



ROTARY LEADERSHIP INSTITUTE
Australia - Western Division

**INFORMATION &
REFERENCES**



Rotary International District 9455

The Rotary Leadership Institute

Information supporting Part 1 of the RLI course	6
Part 1 Session 1 - Leadership	6
Personal Characteristics of Leaders	6
Leadership versus Management Qualities	6
What leaders really do?	6
Managers.....	6
Leaders	6
Change Leadership	6
Transactional Leaders.....	7
Charismatic Leaders	7
Reasons for Resistance to Change	7
Techniques for Reducing Resistance to Change	7
Managers versus leaders.....	8
Part 1 Session 2 - My Rotary World.....	9
Reference Material.....	9
The Four-Way Test	9
Rotary and World War II	10
Dawn of a new century	10
Rotary's archives	10
Rotary's work with the UN and other organizations.....	10
Rotary and the United Nations.....	11
Structure.....	11
Overview of Rotary International's leadership structure	11
Clubs	11
Districts.....	11
The RI Boards.....	11
The Secretariat	11
Council on Legislation	12
The Trustees of The Rotary Foundation	12
District and international zones	12
Working together	12
Rotary Institutes.....	12
Purpose	12
Guiding Principles.....	13
The Object of Rotary	13
Avenues of Service	13
The Four-Way Test	13
Rotary Code of Conduct	13
Mission	14
Moving toward the future	14
Core values	14
Integrity	14
Diversity.....	14
Service and Leadership	14
Strategic Goals.....	15
Support and Strengthen Clubs.....	15
Focus and Increase Humanitarian Service	15
Enhance Public Image and Awareness	15
District 9455 Strategic Plan.....	16
Vision.....	16
Our Mission – “What we have to do”	Error! Bookmark not defined.
Key Result Areas - “Where we have to focus”	Error! Bookmark not defined.

Part 1 Session 3 - Engaging Members	17
Finding members	17
Keeping members	17
Twelve Point Plan for Member Engagement	18
Membership Satisfaction Questionnaire	18
Part 1 Session 4 - Our Foundation	19
District 9680 Foundation giving	19
Flow of Funds	20
Donor Recognition	20
Naming opportunities	20
Sustaining Member	20
Centurion	20
Benefactor	21
Bequest Society	21
Paul Harris Fellow	21
Paul Harris Society	21
Major Donor	21
Arch C. Klumph Society	21
Part 1 Session 5 - Ethics and Vocational Service	22
Rotary Code of Conduct	22
Vocational Service Ideas	22
Part 1 Session 6 - Service Projects	24
Service Project Questions:	24
Project Planning	24
Information supporting Part 2 of the RLI course	25
Part 2 Session 1 – Strategic Planning	25
District 9455 Strategic Plan	Error! Bookmark not defined.
Planning Guide For Effective Clubs	25
Part 2 Session 2 - Targeted Service (Foundation 2)	26
The Rotary Foundation Grant Model	26
What are the areas of focus and how were they selected?	26
What is sustainability and why is it important?	27
What are strategic partnerships and how do they work?	27
Why did The Rotary Foundation develop this current grant model?	27
How will the Foundation know if the current grant model is a success?	27
What is Sustainability?	29
TRF Grant Management Model D9455	29
Part 2 Session 3 – Club Communication	30
10 Tips for Public Speaking	30
Four Fundamental Skills for Speech Organization	31
Outline	31
Transition	31
Opening	31
Conclusion	31
Part 2 Session 4 – Team Building	32
Club Committee Structures	32
Part 2 Session 5 - Attracting Members	34
The club membership committee	34
Information supporting Part 3 of the RLI course	35
Part 3 Session 1- International Service	35
Suggested Steps in Developing an International Service Project	35

What is an International Service Project?	35
Program History and Goals:	35
International Service Projects aim to:	35
Projects should adhere to the following criteria:	36
Getting Involved	36
Volunteer for an international project	36
Volunteers: Register your availability	36
Develop an international project	36
ROTARY AUSTRALIA WORLD COMMUNITY SERVICE (RAWCS).....	37
Where does RAWCS Operate?	37
RAWCS Structure	38
RAWCS National Council Contacts.....	40
Funding.....	40
Rotary Australia Benevolent Society (RABS).....	40
Part 3 Session 2 - Effective Leadership Strategies	41
Leadership Strategies for Volunteers.....	41
Part 3 Session 3 - Rotary Opportunities.....	43
The Programs of Rotary International.....	43
Global Networking Groups	43
Interact	43
Rotaract	43
Rotary Community Corps (RCC).....	43
Rotary Friendship Exchange	43
Rotary Volunteers	43
Rotary Youth Exchange	43
Rotary Youth Leadership Awards (RYLA)	43
Projects Supported by Australian Rotary Clubs & Districts.....	43
Australian Rotary Health (ARH)	43
Rotary Oceania Medical Aid for Children (ROMAC)	44
Interplast	44
Road Safety Education	44
List of Structured Program Resource.....	45
Part 3 Session 4 - Public Image and Public Relations.....	46
Public Relations Writing	46
PR Resources & Ideas	46
Working with the Media	48
Part 3 Session 5 - Vocational Experiences, Areas of Interest and Expectations.....	50
Vocational Service Ideas.....	50
Advancing high ethical standards in the workplace:	50
The classification principle:	50
Promote <i>Rotary's</i> commitment to high ethical standards	50
Recognize and <i>promote</i> the value of all useful occupations	50
Volunteer your vocation.....	50
Part 3 Session - 6 Making a Difference	51
Attachment A - Rotary International Strategic Plan	52
Attachment B – Reasons for Joining Rotary.....	53
Attachment C – New Member Engagement	54
Attachment D - Membership Satisfaction Questionnaire.....	55
Attachment E – Programs of The Rotary Foundation	58
Attachment F – Project Planning Tools.....	62

Attachment G - Planning Guide for Effective Clubs	68
Attachment H – TRF Grant Management Model Model D9455	73
Attachment I – Global Networking Groups.....	85
Overview of the Program	85
Rotary Fellowships	85
Rotarian Action Groups.....	85
How to Organise a New Global Networking Group.....	85
Join a Fellowship (list is updated every year)	86
Attachment J – Interact	88
Attachment K – Rotaract	89
Rotaract	89
How does it work?.....	89
What are some other opportunities available to Rotaractors?	89
How can I learn more?	89
Attachment L – Rotary Community Corps	90
Attachment M – Rotary Friendship Exchange.....	91
How it works - Types of Friendship Exchanges	91
Guidelines.....	91
Attachment N – Rotary Youth Exchange.....	92
Making a world of difference	92
Attachment O – Rotary Youth Leadership Awards.....	93
Attachment P – Rotary Acronyms	94

Information supporting Part 1 of the RLI course

Part 1 Session 1 - Leadership

There are many interpretations of leadership and here are several thoughts on the characteristics of leaders.

Personal Characteristics of Leaders¹

Physical characteristics; Activity, Energy

Personality; Alertness, Originality, Creativity, Personal Integrity, Self-confidence

Social characteristics; Ability to enlist cooperation, Popularity, Prestige, Sociability, Interpersonal Skills, Social Participation, Tact, Diplomacy

Work-related characteristics; Achievement Drive, Drive for Responsibility, Responsibility in Pursuit of Goals, Task Orientation

Intelligence and ability; Judgment, Decisiveness; Knowledge, Fluency of speech

Leadership versus Management Qualities²

Leaders are: Visionary, Passionate, Creative, Flexible, Inspiring, Innovative, Courageous, Imaginative, Experimental, Initiators of change, Have personal power.

Managers are: Rational, Consulting, Persistent, Problem Solving, Tough-minded, Analytical, Structured, Deliberate, Authoritative, Stabilising, Have position power.

What leaders really do?³

Managers cope with complexity and leaders with change. Both involve decision-making, communicating, networking, and ensuring people do their jobs.

Managers

- plan & budget
- organise and staff positions
- control and solve problems
- follow rules

Leaders

- set a direction
- initiate change
- align people
- inspire and motivate

Change Leadership⁴

Question: *Do people resist change?*

Or

Do people resist being changed?

¹ Source: Adapted from Bernard M. Bass, Stogdill's Handbook of Leadership, rev. Ed. (New York: Free Press, 1981), 75-76

² Source: Genevieve Capowski, "Anatomy of a Leader: Where Are the Leaders of Tomorrow?" Management Review, March 1994, 12

³ Source: Kotter (2001). What leaders really do. HBR, 79 (11).

⁴ Copyright © 2000 by Harcourt, Inc. All rights reserved

Transactional Leaders

- Clarify the role and task requirements of subordinates
- Initiate structure
- Provide appropriate rewards
- Try to be considerate
- Meet the social needs of subordinates

Charismatic Leaders

- The ability to inspire
- Motivate people to do more than they would normally do
- Tend to be less predictable than transactional leaders
- Create an atmosphere of change
- May be obsessed by visionary ideas
- **Transformational Leaders:**
- Create a strategic vision
- Communicate the vision
- Model the vision
- Similar to charismatic leaders, but are distinguished by their ability to bring about innovation and change

Reasons for Resistance to Change

Lack of Understanding and Trust: Do not understand the intended purpose of a change or distrust the intentions.

Self-Interest: The fear of personal loss is perhaps the biggest obstacle to organisational change.

Uncertainty: The lack of information about future events.

Different Assessments and Goals: People who will be affected by innovation may assess the situation differently.

Techniques for Reducing Resistance to Change

Educate and communicate: Provide the full facts, clarify and dispel misunderstandings.

Encourage participation: People are part of the change process, thus increasing their commitment to its success.

Facilitate and support: One-on-one discussions, counselling and training.

Negotiate: Increase people's self-interest in successful change.

Managers versus Leaders

Managers give answers, leaders ask questions.

There's nothing certain to turn your employees against you faster than shouting orders at them. Why not spare yourself the impending resentment and simply ask your employees this: "What would you do?" or "What do you think of this idea?" Allowing people to participate in the decision-making process will not only transform what could have been an order into something more easily swallowed--it also inspires creativity, motivation, and autonomy.

Managers criticise mistakes, leaders call attention to mistakes indirectly.

It may seem more efficient to point out your employees' mistakes directly, but this will only leave them feeling embarrassed and frustrated. You should really be giving them the chance to learn and grow from through your critiques. Instead, give your employees the chance to address their mistakes.

For example, say a project was sent to a client and you receive back a disgruntled message. Calmly ask your employee about the clients concern and whether they feel what was provided was on par. This will give them a chance to provide their input, while also improving for the future.

Managers forget to praise, leaders reward even the smallest improvement

Praise pays off when it comes to increasing the overall success of your company. Finding time to recognise your employees for even the smallest accomplishment will only increase their interest in what they do. If you're interested in ensuring your employees take pride in all that they do, regular feedback and recognition is certain to do the trick. Everyone wants to be genuinely appreciated for his or her efforts.

Managers focus on the bad, leaders emphasise the good

This really comes down to seeing the cup half empty or half full. If you're only willing to point out the flaws of a project or an employee, you're not giving them much interest in learning or improving. Instead, create a sandwich effect. Start with some form of praise, follow with the criticism, and end with praise.

Managers want credit, leaders credit their teams

Managers who lack leadership abilities are always first to take credit. But effective leaders understand the importance of crediting their teams for the big wins. This pays off in the long run for creative a workplace with a more positive company culture and employees who are driven toward more successes as a team.

Part 1 Session 2 - My Rotary World

Reference Material

When seeking information, your club leaders, district officers, RI and RDU staff in Parramatta are great starting points depending on the type of information you seek. As are past officers of RI and District Officers.

Our District Directory is printed annually and is also accessible through our district website. Our directory contains significant amounts of Rotary and D9685 information. As a leader in your club this document is an excellent starting point to seek information or assistance irrespective of your role in your club or the district.

The references below may be helpful. An enormous amount of Rotary information is available on all of these sites and any time you have any Rotary questions you will find the answers here. If you are not familiar with these website, take time to have a look and see how Rotary is being presented to the world internationally, Australia-wide and at District level. Some of these sites will require you to logon.⁵

For those who really like the detail on how Rotary works. The Rotary International Manual of Procedure (MOP) is available for downloading in PDF format at <https://www.rotary.org/myrotary/en/governance-documents>. Just click on "Manual of Procedure".

Attendance at District Assembly and other district training seminars and gatherings is also a great opportunity to learn and build up your personal Rotary networks.

Rotary International History

The world's first service club, the Rotary Club of Chicago, was formed on 23 February 1905 by Paul P. Harris, an attorney, who wished to capture in a professional club the same friendly spirit he had felt in the small towns of his youth. The Rotary name derived from the early practice of rotating meetings among members' offices.

Rotary's popularity spread, and within a decade, clubs were chartered from San Francisco to New York to Winnipeg, Canada. By 1921, Rotary clubs had been formed on six continents. The organisation adopted the Rotary International name a year later.

As Rotary grew, its mission expanded beyond serving club members' professional and social interests. Rotarians began pooling their resources and contributing their talents to help serve communities in need. The organization's dedication to this ideal is best expressed in its motto: Service Above Self.

By 1925, Rotary had grown to 200 clubs with more than 20,000 members. The organisation's distinguished reputation attracted presidents, prime ministers, and a host of other luminaries to its ranks — among them author Thomas Mann, diplomat Carlos P. Romulo, humanitarian Albert Schweitzer, and composer Jean Sibelius.

⁵REFERENCES

<https://www.rotary.org/en> Rotary international website

<http://www.rotarydownunder.com.au/> RDU website

<http://www.rotaryaustralia.org.au/> Australian national website

<http://rotarydistrict9685.org.au/> District 9685 website

Rotary and World War II

During World War II, many clubs were forced to disband, while others stepped up their service efforts to provide emergency relief to victims of the war. In 1942, looking ahead to the post war era, Rotarians called for a conference to promote international educational and cultural exchanges. This event inspired the founding of UNESCO.

In 1945, 49 Rotary club members served in 29 delegations to the UN Charter Conference. Rotary still actively participates in UN conferences by sending observers to major meetings and covering the United Nations in its publications.

"Few there are who do not recognise the good work which is done by Rotary clubs throughout the free world," former Prime Minister Winston Churchill of Great Britain once declared.

Dawn of a New Century

As it approached the 21st century, Rotary worked to meet society's changing needs expanding its service efforts to address such pressing issues as environmental degradation, illiteracy, world hunger, and children at risk.

In 1989, the organisation voted to admit women into clubs worldwide and now claims more than 145,000 female members in its ranks.

After the collapse of the Berlin Wall and the dissolution of the Soviet Union, Rotary clubs were formed or re-established throughout Central and Eastern Europe. The first Russian Rotary club was chartered in 1990, and the organization underwent a growth spurt for the next several years.

More than a century after Paul Harris and his colleagues chartered the club that eventually led to Rotary International, Rotarians continue to take pride in their history. In honour of that first club, Rotarians have preserved its original meeting place, Room 711 in Chicago's Unity Building, by re-creating the office as it existed in 1905. For several years, the Paul Harris 711 Club maintained the room as a shrine for visiting Rotarians. In 1989, when the building was scheduled to be demolished, the club carefully dismantled the office and salvaged the interior, including doors and radiators. In 1993, the RI Board of Directors set aside a permanent home for the restored Room 711 on the 16th floor of RI World Headquarters in nearby Evanston.

Today, 1.2 million Rotarians belong to over 34,000 Rotary clubs in more than 200 countries and geographical areas.

Rotary's Archives

Learn more about Rotary's history by contacting the archives.

Who we work with

Rotary's Work with the UN and other Organisations

Throughout its history, Rotary International has collaborated with the United Nations, governments, and nongovernmental organisations to improve the human condition.

The greatest example of Rotary's effective collaborations is its flagship program, "End Polio Now", which aims to eradicate polio worldwide. Working with spearheading partners UNICEF, the U.S. Centres for Disease Control and Prevention, and the World Health Organisation, Rotary has contributed over US\$1 billion to polio and 2.5 billion children have been immunised. For more information see <http://www.endpolionow.org>.

Cooperative efforts are also a key element of Rotary's local service. The Rotary club of Beecroft, for example, has worked with Friends of Ermera and private organisations to build libraries in the Ermera District of East Timor to enhance literacy skills in a nation where the literacy rate is only 50%. Similar collaborations have helped Rotary's 1.2 million club members promote goodwill, service, world understanding, and peace in more than 200 countries and geographical areas.

Rotary and the United Nations

Rotary and the United Nations have a long history of working together and sharing similar visions for a more peaceful world.

In 1942, Rotary clubs from 21 nations organised a conference in London to develop a vision for advancing education, science, and culture after World War II. That event was a precursor to UNESCO. In 1945, 49 Rotarians went to San Francisco to help draft the UN Charter. Rotary and the UN have been close partners ever since, a relationship that's apparent through PolioPlus and work with UN agencies.

Rotary currently holds the highest consultative status offered to a nongovernmental organisation by the UN's Economic and Social Council, which oversees many specialized UN agencies. Rotary maintains and furthers its relationship with a number of UN bodies, programs, commissions, and agencies through its representative network. This network consists of RI representatives to the United Nations and other organisations.

Learn more about Rotary's local and international work through <http://www.rotary.org>.

Structure

Overview of Rotary International's Leadership Structure⁶

Clubs

Rotarians are members of more than 34,000 Rotary clubs, which belong to the global association of Rotary International (RI). Each club elects its own officers and enjoys considerable autonomy within the framework of Rotary's constitution and bylaws.

Districts

Clubs are grouped into approximately 530 RI districts, each led by a district governor, who is an RI officer and leads about 50 clubs. The district administration, including assistant governors and various committees, guides and supports the clubs.

The RI Boards

The 19-member RI Board of Directors, which includes the RI president and president-elect, meets quarterly to establish policies. Traditionally, the RI president, who is elected annually, develops a theme and emphasis for the year.

The Secretariat

RI is headquartered in Evanston, Illinois, USA, with seven international offices in Argentina, Australia, Brazil, India, Japan, Korea, and Switzerland. The office of Rotary International in Great Britain and Ireland (RIBI), located in England, serves clubs and districts in that region.

The Secretariat's active managing officer is the general secretary, who heads a 650-member staff working to serve Rotarians worldwide. Rotary International may be contacted at <https://www.rotary.org/en/contact>.

The Rotary International South Pacific and Philippines Office (RISPPPO) in Parramatta, NSW, may be contacted on (02) 8894 9800.

⁶ *Adapted from Rotary Basics*

Council on Legislation

The Council on Legislation, Rotary's "parliament," meets every three years to deliberate and act upon all proposed enactments and resolutions submitted by clubs, district conferences, the RIBI Conference or General Council, and the RI Board. The Council itself also makes proposals. Read more about the Council on Legislation.

The Trustees of The Rotary Foundation

The 15 directors of The Rotary Foundation are appointed by the RI president, with the agreement of the RI Board. The Trustees manage all business of the Foundation. The trustee chair, who serves for one year as chair, is the head of the Trustees. Each trustee is appointed to a four-year term.

District and International Zones

Just as the more than 34,000 Rotary clubs belong to over 530 districts, the districts, in turn, belong to 34 zones, Australia is in Zone 8. Zones have been broken down further into 41 regions. Each region has a regional coordinator team, which is composed of the Rotary coordinator (RC), regional Rotary Foundation coordinator (RRFC), and Rotary public image coordinator (RPIC) and their assistants. The three coordinators, who are appointed by the RI president-elect or The Rotary Foundation trustee chair-elect, have professional expertise and Rotary knowledge in specific areas and work together to support the priorities of the Rotary Strategic Plan. Regional coordinators also serve as trainers, consultants, and advisers at Rotary institutes, governors-elect training seminars, regional meetings, and district seminars.

Working Together

The members of the regional coordinator team work together to assist district governors, district governors-elect, other district leaders, and club officers and to connect them with resources. The team also supports the interrelated priorities of the Rotary Strategic Plan:

- To support and strengthen clubs;
- To focus and increase humanitarian service; and
- To enhance public image and awareness.

In addition, the regional team works together to hold regional seminars and to create a plan for strengthening clubs, enhancing Rotary's public image, increasing the number of successful service projects, and promoting the support of the Foundation in their regions.

Rotary Institutes

Rotary institutes are informational meetings designed for the past, present, and incoming RI officers. A Rotary institute may be organised for a zone, a section of a zone, or a grouping of zones.

Purpose

The purpose of a Rotary institute is to:

- Provide current, incoming, and past RI officers with updates on RI and Rotary Foundation policies and programs
- Provide a forum for Rotary leaders to make comments and recommendations to the Board of Directors
- Provide fellowship and a participative learning experience that will inspire current, incoming, and past governors to continuing leadership and service

Guiding Principles

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.

Avenues of Service

Based on the Object of Rotary, the Avenues of Service are Rotary's philosophical cornerstone and the foundation on which club activity is based, namely:

Club Service focuses on strengthening fellowship and ensuring the effective functioning of the club.

Vocational Service encourages Rotarians to serve others through their vocations and to practice high ethical standards.

Community Service covers the projects and activities the club undertakes to improve life in its community.

International Service encompasses actions taken to expand Rotary's humanitarian reach around the globe and to promote world understanding and peace.

Youth Service promotes education, leadership and international understanding in the young

The Four-Way Test

In 1932, Rotarian Herbert J. Taylor created The Four-Way Test, a code of ethics adopted by Rotary 11 years later. The test, which has been translated into more than 100 languages, asks the following questions:

Of the things we think, say or do:

- Is it the **TRUTH**?
- Is it **FAIR** to all concerned?
- Will it build **GOODWILL** and **BETTER FRIENDSHIPS**?
- Will it be **BENEFICIAL** to all concerned?

Rotary Code of Conduct

As a Rotarian, I will:

1. Exemplify the core value of integrity in all behaviours and activities.
2. Use my vocational experience and talents to serve in Rotary.
3. Conduct all of my personal, business, and professional affairs ethically, encouraging and fostering high ethical standards as an example to others.
4. Be fair in all dealings with others and treat them with the respect due to them as fellow human beings.
5. Promote recognition and respect for all occupations that are useful to society.
6. Offer my vocational talents: to provide opportunities for young people, to work for the relief of the special needs of others, and to improve the quality of life in my community.
7. Honour the trust that Rotary and fellow Rotarians provide and not do anything that will bring disfavour or reflect adversely on Rotary or fellow Rotarians.

8. Not seek from a fellow Rotarian a privilege or advantage not normally accorded others in a business or professional relationship.

Mission

The mission of Rotary International, a worldwide association of Rotary clubs, is to:

- Provide service to others,
- Promote high ethical standards, and
- Advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders.

Moving Toward the Future

In 2001-02, Rotary International began developing a strategic plan (Refer to Attachment A) to guide the organisation as it entered its second century of service. In June 2007, the Board of Directors approved the RI Strategic Plan 2007-10, which identifies seven priorities:

1. Eradicate polio.
2. Advance the internal and external recognition and public image of Rotary.
3. Increase Rotary's capacity to provide service to others.
4. Expand membership globally in both numbers and quality.
5. Emphasise Rotary's unique vocational service commitment.
6. Optimise the use and development of leadership talents within RI.
7. Fully implement the strategic planning process to ensure continuity and consistency throughout the organisation.

Core Values

Rotary's core values (Fellowship; Integrity; Diversity; Service; Leadership) represent the guiding principles of the organisation's culture, including what guides member's priorities and actions within the organisation. Values are an increasingly important component in strategic planning because they drive the intent and direction of the organisation's leadership.

Fellowship.

Through FELLOWSHIP we build lifelong relationships that create greater global understanding.

Integrity

With INTEGRITY we honour our commitments and uphold ethical standards

Diversity.

Our DIVERSITY enables us to connect different perspectives and approach problems from many angles.

Service and Leadership

We apply our vocational expertise, SERVICE and LEADERSHIP to tackle some of the world's greatest problems

Strategic Goals

Support and Strengthen Clubs

- Foster club innovation and flexibility;
- Encourage clubs to participate in a variety of service activities;
- Promote membership diversity;
- Improve member recruitment and retention;
- Develop leaders;
- Start new, dynamic clubs; and
- Encourage strategic planning at club and district levels

Focus and Increase Humanitarian Service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's 6 areas of focus
- Increase collaboration and connection with other organisations
- Create significant projects both locally and internationally

Enhance Public Image and Awareness

- Unify image and brand awareness
- Publicise action-oriented service
- Promote core values
- Emphasise vocational service
- Encourage clubs to promote their networking opportunities and signature activities

District 9455 Strategic Plan

Our District 9455 Strategic Plan can be found on the District website. The link is:

<http://www.rotarydistrict9455.org.au/news/15236/district-9455-strategic-plan-2014-17>

The Strategic Plan is aligned with the Rotary International Strategic Plan and includes a number of Strategic Goals that can be summarised as follows:

Strategic Goal 1 – Support and Strengthen Clubs

- Strategic planning and future vision
- Strong and vibrant membership
- Develop current and future Rotary leaders
- An effective District structure and governance structure that facilitates the work of Rotary

Strategic Goal 2 – Increase Humanitarian Service

- Promote and coordinate diverse, innovative and sustainable programs across the five Avenues of Service
- Develop effective and sustainable strategic partnerships
- A strong and well supported Rotary Foundation

Strategic Goal 3 – Public Image and Awareness

- Promote a modern and contemporary image of Rotary
- Effective outcome driven communications

Part 1 Session 3 - Engaging Members

Membership Development

To be effective and relevant to a community, a Rotary club needs members. A club's ability to serve the community is directly related to the strength and size of a club's membership base.

For more information refer to:

<https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership>

Finding Members

It's the responsibility of current Rotary club members to invite other qualified individuals to join Rotary. New members bring important benefits to the club, including an increased capacity to serve the community, future leadership, diversity, and fresh ideas, interests, and energy. To learn more about proposing an individual for membership in Rotary, visit *[“Proposing a New Member.”](#)*

Keeping Members

Retaining good members is as critical to Rotary's long-term success and health as the induction of new members. Current members who are dedicated, active, and motivated, support the effective functioning of the club and are likely to attract new members. Successful retention strategies include educating members and keeping them involved and informed.

If your club is aware of a member who is moving but still wishes to maintain Rotary membership, encourage that member to complete the relocation form.

When a new member becomes active, involved, and connected, both the club and the new member become stronger. Ideas for integrating a new member into your Rotary club include:

- Introducing the new member to other club members each week for the first month;
- Encouraging the new member to become involved in club service projects
- Inviting the new member to attend meetings of sponsored Interact or Rotaract clubs;
- Encouraging the new member to get involved in international programs, such as Vocational Training Teams or Rotary Youth Exchange;
- Inviting the new member to neighbouring clubs for a make-up meeting so they can learn about attendance requirements and observe the spirit of fellowship;
- Asking the new member and his or her partner to social activities, dinners, or other special events;
- Encouraging the new member and his or her partner to attend the district conference; and
- Appointing a mentor to help the new member become an active Rotarian

Learn more by going to <http://www.Rotary.org> and enter *[“Members”](#)* in the search window. A list of membership documents will be seen such as *[“New Member orientation”](#)*.

See reasons for joining Rotary at Attachment B.

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- Recognise & 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

For more ways to keep new members engaged refer to Attachment C.

Membership Satisfaction Questionnaire

Use the Membership Satisfaction Questionnaire at Attachment D to find out what your members think about their club.

Part 1 Session 4 - Our Foundation

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education, and the alleviation of poverty.

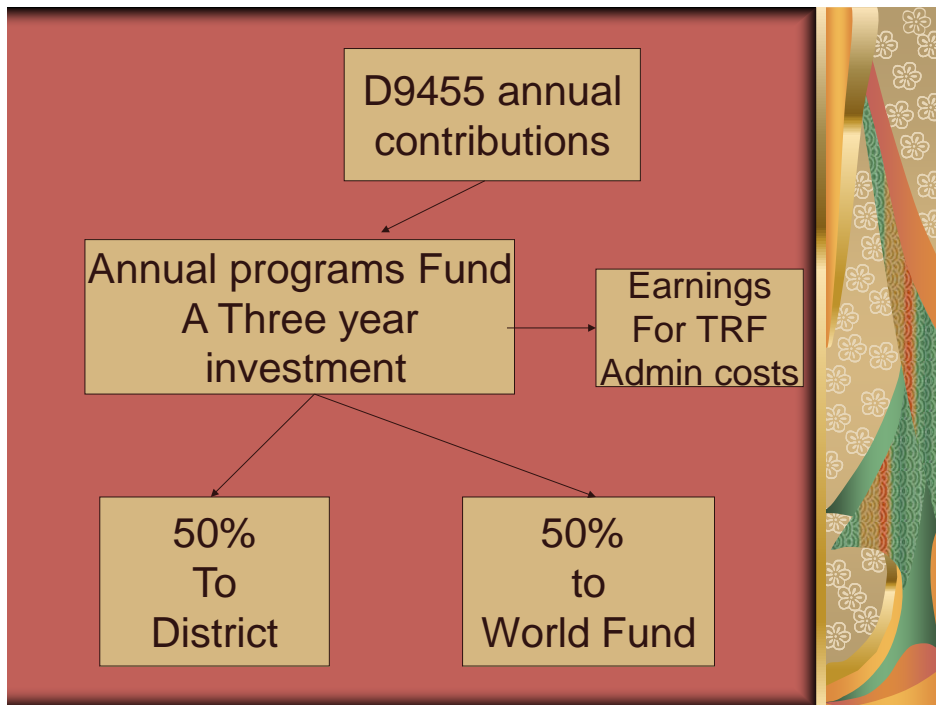
- IT IS OUR FOUNDATION
- MAINLY FUNDED by ROTARIANS.
- OPERATES IN MORE THAN 200 COUNTRIES
- ONE OF THE LARGEST NGOs.
- WE CAN GO ANYWHERE (where governments, business and religious groups cannot go).

There are three funds – the Annual Programs Fund for support of projects today; the Permanent Fund to secure the future and the Polio Fund. Contributions to the annual fund and polio fund are tax deductible.

District 9455 Foundation giving

YEAR	Annual Programs Fund	Restricted including Polio Plus	Permanent Fund	Total
2011-12	\$170,775	\$147,931	\$0	\$318,706
2012-13	\$228,536	\$83,018	\$0	\$311,554
2013-14	\$171,210	\$118,972	\$0	\$290,182
2014-15	\$223,734	\$66,233	\$0	\$289,967

Flow of Funds



Donor Recognition

The Rotary Foundation provides many opportunities for donors to express their commitment to Rotary's work or to honour a friend or family member through a named or endowed gift.

These are available for the Annual Programs Fund (outright contributions that provide immediate funding for the Foundation's cultural, humanitarian, and educational programs) and the Permanent Fund (outright donations or endowed funds).

The Rotary Foundation offers several ways to recognize Rotarians and friends for their generous support.

Naming opportunities

A named gift is an outright contribution to Annual Programs Fund that provides immediate funding for a program. One hundred percent of the gift is spent on a designated program in that given year.

Sustaining Member

Anyone who contributes US\$100 or more per year to the Annual Programs Fund is automatically recognised as a Rotary Foundation Sustaining Member. Sustaining Members are critical to the Foundation. If every club member contributed \$100 every year, Rotary could nearly double its efforts to help needy people worldwide and support the continued growth of its programs. All gifts cumulatively count toward other Foundation recognition programs.

Centurion

In our District, anyone who contributes A\$100 or more per year to the Annual Programs Fund is recognised as a Centurion and many Rotarians now make this

annual contribution. The donation is recognised by a lapel pin and certificate and all gifts cumulatively count toward other Foundation recognition programs.

Benefactor

You may become a Benefactor by making the Permanent Fund a beneficiary in your estate plans or by donating \$1,000 or more to the fund outright.

Foundation Collection boxes are available free of charge from RI Regional office in Parramatta. Contact Bruce Allen on 02 9635 3537 or by email bruce.allen@rotary.org

Bequest Society

Couples or individuals who have made commitments of \$10,000 or more in their estate plans, such as in a will, living trust, or through whole or universal life insurance, can become Bequest Society members.

All Bequest Society members receive recognition from the Trustees of The Rotary Foundation. Donors may elect to receive an engraved crystal recognition piece and a Bequest Society pin. You must ask to become a Bequest Society member by filling out a form.

Paul Harris Fellow

Donors of US\$1,000 or more to the Annual Programs Fund, PolioPlus, or the Humanitarian Grants Program, or people who have that amount contributed in their name, can be recognised as Paul Harris Fellows .

Paul Harris Society

In our District, those who donate US\$1,000 or more each year to the Annual Programs Fund are recognised as Paul Harris Fellows and as members of the Paul Harris Society. Members of this group meet each year to celebrate the work of the Foundation at an annual dinner.

Major Donor

The Rotary Foundation recognises couples or individuals whose combined personal outright or cumulative giving has reached \$10,000. All outright contributions made to the Foundation are included in this total, regardless of the gift designation.

Arch C. Klumph Society

Donors whose cumulative gifts total \$250,000 or more will become members of the Arch C. Klumph Society and have their photos displayed permanently in the Arch C. Klumph Gallery at RI headquarters.

Information about the programs of The Rotary Foundation is at Attachment E

Part 1 Session 5 - Ethics and Vocational Service

Vocational service promotes high ethical standards in businesses and professions, recognises the worthiness of all dignified occupations, and fosters the ideal of service in the pursuit of all vocations. Members conduct themselves and their businesses in accordance with Rotary's principles.

Rotary Code of Conduct

As a Rotarian, I will:

- Exemplify the core value of *integrity* in all behaviours and activities
- Use my vocational experience and talents to serve in Rotary
- Conduct all of my personal, business, and professional affairs ethically, encouraging and fostering high ethical standards as an example to others
- Be fair in all dealings with others and treat them with the respect due to them as fellow human beings
- Promote recognition and respect for all occupations which are useful to society
- Offer my vocational talents: to provide opportunities for young people, to work for the relief of the special needs of others, and to improve the quality of life in my community
- Honour the trust that Rotary and fellow Rotarians provide and not do anything that will bring disfavour or reflect adversely on Rotary or fellow Rotarians
- Not seek from a fellow Rotarian a privilege or advantage not normally accorded others in a business or professional relationship

For more information about vocational service, see:

[\[pdf\] An Introduction to Vocational Service](https://www.rotary.org/myrotary/en/document/569)
<https://www.rotary.org/myrotary/en/document/569>

Vocational Service Ideas

- Advancing high ethical standards in the workplace
- In hiring, training, and review procedures, include discussion and emphasis of honesty, accountability, fairness, and respect.
- In internal communications, praise and encourage exemplary behaviour on and off the job.
- In relations with customers, vendors, and business associates, communicate and demonstrate your personal commitment to high ethical standards.
- The classification principle
- Classification talks to promote vocational awareness in your club.
- Classification talks may also serve as a starting point for initiating club projects that help young people and the unemployed develop marketable skills.
- Organizing tours of members' workplaces is another way to recognize the value of each member's vocation.
- Schedule an occasional meeting in a member's place of employment.
- Invite young people to special vocational meetings.
- Promote Rotary's commitment to high ethical standards
- Post The Four-Way Test on a prominent billboard in your community.

- 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.
- “Walk the talk” by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards.
- Sponsor a Four Way Test essay contest.
- Sponsor a joint “character literacy” project for young children.
- Conduct a RYLA event with special emphasis on ethics.
- Organise a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.
- Recognise and promote the value of all useful occupations.
- Make classification talks and business tours part of your club’s program.
- Join or form a Rotary Fellowship related to your vocation.
- Sponsor a career day for Rotarians to bring young people to their businesses.
- Support professional development.
- Encourage members to take leadership roles in business associations.
- Sponsor a seminar for small business entrepreneurs.
- Hold informal professional networking events where members can meet other local professionals and introduce them to Rotary.
- Start a career counselling program geared towards equipping unemployed or underemployed adults with the skills they need to compete in the job market.
- Volunteer your vocation.
- Mentor a young person.
- Use Rotary’s website to identify a project in need of your specialised vocational experience.

Part 1 Session 6 - Service Projects

See D9685 District directory for district projects, information and district officers supporting service in our district

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?

Good Rotary Service projects require:

- Meeting a need today
- Creativity
- Sustainability
- Risk taking
- New ideas
- Keeping prior projects only if viable today!

Project Planning

Project Planning tools are at Attachment F.

Information supporting Part 2 of the RLI course

Part 2 Session 1 – Strategic Planning

District 9455 Strategic Plan

Our District 9455 Strategic Plan can be found on the District website. The link is:

<http://www.rotarydistrict9455.org.au/news/15236/district-9455-strategic-plan-2014-17>

The Strategic Plan is aligned with the Rotary International Strategic Plan and includes a number of Strategic Goals that can be summarised as follows:

Strategic Goal 1 – Support and Strengthen Clubs

- Strategic planning and future vision
- Strong and vibrant membership
- Develop current and future Rotary leaders
- An effective District structure and governance structure that facilitates the work of Rotary

Strategic Goal 2 – Increase Humanitarian Service

- Promote and coordinate diverse, innovative and sustainable programs across the five Avenues of Service
- Develop effective and sustainable strategic partnerships
- A strong and well supported Rotary Foundation

Strategic Goal 3 – Public Image and Awareness

- Promote a modern and contemporary image of Rotary
- Effective outcome driven communications

Planning Guide For Effective Clubs

The Planning Guide for Effective Clubs is at Attachment G.

Part 2 Session 2 - Targeted Service (Foundation 2)

The Rotary Foundation Grant Model

The Rotary Foundation's current grant model supports district and club humanitarian and educational projects. The Foundation offers funding for two types of grants: district grants and global grants. District grants are block grants that allow clubs and districts to address immediate needs in their communities and abroad. Global grants fund large international humanitarian projects, vocational training teams and scholarships that have sustainable, measurable outcomes in one or more of the areas of focus.

How the grant model benefits clubs and districts

The Rotary Foundation's grant model offers clubs and districts the opportunity to carry out projects and activities that create greater impact, build stronger clubs, increase membership and donor base, enhance public image, and generate enthusiasm to support local service efforts.

In addition, clubs and districts benefit from the following features:

- Grants have been reduced from twelve types to two— global grants and district grants —while maintaining a variety of activities within the grant types.
- Grant payments are processed more quickly and the application and approval process is transparent, allowing clubs and districts to see the status of their grants throughout.
- Districts can now access 50 percent of their District Designated Funds (DDF) for district grants, which gives them more funding for projects and more control over their DDF.
- District grants can be used to sponsor a wide range of activities locally and abroad, including traditional Group Study Exchange teams, scholarships and any projects that align with the Foundation's mission.
- Monitoring and evaluation of grants provide important information to grant sponsors and to the Foundation. For example, knowing the number of people who benefit from their projects can help clubs and districts promote the value of their work to the general public.
- Clubs and districts can determine their level of involvement in global grants. They can develop their own project with an international partner or they can apply for packaged global grants, which are pre-structured with strategic partners and supported entirely by the World Fund.
- The timeline for global grant scholar selection is shorter, so clubs and districts do not have to plan as far ahead.
- Global grant scholarships receive a World Fund match, thereby lowering the annual cost of a scholarship for the sponsors.
- Vocational training teams, which travel to meet vital humanitarian needs, offer service opportunities far beyond the GSE experience. For example, during the first year of the pilot, a team of cardiac professionals from Indiana, USA, travelled to Uganda where they performed paediatric heart surgeries on children while training their Ugandan counterparts on the techniques they used. They saved many lives but also ensured that local doctors would be able to save even more lives in the future.

What are the areas of focus and how were they selected?

The six areas of focus are:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health

- Basic education and literacy
- Economic and community development

These areas were identified as critical humanitarian issues that Rotarians were already addressing worldwide. The Trustees agreed that previous Rotarian experience and interest in these areas would promote greater member engagement and project success.

What is sustainability and why is it important?

The Rotary Foundation defines sustainability as the capacity for maintaining outcomes long-term to serve the ongoing need of a community after grant funds have been expended. A sustainable project typically involves local community leaders in planning so that they are invested in the project's long-term success. Training and the exchange of information prepare communities to maintain results and solve problems on their own, after the Rotary club's involvement has ended. Sustainable projects offer enduring value and a greater return on Rotary's investment of money and volunteer hours.

What are strategic partnerships and how do they work?

A strategic partnership is a relationship between The Rotary Foundation and another international organization that has a unique or specialised knowledge or expertise in one or more of the areas of focus. Strategic partnerships are large-scale, multi-year relationships. Rotary's strategic partners provide financial resources, technical expertise, advocacy, or a combination thereof. These relationships will produce mutually beneficial project portfolios that fulfil the goals of the partners and enhance service opportunities for Rotarians through packaged global grants.

Why did The Rotary Foundation develop this current grant model?

The Foundation recognised the need to use its limited resources more effectively. In 2007, the Foundation was spending 20 percent of its annual program budget on large grants with high impact and 80 percent on short-term activities with minimal impact. The new grant model will flip these percentages so that 80 percent will support high-impact, sustainable projects.

The Foundation also identified a growing need to streamline its operations for improved efficiency and focus its efforts to make greater impact. For example, the increasing demand for small Matching Grants was driving up administrative costs without a corresponding return in terms of impact or public recognition.

The Trustees based the many of the plan's key elements on survey results from Rotary leaders and grassroots Rotarians.







The ultimate goal is to use Foundation resources more strategically by supporting projects that will make a greater impact on communities worldwide, affect a significantly larger number of beneficiaries, and enhance Rotary's public image. Greater recognition of Rotary's work will, in turn, lead to increased interest in joining Rotary and supporting its civic and humanitarian efforts.

How will the Foundation know if the current grant model is a success?

Several factors can help the Foundation measure the success of this model over time—among them, increased Rotarian participation in grant activities, increased giving to the Foundation from both members and non-Rotarians and more media coverage of Foundation-sponsored projects. But the real success indicators will come through the evaluation process which will provide data on the actual number of people who benefit from Foundation grants and demonstrate how the sustainability factor will ensure the continuation of those benefits.



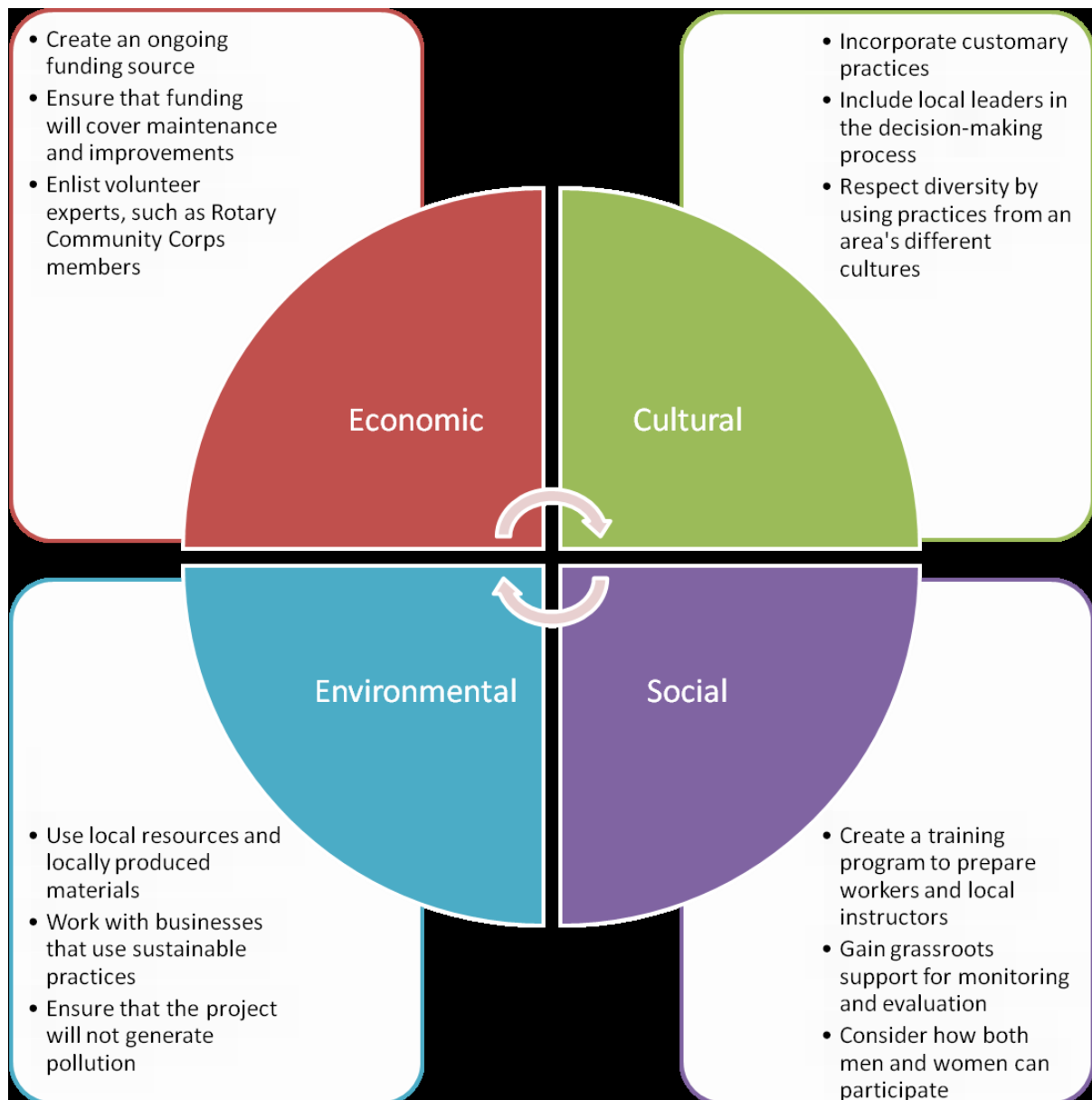
The Rotary Foundation Areas of Focus

TRF MISSION	The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.					
AREAS OF FOCUS*						
STATEMENT OF PURPOSE	<p>Peace and Conflict Prevention/Resolution</p> <p>The Rotary Foundation promotes the practice of peace and conflict prevention/resolution by:</p>	<p>Disease Prevention and Treatment</p> <p>The Rotary Foundation reduces the causes and effects of disease by:</p>	<p>Water and Sanitation</p> <p>The Rotary Foundation ensures that people have sustainable access to water and sanitation by:</p>	<p>Maternal and Child Health</p> <p>The Rotary Foundation improves the lives of mothers and their children by:</p>	<p>Basic Education and Literacy</p> <p>The Rotary Foundation promotes education and literacy for all by:</p>	<p>Economic and Community Development</p> <p>The Rotary Foundation invests in people to create measurable and enduring economic improvement in their lives and communities by:</p>
GOALS	<p>Strengthening local peace efforts</p> <p>Training local leaders to prevent and mediate conflict</p> <p>Supporting long-term peace-building in areas affected by conflict</p> <p>Assisting vulnerable populations affected by conflict, particularly children and youth</p> <p>Supporting studies related to peace and conflict resolution</p>	<p>Improving the capacity of local health care professionals</p> <p>Combating the spread of HIV/AIDS, malaria, and other major diseases</p> <p>Enhancing the health infrastructure of local communities</p> <p>Educating and mobilizing communities to help prevent the spread of major diseases</p> <p>Supporting studies related to disease prevention and treatment</p>	<p>Increasing equitable community access to safe drinking water and basic sanitation</p> <p>Strengthening the ability of communities to develop and maintain sustainable water and sanitation systems</p> <p>Educating communities about safe water, sanitation, and hygiene</p> <p>Supporting studies related to water and sanitation</p>	<p>Reducing the mortality rate for children under the age of five</p> <p>Reducing the maternal mortality rate</p> <p>Improving access to essential medical services and trained health care providers for mothers and their children</p> <p>Supporting studies related to maternal and child health</p>	<p>Ensuring that children have access to quality basic education</p> <p>Reducing gender disparity in education</p> <p>Increasing adult literacy</p> <p>Strengthening the capacity of communities to support basic education and literacy</p> <p>Supporting studies related to basic education and literacy</p>	<p>Strengthening the development of local entrepreneurs and community leaders, particularly women, in impoverished communities</p> <p>Developing opportunities for decent and productive work, particularly for youth</p> <p>Building the capacity of local organizations and community networks to support economic development</p> <p>Supporting studies related to economic and community development</p>

*Under the Future Vision Plan, the areas of focus relate directly to global grants.

What is Sustainability?

The word sustainable often describes something that is environmentally friendly. But environmental concerns are just one aspect of sustainability. Economic, cultural, and social factors are equally important. When a humanitarian project addresses all four levels of sustainability, it has a better chance of producing long-term benefits for the community it serves. Here are examples of ways to incorporate sustainability into our next project:



TRF Grant Management Model D9455

The District 9455 Grant Management Model is at Attachment H.

Part 2 Session 3 – Club Communication

10 Tips for Public Speaking

Feeling some nervousness before giving a speech is natural and even beneficial, but too much nervousness can be detrimental.

Here are some proven tips on how to control your butterflies & give better presentations⁷:

1. **Know your material.** Pick a topic you are interested in. Know more about it than you include in your speech. Use humour, personal stories and conversational language – that way you won't easily forget what to say.
2. **Practice. Practice. Practice!** Rehearse out loud with all equipment you plan on using. Revise as necessary. Work to control filler words; Practise, pause and breathe. Practise with a timer and allow time for the unexpected.
3. **Know the audience.** Greet some of the audience members as they arrive. It's easier to speak to a group of friends than to strangers.
4. **Know the room.** Arrive early, walk around the speaking area and practise using the microphone and any visual aids.
5. **Relax.** Begin by addressing the audience. It buys you time and calms your nerves. Pause, smile and count to three before saying anything. ("One one-thousand, two one-thousand, three one-thousand. Pause. Begin.) Transform nervous energy into enthusiasm.
6. **Visualise yourself giving your speech.** Imagine yourself speaking, your voice loud, clear and confident. Visualise the audience clapping – it will boost your confidence.
7. **Realise that people want you to succeed.** Audiences want you to be interesting, stimulating, informative and entertaining. They're rooting for you.
8. **Don't apologise** for any nervousness or problem – the audience probably never noticed it.
9. **Concentrate on the message – not the medium.** Focus your attention away from your own anxieties and concentrate on your message and your audience.
10. **Gain experience.** Mainly, your speech should represent *you* — as an authority and as a person. Experience builds confidence, which is the key to effective speaking. A Toastmasters club can provide the experience you need in a safe and friendly environment.

⁷Free resource from www.Toastmaster's.com

Four Fundamental Skills for Speech Organisation⁸

1. **Use an outline** which aids understanding.
2. **Transition smoothly** from one point to the next.
3. Craft an effective **speech opening**.
4. Craft an effective **speech conclusion**.

These are fundamental skills that you apply to every speech you'll ever deliver, whether it is a 2 minute off-the-cuff speech, a 15 minute business proposal, or a 60 minute keynote.

Outline

1. Numerous methods, including:
2. Organising by Who, What, When, Where, Why questions
3. The Classic "Three Supporting Points"
4. Chronological
5. Geographical

Transition

Transitions are the Key. Of the four skills, appropriate **transitions are most lacking in the majority of presentations**. Most speakers have an introduction and conclusion, with supporting material arranged in some form of outline. But, there is often little in the way of transition phrases that link the speech together in a cohesive unit.

In a **written piece** (like this article), headings, bullets, and punctuation provide cues to the reader that help them understand the macro-organisation.

In a **verbal speech**, use pauses and transition phrases to achieve this effect so that the audience knows when one point ends, and the next begins.

Opening

- State your premise.
- Road map to where you are going
- Open with a surprise

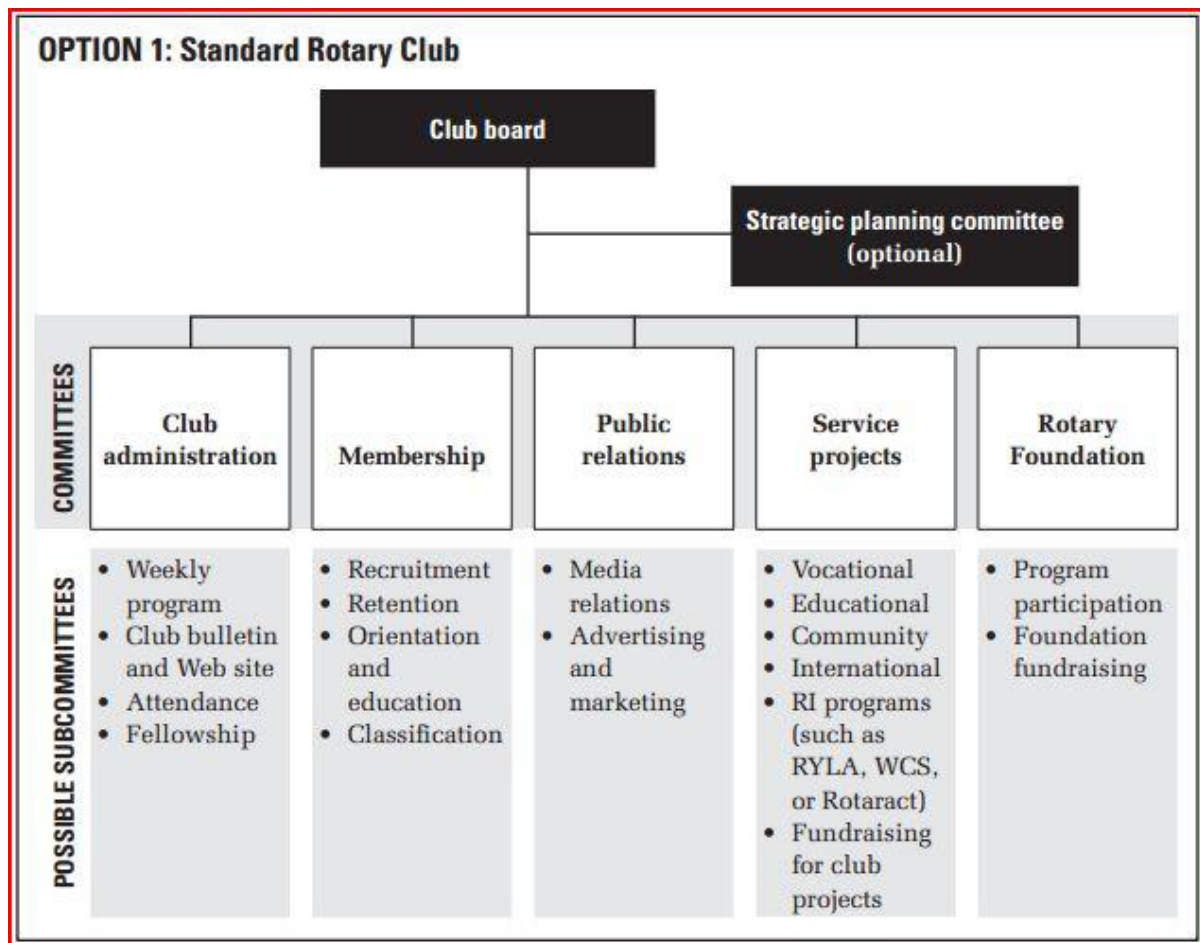
Conclusion.

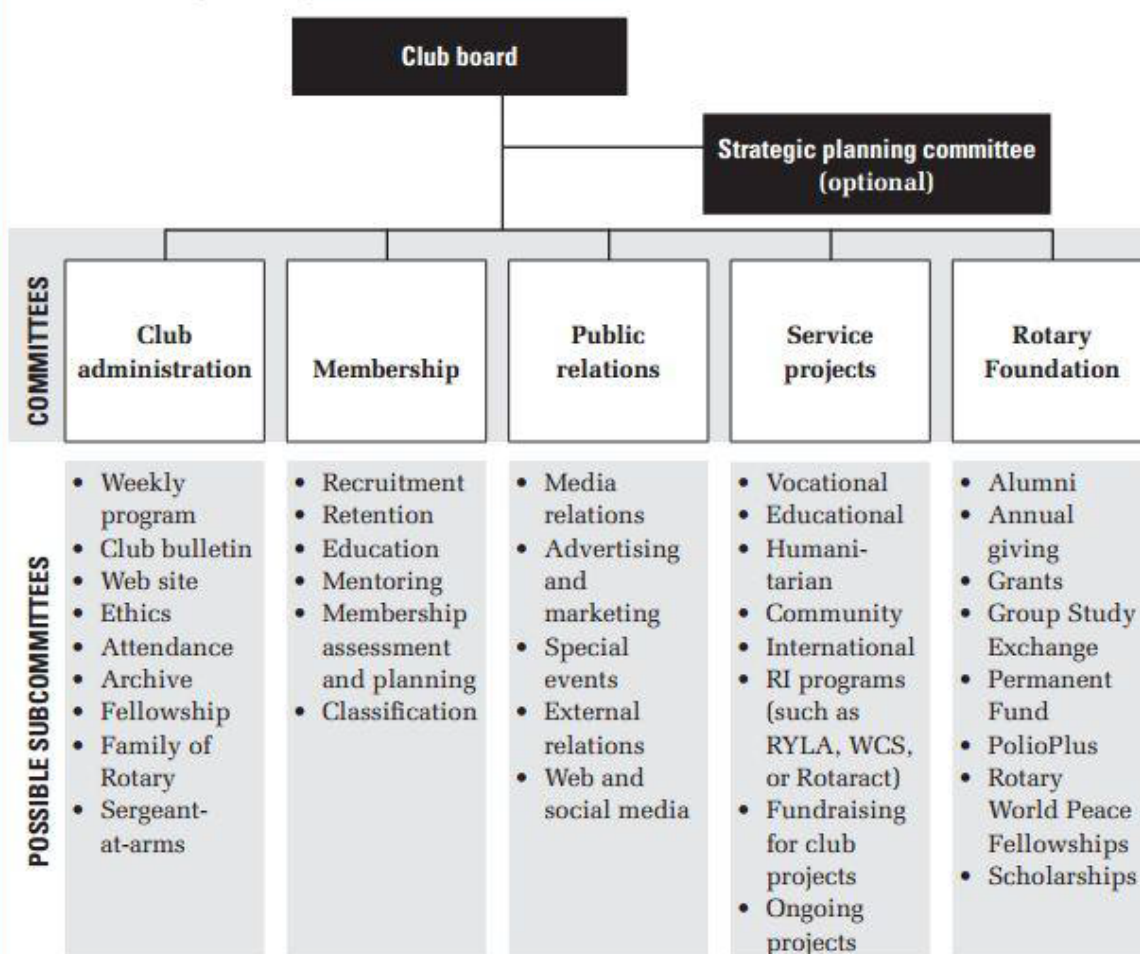
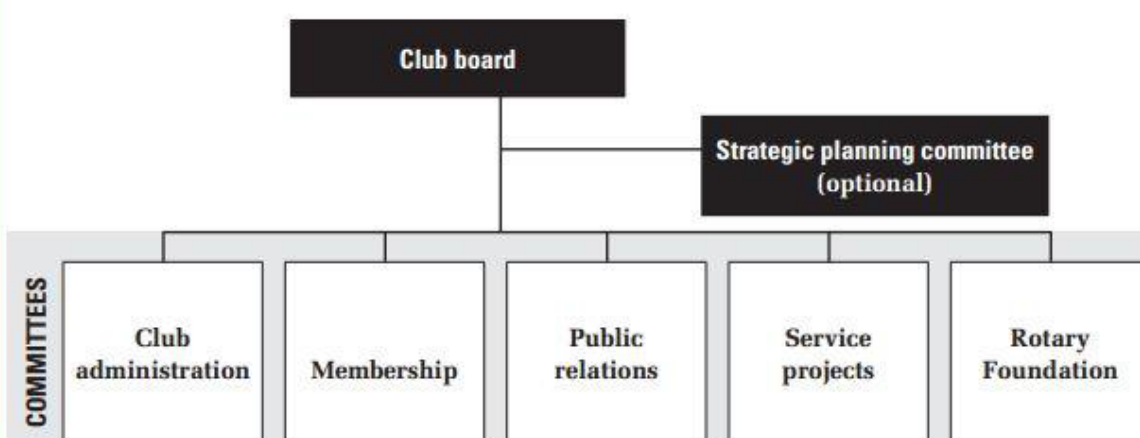
- Summary of 3 main points
- Call-to-action

⁸ Concepts from *Toastmasters Speech 2: Organize Your Speech* by Andrew Dlugan, April 29th, 2008 at <http://www.Toastmasters.com>

Part 2 Session 4 – Team Building

Club Committee Structures



OPTION 2: Large Rotary club**OPTION 3: Small Rotary Club**

Part 2 Session 5 - Attracting Members

The club membership committee

The role of the club membership committee is to develop and implement an action plan for membership development. To be effective, a Rotary club needs members. Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving Rotary beyond the club level is directly related to the size and strength of your club's membership base.

The responsibilities of the club membership committee summarised below are explained further in The Club Membership Committee Manual, 226B-EN (709), downloadable at www.Rotary.org. The boxed material is taken from Club Membership section of The Planning Guide for Effective Rotary Clubs.

- Develop committee goals to achieve club membership goals for the coming year.
- Conduct club assessments to determine strengths and weaknesses.
- Work with the public relations committee to create a positive club image that is attractive to prospective and current members alike.
- Develop programs to educate and train new and current club members.
- Sponsor newly organised clubs in your district, if applicable.

Some key issues and methods to be discussed by the committee include:

How does the club plan to achieve its membership goals? (check all that apply)

- ☐ Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- ☐ Ensure the membership committee is aware of effective recruitment techniques
- ☐ Develop a recruitment plan to have the club reflect the diversity of the community
- ☐ Explain the expectations of membership to potential Rotarians
- ☐ Implement an orientation program for new members
- ☐ Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- ☐ Assign an experienced Rotarian mentor to every new club member
- ☐ Recognize those Rotarians who sponsor new members
- ☐ Encourage members to join a Rotary Fellowship or Rotarian Action Group
- ☐ Participate in the RI membership development award programs
- ☐ Sponsor a new club
- ☐ Other (please describe):

Action steps:

Information supporting Part 3 of the RLI course

Part 3 Session 1- International Service

Suggested Steps in Developing an International Service Project

1. Get ideas from Rotary Web Site or people who have visited a foreign country.
2. Try to select something important that will interest the club members.
3. Present the idea to the club's International Service Committee who will report to the Board of Directors.
4. If approved, make contact with Rotary club or district in the target country to seek cooperation. Conduct a "needs assessment". Conduct a "sustainability assessment".
5. Get estimates of project cost with cooperation of partner club/district.
6. Consider if visit to other country desirable/necessary. If so, discuss ways of financing travel.
7. Develop budget for project with partner club/district. Estimate source of funds - sponsor club, district contribution, partner club, matching grant funds, outside support, etc.
8. Get approval of budget by all sources of support and begin preparation of matching grant applications.
9. Process matching grant applications and execute project.
10. Keep club informed of progress of project. Have pictures taken, etc. for publicity within district, to outside media, etc.
11. Thank those who supported project.
12. Send Annual Reports and Final Report (within 6 months of completion)

What is an International Service Project?

An International Service Project, formerly called "World Community Service" (WCS), involves Rotary clubs from two or more countries uniting to serve one of their communities. Clubs searching for international assistance can publicise their project needs via the web to other clubs around the world. Likewise, clubs looking to support an international project can use web resources to locate a suitable candidate.

By advancing international understanding and goodwill through service, International Service Projects reflect the heart of Rotary and provide exciting, challenging, and rewarding opportunities to Rotarians.

Program History and Goals:

The WCS program was officially launched in 1967. Since then, thousands of WCS projects were completed, and millions of dollars in funds and supplies were donated annually by Rotary clubs to support them. The WCS program was phased out June 30, 2011 in favor of a resource and support model developed by Rotary International to support International Service Projects.

International Service Projects aim to:

1. Improve the **quality of life** of those in need through international service
2. Encourage **cooperation** between clubs and districts in different countries as they carry out international service projects
3. Provide an effective **framework** for exchanging information regarding project needs and assistance
4. Increase **awareness** among Rotarians of International development and cultural issues as well as the importance of implementing projects that help people help themselves
5. Assist participants in **related programs** of Rotary International and The Rotary Foundation

6. Educate Rotarians about **project funding opportunities** available through the Foundation and other sources
7. **Communicate** successful project experiences to other Rotarians
8. Foster **international understanding, goodwill, and peace**
9. The RI Board recommends that when clubs develop programs for World Understanding Month in February, they structure at least one around International Service.

Projects should adhere to the following criteria:

1. The project is humanitarian in nature.
2. Rotarians in two or more countries are involved.
3. The project is located in one of these countries.

Getting Involved

Rotary clubs that get involved find that the project's benefits extend far beyond the communities where their projects take place. Clubs have the opportunity to (1) Undertake more ambitious projects (2) Empower all participants in service efforts (3) Develop closer ties with Rotarians abroad (4) Further international understanding and goodwill AND, (5) Address global concerns

Many clubs start participating in International Service Projects because of **informal contacts** among Rotarians searchable database, available at www.rotary.org, lists hundreds of club and district community service projects worldwide in need of funding, volunteers, donated goods, and partners for Rotary Foundation Matching Grants. It also offers a list of model projects, which can be a source of best practices.

Volunteer for an international project

Through the Rotary Volunteers program, Rotarians and other skilled professionals further by using their professional skills and experience to contribute to international humanitarian projects wherever help is needed. Volunteers with an extensive range of skills, whether they're in accounting or water treatment, are invited to participate. All Rotarians and volunteer-minded friends of Rotary can significantly contribute at the club, district, or international level. See the Rotary.org and select "take action" tab for guidelines.

Volunteers: Register your availability

Ready to get involved? Register as a Rotary Volunteer. Once you submit the form, Rotary club and district officers in your area review your skills and experience. As a Rotary Volunteer, you will serve as a representative of Rotary.

Develop an international project

A WCS project is created when Rotary clubs from two or more countries unite to serve one of their communities. These collaborations help Rotary clubs undertake more ambitious projects that improve lives while fostering international fellowship and understanding. In addition to providing volunteers, clubs can support projects by offering financial assistance, donating goods, or becoming a global grant partner. Program details can be found in the WCS handbook.

ROTARY AUSTRALIA WORLD COMMUNITY SERVICE (RAWCS)

Just some of the programs and projects **RAWCS** has run can be found here. They include programs and projects that have:

- Established medical, dental and general health facilities across second and third world countries;
- Brought clean water to villages;
- Helped street children into homes and education;
- Protected thousands against malaria;
- Provided shelter for those left homeless after tragedies;
- Transported medical equipment to remote regions
- Provided microfinance to poverty-struck communities;
- Established care homes for the elderly;
- Brought literacy programs to villages;
- Provided AIDS education programs;
- Established vocational education training programs;
- Constructed staff accommodation to bring volunteers and professionals into remote regions needing assistance; and
- Helped provide critical post-natal care for mothers and babies



Where does RAWCS Operate?

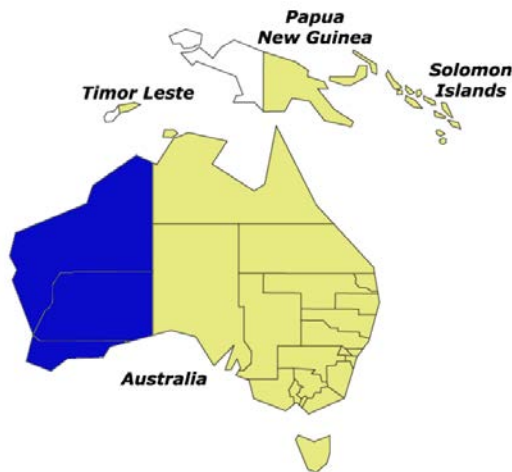
While **RAWCS** is a locally organised body within Australia, its reach is global. **RAWCS** programs and projects have been run in countries including:

Australia	Myanmar	Thailand
Bangladesh	Mongolia	Tibet
Cambodia	Nepal	Timor Leste
Cook Islands	Papua New Guinea	Tonga
Ethiopia	Peru	Uganda
Fiji	Philippines	Vanuatu
Ghana	Samoa	Vietnam
India	Sierra Leone	West Timor
Indonesia	South Africa	Zambia
Kenya	Sri Lanka	Zimbabwe
Madagascar	Tanzania	
Malaysia	Solomon Islands	

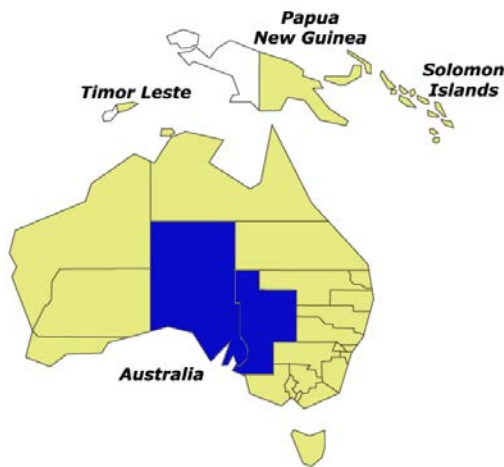
RAWCS Structure

The national governing body of RAWCS serves as a [council](#) assisting and coordinating five regional RAWCS committees.

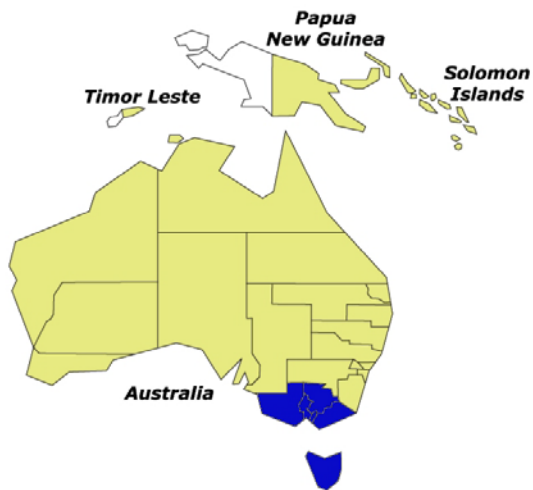
They are responsible for coordinating all RAWCS activities initiated by Rotarians from within their Region. Each Region is administered by an elected chair and a committee proposed each year by the appropriate District Governors. They report to the Board on a regular basis.



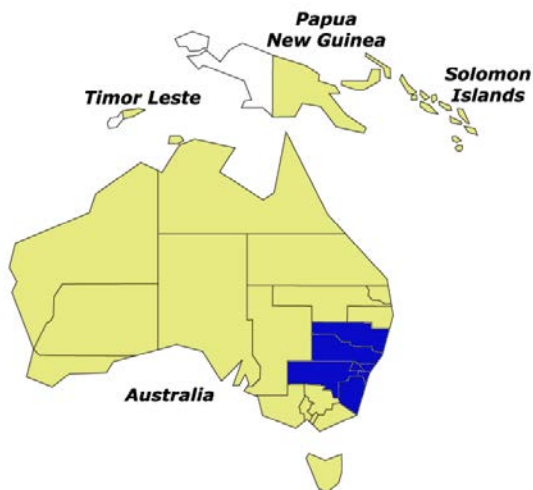
[Western Region](#) - (Rotary Districts 9455, 9465)



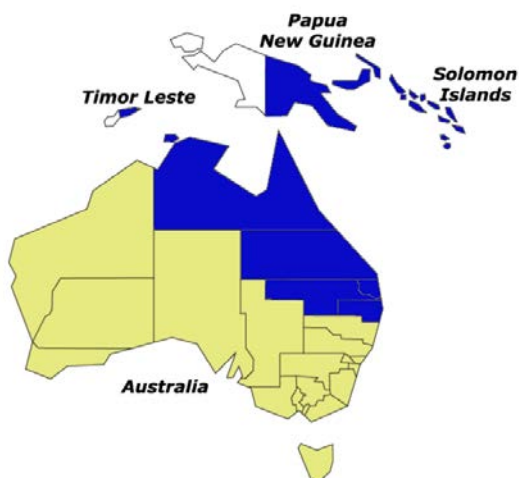
[Central Region](#) - (Rotary Districts 9500, 9520)



[Southern Region](#) - (Rotary Districts 9780, 9790, 9800, 9810, 9820, 9830)



[Eastern Region](#) - (Rotary Districts 9650, 9675, 9685, 9700, 9710, 9750)



[Northern Region](#) - (Rotary Districts 9550, 9570, 9600, 9630, 9640)

The national council assists by seeking and selecting appropriate subcommittees and officers to coordinate International Service activities whilst helping Rotary Clubs and Districts to implement these activities.

It also acts for the Rotary regions, districts and clubs in dealings with Governments, National Insurance Underwriters, Corporate Affairs Commissioners and other bodies and/or departments, concerning requests for overseas assistance and all matters consistent with the objectives of RAWCS.

While these committees act in support of RAWCS programs and projects, the initiative, drive and goodwill behind them stem from your local Rotary club - members of your community wanting to make a difference in the lives of others. **To find a club in your area go to <http://www.rawcs.com.au/eastern.htm> and select "OUR PROJECTS" at the bottom of the page.**

RAWCS National Council Contacts

The current list of National Council Contacts can be found at:

http://www.rawcs.com.au/contacts_national.htm

Funding

RAWCS projects and programs are funded largely by local Rotary Clubs and Rotary International, with the help of generous public, corporate and government support.

The Rotary Foundation Grants program has often provided "global grants" to Rotary Clubs for individual programs, contributing additional funding to that raised by the individual Rotary Club. Additional AusAID subsidies have also enhanced the effectiveness of local Rotary clubs' efforts on such world community service projects.

RAWCS Overseas Aid Fund is a Deductible Gift Recipient so is able to offer tax deductible donations to support organisations with worthy projects in Australia and overseas.

Our Overseas Aid Fund holds the following registrations which will enable it to accept tax deductible donations and grants from all sources in Australia including business corporations and not-for-profit organisations:

- Deductable Gift Recipient
- Tax Concession Charity
- Income Tax Exempt Fund

Rotary Australia Benevolent Society (RABS)

RAWCS has established RABS to assist Rotary clubs and Rotary districts within Australia to respond to needs within their own communities and gain tax deductibility for donations made to their particular project. RABS is a public benevolent institution (PBI) with full Australian Taxation Office certification and provides donors with tax deductibility through the DGR status. The main requirement for RABS is that they provide direct relief for people in need. An example is the assistance given to the people impacted by the devastating bush fires in the Blue Mountains. Any project must address one of the following criteria:

Poverty	Misfortune
Sickness	Destitution
Suffering	Disability
Distress	Helplessness

Part 3 Session 2 - Effective Leadership Strategies



The Rotary Leadership Institute

Insert ELS-2: Building Consensus

BUILDING CONSENSUS



Building consensus is the act of finding a solution that satisfies everyone's needs, especially among those who have different viewpoints; it doesn't mean compromise or surrender. Leading others to consensus results in a decision that is viable and sustainable.

Speaking points

- Define consensus, or share a story of a time you had to bring others together.
- Explain the benefits of open disagreement, which can lead to a better analysis of an issue and allow all parties to express their opinions.
- Discuss the benefits of consensus building, such as helping everyone feel a sense of ownership in the project and discovering new solutions.
- Outline the consensus-building process:
 1. List what each party wants out of the situation.
 2. Review what is critical for each person and what isn't as critical.
 3. Brainstorm new solutions.
 4. Discuss the outcomes of those solutions.
 5. Rework the solutions and other decisions to meet the critical needs.

Discussion questions

Why is consensus important in your profession? Your Rotary club?

How do you ensure that consensus doesn't result in compromise? How do you satisfy everyone involved?

Suggested activities

Group work: Have participants work in small groups on a case study. Assign group members different viewpoints, with one participant acting as a moderator who must build consensus.

Individual work: Ask participants to reflect on a time when they had to participate in building consensus. How do they think the process worked and were they satisfied with the result.

Leadership Strategies for Volunteers

1. A Team is *more* than the Sum of the Parts.

Picking the right mix of people who can work together is key. Just as important is putting a mix of experienced and “new eyes” on the team. Experience in the workplace on similar or relatable matters provides an instant “expert” to your organization.

2. Be Effective with Your Own Time & Take Matters to Closure.

Clarity and Delegation must go hand-in-hand. Say everyone's time is valuable, and then treat the available time as valuable. Have a clear-cut goal for a particular session, several mid-points, and an end-result detailed. Keep the process moving quickly. It is most important to “push to conclusion” in the volunteer setting versus

the business setting. Not only does it accomplish the task and give a sense of accomplishment to the team, it also clears “undone” items from the path of the team as it pursues the next goal.

3. Know the Problem and Empower Others to Break through Barriers with Their Own Solutions.

Preparation by the leader is obvious, especially if it’s missing. Know the problem but do not solve it for the team. Not only will it rob you of unforeseen solutions, it will also take the ownership of the issue away from the team. Ask the team to identify the roadblocks and obstacles and then work from that vantage point toward a solution.

4. We Are Only Volunteers!

You must always recognize the Volunteer/ Work/ Life balance of volunteers. The end goal must be made worth the effort by stressing the meaningfulness of the goal, volunteer recognition, and the developed expectations of the leader. Without all three of these factors, and a sensible timeline, a volunteer task goal will be hard to reach by the team or even by an individual volunteer.

5. Solve Problems with the Right Questions.

Start with a consensus building “yes” or “no” question. Use that answer to diagnose the factors and trends that underpin the answer. The question: “Do we have enough club members to perform the amount of service necessary in our community?” would be a better place to start than “Do we need more members?” Follow-up questions can then get to the real issues.

6. Shhhhhhh!

Leaders are tempted to add input into new ideas from the team. This is often counterproductive. You should be enthusiastic about new ideas but keep additional input to yourself. The ideas and direction need to belong to the team, or they will not feel ownership of the endeavour. Part of the volunteer leader’s job is to make winners of the volunteers. This is a large part of how they get “paid” in a volunteer setting.

7. Build Your Volunteer Leadership Pool.

The more experienced, knowledgeable, and motivated volunteers you have in your pool, the more you will be able to accomplish. Partnering, Mentoring and Succession Planning, are effective techniques to make this happen. Every key person in your organisation should have a replacement trained and ready to do the job if called upon. Recognising your mentors, but placing the responsibility on them to have a replacement, is key.⁹

Many ideas in this article are attributed to Kathleen O'Connor and her article 7 Leadership Strategies to Help You Handle Change at www.Superperformance.com. Human Performance and Achievement Resources.⁹

Part 3 Session 3 - Rotary Opportunities

The Programs of Rotary International

Rotary International's programs and service opportunities, listed below, are designed to help Rotarians meet the needs of their own communities and assist people worldwide.

Global Networking Groups

Encompass Rotary Fellowships (vocational and recreational interest groups) and Rotarian Action Groups (groups focused on service activities). The more than 90 Global Networking Groups are open to all Rotarians, spouses of Rotarians, and Rotaractors.

Interact

Is a service organisation organised and sponsored by Rotary clubs for youth ages 14-18. It has more than 10,900 clubs in 121 countries.

Rotaract

Is organised by Rotary clubs to promote leadership, professional development, and service among young adults ages 18-30. There are more than 7,000 clubs in 162 countries.

Rotary Community Corps (RCC)

Are groups of non-Rotarians who work to improve their communities. There are more than 6,400 RCCs in 76 countries, all organised and sponsored by Rotary clubs.

Rotary Friendship Exchange

Encourages Rotarians and their families to make reciprocal visits to other countries, staying in each other's homes and learning about different cultures firsthand.

Rotary Volunteers

(Phased out June 30, 2011)

Rotary Youth Exchange

Offers students ages 15-19 the chance to travel abroad for cultural exchanges of one week to a full academic year. Rotary clubs and districts sponsor and host about 9,000 Youth Exchange students a year

Rotary Youth Leadership Awards (RYLA)

Are seminars sponsored by clubs and districts to encourage and recognise the leadership abilities of youth and young adults ages 14-30.

Projects supported by Australian Rotary Clubs & Districts

Australian Rotary Health (ARH)

Australian Rotary Health (ARH) is a registered charity conceived by an Australian Rotarian, Ian Scott, in 1981 and financially supported by the majority of Rotary clubs within Australia.

ARH is governed by an honorary board of directors all of whom must be Australian Rotarians, and is advised by an honorary research committee of eminent medical research professionals.

ARH is the largest national Australian Rotary community service program having, up to November, 2013, allocated in excess of \$33 million to Australian medical researchers for research carried out within Australia.

Some of the research projects funded by ARH are research into:

- Childhood leukaemia
- Prostate cancer
- Pancreatic cancer
- Lung cancer
- Alzheimer's disease
- Motor Neurone disease
- Ovarian cancer
- Brain tumours
- Mental health

ARH also supplies indigenous health scholarships of \$5,000

See <http://www.australiarotaryhealth.org> for more information

Rotary Oceania Medical Aid for Children (ROMAC)

Program is for children disadvantage as a result of birth defects or accidents. They are sponsored to travel to Australia and receive major surgery. For more details visit:

<http://www.romac.org.au/>

Interplast

Is a non profit aid organisation founded by Rotary and the Royal Australian College of Surgeons in 1983. It is funded by Ausaid, Rotary and various sponsors. It allows medical teams to provide consultation and operation services to overseas countries.

It also sponsors doctors and nurses undertaking training in Australia. For more information visit:

<https://www.interplast.org.au/>

Road Safety Education

The mission: To contribute to the reduction of trauma on our roads by creating supportive environments for better informed decision making through the delivery of quality, evidence-based road safety education programs.

RYDA is part of the Road Safety Education program. RYDA started as a club project in D9680 and has since expanded throughout Australia and New Zealand. The program is targeted at senior high school students. The students attend a one day excursion to an offsite venue, designed for 150 to 180 students per day. The day consists of six 30-minute sessions facilitated by experts in the fields of driving and driver safety, as well as survivors of accidents. RYDA focuses on attitude and awareness, and address students as both drivers and passengers. The topics covered are:

- Stopping Distances
- Crash Survivor
- My Wheels
- Road Choices - Genevieve Video
- Plan B - Alcohol, drugs and fatigue
- Hazards, Risks & Distractions

List of Structured Program Resource

The following print and multimedia resources are available at www.Rotary.org and are linked through the www.rotaryleadershipinstitute.org website. Most resources are free to download, and print copies may be purchased for a nominal charge.

Publication	Publication #	Year	Cost	
Communities in action/community Assessment tools	605	2012	US\$ 9.00	
Interact Handbook	654	2010	US\$ 3.00	
Rotaract Handbook	562	2010	US\$3.50	
Rotary Community Corps Handbook	770	2010	US\$3.50	
Rotary Fellowship Handbook	729	2006	US\$3.50	
An Introduction to New Generations (now Youth)	735	2011	US\$2.00	

Part 3 Session 4 - Public Image and Public Relations

Public Relations Writing

The ability to write easily, logically, and succinctly is essential for public relations. The object of most PR writing is to grab the reader's attention, convey information quickly, and invite the media to cover your story.

Inverted Pyramid. Most press releases and other written communications for the media use an inverted-pyramid style, with the most important and relevant information at the top, followed by gradually less important information. The headline and the first sentence are the two most important parts of a press release. Make sure they're compelling enough to draw in the editor or reporter.

The five Ws. Include the five Ws in your first paragraph, ideally in the first sentence:

- Who? The main focus of your story; a person or group at the centre of the story
- What? The event or project with which your club is involved
- Where? The location of the event, including a street address
- When? The time, day, and date of an event, or the time period involved for a person or project
- Why? The reason the event, person, or project is significant to the general public

In subsequent paragraphs, provide details about the event or project, or describe how the person or group achieved something extraordinary.

Beyond the press release. Rotarians can communicate stories to the media in many other ways, such as:

- Media alerts. Time-crunched newsrooms appreciate a media alert, a more condensed version of a press release. Ideal for upcoming events or reminders, just answer the five Ws in bullet format, and send the alert to media contacts.
- Letters to the editor. The editorial page is one of the most-read sections of the newspaper, and a letter can reach many people. Use the templates from RI to get started.
- Op-eds. An op-ed is an opinion piece written by an individual who isn't on the newspaper's staff. Before writing an op-ed for your paper, learn what topics are of interest to your community.
- Media kits. Prepare a special folder that holds general information about Rotary and your club as well as materials tailored to the event.
- Fact sheets. Fact sheets provide details about Rotary programs to ensure that journalists have accurate background information

PR Resources & Ideas

1. "Rotary Down Under" regional magazine and e-newsletters at <http://www.rotarydownunder.com.au>
2. "Media & News" is one of the 5 tabs on www.Rotary.org (rev'd 1/2009)
3. Web: *Rotary News* as it breaks
4. RSS Feeds to websites (syndicated news that automatically downloads to a website)
5. Subscribe to Weekly Update Newsletter by email

6. *The Rotarian* magazine
7. Multimedia Resources: *Rotary Video Magazine* (RVM), Rotary Images, E-cards, PSAs, Rotary Radio, Online Videos
8. Media Crisis Handbook
9. *End Polio Now* webpage
10. Newsletters and E-Newsletters: *Rotary World*, *End Polio Now*, *Every Rotarian*, *Every Year*, *International Service Update*, *Membership Minute*, *The New Generations*, *PeaceNet*, *PR Tips*, *ReConnections*, *RI Community Service*, *RI Vocational Service*, *Rotary- Navigating the Global Network*, *Rotary Training Talk*, *Rotary Youth Exchange Newsletter*, *RI Interactive*
11. *Rotary International Interactive* on the Web
12. RI's YouTube Channel, linking Club videos, embedding YouTube videos in club sites. **YouTube** is a video sharing website where users can upload, view and share video clips.
13. RI's Blog links, other Rotary Regional, District, or Club Blogs: A **blog** (a contraction of the term "**Web log**") is a Web site, usually maintained by an individual with regular entries of commentary, descriptions of events, or other material such as graphics or video. Entries are commonly displayed in reverse-chronological order.
14. Wiki - A **wiki** is a page or collection of Web pages designed to enable anyone who accesses it to contribute or modify content, using a simplified markup language Interactive RSS (Really Simple Syndication) Feed- is a basic form of Web page that sends news headlines and other Web content to subscribers - **RSS** is a family of Web feed formats used to publish frequently updated works—such as blog entries, news headlines, audio, and video—in a standardized format.[2] An RSS document (which is called a "feed", "web feed",[3] or "channel") includes full or summarised text, plus metadata such as publishing dates and authorship.
15. Traditional Web Pages
16. **Web conferencing** is used to conduct live meetings or presentations via the Internet. In a web conference, each participant sits at his or her own computer and is connected to other participants via the internet. This can be either a downloaded application on each of the attendees' computers or a web-based application where the attendees will simply enter a URL (website address) to enter the conference. A **Webinar** is a neologism to describe a specific type of web conference. It is typically one-way from the speaker to the audience with limited audience interaction, such as in a webcast. A webinar can be collaborative and include polling and question & answer sessions to allow full participation between the audience and the presenter. In some cases, the presenter may speak over a standard telephone line, pointing out information being presented on screen and the audience can respond over their own telephones, preferably a speaker phone. There are web conferencing technologies on the market that have incorporated the use of **VoIP** audio technology, to allow for a truly web-based communication.
17. Phone Conferencing, Teleconferencing, Videoconferencing
18. Email, E-blasts, E-bulletins, Electronic Press Releases
19. District or Regional Membership Databases
20. Rotary Online User Groups
21. Online Social Networking: **MySpace** is a social networking website with an interactive, user-submitted network of friends, personal profiles, blogs,

groups, photos, music, and videos for teenagers and adults internationally.

Facebook is a popular, free-access social networking website. Users can join networks organised by city, workplace, school, and region to connect and interact with other people., **LinkedIn** is a business-oriented social networking site mainly used for professional networking., **Twitter** is a free social networking and micro-blogging service that allows its users to send and read other users' updates (otherwise known as **tweets**), which are text-based posts of up to 140 characters in length.

22. Regional Magazines.
23. Press Center, Links to worldwide coverage of Rotary in major media outlets, RI media contacts by subject matter, Testimonials, Press Releases email list by topic/region/type of media outlet
24. Fact Sheets: *What is Rotary?*, *Rotary and Education*, *Rotary and Polio Eradication*
25. Under the Members tab at www.Rotary.org , Running a Club tab, Public Relations menu for many resources
26. *Overview of Club Public Relations* – a teaching, “how-to” resource for clubs
27. *Effective Public Relations: A Guide for Rotary Clubs* (22 Pages), order from Shop at RI or download at http://www.rotary.org/RIdocuments/en_pdf/257en.pdf - this a Rotarians Guide to understanding news, PR Writing, Media relations, External Relations and Non-traditional media, and evaluating the effectiveness of your club's PR efforts
28. *Humanity in Motion* media campaign: television, radio, print, Internet, and billboard public service announcements (PSAs) – many of these are free
29. PR Grants, program changes annually based on funding & emphasis
30. RI Public Relations Award
31. Downloadable PR Resources, Report of Results of RI Public Relations Survey, Promotional Guides for various RI and TRF Programs, Rotary Fact Packs, Public Relations writing samples, kits and templates.
32. Cable & Public Access TV
33. PSAs (Public Service Announcements) for TV, Newspaper, Magazines, Club Web Sites or Billboards
34. Posters & Signage
35. Newspaper Supplements
36. Special Events on TV or video
37. Club Brochures
38. Presentations and Speeches
39. Program Booklet ads
40. Community Directories
41. District Newsletter/Directories
42. Public displays
43. Air/Rail terminal advertisements
44. Notecards

Working with the media

Just as manufacturers market their products, Rotary club members must sell stories to the media. Understanding the media will help you market Rotary's message successfully.

- **Identify your target media.**
Consider inviting a local journalist to speak to your club about how to work with the media.
- **Develop a media list.**
After identifying media targets, put together a contact list for each story that includes the names, phone numbers, fax numbers, and e-mail addresses of journalists, editors, or news directors who might take a special interest in Rotary.
- **Contact journalists.**
You can take your story to the media in several ways. Whatever approach you choose, be persuasive, persistent, and friendly, but not aggressive. The most effective methods correspond to the journalist's preferences.
- **Conduct interviews.**
Work with your club to develop informed, articulate spokespeople who are easily accessible and well versed in Rotary's programs.
- **Manage crises.**
Despite your best efforts, problems of a sensitive nature may develop. Be forthcoming if a reporter calls, but avoid initiating contact with the media about unflattering stories. If a situation arises that you think requires immediate attention, contact Rotary International before you speak with the media (phone: RISPPPO: (02) 8894 9800; e-mail: pr@rotary.org). Other alternatives: read the Media Crisis Handbook and phone the Zone 8 Public Image Coordinator.

For more information refer to [\[pdf\] Effective Public Relations: A Guide for Rotary Clubs](#) available at <https://www.rotary.org/myrotary/en/document/862>

Part 3 Session 5 - Vocational Experiences, Areas of Interest and Expectations

Vocational Service Ideas

Advancing high ethical standards in the workplace:

- In hiring, training, and review procedures, include discussion and emphasis of honesty, accountability, fairness, and respect.
- In internal communications, praise and encourage exemplary behaviour on and off the job.
- In relations with customers, vendors, and business associates, communicate and demonstrate your personal commitment to high ethical standards.

The classification principle:

- Classification talks to promote vocational awareness in your club.
- Classification talks may also serve as a starting point for initiating club projects that help young people and the unemployed develop marketable skills.
- Organising tours of members' workplaces is another way to recognise the value of each member's vocation.
- Schedule an occasional meeting in a member's place of employment.
- Invite young people to special vocational meetings.

Promote *Rotary's* commitment to high ethical standards

- Post The Four-Way Test on a prominent billboard in your community.
- 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.
- "Walk the talk" by ensuring that your actions in the workplace, community, and family demonstrate a personal commitment to high ethical standards.
- Sponsor a Four Way Test essay contest.
- Sponsor a joint "character literacy" project for young children.
- Conduct a RYLA event with special emphasis on ethics.
- Organise a discussion or group workshop on maintaining high ethical standards in the workplace and consider inviting local non-Rotarian business leaders to attend.

Recognise and *promote* the value of all useful occupations

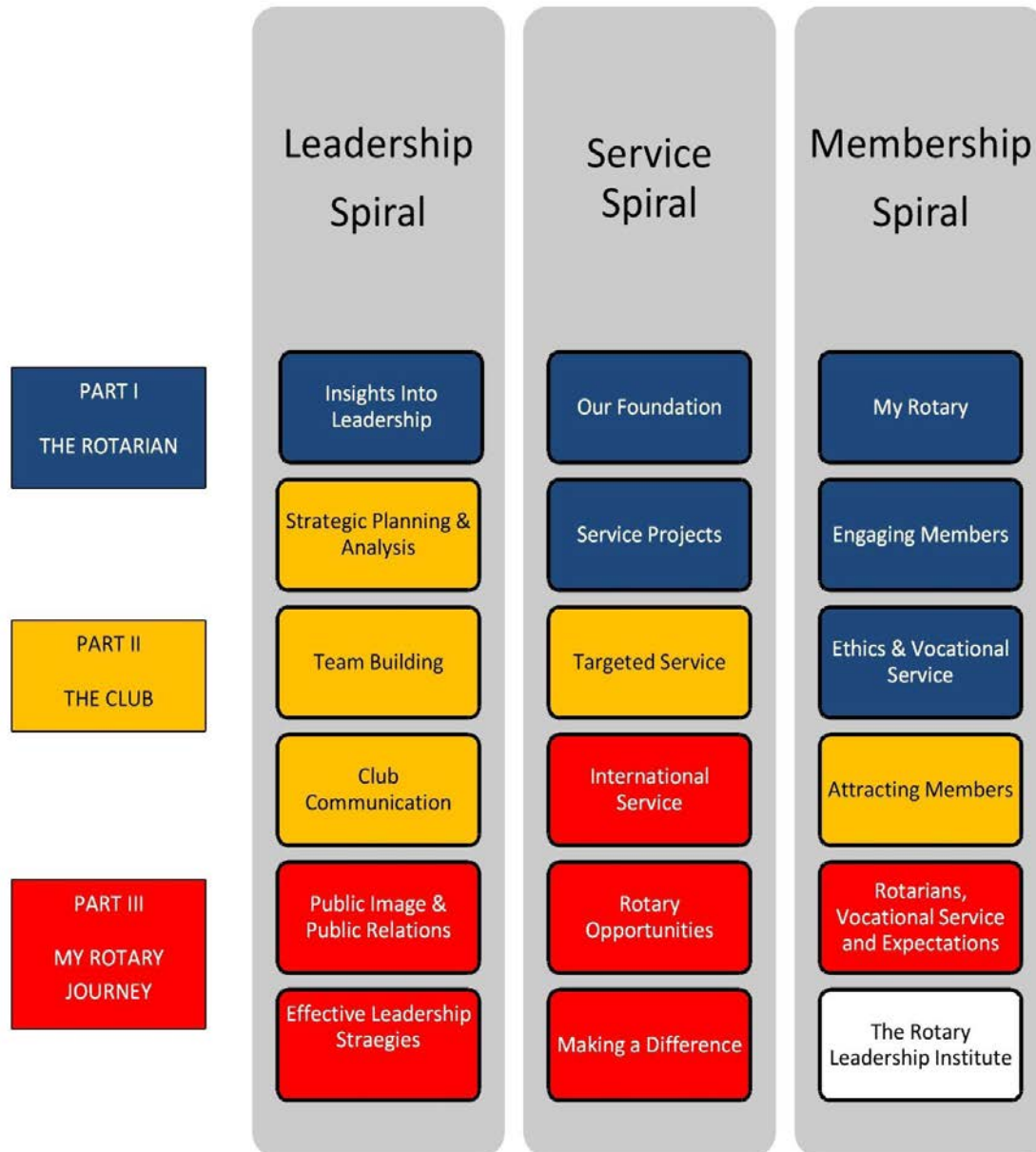
- Make classification talks and business tours part of your club's program.
- Join or form a Rotary Fellowship related to your vocation.
- Sponsor a career day for Rotarians to bring young people to their businesses.
- Support professional development
- Encourage members to take leadership roles in business associations.
- Sponsor a seminar for small business entrepreneurs.
- Hold informal professional networking events where members can meet other local professionals and introduce them to Rotary.
- Start a career counselling program geared towards equipping unemployed or underemployed adults with the skills they need to compete in the job market.

Volunteer your vocation

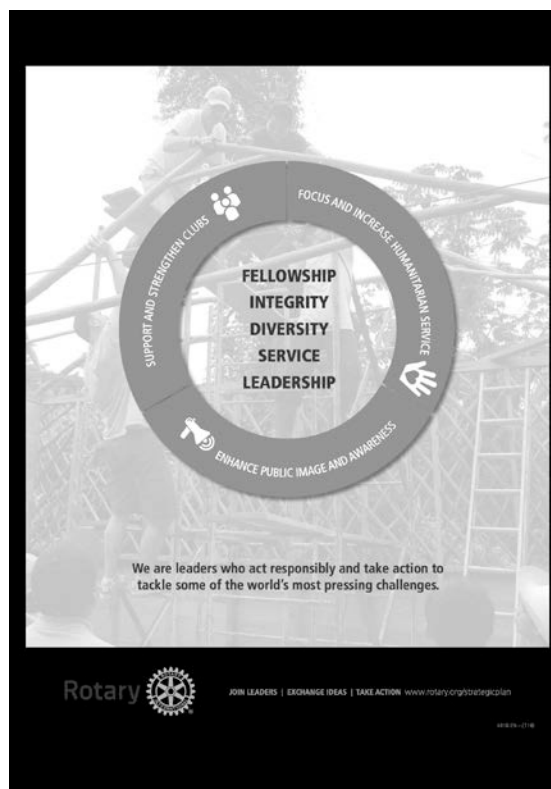
- Mentor a young person.

Part 3 Session - 6 Making a Difference

RLI CURRICULUM SPIRALS



Attachment A - Rotary International Strategic Plan

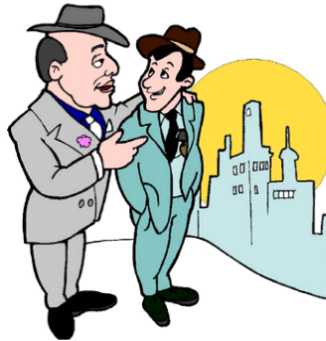


Attachment B – Reasons for Joining Rotary



Prior Generations' Reasons for Joining Rotary

- Social Considerations
- Stature in the Community
- Business Networking
- Entertainment
- Connections with Our Community



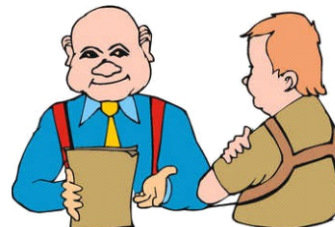
Rotary Leadership Institute – Part I

Rev. 2007-07-08 bww17



Current Generations' Reasons for Joining Rotary

- The Desire to Do Something Important outside the Workplace
- The Desire to Work within a Group of Peers
- The Opportunity to Develop Leadership Skills













Rotary Leadership Institute – Part I

Rev. 2007-07-08 bww17

Attachment C – New member engagement

The Issue. While overall membership has remained stagnant, Rotary Clubs have gained and lost approximately 1.2 million members worldwide in the past 7 years- a staggering retention failure. Rotarians who leave for involuntary purposes (death, relocation, etc.) make up only 7% of the retention loss annually. Statistics from select regions in the Eastern US, Caribbean and South America show that the members who voluntarily leave are usually those who have been in Rotary less than 3 years ("Newer Members"). Newer Members indicate they stay in Rotary to: (1) serve their community, (2) network, and (3) represent their vocation and develop leadership skills.

The Fix. 10 easy-to-do ideas for your club targeted to address these issues and to meet the expectations of Newer Members.

 <p>Pair Bonding. Place newer members on a Newer Member Classification Committee tasked to review all club classifications and to pair newer members with more experienced members. Pairings are to be announced in club meeting. Pairs will sit together during designated meetings, at least monthly. Monthly discussion topics will be encouraged from the podium, such as club history, past club projects, vocational sharing, favorite make-up meetings, and ideas for new community service projects.</p>	 <p>A Minute in the Life. Newer members are scheduled for one-per-week, one minute club meeting podium summary of a job or career related service or product they offer, idea or opportunity in a one page, written format. Talks are not to go "off-script", no "ad libbing". Collect and post summary in weekly club program or on club website, with a link or reference to their business.</p>
 <p>Web-Connected. The name of every Rotarian in the club should be posted to the club website, with their business name linked to their individual or company website (voluntary and with permission). Rotarians should mention their Rotary affiliation on their individual or company website and link back to their club website.</p>	 <p>RLI Posse. Newer members should be financed by the club and sent in small groups to a convenient Rotary Leadership Institute near them, commuting together. The group should report back, as a group, at a club meeting, and should make and advocate for 3 proposals for innovation and/or new projects to the club and /or board. See www.rotaryleadershipinstitute.org.</p>
 <p>Party Time. Organize clubs to meet once a month at a non-Rotary place and time for a "meet and greet" social and networking session. Clubs may sponsor the costs or it may be arranged "pay as you go" for Rotarians, with a very low cost. Mingling may be encouraged by use of varied passports, stations, "secret Rotarian" or other mixing strategies, if needed.</p>	 <p>Adopt-a-Class. Newer members partner with a local elementary or middle school teacher and class to perform a "hands-on", low or no cost service project at or near their school. First step is a needs assessment with school administration or personnel. The whole club can be invited, but the newer members lead.</p>
 <p>"Flash Mob" Project. Charge newer member committee with organizing and conducting a single or multi-club "hands-on" community service project, maximum duration 2 hours. Document with video or photos. Present report at regular club meeting.</p>	 <p>Career-Share. Charge newer member committee with organizing and conducting a single or multi-club "Career Fair", "Career Day", or "job shadowing" event for local Middle School, High School, or College.</p>
 <p>How Do You Interact? Start an Interact club at a school with the younger age now allowed (12 and up), in Middle School. Newer members lead the effort, work with the school sponsor, attend meetings, and serve as Rotarian sponsor for the club.</p>	 <p>Fun Committee. It's exactly what it sounds like! Staff with (mostly) newer members.</p>

Insert by PDG Bevin Wall, Zone 33 Rotary Coordinator 2010-2013. rcBevin@gmail.com

Attachment D - Membership Satisfaction Questionnaire

This survey is intended for use by the club. All club members should complete it to help assess member satisfaction with club activities and projects. Please return your completed form as directed by the club secretary. All responses are confidential.

Do you feel welcome in our Rotary club? ☐ Yes ☐ No.

If no, why not? *(check all that apply)*

- ☐ Compared to me, other members are *(check all that apply)*:
☐ Older ☐ Younger ☐ Different gender ☐ Different ethnicity ☐ Other.....
☐ Club members haven't made an effort to interact with me.
☐ Other.....

Do you feel comfortable sharing concerns with club leaders? ☐ Yes ☐ No.

If no, why not? *(check all that apply)*

- ☐ Club leaders have so many responsibilities; I don't want to burden them.
☐ Club leaders have their own agenda and aren't interested in other ideas.
☐ I haven't been a member long enough to feel comfortable approaching club leaders.
☐ I don't want to be perceived as a complainer.
☐ Other

How would you rate the level of our club's involvement in the following types of activities?

	Excellent	Adequate	Insufficient	Not Aware
Membership development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have you participated in club projects and activities? ☐ Yes ☐ No

If yes, how did you become involved? ☐ I volunteered ☐ I was asked

If no, why not?.....

Please indicate your involvement in the following types of activities:

	Currently Involved	Would Like to Be Involved
Membership development	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

How would you rate your level of satisfaction with your participation in club activities and projects?

☐ Very satisfied ☐ Satisfied ☐ Dissatisfied

If dissatisfied, why? *(check all that apply)*

- | | |
|--|---|
| <input type="checkbox"/> Insufficient knowledge | <input type="checkbox"/> Lack of quality service projects |
| <input type="checkbox"/> Personality conflicts | <input type="checkbox"/> Lack of support from other members |
| <input type="checkbox"/> Cost | <input type="checkbox"/> Insufficient family involvement |
| <input type="checkbox"/> Personal time conflicts | <input type="checkbox"/> Other |

How would you rate the following costs associated with membership in our club?

	Excessive	Reasonable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>
Weekly meetings	<input type="checkbox"/>	<input type="checkbox"/>
Club fines/assessments	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to service projects	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>

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

	Excellent	Adequate	Insufficient
Amount of Rotary content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Convenient	Inconvenient	
Location	<input type="checkbox"/>	<input type="checkbox"/>	Suggested location:.....
Meeting time	<input type="checkbox"/>	<input type="checkbox"/>	Suggested time:.....

Which aspects of our meeting place do you find unsatisfactory? *(check all that apply)*

- ☐ Service
☐ Décor/atmosphere
☐ Meal quality
☐ Meal cost
☐ Parking availability
☐ Other

Which of the following changes would improve our club meetings? *(check all that apply)*

- | | |
|--|---|
| <input type="checkbox"/> Better speakers | <input type="checkbox"/> More focus on fellowship |
| <input type="checkbox"/> Increased variety of program topics | <input type="checkbox"/> Increased emphasis on vocational information |
| <input type="checkbox"/> More involvement of family | <input type="checkbox"/> Better time management |
| <input type="checkbox"/> More service opportunities | <input type="checkbox"/> More leadership opportunities |

How would you rate the amount of our club's fellowship activities?

☐ Too many ☐ Right amount ☐ Too few

How would you rate the amount of Rotary information provided through our club Web site/newsletter?

☐ Excessive ☐ Adequate ☐ Insufficient

Which of the following words would you use to describe our club Web site/newsletter?
(check all that apply)

- ☐ ☐ Interesting
- ☐ ☐ Useful
- ☐ ☐ Informative
- ☐ ☐ Boring
- ☐ ☐ Limited
- ☐ ☐ Uninformative

Is there anything else you'd like to see changed?

.....

.....

.....

What response does your spouse/partner/family have to your involvement in Rotary?
(check all that apply)

- ☐ Feels proud of my involvement
- ☐ Wants to know more/be involved
- ☐ Wants to meet/interact with other Rotary spouses/partners/families
- ☐ Would be interested in becoming a member
- ☐ Other.....
- ☐ Thinks Rotary takes too much of my time
- ☐ Thinks Rotary is too expensive

Thank you for taking the time to complete this questionnaire.
We appreciate your candid and honest answers.
Please submit it as directed by your club secretary.

Attachment E – Programs of The Rotary Foundation



Through Foundation grants and programs, Rotarians and other contributors can help change the world. They can finance a well for a village that lacks clean water, improve the environment, or provide scholarships to educate the next generation. The grants and programs available to Rotarians allow them to realise Rotary's humanitarian mission throughout the world, including its number-one goal of eradicating polio.

Polio Eradication - To eradicate polio, Rotarians have mobilised by the hundreds of thousands. They're working to ensure that children are immunised against this crippling disease and that surveillance is strong despite the poor infrastructure, extreme poverty, and civil strife of many countries. Since the PolioPlus program's inception in 1985, more than two billion children have received the oral polio vaccine.

Polio Eradication Grants - Primarily applied for by National Polio Eradication Committee chairs or a major partner agency, such as the World Health Organization or UNICEF. Support is available for eradication efforts in polio-endemic, recently endemic, and high-risk countries, including National Immunization Days, poliovirus transmission monitoring, and other activities.

The Rotary Peace and Conflict Studies Program - This program, which began July 2006, provides professionals from around the world the opportunity to be trained in conflict resolution and mediation strategies. The intensive three-month course is housed at the Rotary Centre for Peace and Conflict Studies at Chulalongkorn University, Bangkok, Thailand.

Rotary World Peace Fellowships - Each year, up to 60 scholars are sponsored to study at one of the six Rotary Centres for International Studies in peace and conflict resolution for a master's-level degree. Since the program's inception in 2002-03, 233 fellows from 60 countries have participated, funded by awards of almost \$14 million through the Foundation. Sign up for the *Peace Net* newsletter, which provides a forum for the Rotary Centres community.

Polio



A Rotarian immunises a child against polio. Addis Ababa, Ethiopia.

Photo by Jean-Marc Giboux.

Decades ago, polio outbreaks were a constant threat around the world. After the introduction of polio vaccines by Jonas Salk and Albert Sabin and a steadfast immunisation effort, these outbreaks became part of history in most of the world. Yet many still live under the threat of polio, which is why Rotary and its global partners are committed to reaching every child with the vaccine and ending this disease worldwide. Rotary has donated 1.2 billion US dollars to the cause.

Major gains have been made in the global fight against polio:

In the 1980s, 1,000 children were infected by the disease every day in 125 countries. Today, polio cases have declined by 99.9 percent, with only 416 cases reported in 2013 and only three countries are polio endemic.

2.5 billion children have been immunised, over five million have been spared disability, and over 250,000 deaths from polio have been prevented.

What exactly is polio?

A crippling and potentially fatal infectious disease, polio (poliomyelitis) still strikes children mainly under the age of five in countries in Africa, Asia and the Middle East.

Polio can cause paralysis and sometimes death. Because there is no cure for polio, the best protection is prevention. For as little as US\$0.60 worth of vaccine, a child can be protected against this crippling disease for life.

It can cause paralysis within hours, and polio paralysis is almost always irreversible.

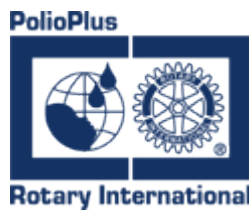
In the most severe cases, polio attacks the motor neurons of the brain stem, causing breathing difficulty or even death.

Historically, polio has been the world's greatest cause of disability.

If polio isn't eradicated, the world will continue to live under the threat of the disease. More than 10 million children will be paralysed in the next 40 years if the world fails to capitalise on its US\$ billions global investment in eradication.

Polio

PolioPlus program



PolioPlus, the most ambitious program in Rotary's history, is the volunteer arm of the global partnership dedicated to eradicating polio. For almost 30 years, Rotary has led the private sector in the global effort to rid the world of this crippling disease. Today, PolioPlus and its role in the initiative is recognised worldwide as a model of public-private cooperation in pursuit of a humanitarian goal.

"Rotary's PolioPlus program is a shining example of the achievements made possible by cooperation between the United Nations and nongovernmental organisations." (Former UN Secretary-General Kofi Annan)

Challenges to polio eradication

Health experts agree that these primary challenges must be overcome in order to reach the goal of polio eradication:

Halting the spread of the poliovirus in the three remaining endemic countries (Afghanistan, Nigeria, and Pakistan), which continue to export it to polio-free areas

Curbing the intense spread of the poliovirus in Pakistan

Rapidly stopping polio outbreaks in previously polio-free countries

Addressing low routine-immunisation rates and surveillance gaps in polio-free areas

Maintaining funding and political commitment to implement the eradication strategies

Polio

Four key strategies for stopping poliovirus transmission:

Routine immunisation

High infant-immunisation coverage with four doses of oral polio vaccine (OPV) in the first year of life is critical. Routine immunisation is essential because it's the primary way that polio-free countries protect their children from the threat of imported polio.

National Immunisation Days

For decades, Rotary's PolioPlus program has been one of the driving forces during National Immunisation Days, or NIDs. Rotarians are involved in myriad ways before, during, and after an NID, by providing funds for millions of drops of vaccine, promoting upcoming campaigns in the community, distributing vaccine to local health centres, serving as monitors, working with local officials to reach every child, and participating in surveillance efforts.

Surveillance

Rotarians play an important role in working with health workers, paediatricians, and others to find, report, and investigate cases of acute flaccid paralysis in timely manner (ideally within 48 hours of onset). PolioPlus sometimes helps fund containers that preserve the integrity of stool samples during transport to laboratories. The program has also played a leading role in providing equipment for the global poliovirus laboratory.

Targeted mop-up campaigns

Rotary's support of mop-up campaigns is similar to NID volunteering, but on a smaller, often "house-to-house," scale.

Generous contributions to PolioPlus help fund these activities and bring us closer to polio eradication.

Resources

Contact PolioPlus committee members at the club, district, and international levels.

Find out how you or your club can contribute to an existing PolioPlus project to help.

www.polioeradication.org

www.endpolionow.org

Attachment F – Project Planning Tools

BUSINESS CASE / PRELIMINARY PROJECT PLAN		
PROJECT:	Date:	No:
DESCRIPTION OF PROJECT: <i>(Describe exactly what is proposed)</i>		
COST OF PROJECT & FUNDING SOURCE: <i>(Detail the estimated capital and annual operating cost of the project and proposed method/source of funding)</i>		
PROPOSED PROJECT TEAM: <i>(Describe who will lead and work on the project)</i>		
PROPOSED PROGRAM: <i>(What is the timeline for the project?)</i>		
IMPACT ON ANY OTHER PART OF THE CLUB: <i>(Describe any impact that the project may have on the club.)</i>		
ALTERNATIVES: <i>(Are there any alternatives which will achieve the same outcomes?)</i>		

RISK ANALYSIS

(What are the risks to the club and how do you propose to minimise these?)

RETURN ON INVESTMENT/BENEFITS:

(Describe the return on the investment in both monetary and/or non monetary terms, why should the project proceed?)

Attachments: *(List attached supporting documents)*

ROTARY CLUB OF

Project Manager:

BUSINESS CASE / PRELIMINARY PROJECT PLAN**PROJECT:****Date:****No:****DESCRIPTION OF PROJECT:****COST OF PROJECT & FUNDING SOURCE:****PROPOSED PROJECT TEAM:****PROPOSED PROGRAM:**

IMPACT ON ANY OTHER PART OF THE CLUB:
ALTERNATIVES:
RISK ANALYSIS
RETURN ON INVESTMENT/BENEFITS:

Attachments: _____

Community Assessments

What are your community's needs and assets? This is an important question in planning any service project. By taking time to learn about local issues, your club will discover new opportunities for service projects and avoid duplicating existing resources. Community assessments such as surveys, asset inventories, and focus groups will reveal information you didn't know before.

Assessment tips

When assessing your community, take a positive approach – don't just look at the community's problems. A close assessment might include these factors:

Human assets

One of the community's most important assets is its people. What are some of the residents' unique skills and talents, and what are their needs and challenges? How can the community be involved in your club's project?

Organisational assets

What groups and organisations in your community provide resources for local projects? Consider government offices, nongovernmental and non-profit organisations, religious institutions, schools, and businesses. Don't forget to look at informal groups, such as neighbourhood organisations or sports teams, as well.

Physical assets

A community's physical assets include any existing infrastructure – buildings, parks, public transit systems, hospitals and clinics, water and sanitation facilities, recycling centres and landfills, libraries, theatres, meeting halls – that might be used to support a project.

Club assets

Rotary clubs sometimes forget that they're full of hidden assets. Club members' expertise and professional skills are important tools for service. A close examination of your club's financial and human resources will help determine the types of projects club members can effectively manage.

Read more in [Community Assessment Tools \(PDF\)](#).

After the assessment is completed and a focus is selected, read ideas for implementing a club service project.

The PACE Approach

Partnerships Advancing Community Engagement

Introduction to PACE Principles

Community service is a major pillar of Rotary Clubs in District 9800. *PACE is an effective process to secure better outcomes in local community service projects and raise the profile of Rotary*¹⁰.

Around the world, more and more people are realising the powerful outcomes that can be achieved when people with specialist knowledge, complementary skills and a desire to work collaboratively, come together and create a solution to a community 'problem'. These are people who may have different perspectives on the 'problem', yet have similar interests and aspirations, and includes the people who are, themselves, affected by/living the 'problem'.

Benefits for your Rotary Club

Rotary has a clear role to play in supporting those in need in local communities. By taking a leadership role in finding out what needs to be done, engaging other local 'experts' and bringing to the table the knowledge, skills and networks (and funds if necessary), Rotary will be more connected and relevant in the local area = more members.

Every Community or Neighbourhood is Unique

Each situation and solution will depend on unique factors – the people, the community, and the 'problems' – and there will be no single way to solve these. Examples are community safety, improved local economic activity, reducing crime, stable families, elders living with dignity, homelessness, or a cleaner environment.

Champions a Key Success Factor

One or more 'champions' in the club are critical to success – they are people who are passionate, want to be involved and are able to drive the process, build the relationships and see the project through.

'Check List' of the PACE Approach (**see over**)

Use the following as a guide for agreements during the initial discussions¹¹:

common language – no big words to confuse or mystify people

common sense – apply a common sense approach in all that we do

common ground – work from a 'common ground' position

Finally - Review and Celebrate

The acid test – to gauge your success, ask yourselves three more questions:

- How much did we do?
- How well did we do it?
- Is anyone better off?

Celebration of achievements is important!

¹⁰ PACE Evaluation Report on Four pilots projects with Rotary, Brotherhood of St Laurence (Feb 2008)

¹¹ *Trying Hard is Not Good Enough*, Mark Friedman, Fiscal Policy Studies Institute

CHECK LIST

Phase	Stages in the PACE Approach
1	<p>Research community needs - <i>(Consult, Identify, Focus, Research)</i></p> <p>In your Club, brainstorm local problem/s, discuss what could make it/them better.</p> <p>Ask 5 key questions - why is this important?</p> <ul style="list-style-type: none"> - what is the current situation? - what would it take to do better? - who can play a role? - what role can Rotarians play?
2	<p>Community consultation - <i>(Contact, Consult, Review, Assess)</i></p> <p>Make a list of who else is interested / involved / knowledgeable / experienced in this 'problem'; don't forget Council!</p> <p>Contact them, learn how they are working on the 'problem', are they a stakeholder in this project?</p>
3	<p>Define the issue and the approach - <i>(Review, Research, Prioritise, Consult, Agree)</i></p> <p>Decide an approach. From the people you have contacted, are they or their approach relevant ?</p> <p>Do you now need to revise your original thinking? Do you need to consult further?</p> <p>Be clear - Who is the target group? Who benefits? Who will be involved? How you will go about it?</p> <p>What would be your desired outcomes?</p> <p>Agree the project. It may be multi-faceted, have several phases, or be a 'start up' project to hand over later. Rotary's role may not be the 'lead player', but facilitator, or providing the 'glue' that holds it together and keeps it going.</p>
	<p>Collaborate with the Community, Create a Team of Stakeholders</p> <p style="text-align: right;"><i>(Collaborate, Focus, Plan, Consult, Set Tasks, Contribute)</i></p> <p>Set up the project team - <i>Coming together is a beginning</i></p> <p>Have clear goals, consensus decision making, be clear about the resources, agree the timescales – then leave the team to work it out together. The goals don't have to be grand – a simple solution often produces a better result – keeping positive aspirations is important</p> <p>Create a realistic project plan together - <i>Keeping together is progress.</i> Continue to collaborate, keeping focus on the 'problem' and agreed outcomes.</p> <p>Refine the plan, prioritise steps, set budget - <i>Working together is success.</i> Continue to work collaboratively with all parties, defining who will work on which set tasks.</p>
5	<p>Implement the Project <i>(Start, Manage, Keep talking with others, Check in with Partners, Work on trust, and Review plan – often!)</i></p> <p>Now just do it - implement the project plan. Follow up actions are a team responsibility.</p>
6	<p>Operation management/administration <i>(Monitor, Mentor, Review, Assess, Handover)</i></p> <p>Keep up the momentum, continue to monitor, mentor others, review and assess progress. The project may be at a point where the end is in sight, or it can now be handed over to others.</p>

Attachment G - Planning Guide for Effective Clubs



PLANNING GUIDE FOR EFFECTIVE CLUBS

Dear President Elect: Please prepare this together with your President Nominee and committee chairpersons. **Please email a saved completed copy to District Governor Elect and email a copy to your Assistant Governor.** The information you provide will be used as a basis for discussion with your Assistant Governor at his/her official visit in July. If you need more room, please attach another page or document.

Rotary Club of

President):

Secretary:

President Elect:

Assistant Governor:

1. What are four (4) key objectives for your year?

(1)

(2)

(3)

(4)

2. EXECUTIVE ADMINISTRATION: (President, Secretary, Treasurer)

- a. Has an "Annual Statement" been lodged with Consumer Affairs Vic for past year?

YES ☐ NO ☐

- b. Has an income/expense budget been prepared yet for your year? YES ☐ NO ☐

- c. Does your Club provide an allowance for your Club President? YES ☐ NO ☐

Amount \$ per annum

- d. What is your Club's annual subscription fee \$ Joining Fee \$ Meal Fee \$

3. CLUB ADMINISTRATION

- (a) Has your **Club Website** been updated since January? YES ☐ NO ☐

- (b) Have you appointed a **Club Protection Officer** for your year? YES ☐ NO ☐

- (c) The DG has requested a hard copy of your Bulletin, can you arrange to post. YES ☐ NO ☐

Likely numbers including partners to attend District Conference in Launceston in March 2009?

Have you appointed an **On-to-Launceston Conference Chairperson**? YES ☐ NO ☐

Briefly describe a minimum of six **fellowship** events planned in your club during year:

First half:

Second half:

4. MEMBERSHIP: Current as at 31st May (this year): (includes female members)

Made up of:

No of Actively employed?

No of Retired?

Total

Age: Under 30:

30-39:

40-49:

50-59:

60-70:

70+:

DISTRICT 9455

Number of **new** members planned in **your** year?

Anticipated losses in **your** year?

Total membership planned by end of **your** Rotary year **30th June**

(a) Will the President & Membership Chairman attend the District Membership Seminar YES ☐ NO ☐

(b) New members seminars in metro and country areas will be held for new members to make them more familiar with the objectives and activities of Rotary International. Will you provide the membership training team with the contact points for all your new members as they are inducted? YES ☐ NO ☐

(c) Our District will be conducting Rotary Leadership Seminars through the **Rotary Leadership Institute** during the year. Will your club be prepared to nominate appropriate club members to attend these seminars? YES ☐ NO ☐ How many?

(d) **ATTENDANCE:** Year-to-date % as at end of this April? % Planned by next April %

5. VOCATIONAL SERVICE PROJECTS

Is your club planning any activities in these areas?

(a) **VOCATIONAL AND EMPLOYMENT:**

- ☐ Career Interviews/Counselling * ☐ Work Experience * ☐ Business Bank
☐ Job talks ☐ Seeking employment for released prisoners ☐ Vocational visits

Your Projects:

(b) **EXCELLENCE AWARDS:**

- ☐ Shine On Awards * ☐ Community Achievement/Volunteer Awards
☐ Business Awards/Function

Your Projects:

(c) **VOCATIONAL SUPPORT AND ROTARY EDUCATION:**

- ☐ Police Leadership Mentoring Program
☐ A Literacy Project ☐ Computers 4 Kids & Community *
☐ Inter-School Debates * ☐ Ethics Debate within own Club or with other Clubs
☐ Establish a "Friendship or Sister Club" within Australia
☐ We have an existing Friendship/Sister Club within Australia. Which Club?
☐ Mentoring and seeking and/or repairing housing for released prisoners

Look at establishing a Rotaract Club in your area? YES ☐ NO ☐

Your Projects:

6. COMMUNITY SERVICE PROJECTS:

(a) Will your Club approach your local Council to explore ways to best serve your community? YES ☐ NO ☐

(b) What does your club believe is the most important need in your local community?

If you have incorporated any of the following projects in your Plans and Objectives please check the boxes:

1. ENVIRONMENT:

☐ Project Growtree ☐ Rotary Environmental Activism

Your Projects:

2. COMMUNITY SUPPORT:

☐ Rotary Camp Getaway * ☐ P.A.C.E (*Partnerships Advancing Community Engagement*) ☐ Disaster response

☐ ARHRF ☐ Drug Addiction/ Rehabilitation (Odyssey House) ☐ 'Second Bite'
☐ PROBUS Clubs

Your Projects:

3. HEALTH:

☐ Multiple Sclerosis Awareness ☐ Prostate Awareness ☐ Stroke Awareness
☐ Ovarian Cancer Research ☐ Organ Donor (*"Have a Heart"*)
☐ Heart Issues ☐ Neuro Science Observation Ward

Your Projects:

7. FOUNDATION

(a) CONTRIBUTIONS: From a variety of sources including:

- Number of "Centurions" x Aus \$100 each PLUS =Aus \$
- Club contributions equivalent to Aus\$... (US\$110) x no of members =Aus \$
- Nomination of a Paul Harris Fellow? YES ☐ NO ☐ =Aus \$
- Nomination of a Royce Abbey Awardee? YES ☐ NO ☐ =Aus \$
- Donate to The PolioPlus Global Program/ YES ☐ NO ☐ =Aus \$

Total contributions

=Aus \$

Is your Club planning to participate in:

(b) EDUCATIONAL AND CULTURAL PROGRAMS:

Group Study Exchange

- ☐ Host the incoming GSE Team Members from Turkey
- ☐ Host the incoming GSE Team Members from Sweden
- ☐ Host a Vocational Visit for an Incoming Team Member
- ☐ Host farewell/welcome Dinner for incoming Teams
- ☐ Host farewell/welcome Dinner for our District Outbound Teams
- ☐ Nominate a D9680 Team leader or team Member

Scholarships

Nomination

☐ Rotary World Peace Fellow ☐ University Teachers ☐ Ambassadorial Scholar

(c) HUMANITARIAN PROGRAMS:

- ☐ Matching Grants ☐ District Simplified Grant (DSG)
- ☐ Volunteer Service Grant

Your Projects:

(d) PROMOTION AND PUBLICITY

- ☐ Include a speaker from The Rotary Foundation Panel at one of your weekly meetings.
- ☐ Plan an activity for The Rotary Foundation Month of November.
- ☐ Plan an activity to fundraise specifically for the Polio Plus Program
- ☐ Plan to send a representative to the District Foundation Seminar & Matching Grants Workshop.

Your Projects:

8. NEW GENERATIONS PROJECTS:

Will your club participate in:

(a). YOUTH PROGRAMS:

- ☐ Youth Exchange* (Possibly in partnership with a cluster club) ☐ Host Incoming ☐ Sponsor Outgoing
- ☐ Establish an Interact Club* ☐ Youth Suicide Prevention *
- ☐ Camp quality *

(b). YOUTH DEVELOPMENT:

- ☐ RYLA* ☐ MUNA * ☐ RYPEN * ☐ Storm the Stage* ☐ Interact *
- ☐ National Youth Science Forum*- Canberra ☐ Siemens Science Schools*

Your Projects:

9. INTERNATIONAL SERVICE PROJECTS:

Will your club be participating in any of these?:

1. ROTARY AUSTRALIA WORLD COMMUNITY SERVICE (RAWCS) projects:

(Note: Some of the following projects can qualify for a Matching Grant)

- ☐ Donations In Kind ☐ Rotary Australia Volunteers (RAWCS) ☐ East Timor
- ☐ Safe Water-Saves Lives ☐ National Projects Funding

2. ROTARY FRIENDSHIP EXCHANGE PROGRAMS:

- ☐ Friendship Exchange to/from another Country Which Country?
- ☐ Recreational Fellowships
- ☐ We have existing international Sister or Twin Clubs with: Club: Country:
- ☐ We plan a formal relationship with an overseas Club. Club: Country:

Your Projects:

2. INTERNATIONAL PROGRAMS: ☐ ROMAC ☐ RAM (*Malaria*) ☐ International House ☐
Interplast Australia

10. PRESIDENT'S PLANS AND COMMENTS:

a. Do you have or plan to have a ***Horizons/Strategic Planning Meeting*** to examine the future direction of your club over the next 3 years. YES ☐ NO ☐

b. List Rotary subjects on which you would like additional information or assistance:

c. Describe briefly any problems or questions you would like to discuss with the **Assistant Governor** during the club visit in July.

It is important to note that: Projects listed on previous pages with asterisk (*) indicate Rotary organised activities (ROAs) with potential to involve regular direct contact by Rotarians or volunteers **with children under the age of 18 years.** Rotarians must complete a "*Working With Children*" form before being involved in these projects or programmes. Fines may also be imposed on a Rotary Club for allowing such involvement without evidence of prior assessment.

Please briefly list **any other** similar projects planned in your club that may involve regular direct contact with children under the age of 18 years: (eg home hosting interstate students; children's Christmas party etc)

Space for additional comments:

Signed by: (President)

Attachment H – TRF Grant Management Model Model

A Guide to DISTRICT Grants

District Budgets

A budget is established each year for grants to clubs under the new District Grants program of the Rotary Foundation.

District Grants — Within Australia (DGA)

- i. Are for smaller local community projects;
- ii. Require active Rotarian participation but do not require a partner;
- iii. Minimum grant \$1,000;
- iv. Club funding must be at least 50% of the total Project cost
- v. Require upon completion of the project a report and copies of receipts before 31st May

.

District Grants — International (DGI)

- i. Are for international projects that do not qualify for a Global Grant i.e. projects with a budget total of less than \$30,000;
- ii. Require an international partner that can be a Rotary District, a Rotary Club or a third party. Preference will be given to Rotary partners;
- iii. Minimum grant \$2,000, maximum grant \$6,000
- iv. The Rotary club is accountable for the management of grant funds in accordance with the Memorandum of Understanding;
- v. Reporting required as per other District grants.

Club Eligibility for District Grants

Your Rotary Club must:-

- i. Have signed a Memorandum of Understanding with the District;
- ii. Have at least one representative of the club attend a District Global Grants Management Seminar;
- iii. Be current in payment of dues to Rotary District 9455 and Rotary International;
- iv. Be current in meeting the reporting requirements on open Global or District Grants;
- v. Have completed a Foundation Goals Form on line for the current year. www.rotary.org

Use of Grants

- i. Approval must be obtained before the project is started;
- ii. The club is responsible for the proper disbursement of grant funds;
- iii. The club is responsible for prompt repayment to the District for any funds not properly disbursed or accounted for;

iv. the Rotary Foundation has determined both permitted and prohibited uses of grant funds and applicant clubs should review the complete guidelines to ensure that the project is eligible for funding.

Funding

- i. Funds contributed to the project from the project recipient will not be matched, even if paid through club accounts;
- ii. Each project must be a new project for the initiating club and for each of the clubs cooperating on a joint project;

Reporting and Payment

Expenditure on the project, must be evidenced by the presentation of invoices and receipts at completion of the project. The amount paid will be the agreed proportion of the actual eligible expenditure or the District Grant amount awarded - whichever is the lesser. Therefore, reconciliation of the award amount to clubs is contingent on the Grants Subcommittee receiving original or certified copies of invoices and/or receipts for project expenditure. These must detail what goods and services were purchased

The Grant is also dependent on presentation of a District Grant Project Report that is accepted upon review by the District Grants Subcommittee Chairman

It is stressed that the reporting obligations are an essential part of the project and failure to comply will require repayment of grant monies and/or exclusion from further grant applications

GLOBAL Grants 2014-15

District Budgets

A budget is established each year for DDF contributions to Global Grant projects by District 9455 clubs.

Global Grants — Humanitarian (GG)

- i. International projects meeting all the requirements of the Rotary Foundation's Global Grants Program;
- ii. Project expenditure must be greater than \$30,000;
- iii. At least 30% should come from Rotary Clubs, individuals and other sponsors
- iv. Clubs and other funds are matched by TRF x 50%
- v. DDF is matched by TRFx100%

Global Grants — Vocational Training Teams (VTT)

- i. Must meet the requirements of the Rotary Foundation's Vocational Training Teams Grants Program;
- ii. Can be club or district instigated;
- iii. Budget at least \$30,000

Club Eligibility to Receive a Global Grant

Your Rotary Club must:-

- i. Have signed a Memorandum of Understanding and attended a District Foundation Seminar on Global Grants, and achieved Grants Qualification from The Rotary Foundation;

- ii. Be current in payment of dues to Rotary District 9455 and Rotary International;
- iii. The International Host Rotary Club and District must also be “qualified”;
- iv. Your club and the International Host club must be current in meeting the reporting requirements on open District Simplified Grants, Matching Grants, Global or District Grants;
- v. Have completed a Foundation Goals Form for the current year.

Use of Grants

- i. Approval must be obtained before the project is started;
- ii. The club is responsible for the proper disbursement of grant funds;
- iii. The club is responsible for prompt repayment to The Foundation for any funds not properly disbursed or accounted for;
- iv. The Rotary Foundation has determined both permitted and prohibited uses of grant funds and applicant clubs should review the complete guidelines to ensure that the project is eligible for funding.

Funding

- i. DDF is matched by the Foundation 100%; Club and other approved funds matched 50%;
- ii. Funds contributed to the project from the project recipient will not be matched, even if paid through club accounts;
- iii. All DDF contributions must be confirmed by District before clubs may apply online to The Foundation;
- iv. DDF will be made available on a first in first serve bases on the receipt of club proposals in writing.
- v. Each project has to have a dedicated bank account.

Getting Started

- i. Global Grants are applied online by a club or District. Please note Global Grants are complex and clubs should not commence an online application without first consulting the District Foundation Committee;
- ii. Global Grants must be sustainable and have measureable outcomes.

Terms and Conditions for Rotary Foundation District Grants and Global Grants

For grants awarded after 1 July 2014

The Rotary Foundation may modify the terms and conditions of the grant at any time. Updates can be found on rotary.org

I. What We Fund

The Rotary Foundation funds district grants and global grants. District grants are block grants to districts that fund scholarships, projects, and travel that align with the mission of The Rotary Foundation. Global grants fund scholarships, projects, vocational training teams, and some travel within the six areas of focus that are sustainable, measurable, and host community- driven.

II. Eligibility Guidelines

All Foundation grant activities must:

1. Relate to the [mission of The Rotary Foundation](#)
2. Include the active participation of Rotarians

3. Exclude any liability to The Rotary Foundation or Rotary International beyond the funding amount of the grant
4. Adhere to the governing laws of the United States and the host area of the grant, and harm no individuals or entities
- R5. Only fund activities that have been reviewed and approved before their implementation. Grants may not be used to reimburse clubs or districts for activities and expenses already completed or in progress. Planning for grant activities prior to approval is encouraged, but expenses may not be incurred
6. Demonstrate sensitivity to the host area's tradition and culture
7. Comply with the Conflict of Interest Policy for Grant Participants as outlined in section 7.030 of The Rotary Foundation Code of Policies
8. Comply with the policy regarding the use of Rotary Marks as outlined in section 1.050.2 of The Rotary Foundation Code of Policies

District Grants

1. Support local and international projects, scholarships, vocational training teams, and related travel
2. May allocate up to 3 percent of the grant award for grant-related administrative expenses such as bank fees, postage, software, and an independent financial assessment

Global Grants

1. Align with one or more of Rotary's [areas of focus](#)
2. Are [sustainable](#). Host communities must be able to address their own needs after the Rotary club or district has completed its work
3. Are measurable. Sponsors select standard measures from the [Global Grant Supplement](#), and may add their own measurements in their report to the Foundation. Expenses to measure project outcomes are capped at 10 percent
4. Are host community-driven. The host community designs the grant based on local needs that they have identified
5. Can include up to 10 percent of the project budget for a project manager
6. Support humanitarian and educational projects
7. Provide scholarships to fund graduate-level coursework or research or its equivalent for a term of one to four academic years
8. Support vocational training teams that address a humanitarian need by providing or receiving professional training
9. Support travel for up to two individuals as part of a humanitarian project. These individuals provide training or implement the project should the host club confirm that their skills are not readily available locally.
10. Support communities in Rotary countries and geographical areas
11. Are sponsored by at least one Rotary club or district in the country or geographical area where the grant project will take place (primary host sponsor) and one or more outside that country or geographical area (primary international sponsor)

III. Restrictions

Grants cannot be used to unfairly discriminate against any group; promote a particular political or religious viewpoint; support purely religious functions; support activities that involve abortion or that are undertaken solely for sex determination; fund the purchase of arms or ammunition; support

[Rotary Youth Exchange](#), [RYLA](#), [Rotary Friendship Exchange](#), [Rotaract](#), or [Interact](#); or serve as a new contribution to the Foundation or another Rotary Foundation grant.

In addition, grants cannot fund:

1. Continuous or excessive support of any one beneficiary, entity, or community
2. Establishment of a foundation, permanent trust, or long-term interest-bearing account. Grant funds can be used to establish a microcredit fund if the sponsors comply with the requirements detailed in section X (Microcredit).
3. Purchase of land or buildings
4. New construction of any structure in which individuals live, work, or engage in any gainful activity, such as buildings (schools, homes/low-cost shelters, and hospitals), containers, and mobile homes, or of structures in which individuals carry out manufacturing or processing activities. Additions to existing structures are acceptable.
5. Fundraising activities
6. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
7. Public relations initiatives not directly related to a humanitarian or educational activity
8. Project signage in excess of \$500
9. Operating, administrative, or indirect program expenses of another organization
10. Unrestricted cash donations to a beneficiary or cooperating organization
11. Travel for staff of a cooperating organization involved in a humanitarian project
12. Global grant humanitarian projects that consist solely of individual travel expenses
13. Activities and expenses already in progress or completed
14. Activities primarily implemented by an organization other than Rotary
15. Transportation of vaccines by hand over national borders
16. Travel to National Immunisation Days (NIDs)
17. Immunisations that consist solely of the polio vaccine
18. International travel for youth under the age of 18, unless accompanied by their parents or guardians

IV. How to Apply

Apply for grants online through [Member Access](#). In order to receive a grant from The Rotary Foundation, all districts involved must be qualified by The Rotary Foundation, and for global grants, all clubs involved must be qualified by their district. In addition, districts, clubs, and all grant committee members must be in good standing with Rotary International and The Rotary Foundation. Individuals prohibited from serving on a grant committee include RI fiscal agents, national treasurers, and officers and paid staff of a cooperating or beneficiary organization associated with the grant. When acting as a primary sponsor, all districts and clubs are limited to 10 open grants at a time.

For district grants, districts may submit one application per Rotary year, and this application must include a spending plan. Any requests for an increase in the grant amount must be made before any portion of the grant has been paid by the Foundation. Districts may reserve up to 20 percent of their district grant funds for contingencies that may arise during the year; note this contingency fund on the spending plan and itemize contingency items when you submit your final report. All district grant applications must be received before 15 May of the Rotary year for which the funds are requested.

For global grants, scholars and vocational training team members must submit individual applications to supplement the overall grant application. Applications are accepted on a rolling basis throughout the Rotary year; however,

Applications involving **travel expenses should be submitted 90 days** prior to the travel dates. Note that:

1. If grant applications are not completed and approved within six months of submission, the application will be withdrawn.
2. If payment requirements are not met within six months of approval, the grant will be cancelled.
3. If grants are not implemented within 12 months of payment, the grant will be cancelled and the sponsors will be required to return the funds.

District Grants

Districts must establish a grant committee of three Rotarians, including the district governor of the implementation year, the district Rotary Foundation committee chair, and the district grants subcommittee chair.

Global Grants

Primary host and international sponsors must each establish a grant committee of three Rotarians for a global grant. Members of this grant committee must come from the primary sponsor club (if the grant is club-sponsored) or district (if the grant is district-sponsored). For club-sponsored grant applications, district Rotary Foundation committee chairs must confirm that the clubs are qualified.

Scholarship applications must:

1. Provide proof of university admission to a graduate-level program or letter of invitation to conduct post graduate level research when applying for the grant. Admission that requires a guarantee of financial support is acceptable.

Vocational training team applications must:

1. Support teams composed of at least two members with at least two years of work experience in the area of focus and a Rotarian team leader who has a general level of Rotary knowledge, international experience, leadership skills, and some expertise within the area of focus. Non-Rotarians may serve as team leaders provided the sponsors establish the need for this in the grant application.
2. Confirm that if more than one team is travelling under a single grant, the teams must share the same two primary sponsors and begin travel within one year of each other.
3. All team members must be approved by The Rotary Foundation prior to travel. Any alterations to team composition must be reported to, and approved by, The Rotary Foundation.

V. Travel Policies

Airfare for any travel funded by Rotary Foundation grants must be booked through Rotary International Travel Services (RITS) according to established travel policies.

Rotary Foundation grants will cover the following budgeted expenses related to travel:

1. Economy-class ticket(s)
 2. Transportation to and from airport and local travel related to grant implementation
 3. Cost of inoculations/immunizations, visas, and entry and exit taxes
 4. Insurance costs
 5. Normal and reasonable luggage charges
- Rotary Foundation grants will not cover the following expenses related to travel:
1. Expenses associated with optional stopovers before or after preapproved travel

2. Penalties resulting from changes in personal travel arrangements, including optional stopovers
3. Excess baggage charges, shipping charges, and flight cancellation insurance The club or district sponsoring the grant is responsible for maintaining emergency contact information and travel Itineraries for all grant recipients travelling on grant funds. This information must be provided to the Foundation upon request.

Grant recipients are responsible for:

1. Making travel arrangements through RITS. Failure to arrange travel promptly may increase the cost of travel or result in the cancellation of the grant.
2. Any expenses that exceed the approved travel budget, unless approved by the Foundation
3. Meeting all medical requirements for international travel.
4. Arranging and funding any personal travel. Such travel may take place for a maximum of four weeks at the end of the grant activities, after which grant recipients are expected to return home.
5. Abiding by RI country travel restrictions.

Travellers are also expected to hold the following minimum insurance coverage prior to travel:

1. US\$250,000 or equivalent for medical care and hospitalisation for basic major medical expenses, including accident and illness expense, hospitalisation, and related fees
2. US\$50,000 or equivalent for emergency evacuation
3. US\$50,000 or equivalent for repatriation of remains
4. US\$500,000 in professional liability (a.k.a. errors and omissions liability) insurance appropriate to the furnishing of professional health care services. (This applies only to healthcare professionals who will be providing services as part of the grant activities and refers to coverage for that participant's legal liability arising from their professional acts or omissions that cause harm to others). Insurance coverage should be worldwide, not limited to the host country, although coverage in the home country may be excluded. Insurance must be valid from the date of departure through the date of return home.

Non-Rotarians receiving grant funding for scholarships, participation in vocational training teams, or travel to implement a humanitarian project are expected to:

1. Demonstrate knowledge of Rotary
2. Participate in an orientation session before departure
3. Participate in club and district activities as requested by their sponsors
4. Be proficient in the language of the host country

In addition:

1. Relatives of a vocational training team member may participate on the same team if they meet eligibility requirements
2. Scholarship recipients must reside in their host district

VI. How Grants Are Funded

District Grants

District grants are funded by The Rotary Foundation solely with allocations from the [District Designated Fund](#) (DDF). A district may apply for a single grant each Rotary year to support one or more projects using up to 50% of the district's [SHARE allocation](#), which represents 50 percent of its annual giving from three years' prior plus any Permanent Fund- SHARE earnings.

Global Grants

Global grants are funded by The Rotary Foundation from the World Fund, and awards range from US\$15,000 to \$200,000. The Foundation matches cash at 50 percent and DDF contributions at 100 percent. All global grants have a minimum budget of US\$30,000.

The Foundation will match non-Rotarian contributions toward a grant, provided they do not come from a cooperating organisation or a beneficiary of the project.

International sponsors for humanitarian projects are required to provide at least 30 percent of the total sponsor funding. Host sponsors for humanitarian projects are encouraged to contribute toward the financing of the grant. Grant financing cannot be changed after approval. Paul Harris Fellow recognition credit will only be given for sponsor contributions sent to The Rotary Foundation and will not be granted for contributions sent directly to the project. Contributions sent prior to grant approval may not be available for that specific grant. All global grant contributions are considered irrevocable contributions to The Rotary Foundation and will not be refunded.

VII. Cooperating Organisations

Cooperating organizations are reputable non-Rotary organisations or academic institutions that provide expertise, infrastructure, advocacy, training, education, or other support for the grant. Cooperating organisations must agree to comply with all reporting and auditing activities required by The Rotary Foundation and provide receipts and proof of purchase as required. No more than five global grants may be approved in one Rotary year for projects involving a single cooperating organisation. Universities hosting scholars are not considered a cooperating organisation.

District Grants

All funding provided to cooperating organisations must be used for specific project expenses. The sponsoring district must maintain an itemised report of such expenses.

Global Grants

At the time of application, grant sponsors need to provide a [memorandum of understanding \(MOU\)](#) signed by both primary sponsors and the cooperating organization. The MOU should include the following:

1. Verification from both primary sponsors that the grant is initiated, controlled, and
2. Managed by Rotary clubs or districts
3. Endorsement from the primary sponsors affirming that the cooperating organisation is reputable, responsible, and acting within all governing laws
4. Grant implementation plan clearly delineating the activities of each party
5. Agreement from the cooperating organisation to participate in any financial review by the Foundation of activities connected with the grant

VIII. Payments

District Grants

Grant funds will be paid only to the district or district foundation bank account identified by the district at the time of application. District grant funds will not be released until the previous Rotary year's district grant is closed. Funds are not available after the close of the implementation year; if sponsors do not meet all payment requirements by 15 May of the implementation year, the grant will be cancelled.

Global Grants

Grant funds will not be released until sponsor contributions have been submitted to The Rotary Foundation and any payment contingencies have been met. Grant funds will be paid to the account provided in the application. Account signatories must be members of the sponsoring club or district. If a grant project is cancelled after the project sponsors receive payment, all remaining grant funds must be returned to the Foundation, where they will be credited to the World Fund.

IX. Reporting Requirements and Documentation

Grant recipients are responsible for reporting on the use of grant funds to The Rotary Foundation. Progress and final reports must be submitted via [Member Access](#) and all forms must be completed in their entirety for the report to be accepted. New grant applications will not be accepted by the Foundation if a grant sponsor has an overdue report for any Foundation grant. The Foundation reserves the right to review grants at any time, conduct an audit, send a monitor, require additional documentation, and suspend any or all payments.

The following reporting criteria also apply to grant recipients:

1. Unused grant funds must be returned promptly to The Rotary Foundation.
2. Districts must report the use of grant funds to their member clubs in accordance with the terms of qualification.
3. Grant sponsors must maintain copies of all receipts and bank statements related to grant-funded expenditures in accordance with the terms of qualification and any applicable local and international laws.
4. Grant sponsors who fail to adhere to Foundation policies and guidelines in implementing and financing grant projects must return grant funds in their entirety and may be barred from receiving future grants for a period of up to five years.

District Grants

These additional criteria apply to district grants:

1. Final reports documenting the disbursement of funds must be submitted to the Foundation within 12 months of receiving the payment, or within two months of the grant's total disbursement.
2. All grant projects and activities funded by district grants must be completed within 24 months of disbursement by the Foundation or the local district to the club or project site.
3. Unused grant funds in excess of US\$500 must be returned promptly to The Rotary Foundation and will be credited to the district's DDF. Unused grant funds below US\$500 must be used for charitable purposes.

Global Grants

These additional criteria apply to global grants:

1. Progress reports must be submitted within 12 months of receiving the first grant payment and every 12 months thereafter.
2. Final reports must be submitted within two months of completing the project.
3. Unused grant funds in excess of US\$500 must be returned to The Rotary Foundation and will be credited to the World Fund. If grant funds remain after a project's completion, the Foundation may approve their use for project related expenses, such as additional project supplies.

Acceptable reports contain detailed accounts of the project's implementation, including:

1. A description of how the project has advanced the goals of the selected area(s) of focus
2. An account of how the project achieved the specific objectives outlined in the application, including the relevant measures and data collected
3. An explanation of how the project's outcomes will be sustained over time
4. A description of the participation of both host and international partners, as well as any cooperating organisations associated with the grant
5. The report should also include a detailed account of spending for the project and project account bank statements. Sponsors must explain any budget variances in the final report. Additionally, the Foundation may request that sponsors submit receipts in support of the report.

The Foundation will close the grant once the project implementation is complete and sponsors have demonstrated that sustainability measures are in place to ensure that the local community will continue the project.

X. Microcredit

The Rotary Foundation is committed to using microcredit programs to facilitate small, self-help enterprises. Clubs and districts applying for global grants are encouraged to partner with reputable and established cooperating organisations/microfinance institutions to administer loan programs as a way of undertaking sustainable development projects. However, microcredit programs funded by the Foundation must incorporate a component, such as training, that extends beyond the management of loan capital. In addition:

1. Clubs and districts that wish to use global grant funds to support a microcredit project must submit the [microcredit supplement form](#) with the grant application.
2. Microcredit activities must be supervised and controlled by the sponsoring club or district.
3. Interest and fees generated by microcredit fund capital from The Rotary Foundation may be used for administrative expenses that directly support the project.
4. Grant sponsors must submit a microcredit supplement form with the grant report.
5. If a microcredit project is terminated before the Foundation's reporting requirements are met, grant funds must be returned to The Rotary Foundation.
6. The Rotary Foundation will not fund loan guaranty systems.

XI. Special Considerations for Rotary Foundation (India)

The Rotary Foundation and the Rotary Foundation (India) encourage all Rotary clubs and districts in India to become registered with the Government of India (GOI) under the Foreign Contribution Regulation Act (FCRA). For general information about the FCRA, go to <http://mha.nic.in/fcra.htm>; for registration forms, go to <http://mha.nic.in/fcra/intro/forms.html>.

In addition to all other terms and conditions, grants with full or partial payment to a Rotary club or district in India should follow these payment and reporting procedures to comply with GOI laws and the FCRA:

1. Grant funds will not be released to a bank account in India unless all general payment conditions listed below have been met. Either the sponsors provide documentation showing that the bank account is registered under the FCRA or staff must determine that sufficient funds are available from contributions made within India. Otherwise, the payment will be placed in a queue and paid on a first-come, first-served basis only when additional contributions are made and sufficient funds are available. The sponsors of grants must ensure funds are not co-mingled a District Grants Payment is contingent upon the approval of a detailed spending plan that includes an itemised budget for each listed project or activity. Grant funds will be paid only to the district bank account. The name of the district bank account must be easily identifiable with both the district and the project. (A proper naming example is Rotary District 0000 District Grant 12345). District grant funds will not be released until the previous Rotary year's district grant is closed.

Funds are not available after the close of the implementation year; if sponsors do not meet all payment requirements by 15 May of the implementation year, the grant will be cancelled.

b. Global Grants

Grant funds will not be released until all sponsor contributions have been submitted to The Rotary Foundation and any payment contingencies have been met. Grant funds will be paid to the account provided by the grant sponsors.

2. Progress reports on grant funds released to India through 31 March are due by 31 May of that same year. Final reports are due two months after the grant's completion. Grant sponsors must

ensure that funds received in a FCRA-registered bank account are not co-mingled with local funds.

3. All progress reports must:

- a. Meet all general reporting requirements as listed in section IX.
- b. Show that a copy of the progress report filed electronically via Member Access has been submitted to the South Asia Office.
- c. Include a utilisation certificate if a portion of the grant amount has been used, along with statement of receipt and payment for the grant amount, certified by an independent chartered accountant (including membership number)
- d. If the grant funds were not used for any reason, include an original bank statement or bank passbook (or a photocopy certified by the bank manager or a chartered accountant) indicating the date on which the grant amount was credited and a statement explaining why the grant amount has not yet been used, even if the grant amount was received before March

4. All final reports must:

- a. Meet all general reporting requirements as listed in section IX.
 - b. Show that a hard copy of the final report filed electronically via Member Access has been submitted to the South Asia Office.
 - c. Include the following:
 - i. A utilisation certificate along with statement of receipt and payment for grant amount, certified by an independent chartered accountant (including membership number)
 - ii. An original bank statement or bank passbook (or a photocopy certified as true copy by the bank manager or a chartered accountant)
 - iii. A bank reconciliation statement, if multiple grants were paid to a single FCRA account
 - iv. Originals or photocopies of bills of payment/expenses vouchers and, if only photocopies are provided, a written undertaking that "all originals will be kept for a period of eight years and will be produced as and when required by Rotary Foundation (India)"
 - v. Beneficiary information (for example, photographs, newspaper clippings, appreciation letter from beneficiary)
 - d. Return of any remaining funds of any amount to the Rotary Foundation (India)
5. A FCRA-registered club or district is responsible for furnishing FC-3 return along with the financial statements to the Ministry of Home Affairs, New Delhi, in a timely manner.

Submitting Foundation Goals In Rotary Club Central

Club presidents-elect are asked to set goals for the Annual Fund, PolioPlus Fund, Major Gifts and the Permanent Fund to support The Rotary Foundation's grants and activities. Use Rotary Club Central [<http://map.rotary.org/en/rcc/Pages/ClubGoalsProgress.aspx>]

Enter your goals by 1 May. This information will be used by the Trustees to calculate the worldwide Annual Fund Goal.

4. Report on Use of Grant Funds

The club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

5. Document Retention

The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports

transparency in grant management and assists in the preparation for audits or financial assessments.

a. Documents that must be maintained include, but are not limited to:

1. Bank information, including copies of past statements
2. Club qualification documents including a copy of the signed club MOU
3. Documented plans and procedures, including:
 - i. Financial management plan
 - ii. Procedure for storing documents and archives
 - iii. Succession plan for bank account signatories and retention of information and documentation
 - iv. Information related to grants, including receipts and invoices for all purchases
- b. Club records must be accessible and available to Rotarians in the club and at the request of the district.
- c. Documents must be maintained for a minimum of five years, or longer if required by local law.

6. Reporting Misuse of Grant Funds

The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

Attachment I – Global Networking Groups

Overview of the program

Global Networking Groups allow individual Rotarians from several countries to join together to focus on common interests. Through these groups, you can

- Share fellowship and friendship with thousands of Rotarians
- Meet other Rotarians with a similar hobby or vocational background
- Collaborate with Rotarians from around the world who are dedicated to a particular area of service

There are two types of Global Networking Groups: Rotary Fellowships and Rotarian Action Groups.

Rotary Fellowships

Rotary Fellowships offer Rotarians the opportunity to make friends with others in Rotary who share a common vocation, hobby, or recreational interest. Read more about Rotary Fellowships in the

[\[pdf\] Rotary Fellowships Directory](#)

<https://www.rotary.org/myrotary/en/document/885>

Rotary Fellowships Directory date added: April 25, 2013 2:05:32 PM CDT file size: 275.68 KB Publication #:

[\[pdf\] Rotary Fellowships Handbook](#)

<https://www.rotary.org/myrotary/en/document/886>

Rotary Fellowships Handbook date added: April 25, 2013 2:05:32 PM CDT file size: 187.82 KB Publication #: 729

Rotarian Action Groups

Rotarian Action Groups conduct international service projects that further the Object of Rotary. If you're interested in supporting a particular type of service activity, there may be a Rotarian Action Group for you. Learn more [\[pdf\] Rotarian Action Groups Officer Directory](#)

<https://www.rotary.org/myrotary/en/document/714>

Rotarian Action Groups Officer Directory date added: April 18, 2013 4:00:03 PM CDT file size: 224.34 KB Publication #:

Examples are Aids, dental volunteers, Water and Sanitation,, malaria ,literacy
How to join - look at the directory and visit the group website for instructions.

How to organise a new Global Networking Group

Forming a new Global Networking Group requires time-intensive, long-range planning and deliberate outreach to Rotarian colleagues. But, as Rotarians who've established a group will attest, the effort is worthwhile. Before preparing a proposal, you'll need to determine whether your proposed group would be a Rotary Fellowship or a Rotarian Action Group.

Consult the Rotary.org website and search for Rotary Fellowships or Rotary Action groups.

Join a Fellowship (list is updated every year)

Find current contacts via

http://www.rotary.org/Rldocuments/en_pdf/fellowships_directory_en.pdf

Amateur Radio	Antique Automobiles
Bird Watching	Bridge
Canoeing	Caravanning
Carnivals parades and festivals	Chess
Computer Users	Convention Goers
Cricket	Curling
Cycling	Doctors
Doll Lovers	Editors and Publishers
Environment	Esperanto
Fine Arts and Antiques	Fishing
Flying	Golf
Gourmets	Home Exchange
Internet	Italian culture
Latin Culture	Lawyers
License Plate Collecting	Literacy Providers
Magna Graecia	Magicians
Marathon Running	Motorcycling
Music	Old and Rare Books
Police and Law Enforcement	Pre- Columbian Civilisations
Quilters and Fiber Artists	Railroads
Recreational Vehicles	Rotary Global History
Rotary Heritage and History	Rotary on Stamps
Scouting	Scuba Diving
Shooting sports	Singles
Skiing	Social Networks
Tennis	Total Quality Management
Travel Agents	Travel and Hosting
Wellness and fitness	Wine
Yachting	

List of Rotarian Action Groups

Rotarians for Fighting AIDS	http://www.rffa.org/
Blindness Prevention	http://www.rag4bp.org/
Blood Donation	http://www.ourblooddive.org/
Dental Volunteers	http://www.ragdvs.com/
Diabetes	http://www.ragdvs.com/
Food Plant Solutions	http://foodplantsolutions.podbean.com/
Health Fairs	http://www.worldhealthfairs.org/
Hearing	http://www.wifrahl.org
Hunger & Malnutrition	http://www.alleviatehunger.org/
Literacy	http://www.litrag.net/
Malaria	http://www.remarag.org/
Microcredit	http://www.rotarianmicrocredit.org/
Multiple Schlerosis	http://www.rotary-rfmsa.org/
Polio Survivors & Associates	http://www.rotarypoliosurvivors.com
Population Growth & Sustainable Development	http://www.rifpd.org/
Water and Sanitation	http://www.startwithwater.org

Attachment J – Interact



Interact is Rotary International's service club for young people ages 14 to 18.

Interact clubs are sponsored by individual Rotary clubs, which provide support and guidance, but they are self-governing and self-supporting.

Club membership varies greatly. Clubs can be single gender or mixed, large or small. They can draw from the student body of a single school or from two or more schools in the same community.

Each year, Interact clubs complete at least two community service projects, one of which furthers international understanding and goodwill. Through these efforts, Interactors develop a network of friendships with local and overseas clubs and learn the importance of

- Developing leadership skills and personal integrity
- Demonstrating helpfulness and respect for others
- Understanding the value of individual responsibility and hard work
- Advancing international understanding and goodwill

As one of the most significant and fastest-growing programs of Rotary service, with more than 10,700 clubs in 109 countries and geographical areas, Interact has become a worldwide phenomenon. Almost 200,000 young people are involved in Interact.

For more information about Interact in your area, look at our district website or directory.

Attachment K – Rotaract

Rotaract



Rotaract is a Rotary-sponsored service club for young men and women ages 18 to 30. Rotaract clubs are either community or university based, and they're sponsored by a local Rotary club. This makes them true "partners in service" and key members of the family of Rotary.

As one of Rotary's most significant and fastest-growing service programs, with more than 7,000 clubs in about 163 countries and geographical areas, Rotaract has become a worldwide phenomenon.

How does it work?

All Rotaract efforts begin at the local, grassroots level, with members addressing their communities' physical and social needs while promoting international understanding and peace through a framework of friendship and service.

What are some other opportunities available to Rotaractors?

Rotaractors may also

- Assist in organising Interact
<http://www.rotary.org/en/StudentsAndYouth/YouthPrograms/Interact/Pages/ridefault.aspx>
- clubs or mentor Interactors
- Participate in Rotary Youth Leadership Awards
- Join in with Rotary Foundation programs
- Seek membership in their local Rotary club

Rotaractors are encouraged to keep in contact with Rotary clubs, projects and activities.

How can I learn more?

Look at the Rotary.org or district website or directory.

- Download the Rotaract handbook at
<https://www.rotary.org/myrotary/en/document/418>

Attachment L – Rotary Community Corps

A Rotary Community Corps is a group of non-Rotarian men and women who share Rotarians' commitment to service. Under the guidance of a sponsoring Rotary club, dedicated RCC members put their own skills to work to improve the quality of life in their communities.

A Rotary Community Corps is:

- An opportunity for Rotarians and non-Rotarians to work together to foster enduring community development
- Adaptable to any community, rural or urban
- Active participants mobilize to articulate, design, and carry out their own plans for change. Rotarians oversee projects but allow corps members to increase their independence.

Goals of a Community Corps:

- Encourage individuals to take responsibility for the improvement of their community or village.
- Recognise the dignity and value of all useful occupations.
- Mobilise self-help activities and collective work to improve quality of life.
- Encourage the development of human potential to its fullest, within the context of the local culture and community.

RCC Guidelines

- Membership should be open to non-Rotarian men and women who reside, are employed, or study near the Corps' community.
- RCCs should meet at least once per month.
- No meeting of the RCC is deemed official unless a member of the Rotary club is present. RCCs are encouraged to undertake two major projects annually.
- Any membership dues should be nominal.

RCCs are encouraged to:

- Elect a leadership group for a one-year term.
- Choose a representative from within the leadership group. The representative represents the RCC with the sponsoring Rotary club and the public.

Useful references:

- [ppt\] Rotary Community Corps \(RCC\) presentation](#)
- Rotary Community Corps (RCC) presentation date added: November 8, 2013 2:03:41 PM CST file size: 1.51 MB Publication #:
- [\[pdf\] Rotary Community Corps \(RCC\) Brochure](#)
- Rotary Community Corps (RCC) Brochure date added: April 18, 2013 2:21:13 PM CDT file size: 696.88 KB Publication #: 779
- [\[pdf\] Rotary Community Corps \(RCC\) Organization Form](#)
- **Rotary Community Corps** (RCC) Organisation Form date added: April 18, 2013 2:21:12 PM CDT file size: 198.52 KB Publication #: 769
- Standard **Rotary Community Corps** (RCC) Constitution and Bylaws date added: April 18, 2013 4:00:04 PM CDT file size: 133.24 KB Publication #:
- [\[pdf\] Rotary Community Corps \(RCC\) Handbook](#)

Attachment M – Rotary Friendship Exchange

A group of Japanese Rotarians renew old friendships made at an RI Convention with club members from Australia. Italian Rotarian parents of a former Rotary Youth Exchange student spend time with the family who hosted their son in Thailand. Rotarian paediatricians from Ghana travel to Germany to stay with doctors there.

Experiences like these happen all the time through Rotary Friendship Exchange, Rotary's international exchange program for Rotarians and their families. Participants experience other cultures and build friendships by staying in the homes of Rotary club members in another country. This program advances international understanding and peace through personal contact across borders while developing interclub relationships that lead to fellowship and service projects.

How it works - Types of Friendship Exchanges

- Visitor program - Individual Rotarians, who may be accompanied by family members, spend a few days in a Rotarian's home abroad.
- Team program
Rotarian couples (typically four to six) visit several communities in a host district for up to one month.
- Vocational Rotarians of the same occupation observe how their job is done in other countries.

Guidelines

- Only Rotarians and their immediate families are eligible for the visitor program, and participation in the team program is limited to Rotarians and their spouses.
- Spouses or children must always be accompanied by Rotarians on an exchange.
- Rotarians interested in participating must apply through their club president. Not every district participates in Friendship Exchange, so prospective applicants should ask their club president about the program.

District governors from participating districts appoint a district Friendship Exchange chair, who is responsible for coordinating exchanges through a list of chairs from around the world. E-mail friendshipexchange@rotary.org to identify your district chair.

Other resources available to download include:

[\[pdf\] Rotary Friendship Exchange Handbook](#)

[\[pdf\] Rotary Friendship Exchange Matching Board](#)

Attachment N – Rotary Youth Exchange

Making a world of difference



As a Rotary Youth Exchange student, you'll spend up to a year living with a few host families and attending school in a different country.

Whether you participate in Rotary's long-term or short-term Youth Exchange programs, you'll learn a new way of living, a great deal about yourself, and maybe even a new language. You'll also be an ambassador, teaching people you meet about your country, culture, and ideas. You can help bring the world closer – and make some good friends in the process.

More than 8,000 young people each year have experiences like these through Rotary Youth Exchange. It's the opportunity of a lifetime. Are you ready for it?

Find out what countries participate by contacting Rotarians or the Youth Exchange chair in your area.

For more information, read the following resources:

Youth exchange handbook at <https://www.rotary.org/myrotary/en/document/888A>

Attachment O – Rotary Youth Leadership Awards



Rotary Youth Leadership Awards (RYLA) is Rotary's leadership training program for young people. RYLA participants can be ages 14-30, but most clubs and districts choose to focus on a narrower age range, such as 14-18 or 19-30.

RYLA emphasises leadership, citizenship, and personal growth, and aims to:

- Demonstrate Rotary's respect and concern for youth
- Provide an effective training experience for selected youth and potential leaders
- Encourage leadership of youth by youth
- Recognise publicly young people who are rendering service to their communities

To find out about a RYLA event in your area, contact the district youth directory or the district's RYLA chair.

Download the RYLA handbook at: <https://www.rotary.org/myrotary/en/document/896>.

Attachment P – Rotary Acronyms

For a list of useful Rotary acronyms refer to the following website:
<http://www.rotary9790.org.au/info/acronyms.asp>