Find Your Passion in Rotary

Lone Star Division RLI

A Joint Project of over 400 Rotary Districts worldwide

2024-2025 Participant Materials

Participant-PART I

Lone Star Division RLI

Greetings RLI Participants!

Welcome to your opportunity to **"Find Your Passion in Rotary"** and hone your leadership skills in your club and in your career. Royal Leadership Institute International is a grassroots, multidistrict program whose mission is to strengthen Rotary clubs through quality leadership education.

What is RLI International?

Established in **1992**, RLI International has become a **worldwide organization** with divisions in every continent of the Rotary world. While it is an unofficial program of Rotary International, the RI Board has adopted a resolution recommending RLI International or similar programs to the districts, and the Council on Legislation has twice recommended RLI International to the Board. These endorsements highlight the value and recognition RLI has garnered within the Rotary community.

Why Participate in RLI International?

- Gain valuable **leadership skills** for both your club and career.

- Develop **Rotary knowledge** to strengthen your club.

- Build **lasting relationships** with fellow Rotarians.

- Engage in **fun, interactive sessions** that inspire and educate.

Looking Ahead

We look forward to **"seeing" you all** as together we travel **"the road ahead"**!

Best regards,

Debbie G. High
Co-Chair
Lone Star Division RLI

Sherri C. Muniz
Co-Chair
Lone Star Division RLI

SCAN ME

RLI Part I – THE ROTARIAN
TABLE OF CONTENTS

The Rotary Leadership Institute (RLI) International is a multi-district leadership and Rotary development program using facilitation in small groups to engage Rotarians and strengthen clubs.

RLI International is a recommended program of Rotary International but is not an official program of Rotary International.

Our Mission: The Rotary Leadership Institute International is a grassroots, multi-district leadership development program whose mission is to strengthen Rotary clubs through quality leadership education.

COURSE MATERIALS

My Leadership in Rotary

As a Rotarian, I am, by definition, a leader.

Good leadership requires thought, planning, preparation, responsibility, a willingness to try something new, not being bound by the past, and the confidence to take risks.

While there are certain innate qualities a person brings to leadership, leadership can be taught in the sense that a person can develop and strengthen their leadership skills.

Session Goals:
- Explore the Characteristics of Leadership
- Review Leadership Styles
- Examine how your leadership style relates to other leaders in your club and to the needs of your Rotary Club

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Resources, from either this Part I Workbook or on website, https://lonestarrli.com/find-an-event/Resources:

- 8 Common Leadership Styles

- 12 Leadership Essentials

- The Basics For Effective Leadership

- Situational Leadership Model

Session Activities:

1. What are the characteristics of good leadership?

2. Which are the most important?

3. Which are the most important for business?

4. Which are the most important for Rotary or a volunteer organization?

5. Why are they different?

6. If all Rotarians are leaders, does our personal leadership matter?

1. Which ones are you most comfortable with?

2. Which ones are most important to leadership in Rotary?

3. Should you use the same style all the time? Why? (Or why not?)

4. Which ones are the most visible in your club?

5. Think about a successful President in your club (without identifying that person) and tell us how their success is related to their leadership style.

6. Which type of leadership do you think would be most successful in your club?

7. How can you apply this information in your club or to yourself?

Summary:
- Leadership is a learned skill and a personal choice.
- Leadership requires thought, planning, preparation, and a willingness to try something new.
- Leading volunteers can be different than leading employees.

In Part II under team building, we will develop further qualities and characteristics of volunteer leadership.

8 Common Leadership Styles

Adapted from Indeed.com

At some point in your Rotary activities, you may take on a leadership role. Whether you're leading a meeting, project, team or the club, district, zone, or Rotary International, you might consider identifying with or adopting a defined leadership style.

Most professionals develop their own style of leadership based on factors like experience and personality, as well as the specific needs of a assignment and its organizational culture. Every leader is different, but there are eight leadership styles commonly referenced.

In this article, we'll cover eight of the most common leadership styles and provide examples and common characteristics of each.

What are leadership styles?

Leadership styles refer to the distinct manner and approach in which a leader guides, motivates, and manages their team. It encompasses a set of behaviors, strategies, and decision-making processes that reflect the leader's values, personality, and experience.

Leadership styles can range from authoritative and autocratic to democratic and transformational, with each style having its own strengths and weaknesses depending on the context in which it is applied. Understanding different leadership styles helps in identifying how leaders can influence their team's dynamics, productivity, and overall success.

Why is it important to know your leadership style?

Knowing what leadership style fits you is crucial because it allows you to lead more effectively and adapt your approach to various situations. Self-awareness of your leadership tendencies enables you to leverage your strengths while addressing areas that may need improvement.

Additionally, understanding your leadership style helps you communicate better with your team, aligning your strategies with their needs and fostering a more cohesive and productive working environment. It also allows you to adapt to different team dynamics and challenges, ultimately leading to more successful and sustainable leadership.

Types of leadership styles

Here's an overview of eight common leadership styles, from autocratic to visionary, with a look at the benefits and challenges of each style:

1. Autocratic leadership style

Also called the "authoritarian style of leadership," this type of leader is someone who's focused primarily on results and team efficiency. Autocratic leaders often make decisions alone or with a small and trusted group and expect employees to do exactly what they're asked.

Autocratic leaders typically have self-confidence and are self-motivated. They communicate clearly and consistently, are dependable, and follow the rules. They value highly structured environments and are proponents of supervised work environments.

The benefits and challenges of an autocratic leadership style include:

Benefits: Autocratic leaders can promote productivity through delegation, provide clear and direct communication, and reduce employee stress by making decisions quickly on their own.	**Challenges: Autocratic leaders are often prone to high levels of stress because they feel responsible for everything, plus their lack of flexibility can lead to team resentment.**

2. Bureaucratic leadership style

Bureaucratic leaders are similar to autocratic leaders in that these leaders expect their team members to follow the rules and procedures precisely as written. The bureaucratic style focuses on fixed duties within a hierarchical system, where each employee has a set list of responsibilities, and there's little need for collaboration and creativity.

This leadership style is most effective in highly regulated industries or in departments like finance, health care, or government. This style may fit your leadership approach if you're detail-oriented and task-focused, value rules and structure, are strong-willed and self-disciplined, and have a great work ethic.

The benefits and challenges of a bureaucratic leadership style include:

Benefits: This style can be efficient in organizations that need to follow strict rules and regulations. These leaders separate work from relationships to avoid clouding the team's ability to hit goals.	Challenges: This style doesn't promote creativity, which can feel restricting to some employees. This leadership style is also slow to change and does not thrive in an environment that needs to be dynamic.

3. Coaching leadership style

A coaching leader is someone who can quickly recognize their team members' strengths, weaknesses, and motivations to help each individual improve. This type of leader often assists team members in setting smart goals and then provides regular feedback with challenging projects to promote growth. They set clear expectations and create a positive, motivating environment.

The coach leadership style is one of the most advantageous for employers as well as the employees they manage. Unfortunately, it's often also one of the most underused styles—largely because it can be more time-intensive than other types of leadership. Coaching leaders are supportive and value learning as a way of growing. They're self-aware, offer guidance instead of giving commands, and ask guided questions.

The benefits and challenges of a coaching leadership style include:

Benefits: Coaching leadership is positive in nature and promotes the development of new skills, empowers team members, and fosters a confident company culture. They're often seen as valuable mentors.	Challenges: While this style has many advantages, it can be more time-consuming as it requires one-on-one time with employees which can be difficult to obtain in a deadline-driven environment.

4. Democratic leadership style

The democratic style (aka the "participative style") is a combination of the autocratic and laissez-faire types of leaders. A democratic leader asks their team members for input and considers feedback from the team before they make a decision. Because team members feel their contributions matter, a democratic leadership style is often credited with fostering higher levels of employee engagement and workplace satisfaction.

Democratic leaders value group discussions and provide all information to the team when making decisions. They promote a work environment where everyone shares their ideas and is characteristically rational and flexible.

The benefits and challenges of a democratic leadership style include:

Benefits: Working under the democratic leadership style, employees can feel empowered, valued, and unified. It has the power to boost retention and morale. It also requires less managerial oversight, as employees are typically part of decision-making processes and know what they need to do.	**Challenges: This leadership style has the potential to be inefficient and costly as it takes time to organize group discussions, obtain ideas/feedback, discuss possible outcomes, and communicate decisions. It also can add social pressure to members of the team who don't like sharing ideas in group settings.**

5. Laissez-faire leadership style

The laissez-faire style is the opposite of the autocratic leadership type, focusing mostly on delegating many tasks to team members and providing little to no supervision. Because a laissez-faire leader doesn't spend their time intensely managing employees, they often have more time for other projects.

Managers may adopt the laissez-faire style when all team members are highly experienced, well-trained, and require little oversight. However, it can cause a dip in productivity if employees are confused about their leader's expectations, or if some team members need consistent motivation and boundaries to work well.

The benefits and challenges of a laissez-faire leadership style include:

Benefits: The laissez-faire leadership style encourages accountability, creativity, and a relaxed work environment, which often leads to higher employee retention rates.	**Challenges: This style typically doesn't work well for new employees, as they need guidance and hands-on support in the beginning. Other employees may not feel properly supported.**

6. Pacesetter leadership style

The pacesetting style is one of the most effective for achieving fast results. Pacesetter leaders primarily focus on performance, often set high standards, and hold their team members accountable for achieving their goals.

While the pacesetting leadership style can be motivational in fast-paced environments where team members need to be energized, it's not always the best option for team members who need mentorship and feedback.

The benefits and challenges of a pacesetter leadership style include:

Benefits: Pacesetting leadership pushes employees to hit goals and accomplish business objectives. It promotes high-energy and dynamic work environments.	**Challenges: Pacesetting leadership can also lead to miscommunications and stressed-out employees as they are always pushing toward a goal or deadline.**

7. Servant leadership style

Servant leaders live by a people-first mindset and believe that when team members feel personally and professionally fulfilled, they're more effective and more likely to regularly produce great work. Because of their emphasis on employee satisfaction and collaboration, they tend to achieve higher levels of respect.

Servant leaders motivate their teams and have excellent communication skills. You may find this leadership style a match for your own style if you

tend to encourage collaboration and engagement among team members and if you commit to growing your team professionally.

The benefits and challenges of a servant leadership style include:

Benefits: Servant leaders have the capacity to boost employee loyalty and productivity, improve employee development and decision-making, cultivate trust, and create future leaders.	**Challenges: Servant leaders can become burnt out as they often put the needs of their team above their own They may have a hard time being authoritative when they need to be.**

8. Visionary leadership style

Visionary leaders possess a powerful ability to drive progress and usher in periods of change by inspiring employees and earning trust for new ideas. A visionary leader is also able to establish a strong organizational bond. They strive to foster confidence among direct reports and colleagues alike.

Visionary style is especially helpful for small, fast-growing organizations, or larger organizations experiencing transformations or restructuring. Visionary leaders tend to be persistent and bold, strategic, and open to taking risks. They're often described as inspirational, optimistic, innovative, and magnetic.

The benefits and challenges of a visionary leadership style include:

Benefits: Visionary leadership can help companies grow, unite teams and the overall company, and improve outdated technologies or practices.	**Challenges: Visionary leaders may miss important details or other opportunities, like recognizing their teams, because they're so focused on the big picture.**

How to choose a leadership style

As someone who's interested in the leadership path or looking for more structure in their current leadership approach, it can be helpful to choose a leadership style that feels authentic to you. Some questions you may ask yourself when trying to determine which style is right for you include:

- *What do I value more—goals or relationships?*

- *Do I believe in structure or freedom of choice?*

- *Would I rather make a decision on my own, or collectively?*

- *Do I focus on short or long-term goals?*

- *Does motivation come from empowerment or direction?*

- *What does a healthy team dynamic look like to me?*

My Rotary World

I am a vital part of a worldwide organization of like- minded people.

Session Goals:

- Review the purpose of Rotary
- Learn about Rotary's organizational structure
- Understand the Vision and Strategic Priorities

Resources:

- Action Plan Flyer

- Designing Your Rotary Experience

- Rotary Basics

Session Activities:

1. Why did you join Rotary?

2. What does Rotary believe in?

3. How does this connect with why you joined Rotary?

1. How is Rotary structured?

2. Why does Rotary have this structure?

3. How can these people help you and your club?

4. How does the Rotary Foundation support the core values of RI?

True or False!

1. My club is autonomous.

   What does your club have to do to remain a club?

   What is the purpose of a club? What does it do?

2. My dues are used only for the benefit of my club.
   Where does your money go?

3. I am a Rotarian. I belong to Rotary International.

4. The District exists to provide support for our club.
   What does the district do for the clubs?

5. The Assistant Governor that visits our club is next in line to be the District Governor.

   What is the role of the AG?

6. I can access information about my District online.
   Does your District have a website? Does your Zone?

7. I am just a member. There isn't much on the RI website that is of value to me.
    Who has been to the website?
   What did you find there?

8. Zone tells the district what to do.
   What does Zone do?

9. Rotary International tells the district what to do.
   What is the role of Rotary International?

10. When we are finished with this session. I will know everything about Rotary!

Summary:

➢ The structure of Rotary serves the clubs and Rotarians.
➢ The Object of Rotary gives us all purpose.
➢ Support is available from all levels of Rotary.

ROTARY

ROTARY INTERNATIONAL

Rotary

Object of Rotary

The object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

I. *The development of acquaintance as an opportunity for service;*

II. *High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to service society;*

III. *The application of the ideal of service in each Rotarian's personal, business, and community life;*

IV. *The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.*

ROTARY INTERNATIONAL

INTERNATIONAL

Rotary Organizational Structure

YOU!

CLUB

DISTRICT

ZONE

Rotary International
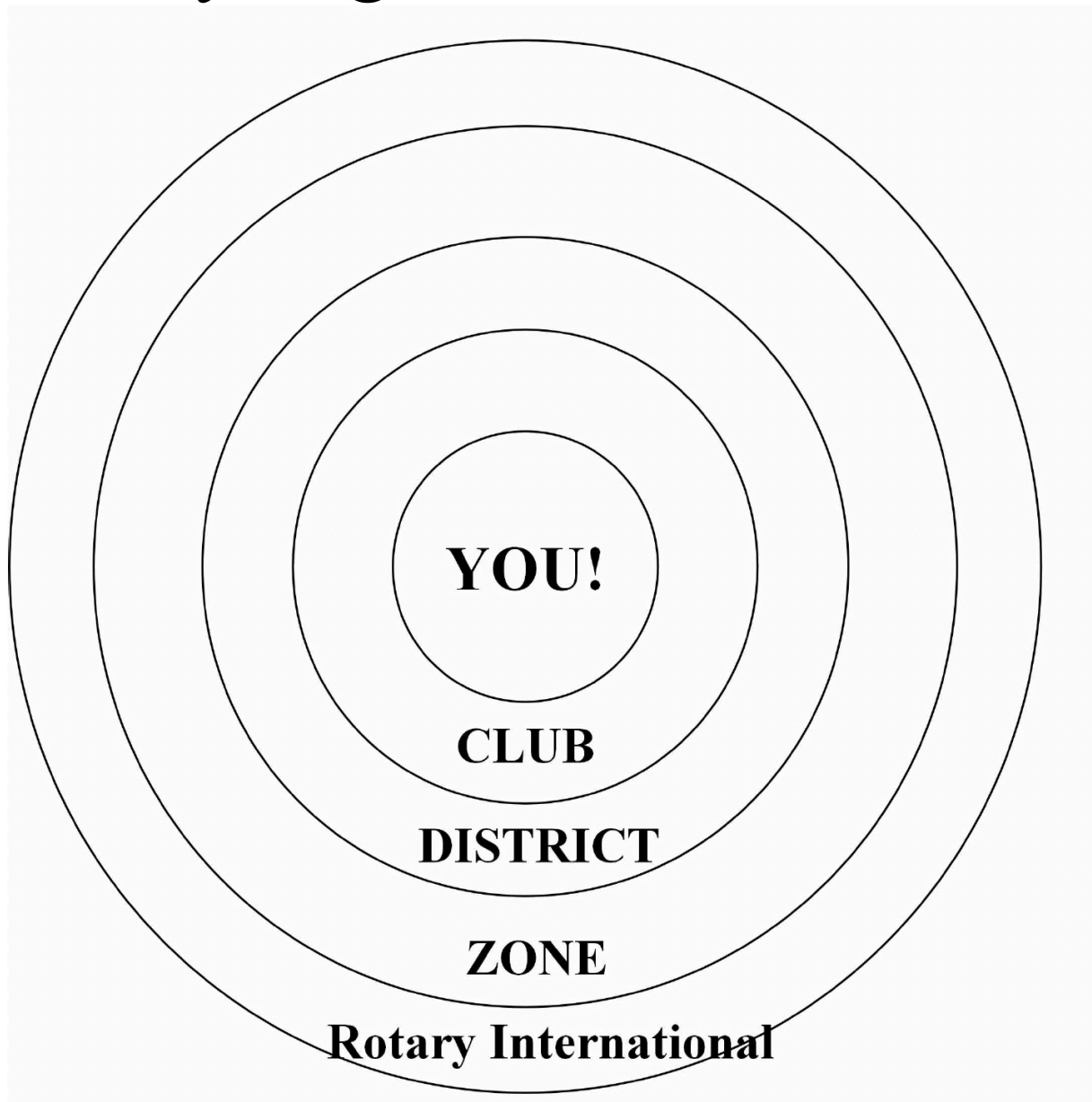
The
Rotary
Foundation

Help at Every Level!

District

Governor
Assistant Governors
District Treasurer
District Secretary
District Rotary Foundation Chair
District Public Image Chair
District Membership Chair
Other District Chairs

Zone Rotary International Director
Rotary Coordinator
Regional Rotary Foundation Coordinator
Rotary Public Image Coordinator
End Polio Now Coordinator
Endowment and Major Gifts Advisers

Rotary International

President

General Secretary & CEO – John Hewko

Learning Center - online at www.rotary.org

Rotary Foundation Team

Branding Team

Council on Legislation (COL) and Council on Resolutions (COR)

Rotary Governance Documents - online at www.Rotary.org

Rotary Constitution (updated by COL)

Rotary International Bylaws (updated by COL)

Standard Rotary Club Constitution (updated by COL)

Recommended Rotary Club Bylaws (changed by the club)

Rotary Code of Policies (updated after every RI board meeting)

Rotary Foundation Code of Policies (updated after every TRF board meeting)

Rotaract Club Constitution (updated by COL)

Recommended Rotaract Club Bylaws (changed by the club)

Manual of Procedures (updated by COL)

Ethics & Vocational Service

I am ethical. I recognize and promote ethics in others and seek opportunities to serve through my vocation.
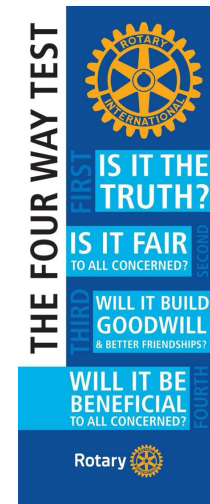
Session Goals:

- Examine the concept of Vocational Service and why it is important to Rotary clubs
- Reflect on whether Rotarians can affect business ethics and how
- Discuss how Rotary's Guiding Principles relate to our clubs and our lives

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Resources
- 5 Ways to Inspire Through Vocational Service
- Applying the Four Way Test
- The Four Way Test Means Business
- Rotary DEI Code of Conduct

Session Activities

1. Why is vocational service important? Or is it?

2. What role did vocational service play in the founding of Rotary?

3. Why may some clubs still have classifications?

4. What are the advantages? Disadvantages?

5. If your club has classifications, how does your club apply the classification program?

6. How do ethics apply to our vocations?

7. How does Rotary define ethics?

8. Why are ethics important? Or are they?

9. How does being a Rotarian affect your business practices? Or does it?

10. How do ethics impact diversity, equity, and inclusion (DEI)?

11. Can Rotarians impact the ethics of their community? How?

12. What kind of vocational service does your club do?

Summary:

➢ Vocational Service is one of the major motivations for the founding of Rotary – to use our vocational and professional skills to benefit society.

➢ Clubs should make a point of utilizing the individual skills of its members in planning and executing its projects.

➢ Rotarians should be proactive in promoting and exercising the principles of the Object of Rotary and the guiding principles.

Guiding Principles of Rotary

The Object of Rotary

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

FIRST. The development of acquaintance as an opportunity for service;

SECOND. High ethical standards in business and professions, the recognition of the worthiness of all useful occupations, and the dignifying of each Rotarian's occupation as an opportunity to serve society;

THIRD. The application of the ideal of service in each Rotarian's personal, business, and community life;

FOURTH. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

Rotary Code of Conduct

As a Rotarian, I will:

1. Act with integrity and high ethical standards in my personal and professional life.
2. Deal fairly with others and treat them and their occupations with respect.
3. Use my professional skills through Rotary to mentor young people, help those with special needs, and improve people's quality of life in my community and in the world.
4. Avoid behavior that reflects adversely on Rotary or other Rotarians.
5. Help maintain a harassment-free environment in Rotary meetings, events, and activities; report any suspected harassment; and help ensure non-retaliation to those individuals that report harassment.

The Four-Way Test

From the earliest days of the organization, Rotarians were concerned with promoting high ethical standards in their professional lives. One of the world's most widely printed and quoted statements of business ethics is The Four-Way Test, which was created in 1932 by Rotarian Herbert J. Taylor (who later served as RI president) when he was asked to take charge of a company that was facing bankruptcy.

This 24-word test for employees to follow in their business and professional lives became the guide for sales, production, advertising, and all relations with dealers and customers, and the survival of the company is credited to this simple philosophy. Adopted by Rotary in 1943, The Four-Way Test has been translated into more than a hundred languages and published in thousands of ways. It asks the following four questions:

"Of the things we think, say or do:

1. **Is it the TRUTH?**
2. **Is it FAIR to all concerned?**
3. **Will it build GOODWILL and BETTER FRIENDSHIPS?**
4. **Will it be BENEFICIAL to all concerned?"**

   Note: the 4 Way Test is not part of the RI Bylaws

The Five Avenues of Service

Based on the Object of Rotary, Rotary's Philosophical cornerstone and foundation of club activity:

Club Service focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.

Vocational Service calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society.

Community Service encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest

International Service exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.

Youth Service recognizes the importance of empowering youth and young professionals through leadership development programs such as Interact, Rotary Youth Leadership Awards, and Rotary Youth Exchange.

Rotary Diversity, Equity, and Inclusion (DEI) Code of Conduct (2021)

Rotary International's Board approved a new DEI code of conduct that reflects our core values. It provides a supportive framework for how Rotary members can create and maintain an environment that is collaborative, positive, and healthy for everyone.

The DEI code of conduct asks Rotary members to:

- Use respectful language
- Be supportive
- Foster a welcoming and inclusive environment
- Celebrate diversity

Although free expression is important, what we say and how we behave matter. Rotary does not tolerate speech or behavior that promotes bias, discrimination, prejudice, or hatred because of age, ethnicity, race, color, disabilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity.

All Rotary leaders, from club presidents and district governors to directors and trustees, are expected to apply the DEI code of conduct uniformly by taking responsibility for how their words and actions may affect others.

Vocational Service Ideas

1. Advancing high ethical standards in the workplace

    a. In hiring, training, and review procedures, include discussion and emphasis of honesty, accountability, fairness, and respect.

    b. In internal communications, praise and encourage exemplary behavior on and off the job.

    c. In relations with customers, vendors, and business associates, communicate and demonstrate your personal commitment to high ethical standards.

2. The classification principle

    a. Classification talks to promote vocational awareness in your club.

    b. Classification talks may also serve as a starting point for initiating club projects that help young people and the unemployed develop marketable skills.

    c. Organizing tours of members' workplaces is another way to recognize the value of each member's vocation.

    d. Schedule an occasional meeting in a member's place of employment.

    e. Invite young people to special vocational meetings.

3. Promote Rotary's commitment to high ethical standards

    a. Post The Four-Way Test on a prominent billboard in your community.

    b. Display The Four-Way Test and/or the Declaration of Rotarians in Businesses and Professions in your office or work space and talk about it.

    c. "Walk the talk" by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards.

    d. Sponsor a Four Way Test essay contest.

    e. Sponsor a joint "character literacy" project for young children.

    f. Conduct a RYLA event with special emphasis on ethics.

    g. Organize a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.

4. Recognize and promote the value of all useful occupations

    a. Make classification talks and business tours part of your club's program.

    b. Join or form a Rotary Fellowship related to your vocation.

    c. Sponsor a career day for Rotarians to bring young people to their businesses.

    d. Support professional development

    e. Encourage members to take leadership roles in business associations.

    f. Sponsor a seminar for small business entrepreneurs.

    g. Hold informal professional networking events where members can meet other local professionals and introduce them to Rotary.

    h. Start a career counseling program geared towards equipping unemployed or underemployed adults with the skills they need to compete in the job market.

5. Volunteer your vocation

    a. Mentor a young person.

    b. Use Rotary Showcase to identify a project in need of your specialized vocational skills.

Foundation I: Our Foundation

I am Doing Good in my local community and around the world.

Session Goals:

- Understand the basic goals of our Rotary Foundation
- Discuss the importance and value of having a foundation
- Review and understand the Areas of Focus
- Examine how you as a Rotarian can work with the Foundation

Resources:

- The Rotary Foundation Reference Guide
- Charity Navigator website

- Rotary.org

Session Activities

1. What do you know about the Rotary Foundation?

2. Why do we have a Rotary Foundation?

3. What is the Mission of the Rotary Foundation?

4. How does the Foundation achieve its mission?

5. What kind of projects have received Foundation funding in your club?

> We will talk about the different kinds of grants later in the RLI program. You can also learn more about grants by going to rotary.org and by talking to your District Foundation team!

6. Who decides what kind of projects are done?

7. Where does the money for the Foundation come from?

8. Why should you give to the Foundation?

9. What are the different ways you can support the Foundation?

a. Annual Fund
    i. Sustaining Member – gives $100 per year
    ii. Paul Harris Fellow - $1000, cumulative
    iii. Paul Harris Society – commitment to give $1000 per year
    iv. Major Donor - $10,000, cumulative
    v. Arch Klumph Society - $250,000, cumulative
b. Polio Plus or Rotary Peace Fellows
    i. Paul Harris Fellow - $1000, cumulative
    ii. Major Donor - $10,000, cumulative
    iii. Arch Klumph Society - $250,000, cumulative
c. Endowment Fund
    i. Benefactor – leave any amount in your will
    ii. Bequest Society – leave at least $10,000 in your will
d. Club Recognition
    i. EREY – Every Rotarian Every Year: Every Rotarian gives at least $25 during the year and total club giving averages $100 per member. Earned annually, club gets a banner.
    ii. 100% Foundation Giving – every member gives at least $100 during the year. Earned annually, club gets a banner.
    iii. 100% Paul Harris Fellow Club – every member is a Paul Harris Fellow. Is only earned one time, the club gets a banner.
    iv. Top 3 Per Capita – the three clubs in the district with the highest average giving per member (per capita) are recognized with a banner.

Summary:

> ➤ The Rotary Foundation gives you the power to make big changes in the world!

Rotary's Seven Areas of Focus
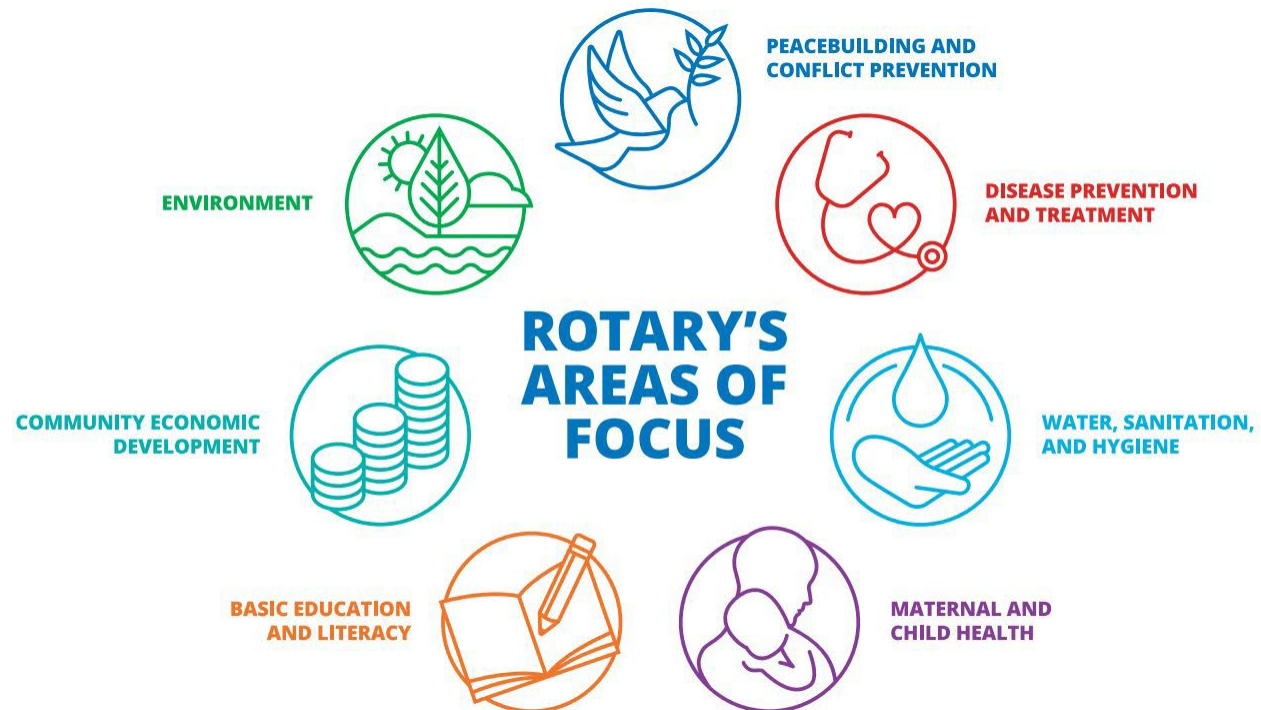
The Motto of The Rotary Foundation

DOING GOOD IN THE WORLD

The Mission of The Rotary Foundation

THE ROTARY FOUNDATION HELPS ROTARY MEMBERS TO ADVANCE WORLD UNDERSTANDING, GOODWILL, AND PEACE BY IMPROVING HEALTH, PROVIDING QUALITY EDUCATION, IMPROVING THE ENVIRONMENT, AND ALLEVIATING POVERTY.

2024 – 25 ANNUAL JOINT GOALS

"Together, we see a world where people unite and take action and create lasting change - across the world, in our communities, and in ourselves."

GOALS FOR PRIORITY 1 - INCREASE OUR IMPACT
1. Eradicate polio, highlight Rotary's role, and plan for a polio-free world.
2. Increase the overall giving to The Rotary Foundation and build the Endowment Fund to $2.025 billion by 2025.
3. Encourage community assessments and measurement of projects and programs at the club, district, and international level.

GOALS FOR PRIORITY 2 - EXPAND OUR REACH
4. Advance actions to cultivate diversity, equity, and inclusion in our clubs and the family of Rotary.
5. Strengthen existing relationships and develop new partnerships that align with our Action Plan.
6. Establish and nurture innovative clubs and new participant engagement channels.
7. Increase awareness and understanding of Rotary and our members' impact in communities locally and globally.

GOALS FOR PRIORITY 3 - ENHANCE PARTICIPANT ENGAGEMENT
8. Enhance member engagement tools that support clubs in meeting their members' needs and increasing member retention.
9. Increase collaboration and connection among participants, particularly Rotary and Rotaract clubs.
10. Highlight opportunities offered through Rotary to foster professional connections and build leadership skills.

GOALS FOR PRIORITY 4 - INCREASE OUR ABILITY TO ADAPT
11. Support regional adaptability by testing innovative approaches to foster greater collaboration and operating efficiencies.
12. Support diversity, equity, and inclusion in our leadership and governance.

Engaging Members
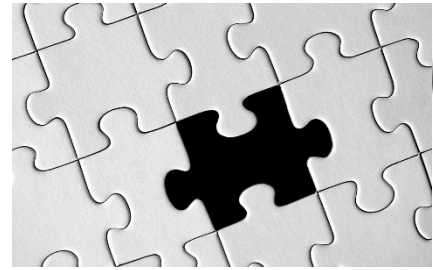
I make my club and Rotary stronger by my active participation.

Session Goals:

- Review why people are attracted to and join Rotary
- Learn the factors that retain members in Rotary
- Discuss the importance of participation

Resources:
- Strengthening Your Membership
- Member Satisfaction Survey
- Member Assessment Tools
- Club Types Matrix

Session Activities

1. What do people want from Rotary? (Why did you join?)

2. What was orientation like?

3. When did you feel like you really belonged?

4. What is member engagement?
   a. Why does it matter for you as a member?
   b. How can you tell if the members are engaged?

5. Why do people stay in Rotary?

6. How can we meet these needs?
   Break the group into 3 groups. Each group will discuss and report on one topic: Fellowship, Service, Networking.
   a. Fellowship – what can we do? How do we create a sense of belonging?

    b.   Service – how can we ensure our service is meaningful?

    c.   Networking – how can we do this?

Have each group report their suggestions.

    d. What about Education?

7. Could club meeting times or club structure have an impact? How?

8. What role could technology play in engaging members?

9. How does your club encourage diversity and inclusion?

10. Where can you go for help with Membership?

11. What is your take home from this session?

Summary:

➢ The more your members know and get involved, the stronger your club will be.

siegel + gale – Why Join Rotary?

Global Impact ~8%
Training ~3%
Recognition ~4%
Networking ~19%

Positively Impact my Community ~36%

Friendship ~30%

siegel + gale – Why Stay in Rotary?

Global Impact ~15%
Training ~4%
Recognition ~2%
Networking ~5%

Positively Impact my Community ~36%

Friendship ~38%

ENHANCING THE CLUB EXPERIENCE

The power of your club lies in your members. By asking them for feedback regularly, you are demonstrating your openness to change and empowering them to help craft an ideal club experience. Use this survey to obtain member feedback about your club. Then use the information to make a plan to ensure that members are enjoying their Rotary club experience.

Keep responses confidential when discussing and analyzing them.

OUTCOME

Conduct this assessment and act on its results to:

• Identify what your members like and don't like about their club experience

• Develop an action plan that builds on what your members like and discontinues or changes what your members aren't satisfied with

GETTING ORGANIZED

You'll need a dedicated group of members to conduct the member satisfaction survey. It can be your club's membership committee or a few interested, unbiased members. You can either devote time during a club meeting to talking about member satisfaction and taking the survey or hand it out or email it to members and allow them more time to complete it. Alternatively, hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.

Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.

Consider using an online survey tool. They're convenient, are often free or inexpensive to use, and are helpful in managing response data.

GETTING STARTED

Ready to start? Here's how.

Step 1: Introduce the survey

Discuss why it's important to get feedback from all club members.

Step 2: Distribute the survey

Pass out or email the Member Satisfaction Survey to members or use an online survey tool. Explain that their responses are confidential and will be used to enhance the club experience for both current and prospective members.

Step 3: Analyze the data

Have your dedicated group review the survey results. Stress the importance of confidentiality and respecting all viewpoints.

Step 4: Present the results

Present and discuss the survey results to the club. Allow time for members to ask questions.

Step 5: Make an action plan

Hold a forum where club members can offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for implementing changes.

Step 6: Take action

The final step is to implement the action plan. Talk to members and involve as many of them as you can in the process so that they are invested in enhancing the club experience.

Interested in doing other assessments?

Representing Your Community's Professions: A Classification Assessment

Diversifying Your Club: A Member Diversity Assessment

Finding New Club Members: A Prospective Member Exercise

Improving Your Member Retention: Retention Assessment and Analysis

Understanding Why Members Leave: Exit Survey

MEMBER SATISFACTION SURVEY

This survey focuses on your day-to-day experiences in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers; we simply ask for your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with your membership in our Rotary club?

   ☐ Satisfied

   ☐ Somewhat satisfied

   ☐ Neither satisfied nor dissatisfied

   ☐ Somewhat dissatisfied

   ☐ Dissatisfied

2. Considering our club's **culture, members, and meetings**, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Club meetings are a good use of my time	☐	☐	☐	☐	☐
My club does a good job involving new members	☐	☐	☐	☐	☐
My club's members care about one another	☐	☐	☐	☐	☐
My club reflects the demographic profile of our area's business, professional, and community leaders	☐	☐	☐	☐	☐

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club actively seeks to involve all members in projects and activities according to their interests, skills, and availability	☐	☐	☐	☐	☐
The amount of fundraising activities is appropriate	☐	☐	☐	☐	☐

Comments and suggestions:

3. How would you rate the following aspects of our **weekly meetings**?

	Excellent	Good	Fair	Poor	Very poor	N/A
Rotary International updates	☐	☐	☐	☐	☐	☐
Length	☐	☐	☐	☐	☐	☐
Time for socializing	☐	☐	☐	☐	☐	☐
Professional connections and networking	☐	☐	☐	☐	☐	☐
Variety of program topics	☐	☐	☐	☐	☐	☐
Location	☐	☐	☐	☐	☐	☐
Meeting time and day	☐	☐	☐	☐	☐	☐
Meals or refreshments	☐	☐	☐	☐	☐	☐
Speakers and programs	☐	☐	☐	☐	☐	☐

Comments and suggestions:

4. What are your opinions about our club's **service projects**?

	Just right	Too many	Too few
Total number of service projects	☐	☐	☐
Number of community service projects	☐	☐	☐
Number of international service projects	☐	☐	☐

	Agree	Disagree	No opinion
Service projects are well organized	☐	☐	☐
Service projects make a difference in the community or the world	☐	☐	☐
Service projects are meaningful to me	☐	☐	☐

Comments and suggestions:

5. Thinking about **communication** and **responsiveness** in our Rotary club, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club does a good job communicating to members	☐	☐	☐	☐	☐
My club does a good job listening to members	☐	☐	☐	☐	☐
My club seeks input and ideas from members	☐	☐	☐	☐	☐
My club regularly acts upon members' input and ideas	☐	☐	☐	☐	☐
I am comfortable with the pace of change in my club	☐	☐	☐	☐	☐
My club works to update club processes and rules to meet the needs of its members	☐	☐	☐	☐	☐

Comments and suggestions:

6. Indicate your agreement with the following statements about the **value** of your membership.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I feel welcome in my club	☐	☐	☐	☐	☐
I make valuable connections through my club	☐	☐	☐	☐	☐
My club provides opportunities to use my talents and skills	☐	☐	☐	☐	☐
My experience as a member is worth the money I spend on Rotary participation	☐	☐	☐	☐	☐
My experience as a member is worth the time I give to Rotary	☐	☐	☐	☐	☐
My family sees value in my Rotary membership	☐	☐	☐	☐	☐
My friends see value in my Rotary membership	☐	☐	☐	☐	☐
Through Rotary, I make a difference in my community	☐	☐	☐	☐	☐
Through Rotary, I make a difference in the world	☐	☐	☐	☐	☐

Comments and suggestions:

7. Indicate your agreement with the following statements about **club engagement**.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I invite my friends, family, and colleagues to club events	☐	☐	☐	☐	☐
I invite qualified prospective members to join my Rotary club	☐	☐	☐	☐	☐
I frequently participate in my club's activities, projects, and programs	☐	☐	☐	☐	☐
I'm proud of my Rotary club	☐	☐	☐	☐	☐

Comments and suggestions:

8. Thinking about the **costs** associated with club membership, how would you rate the following?

	Too low	Just right	Too high	Not applicable
Club dues	☐	☐	☐	☐
Meals at weekly meetings	☐	☐	☐	☐
Club fines	☐	☐	☐	☐
Club assessments	☐	☐	☐	☐
Requests for donations for service projects	☐	☐	☐	☐
Requests for contributions to The Rotary Foundation	☐	☐	☐	☐

Comments and suggestions:

Engagement Ideas: Delivering Value – Keeping Rotarians

The Issue: Of all the members who leave Rotary, only about 7% leave for involuntary reasons (death, relocation, etc.) Most of the folks who leave have been members for less than 3 years.

The Fix: Find ideas to engage, especially your newer members, who likely joined to serve their community, network, and make new friends.

Our Ideas:

Buddy System   Partner newer members with more experienced members to act as mentors and help them adapt to your club atmosphere and "learn the ropes".

RLI Posse   Consider having your club cover the cost of sending new members to RLI.

Fun Committee   Put new members on a committee devoted to holding fun activities for everyone! Maybe a group visit to a local attraction, concert, or play. Maybe it is a new fun event during the meetings.

Adopt A Class   Partner members with local elementary schools to conduct reading, mentoring, or other activities.

Rotary Minute   Have every member share a 1-minute talk about themselves. It could be their "Rotary Ah-Ha" moment or a "get to know you" moment.

Interact   Start an Interact group or get involved with your existing club!

Party Planning   Put together a committee to arrange social events outside of the regular club meetings.

Vocational Minute   Have every member give a short presentation on their vocation or information about their vocational field.

Your Ideas:

Twelve Point Plan for Member Engagement

1) Set up a Member Services Committee

2) Measure & Examine Club's History of Engagement and Member Retention Rate

3) Provide Pre-Induction Orientation Program

4) Greet – Assign a Job – Introduce

5) Develop a Mentor & Education Program

6) Conduct a Reception for New Members

7) Log New Member Activities the first year

8) After Year One- Recognize & Interview

9) Advocate New Member Opportunities

10) Provide Networking & Professional Development Opportunities

11) Spot Danger Signs and Remedy Engagement Problems

12) Be Innovative – Highlight the Reasons We Stay in Rotary

Thinking Outside the Box—Perk Up Club Meetings!

1. Have Rotarian's connections run a meeting—spouses, partners, or children.
2. Switch club president with a nearby club and have that president conduct your meeting.
3. Change the room layout—completely.
4. Reverse the order of the regular agenda.
5. Invite a new member to organize a meeting.
6. Bring in a professional coach to run a meeting.
7. Invite past presidents who have left the club to come back and reflect on the changes in Rotary over the years.
8. Cancel your regular meeting and ask members to attend another club in the area to see how that club operates and bring back ideas.
9. Use a Rotary Learning Center video for your meeting.
10. Change the meeting time.
11. Focus on vocational development with members relating how their businesses started and the challenges they faced.
12. Create a promotional document to give to speakers before they arrive so they know what to expect at your club meeting (and for marketing).
13. Visit local businesses instead of a formal meeting.
14. Have a "pocket presentation" ready in case the scheduled presenter doesn't show up. It could be a video, a club member who is ready, or a quick project.
15. Develop a "speed-networking" event for members and invite your community.
16. Celebrate something in your community—arts event, team championship, or local school successes.
17. Have a social instead of a regular meeting.
18. Attend a community event as a group – sporting, museum, art gallery, or play.
19. Have a trivia contest.
20. Discuss the Rotary monthly theme.

CLUB EXPERIENCE MATTERS THE MOST

Recent Rotary research confirms that the single most important factor in member satisfaction is the club experience.

WHAT MAKES UP THE CLUB EXPERIENCE?

1 **Meeting enjoyment** — When members have fun, and feel that they are included and belong

2 **Confidence in club leadership** — When members feel that they have input in the club, their club leaders are open to their ideas, and when they trust the leaders to make good decisions for the club

3 **Personal growth opportunities** — When members feel that their club and Rotary offer ways for them to develop skills and to grow

4 **Connections** — When members feel that they've formed valuable relationships through Rotary

5 **Meaningful service** — When members feel that the service their club does makes a difference in the world and in their community

Using our Membership Assessment Tools guide, which includes the Membership Satisfaction Survey, can help you craft an experience that reflects your members' interests and needs.

Rotary

Creating Service Projects

I am a vital part of a worldwide service organization meeting needs in communities.

Session Goals:

- Identify the qualities of a good service project
- Relate the culture of your club to meeting the needs of your community
- Explore effective strategies and best practices for creating and leading successful service projects in your club

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Resources

- Community Assessment Tools
- Club Service Projects Committee Job Description

Session Activities

1) What are service projects?

2) Why do they matter?

3) What is the best way to find a project? How did you find your last project?

    Why this approach?

4) How do you present the project to your club? What steps could you use?

5) Develop a "business plan" for a service project.

6) How will you evaluate the success or lack of success of your project?What are your benchmarks?

7) What new ideas did you try to include? How could you make it "bigger, better, bolder?"

8) What options do we have for fundraising?
   a) Discuss the difference between a community service project and a purely fundraising event. Can the two be combined?
   b) How can a fundraising event also be a membership event for Rotary? Telling the story of your project can attract like-minded people to your club.
   c) What are some of the best fundraising events you have been involved with or have hear of?

SUMMARY

Good Rotary Service projects require:

   ➢ Meeting a community-identified need
   ➢ Creativity
   ➢ Sustainability
   ➢ Risk taking
   ➢ New ideas
   ➢ Keeping prior projects only if they are still needed

Service Project A

Rotarians and community leaders have been concerned that there are not enough recreational facilities and activities for teenagers in the community. With little to do and no place to "hang out," teenagers have been gathering at the shopping mall or the town square, sometimes getting into trouble and harassing older people and other teens.

A team of Rotarians visited the Mayor, who agreed that more recreational facilities and activities are needed for teenagers, but the town budget cannot pay for a youth center, etc. The Mayor did say that the town has a vacant lot that could be donated or used for some purpose. It also has a vacant two-room school building that could possibly be repaired and used for teen activities; however, it has not been used for several years and is not in very good condition.

Service Project B

Members of your club have talked to the head of the local welfare department about possible projects, and she told them of an elderly couple who were largely confined to their home because they couldn't navigate the 6 steps to the front of their home. They also had trouble climbing the steps to their bedroom and often ended up sleeping on a couch or even on the floor. The head of the welfare department asked if Rotary could help the couple.

Service Project C

Members of your club have talked with the principal and some teachers and guidance counselors at an elementary school in town to learn the major issues for the students. Unfortunately, there are a lot of problems, but the educators believe that the most significant issue is that some third graders are far behind in reading skills, and some can't read at all. What can your Rotary club do to help third graders become better readers?

Service Project D

Members of your club are concerned about the impact of mowing roadside hedgerows on the environment and local wildlife. There is also great concern about the water quality of the local stream. After talking with local politicians, you have found they are supportive, but have no specific plans. What can your Rotary club do to address these problems?

Service Project E

You have become aware that many elderly people in your local community live in loneliness either by living alone in their homes or by living in a nursing home. Many older people want to be participants in society but have no arenas in which to particpate.

At the same time, there are many young people in your local community with little to do, often feeling aimless as they wander through the area.

How can you as a Rotary club contribute to young and old people finding common meeting arenas where the old ones can participate, and the young ones can find meaningful activities?

Service Project F

In recent years, many young people have gathered in the city on public holidays and have been obviously influenced by alcohol and other drugs. Several are 16 years of age or younger and are not allowed to drink or buy alcohol.

On the last public holiday, many young people gathered in the city center and the police warned against a negative youth culture and called for more sober adult role models in the city center on these days.

How can you, as a Rotary, take part in preventing a negative development in the city center and how can you get more elderly people on board?

Service Project G

Many young people are uncertain about what to study after finishing secondary school and are unsure which courses to choose in high school.

Many Rotarians have long professional experience from many different professions and can tell young people about their experiences from professional life.

A secondary school has reached out to your local Rotary Club to organize a career day, providing young people with guidance on the educational paths they can take to achieve their goals

Decide how your Rotary club can organize a career day in collaboration with the secondary school.

Service Project Questions

- Can a Rotary club do anything to help?

- If so, what can Rotarians do "hands on" to help?

- How much funding is required? Fundraising?

- How can the project be designed? What is needed?

- Will the project generate good publicity for the club?

- Can the members be "sold" on the project?

- Is this a one-year project or a continuing project?

- What other community resources are available or what other organizations should be involved?

- What are the steps necessary to move forward?

> "*The time we take to serve those who need us can be the turning point, not only in their lives but also in our own.*"
>
> *1980-81 RI Pres. Rolf Klarich*
> *— Take Time to Serve*
> THE ROTARIAN, *July 1980*

John Kotter's Eight Steps to Leading Change

https://www.kotterinc.com/methodology/8-steps/

1. **Create a sense of urgency**

   Inspire people to act – with passion and purpose – to achieve a bold, aspirational opportunity. Build momentum that excites people to pursue a compelling (and clear) vision of the future… together.

2. **Build a Guiding Coalition**

   A volunteer network needs a coalition of committed people – born of its own ranks – to guide it, coordinate it, and communicate its activities.

3. **Form a Strategic Vision**

   Clarify how the future will be different from the past and get buy-in for how you can make that future a reality through initiatives linked directly to the vision.

4. **Enlist a Volunteer "Army"**

   Large-scale change can only occur when massive numbers of people rally around a common opportunity. At an individual level, they must *want to* actively contribute. Collectively, they must be unified in the pursuit of achieving the goal together.

5. **Enable Action by Removing Barriers**

   Remove the obstacles that slow things down or create roadblocks to progress. Clear the way for people to innovate, work more nimbly across silos, and generate impact quickly.

6. **Generate Short-Term Wins**

   Wins are the molecules of results. They must be recognized, collected, and communicated – early and often – to track progress and energize volunteers to persist.

7. **Sustain Acceleration**

   "The way that you can guarantee success in a difficult change… is to not skip any of the steps or the learnings."

8. **Institute Change**

   Articulate the connections between new behaviors and organizational success, making sure they continue until they become strong enough to replace old habits. Evaluate systems and processes to ensure management practices reinforce the new behaviors, mindsets, and ways of working you invested in.

Toxic Charity by Robert Lupton
A Synopsis

https://www.luptoncenter.org/toxic-charity-holistic-overview/

Toxic Charity the Book

Toxic Charity was a book that Bob Lupton published in 2011. At the time of its publication, Bob Lupton and his wife Peggy had lived and worked in Atlanta for nearly 40 years. The organization Bob founded, which was initially called Family Consultation Services, was working to revitalize neighborhoods in Atlanta that had been deeply affected by systemic injustice.

Living alongside neighbors in Atlanta, Bob started to notice the ways many charity programs were unhelpful at best and at worst downright degrading. At the same time, he knew that everyone coming to his neighborhood to do charity had their hearts in the right place. Many of them truly wanted to help. They simply had no idea what they were doing was harmful. Bob wrote Toxic Charity to illustrate the reality of what was going on for his mostly white, mostly middle and upper class, mostly educated, and overwhelmingly Christian peers. He wanted them to see the true effects of their charity and offer them a new model.

What *is* Toxic Charity

At its core, Toxic Charity is trying to address chronic ongoing poverty through one-way crisis relief. Common charity models like toy giveaways, school supply handouts, food pantries, and the like are examples of short-term fixes focused on transferring resources. The issues they address tend to be much broader, larger, and more systemic. As a result, one-way charity rarely solves the underlying issue, but results in a cycle of continual one-way giving and receiving.

Unfortunately, Toxic charity can end up reinforcing assumptions about givers and receivers, namely the idea that receivers core issue is that they "lack" items or resources and "need" someone to provide them. This paradigm can bolster deeper biases, like the idea that low-income people don't know how to manage money or don't work hard enough.

Toxic Charity can get even more dangerous when a "giver" or program has little geographic or relational tie to the people they're giving to. Commuting into a neighborhood to give hand-outs can make it more difficult to form relationships based on dignity and trust.

Common Toxic Charity Mistakes

We talk to Change-Makers who really want to make a difference every day. Here are a few common Toxic Charity mistakes:

Only Focusing on Resource Transfer

Sometimes it can be tempting to try to transfer resources, only in a slightly more dignifying way. For example, we've encountered Change-Makers who realized that handing out Christmas presents to children can be really embarrassing for parents — it's toxic charity. The next step they take is hosting a Christmas store where parents can come and select toys for their kids, wrap them, and give them to their children. This is an absolutely improved model, and it's one

we use ourselves every year for Pride for Parents! What's key is that we know the toy store won't solve material needs. Resource transfer can be a healthy ecosystem and a way for organizations to engage, but it is not in itself the solution we are pursuing. This toy store isn't the only way we come alongside a neighborhood here in Historic South Atlanta.

Shifting to Development without Relationships

 Proximity, or being emotionally, physically, and geographically integrated with the neighborhood where you want to work is absolutely essential. Change moves at the speed of trust. Trust is impossible without building neighborhood relationships. Relationships are shallow without time spent listening, learning, and seeking to understand. Yes, it can feel slow, and we know it can be tempting at times to change the systemic realities of a place without investing in relationships. Unfortunately, working on a systemic level without collaborating with neighbors can look like doing development *to* people without their consent. Building new roads or businesses can be great, but if they're completed without community buy-in, they will rarely make a difference and can even cause harm.

Locating Toxicity in Neighbors

We all have biases. Interrogating them is critical to being a trustworthy partner. One common error we've seen is change-makers trying to change their models without changing their own hearts. We have seen some people try to make change while still viewing their neighbors or neighborhoods as deficient. We've had tough conversations with some people who come to the conclusion that Toxic Charity is toxic because recipients are greedy or lazy. These biases will get in the way of trust and true partnership. Beliefs like these also tend to ignore local history and the realities of systemic injustice. We encourage everyone to examine their internal biases and to examine the histories of systemic injustice. We're all part of systems that oppress some and give others an advantage. We're all also un-learning prejudices and assumptions we have. It's a journey!

Lone Star Division RLI

Part I
- The Rotarian

Part II
- The Club

Part III
- The Journey

Register NOW
for the NEXT Part!!