


Rotary Leadership Institute

Sunshine Division


Event Agenda

Part One—The Rotarian

7:00 am—8:00 am	Registration Opens Check-in, Distribution of materials, Breakfast
8:00 am—8:10 am	Welcome, Introductions
8:15 am—10:05 am	I'm a Rotarian!
10:05 am — 10:20 am	Break
10:20 am—11:05 am	Rotary Opportunities
11:10 am—12:05 pm	Ethics and Vocational Service
12:10 pm—12:50 pm	Lunch
12:55 pm—1:40 pm	Rotary: The Bigger Picture
1:45 pm—3:00 pm	Foundation Basics
3:00 pm—3:15 pm	Evaluation
3:20 pm—3:30 pm	Closing Ceremonies



The Plan for Today



- Introductions
- Overview of RLI
- Notebook Review
- Evaluation Form

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Be Enthusiastic!

You set the theme for the entire day!

Explain the process of RLI:

- discussion and participation instead of lectures.
- Having fun, making new acquaintances, new friends, and
- engaging Rotary are all the goals of the sessions.

EXPLAIN THE EVALUATION FORM:

Share that all discussion leaders are volunteers, donating their time. However, we still want honest feedback on both the content and the discussion leaders. The content is updated based on attendee feedback.

NOTES:



I'm a Rotarian!

SESSION GOALS

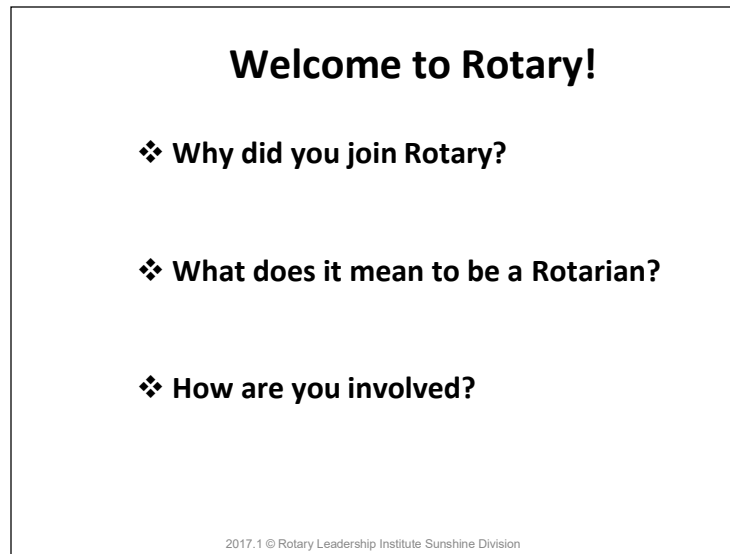
- Understand “*The Object of Rotary*” as the foundation and purpose of Rotary International.
- Explore the (4) specific *Objects* and how they relate to the Avenues of Service.
- Clarify how *The Object of Rotary* drives all activities, programs, and projects of Rotary International and Rotary Clubs.

RESOURCE MATERIALS

- Rotary.org My Rotary (create your own account) <https://my.rotary.org/en/guiding-principles> : Guiding principles.
- The ABCs of Rotary by PDG Cliff Dochterman <https://rotary5630.org/wp-content/uploads/2012/09/The-ABCs-of-Rotary.pdf>
- New Member Orientation Manual (Rotary International publication 414en) <https://my-cms.rotary.org/en/document/new-member-orientation-how-guide-clubs>
- Connect for Good (Rotary International publication 595en) <https://my-cms.rotary.org/en/document/connect-good>
- The Rotary Learning Center on rotary.org (log in under MY ROTARY)
- Your District website

PREPARATION:

This session is designed to help Rotarians understand what they believe about Rotary versus what Rotary believes about itself. This session does not have any exercise. Be very familiar with the Objects of Rotary.



PROCESS:

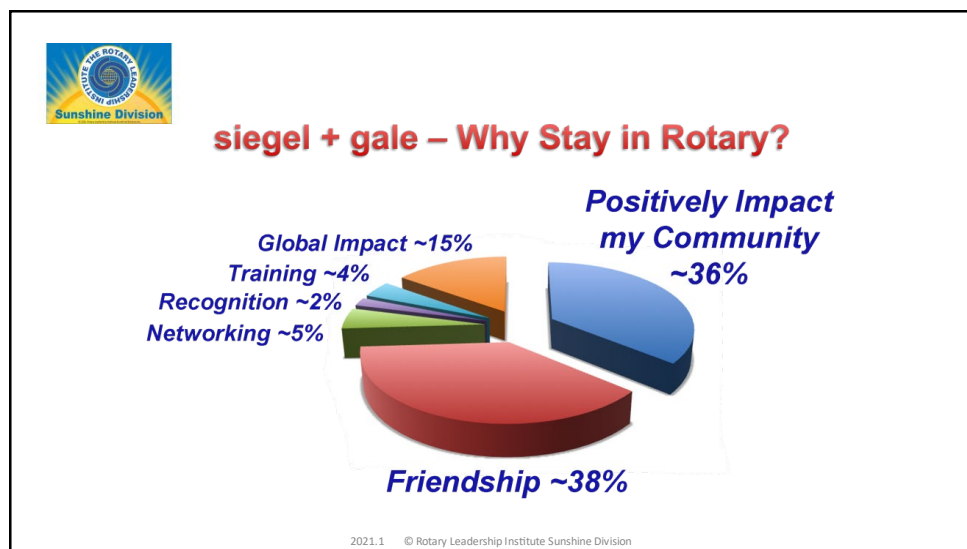
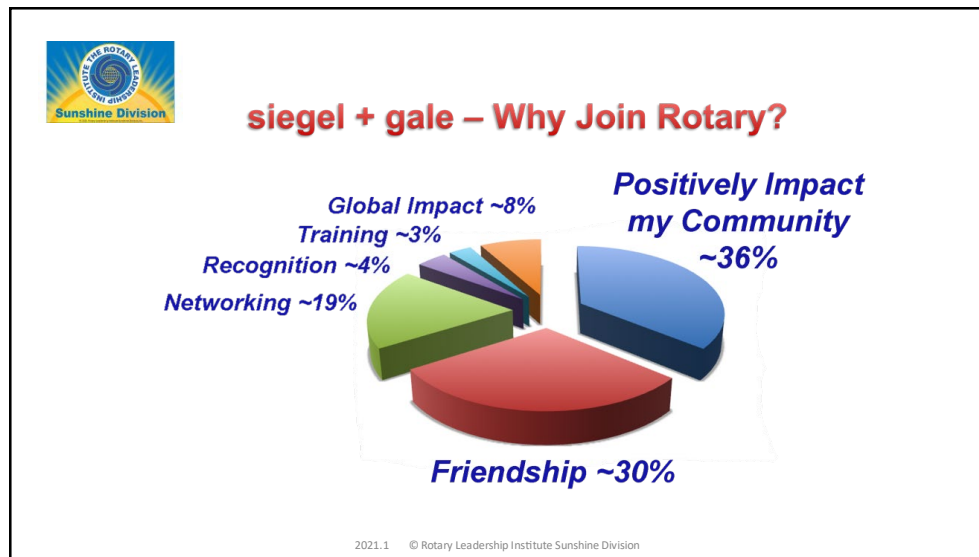
Ask each question and allow time for everyone to respond. This is the buy in for the rest of the day so they can see how the information presented in Part One applies to them personally. The variety of responses from fellow participants should stir interest in learning more. Respond to every answer with a comment that relates what they say to the object of Rotary, expand on every answer.

Use a question that you can respond to, directed to other participants.

Other questions:

Why is your club better than mine?

NOTES:



These are the reasons identified by most Rotarians for why they joined and why they stay in Rotary. The study was done in 2014 and has been repeated with the same results:

Fellowship
Service
Networking

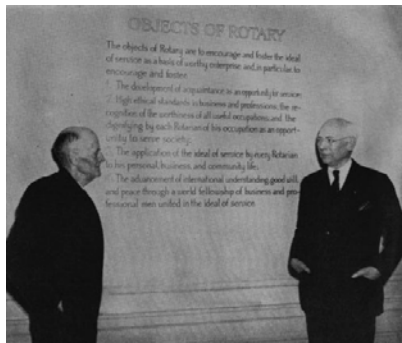
**According to Past RI President,
Bob Barth, a Rotary pin means this:**



**You can rely on me.
I am dependable.
I am available.
I give more than I take.
I add value.
I serve.**

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What does Rotary believe in?



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These are the transition slides into the Object of Rotary. The goal is to confirm that a Rotary membership is important and to deepen their understanding of the organization they joined.

The Object of Rotary

The purpose of Rotary is for Clubs and their members to pursue and further

The Object of Rotary

But.....

What *is* the OBJECT OF ROTARY?

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PROCESS:

- Ask each question and allow 2-3 minutes for responses.
- Follow-up question:
 - Is your answer the typical answer you give when asked these questions?
 - Do you change your response based upon who might be asking the question?
- The Object of Rotary is the foundation and one of the guiding principles of Rotary International.
- Does anyone know what The Object of Rotary is?
- How many Objects of Rotary, and How many Avenues of Service?

NOTES:

The Student Guide Fact: “In 1906 there were only 3 Objects of Rotary”

More info: 1906 Objects - promotion of business interests, promotion of good fellowship and the advancement of the best interests of the community

More info: 1910 had 5 Objects, 1915 had 6 Objects. It changed several times until we got the final 4 in 1935 at the International Convention in Mexico City

- Emphasize there are (4) parts but will primarily cover the First Object; the others will be covered in the appropriate courses.

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:**

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PROCESS:

- Ask someone to read the statement
- BEFORE going on to the Four Objects, ask what this preamble, specifically
“the ideal of service as a basis of worthy enterprise” means to them.
Examples:
 - giving back
 - helping those less fortunate
 - its good business to serve in your community
- WHO is to *encourage and foster*?
 - Rotary Clubs
 - Individual Rotarians
 - Club Officers
 - Districts



The First Object of Rotary

The development of acquaintance as an opportunity for service.

Through Club **Service**, we have fun, build lasting friendships, and make sure that our club functions well.



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PROCESS:

- Ask a volunteer to read this slide aloud. Ask which Avenue of Service this *Object* most closely resembles.

(CLICK) and the avenue is on the slide

- Ask someone in the group to read the Club Service Section
- Ask for a few examples of Club Service (2-3).

SUGGESTION: you may have to ask the class to name the Avenues of Service to get this rolling. Don't assume they know what you are referring to.

NOTES:



The Second Object of Rotary

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

Through **Vocational Service**, we volunteer our professional skills to serve others and promote integrity in everything we do.



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PROCESS:

- Ask someone read this slide. Ask which Avenue of Service this *Object* most closely resembles.

(CLICK) and the avenue is on the slide

- Ask someone in the group to read the Vocational Service Section
- Ask for a few examples of Vocational Service (2-3).

NOTES:



The Third Object of Rotary

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

Through **Community Service**, we address local needs and work with our community to bring lasting improvements .



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PROCESS:

- Ask someone read this slide. Ask which Avenue of Service this *Object* most closely resembles.

(CLICK) and the avenue is on the slide

- Ask someone in the group to read the Community Service Section
- Ask for a few examples of Community Service (2-3).

NOTES:



The Fourth Object of Rotary

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

Through **International Service**, we meet humanitarian needs around the globe and promote world understanding and peace.



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PROCESS:

- Ask someone read this slide. Ask which Avenue of Service this *Object* most closely resembles.

(CLICK) and the avenue is on the slide

- Ask someone in the group to read the International Service Section
- Ask for a few examples of International Service (2-3).
- Ask if it's coincidental that the Four Objects of Rotary relate directly to an Avenue of Service.



The Avenues of Service

Through **Youth Service**, we work with young people to help them become the next generation of leaders, visionaries, and peacemakers.



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PROCESS:

- Introduce the 5th Avenue of Service
- How does it relate to the Object of Rotary?
- Ask for a few examples of Youth Service (2-3)
 - Rotary Youth Exchange
 - Interact
 - RYLA/S4TL
 - Student Scholarships
 - Rotaract
 - Others relevant to the geographical/district area

How many Avenues of Service, and How many Objects of Rotary? Why?

Note:

Youth Services is the correct name, not New Generations!

Student Guide has this fact:

- Did you know...That the 5th Avenue of Service (Youth Services) was added in 2010!



The Five Avenues of Service

- Through Club Service, we have fun, build lasting friendships, and make sure that our club functions well.
- Through Vocational Service, we volunteer our professional skills to serve others and promote integrity in everything we do.
- Through Community Service, we address local needs and work with our community to bring lasting improvements .
- Through International Service, we meet humanitarian needs around the globe and promote world understanding and peace.
- Through Youth Service, we work with young people to help them become the next generation of leaders, visionaries, and peacemakers .

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PROCESS:

- Each of the Objects of Rotary can be directly related to an '*Avenue of Service*', however, the fifth avenue was added in 2010.
- If you could write a fifth Object of Rotary for the Youth Service Avenue, what would it be?

NOTES:

Student Guide has this Fact!

**Did you know....
That in 1906 there were only
3 Objects of Rotary!**

The First Object of Rotary

The development of
acquaintance as an opportunity
for service.

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PROCESS:

- All four *Objects of Rotary* are of equal importance to the overall success of Rotary. We will now focus our attention on the First *Object of Rotary*.
 - What does this *Object* really mean?
 - Why is this the first *Object* of Rotary?
 - What can clubs and members do to achieve this?
 - How does **ACQUAINTANCE** relate to **SERVICE – CLUB MEMBERSHIP – RETENTION?**
 - If this *Object* is not met, what is the impact on the other *Objects*?
- Facilitate a discussion on the meaning of the *First Object*, how a Rotary club and its members can further their pursuit and achieve this *First Object* and why it is essential they do.

NOTES:

The Object of Rotary

The Two Most Challenging Questions for a Rotarian

1. What *is* Rotary?

2. What *is* Rotary's purpose?

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PROCESS:

- Ask the question: What is Rotary? Let as many of the class have a shot at it as time permits.
- Ask the 2nd question: What is Rotary's purpose? Let as many of the class have a shot at it as time permits.
- Try and get the class to circle back to 'the Object of Rotary' as they develop their answers.
- How many Objects of Rotary, and How Many Avenues of Service?
-

NOTES:

ROTARY

Rotary



Object of Rotary

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

- I. The development of acquaintance as an opportunity for service;*
- II. High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to service society;*
- III. The application of the ideal of service in each Rotarian's personal, business, and community life;*
- IV. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.*

INTERNATIONAL

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ROTARIAN CODE OF CONDUCT

As a Rotarian, I will:

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

The Four Way Test
Rotary



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



Summary



The sole purpose of a Rotary Club and its members is to pursue and further

The Object of Rotary

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PROCESS:

- This is the DL's opportunity to reinforce that it is every Rotarian's obligation and responsibility to pursue and further the *Object of Rotary*, and in particular, the *First Object*.

NOTES:



SESSION GOALS:

- Provide an overview of Rotary International's structured programs, networking groups and menu of service opportunities.
- Discuss the program's relation to Rotary's goals and to an individual's Rotary experience.
- What is your goal for this class?

RESOURCE MATERIALS:

- www.rotary.org
- District websites
- *Rotary* magazine
- Rotary Fellowships: <https://www.rotary.org/en/our-programs/more-fellowships>
- Rotary Action Groups: <https://my.rotary.org/en/take-action/empower-leaders/join-rotarian-action-group>

PREPARATION:

If you are a member of a RAG or Fellowship, wear your pin. Be very familiar with the structured programs. Know why Rotaract isn't on that list!

PROCESS:

- Might have to give one away in order to get this rolling
- There are () Rotary International programs. See how many the group can name. The student manual is blank.
- Be sure to acquaint yourself with these programs; you may need to explain their purpose/activities.
- Review the logos to be sure you know what logo goes with which program.
- How do clubs use these programs? Why?
- How many of your clubs participate in these programs?
- Why might participation be important? What can you do to encourage participation?
- Once the slide is totally exposed, ask if they can think of any others?

NOTE: Rotaract is not a structured program! It is now a Membership Type

NOTE: Youth Service Exchange was discontinued July 2024



Structured Programs

<u>Youth Programs</u>	<u>Social Programs</u>	<u>Service Programs</u>
<p>Interact Rotary Sponsored Club</p>  <p>Rotary  rotary youth exchange</p> <p>RYLA</p>	<p>Rotary Fellowships</p> <p>Rotary Friendship Exchange</p> 	<p>Rotary  </p> <p> Rotary Community Corps</p> <p>Rotary Action Groups</p>

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8 Rotary International Programs

Interact is a service organization organized and sponsored by Rotary clubs for youth ages **12-18**. It has more than 14,900 clubs in 145 countries and geographical areas with almost 342,900 young people involved.

Rotary Youth Leadership Awards (RYLA) are seminars sponsored by clubs and districts to encourage and recognize the leadership abilities of youth and young adults ages 14-30.

Rotary Peace Fellowships promote national and international cooperation, peace and the successful resolution of conflict through educating Rotary Peace Fellows, selected for their outstanding academic, civic, and humanitarian activities.

Autonomous, international groups, **Rotarian Action Groups** provide assistance and support to Rotary clubs and districts in planning and implementing service projects in their respective areas of expertise. They are comprised of Rotarians, Rotarian spouses and Rotaractors who have expertise in and a passion for a particular type of service.

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 8000 students each year.

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 Community Corps (RCC) are groups of non-Rotarians who work to improve their communities. There are over 11,000 RCC in over 100 countries, all organized and sponsored by Rotary Clubs.

Rotary Fellowships are autonomous, international groups of Rotarians, Rotarian spouses and Rotaractors who join together for any number of reasons, including fellowship, vocational development, make new friends and explore new opportunities for service.

The first Interact club was chartered Nov 5 1962 at Melbourne High School in Florida.

Rotary Peace Fellow Locations 2023

[Duke University and University of North Carolina at Chapel Hill](#), USA

[International Christian University](#), Japan

[University of Bradford](#), England

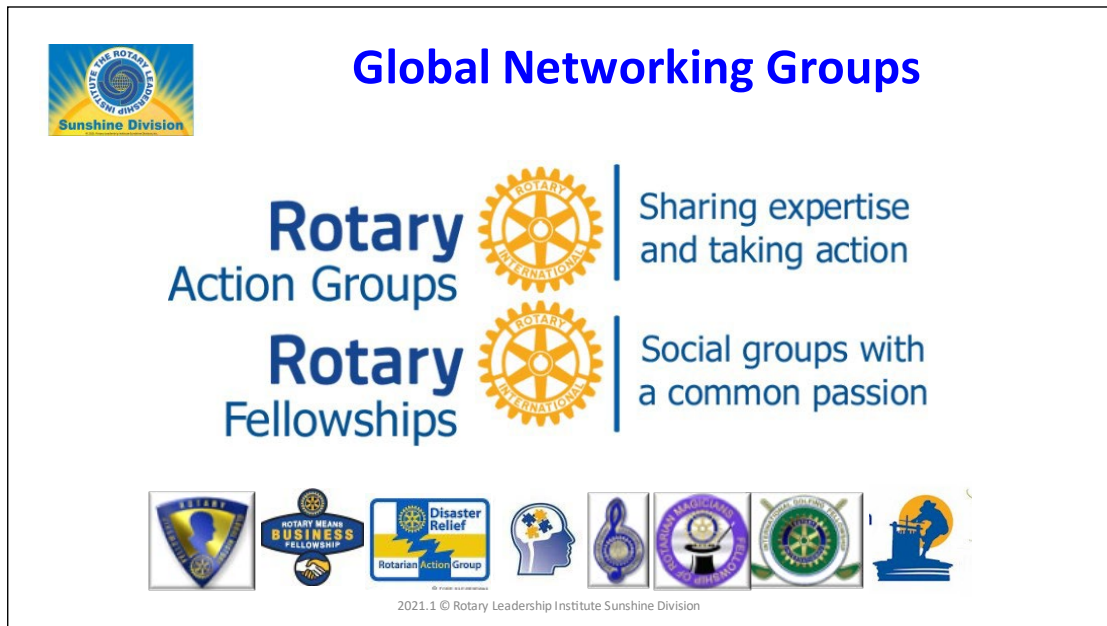
[University of Queensland](#), Australia

[Uppsala University](#), Sweden

Makerer University, Kampala, Uganda (only the certificate program offered here)

[Bahçeşehir University \(BAU\)](#), Istanbul, Turkey (certificate program only)

NOTE: The list of participating universities is updated every year. If your club wishes to sponsor a Peace Fellow, check for the current list.



PROCESS:

- Review the various opportunities for Rotarians to be involved *beyond the club* and establish friendships world-wide. Fellowship Groups listed below.
 - Is anyone here a member of a Fellowship?
 - Why join a Fellowship?
- Discuss the Rotarian Action Groups (RAGS):
 - Is anyone in the group involved in any of the RAGS?
 - Do they advance Rotary's mission? How?
 - Does involvement in one of these groups detract from club service opportunities?
 - How do you find out more and <potentially> join one of these groups?

Across the bottom of the slide are the logos for:

History Fellowship
Rotary Means Business Fellowship
Disaster Relief Rotary Action Group
Alzheimer & Dementia Action Group (ADRAG)
Musician's Fellowship
Magician's Fellowship
Golfer's Fellowship
Wine Appreciation Fellowship

Rotary Action Groups by area of focus 2024

Promoting peace

[Peace](#)

[Refugees](#)

[Slavery Prevention](#)

Fighting disease

[Addiction Prevention](#)

[Alzheimer's/Dementia](#)

[Blindness Prevention](#)

[Blood and Organ Donation](#)

[Diabetes](#)

[Family Health/AIDS Prevention](#)

[Health Education and Wellness](#)

[Hearing](#)

[Hepatitis Eradication](#)

[Malaria](#)

[Mental Health Initiatives](#)

[Multiple Sclerosis](#)

Providing clean water and sanitation

[Menstrual Health and Hygiene](#)

[Water, Sanitation and Hygiene](#)

Saving mothers and children

[Clubfoot](#)

[Reproductive Maternal and Child Health](#)

Supporting education

[Basic Education and Literacy](#)

Growing local economies

[Community Economic Development](#)

[Disaster Assistance](#)

Protecting the environment

[Endangered Species](#)

[Environmental Sustainability](#)

Action groups that work in more than one area of focus

[Food Plant Solutions](#)

Autonomous, international groups, Rotarian Action Groups provide assistance and support to Rotary clubs and districts in planning and implementing service projects in their respective areas of expertise. They are comprised of Rotarians, Rotarian spouses and Rotaractors who have expertise in and a passion for a particular type of service.

Rotary Fellowships (just a sampling, there are more!)

- 4x4 vehicles
- Amateur Radio
- Antique Automobiles
- Badminton
- Bathhouse
- Beard and Moustache
- Bee
- Beer
- Bird Watching
- Caravanning
- Chess
- Comedy
- Computer Users
- Corporate Social Responsibility
- Cricket
- Cruising
- Cultural Heritage
- Curling
- Cycling
- Doll Lovers
- Draughts (Checkers)
- E-Clubs
- Editors and Publishers
- Educators
- Environment
- Esperanto
- Ethics
- European Philosophy
- Executive Managers
- Fishing
- Flying
- Genealogists
- Gin
- Go
- Golf
- Gourmet Cooking
- Graphic Designers
- Healthcare Professionals
- Hiking
- Home Exchange
- Honorary Consuls
- Horseback Riding
- Hunting
- Internet
- Italian Culture
- Jazz
- Latin Culture
- Lawyers
- LGBT
- Magicians
- Magna Graecia
- Marathon Running
- Metalhead
- Military Veterans
- Motorcycling
- Music
- Old and Rare Books
- Palmwine
- Past District Governors
- Peace Fellows
- Photographers
- Police and Law Enforcement
- Public Health
- Quilters and Fiber Artists
- Railroads
- Recreational Vehicles
- Rotary Global History
- Rotary Heritage and History
- Rotary Means Business
- Rotary on Pins
- Rotary on Stamps
- Rowing
- Scouting
- Scuba
- Shooting Sport
- Singles
- Skiing
- Social Networks
- Strategic Planning
- Surfing
- Table Tennis
- Tennis
- Travel and Hosting
- Triathlon
- Wellness and Fitness
- Whisk(e)y
- Wildlife Conservation
- Wine
- Yachting
- Yoga

Local or Regional Programs

- ❖ **Rotary Leadership Institute – Sunshine Division**
- ❖ **District Initiatives**
- ❖ **Other?**

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PROCESS:

- This is the opportunity for participants to discuss local or regional projects. Especially informative if there is a mix of club/district participants.

NOTES:

- Florida: Rotary Camp Florida
- 6930: Josh the Otter
- Georgia: Laws of Life
- Georgia: GRSP Georgia Rotary Student Program
- 6990: Helicopter Golf Ball Drop; Black Stallion Literacy Project
- Z34: Caribbean Partnership
- Nationwide - The CART Fund (Coins for Alzheimer's Research Trust)

Summary

- ❖ **Many opportunities for the advancement of the Objects of Rotary go unnoticed.**
- ❖ **Opportunities abound at various levels of Rotary.**

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NOTES:



SESSION GOALS:

- Examine the concept of “vocational service” and why it is important to Rotary Clubs
- Reflect on whether Rotarians can affect business ethics and how.
- Discuss the vocational projects that Rotary Clubs perform and the impact they have.
- What is your goal for this class?

RESOURCE MATERIALS:

- The 4-Way Test (included)
- Rotary Code of Conduct
- Applying the 4-Way Test (booklet) www.4waytest.org
- Vocational Service Month - January
- Zone Rotary Coordinator Team <https://www.rizones33-34.org/zone-coordinators/>

NOTES:

- The Rotary Code of Conduct (formerly known as the “Declaration of Rotarians in Business and Professions”) is included in the student guide. Discuss: This is the oath we take as a Rotarian. How do you feel about this?

Preparation: No special prep is needed.



What is Vocational Service

Why is Vocational Service an important element of Rotary?



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PROCESS:

- Why is vocational service important? Or is it?
- What was the role of vocational service in the founding of Rotary?
- How did the principles of one's vocation shape early Rotary ideals and practice?

NOTES:

- Have your ethics ever been tested and how did you respond?
- Use Herb Taylor as an example of ethics (the author of The 4-Way Test)
- How do you use your vocation to help others?
- Share the story of "Walgreen's": Charles R. Walgreen, Jr., a Rotarian, made sure The 4-Way Test was in every Walgreen's store. Today, you can still find The 4-Way Test in each store.

Student Guide Fact: quote from Paul Harris about vocational service:

"Rotarians believe that all honorable vocations are entitled to recognition if they are used in the service of society. With these signs of agreement firmly established, disagreement is almost unknown."

The Second Object of Rotary

- ❖ **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.**

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PROCESS:

- The Object of Rotary, exemplified by the Second Object, is one of the Guiding Principles of Rotary.
- Why is this important to our organization today?

NOTES:

What is Vocational Service

Evolution from Vocational Emphasis to Service

Have any of the early Ethical & Vocational principals carried over to today's Rotary?

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PROCESS:

Discuss a working definition of what Vocational Service is.

Rotary began as a vocational club – men of different professions coming together to network. Within two years, they did their first service project (a comfort station in Chicago).

NOTES:



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

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PROCESS:

- Do you state The Four-Way Test in your club meetings?
- Do you know the history of The Four-Way test? (see note below)

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

In the early 1930s [Herbert J. Taylor](#) set out to save the Club Aluminum Products distribution company from bankruptcy. He believed himself to be the only person in the company with 250 employees who had hope. His recovery plan started with changing the ethical climate of the company.


In the 1940s, when Taylor was an international director of Rotary, he offered the Four Way Test to the organization, and it was adopted by Rotary for its internal and promotional use. Never changed, the twenty-four-word test remains today a central part of the permanent Rotary structure throughout the world and is held as the standard by which all behavior should be measured. The test has been promoted around the world and is used in myriad forms to encourage personal and business ethical practices.^[3] Taylor gave Rotary International the right to use the test in the 1940s and the copyright in 1954. He retained the rights to use the test for himself, his Club Aluminum Company and the Christian Workers Foundation.

- **The Four Way Test is not part of the Rotary By-Laws.**

Ethics & Vocational Service

Can Rotarians Raise The Ethical Standards of Business?

What Does Your Club Do For Vocational Service?



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PROCESS:

- Are you familiar with the Rotary Code of Conduct?
- How can you exemplify integrity in your profession and raise the standard of business ethics in today's world?
- What does your club do for vocational service?
 - For youth?
 - Club members?
 - Your community?
 - Career development?
 - How do you measure results?
- How do ethics impact Diversity, Equity, & Inclusion?

NOTE:

The Rotary Code of Conduct was formerly known as the Declaration of Rotarians in Business and Professions. It was changed in May 2011.

ROTARIAN CODE OF CONDUCT

As a Rotarian, I will:

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





Summary

- **Vocational Service is one of the major motivations for the founding of Rotary – to use our vocational and professional skills to benefit society**
- **Many clubs do Vocational Service, but call it something else – like club, community or international service**
- **Clubs should make a point of utilizing the individual skills of its members in planning and executing its projects**
- **Clubs and its members should be proactive in promoting and exercising the ethical principles of Rotary, the 4-Way Test**

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- Vocational Service is one of the major motivations for the founding of Rotary – to use our vocational and professional skills to benefit society.
- Many clubs do Vocational Service, but call it something else – like club, community, or international service.
- Clubs should make a point of utilizing the individual skills of its members in planning and executing its projects.
- Clubs and its members should be proactive in promoting and exercising the ethical principles of Rotary, The 4-Way Test and the Rotary Code of Conduct.



Part One - The Rotarian



Rotary: The Bigger Picture

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Data as of July 2023 – Districts may change in June 2024

SESSION GOALS:

- Discuss the purpose of Rotary.
- Dissect the layers of the Rotary organization.
- See how each entity can assist your Club.
- What is your goal for this class?

RESOURCE MATERIALS:

- Rotary Basics – RI Publication 595-EN <https://my-cms.rotary.org/en/document/rotary-basics-print>
- A Century of Service: The Story of Rotary International, *David C. Forward*
- Rotary Strategic Plan <https://my.rotary.org/en/document/strategic-plan>
- RI Staff

Preparation:

Consider printing a handout with a “who is who” in District/Zone/RI level with positions/names rather than just names as there usually are multiple districts participating.



Organization

The Club

The Area

The District

The Zone

Rotary International

**The Rotary
Foundation**

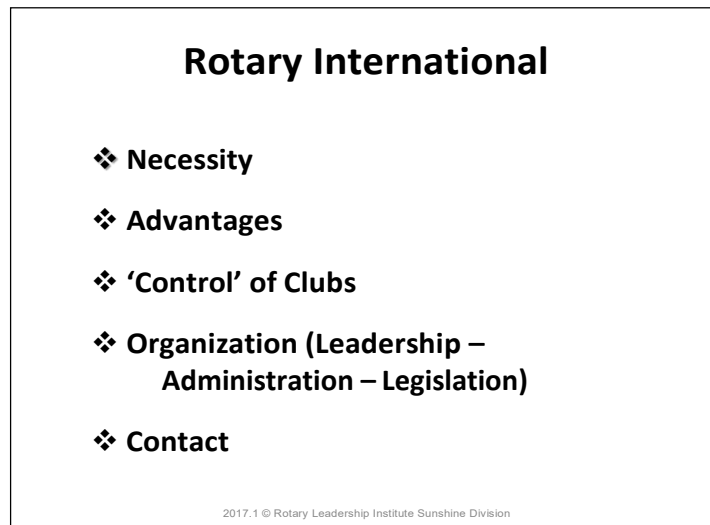
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PROCESS:

- What is the hierarchy of the Rotary organization beginning with the club?
- Why do you think these various levels get smaller in type set (font) the farther down the list we go which in reality represents a greater segment of our organization?
- Why is the Rotary Foundation shown to the side?

NOTES:

Share that The Rotary Foundation is independent of Rotary International and has its own board of directors.



PROCESS:

- Why can't we just have clubs and not worry about these other entities?
- What are the advantages?
 - Discuss the INTERNATIONAL aspect.
- How does Rotary International "control" the clubs?
 - Point out that clubs are autonomous.
 - Is 'control' a good word for this question?
- What is the organizational structure of RI?
 - Might mention:
 - RI President
 - General Secretary (John Hewko)
 - Council on Legislation (meets every 3 years) this is the only way to change our legal documents like the constitution and Manual of Procedure.

NOTES:

The Rotary District

Why do we have Districts?

What does a District Governor do?

How about the Assistant Governors?

Why is the District important to the Club?

Contact

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PROCESS:

- Why do we have Districts?
 - *"A district is a group of clubs within a geographical boundary established by the Board. The purpose of a district is to strengthen and support clubs." (Rotary Code of Policy April 2019 17.010.1)*
- What does a District Governor do?
- What does an Assistant Governor do?
- How is the District important to our clubs?
- What communications methods are available between the Club and the District?

Website

DaCdb or similar program

Newsletters

Other Social media

Blog

Facebook

Rotary Minute or Minutarian

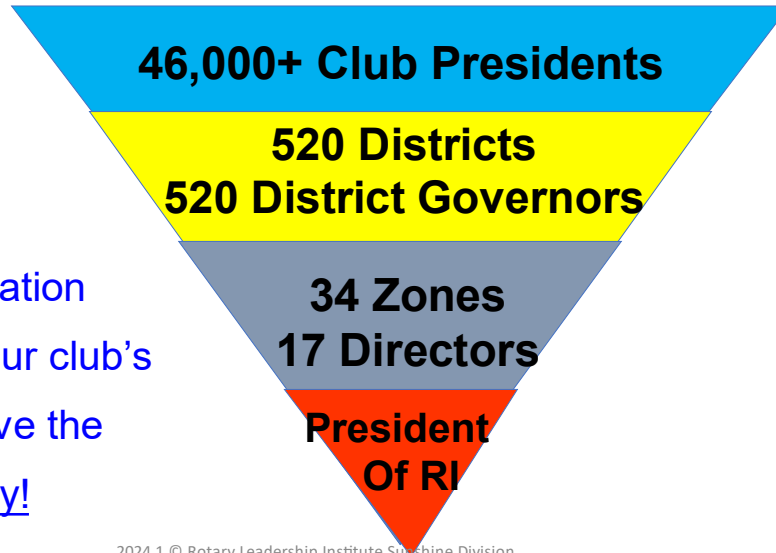
NOTES:



Overview

1.4 Million Members in 46,000+ Clubs

The Purpose
of the entire
Rotary Organization
is to support your club's
efforts to achieve the
Object of Rotary!



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PROCESS:

- Why is the pyramid inverted?
- How many members does your club have?
- How many members does your district have? How many clubs?
- Where would an Assistant Governor fall on this org chart?
- Where would a Rotary Coordinator fall on this org chart?
- What is the purpose of all those positions, beyond that of the Club President?

NOTES:

- Rotaractors are essentially a membership classification and now have access to the Rotary website. The "46,000+ Clubs" include both Rotary and Rotaract clubs.

Student Guide Facts:

There are 8 Districts & 381 Clubs in Florida.

There are 3 Districts & 200 clubs in Georgia.

There are 3 Districts & about 209 clubs in the Caribbean.

Summary

**What is the purpose of Rotary: The Bigger
Picture**

**To assist you and your Club
in achieving the
Object of Rotary**

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NOTES:



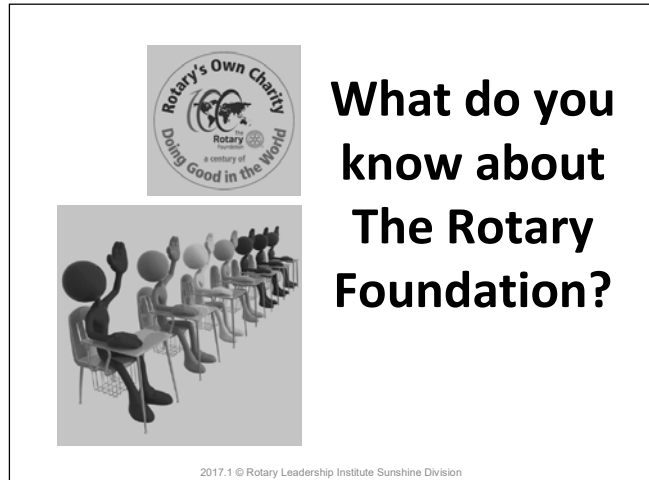
SESSION GOALS:

- Review the basic goals, programs, and financing of The Rotary Foundation
- Discuss the importance and value of The Rotary Foundation to clubs and Rotary International
- Discuss the reasons the Foundation is important to the individual Rotarian.
- What is your goal for this class?

RESOURCES:

- The Rotary Foundation Reference Guide (Rotary Foundation Publication 219en) <https://my.rotary.org/en/document/rotary-foundation-reference-guide>
- Foundation Facts 2022 <https://my.rotary.org/en/document/rotary-foundation-facts>
- Rotary Learning Center www.rotary.org/myrotary/en/learning-reference
- Regional Rotary Foundation Coordinator Team
- Rotary and Polio Resources <https://www.endpolio.org/resource-center#education>
- Disaster Response Fund <https://rotary.planmygift.org/documents/R/rotary-international-foundation/pdf-guidelines-disaster-response.pdf>
- CDC What is Polio? <https://www.cdc.gov/polio/what-is-polio/index.htm>
- Rotary.org
- charitynavigator.org (check us out)

Preparation: as a DL for RLI, you are discussing the Foundation in general terms, NOT as it applies to the practices of a specific district. Every district handles aspects of the Foundation differently. Please save specific district practices for Assemblies and Foundation seminars. Remember, this module is about how an *individual Rotarian* works with the Foundation. Avoid saying “in my district...”



PROCESS:

- This question can go a bunch of different directions and that's ok. If the comments are good and not repetitive, it is ok to let the class cover much of the following slides before they ever see them.

NOTES:

Fact in Student Guide: The Rotary Foundation was started by Arch Klumph in Atlanta, Georgia! (in 1917)

Fact in Student Guide: The Rotary Foundation was started with \$26.50 from the Rotary Club of Kansas City, MO.

Mission Statement



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.

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PROCESS:

- Transition slide to understanding the Foundation.
- Question:
 - How does the Foundation do this? Rotarians & Grants (only a Rotarian can write a grant! The Foundation can't)

NOTES:



TRF Basics

1. We donate money

**2. The money is used to
Do Good in the World**



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PROCESS:

- This is the absolute simplest explanation of the Foundation and should sum up what they know about the Foundation.
- Goal is to make the Foundation simple to understand and demystify it for the average Rotarian.

NOTE: The Rotary Foundation is a not-for-profit corporation that supports the efforts of Rotary International to achieve world understanding and peace through international humanitarian, educational, and cultural exchange programs. Remember, the Rotary Foundation is independent from Rotary International.

NOTES:

Giving Money

- Who can give to the Foundation?
- How can you give?
- Why should you give?

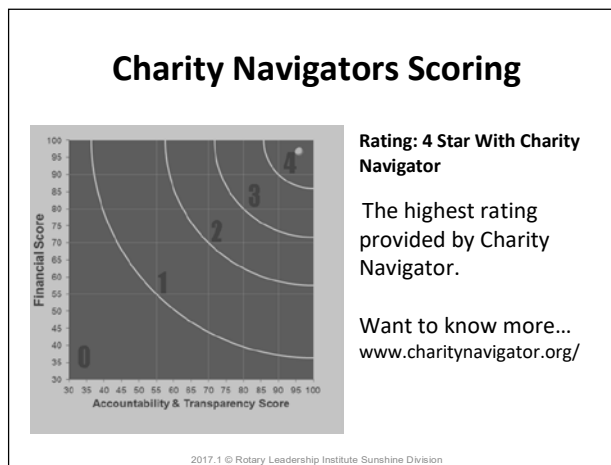
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PROCESS:

- Present the questions one at a time for discussion.
- Under “who can give” – make sure they mention people who are not Rotarians! Companies, organizations, and your next-door neighbor. Anyone can give!

NOTES:

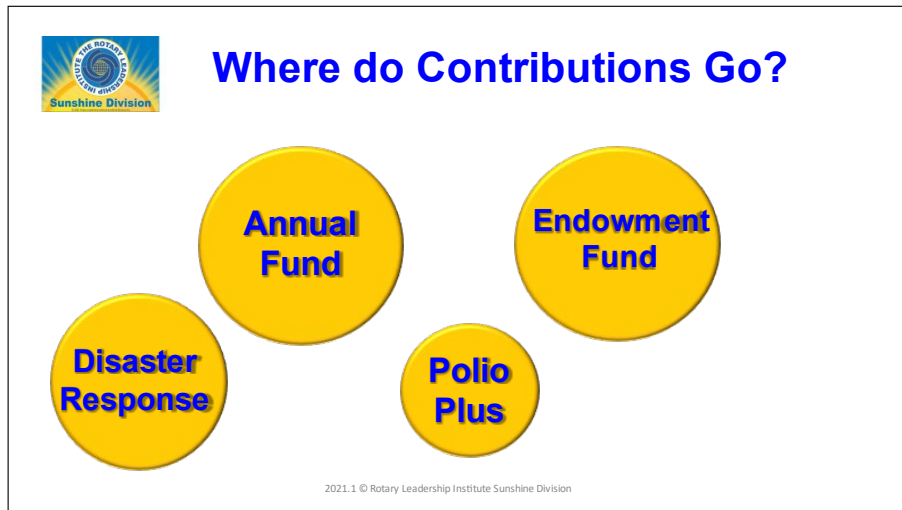
- List some of the ways you can give to the Foundation (PHF, EREY, etc)



PROCESS:

- Encourage attendees to go to Charity Navigator and look up some of their favorite or well-known charities. Four major cancer charities were fined in excess of \$75 million in 2015, after raising over \$187 million. Two of them were shut down amidst ongoing investigations. Lots of other charities may skirt the edge. Might this have been prevented by using Charity Navigator or other available rating agencies?
- The Rotary Foundation has scored a perfect 4 for 15 years so far! (as of October 2023)
- Question: do you know anything about other charities you might support?

NOTES:



PROCESS:

- Brief discussion on the flow of funds and where contributions can go.
- Annual Fund and Endowment Fund are **investment funds**.
- PolioPlus and Disaster Response are a pass-through accounts (funds spent immediately)
- IF it comes up: The Peace Fellow Fund is a pass-through account as well.
- Discuss where different types of giving default:
 - “live money” defaults to Annual Fund (money given while you live)
 - “dead money” defaults to Endowment Fund (money left in wills, etc)
 - Donors can specify where the money goes no matter which investment fund they use.

NOTES

Try to avoid going into a discussion about points.



The Annual Fund




- The first choice of many Rotarians
- Primary source of grant funding
- Invested for 3 years and the interest is used to fund TRF operating expenses
- Returned as SHARE
- Often billed on your club invoice or through Rotary Direct

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PROCESS:

- Question: how many of your club's bill Foundation giving on the club invoice?
- How many of you go to Rotary.org to make your donations?
- Does anyone do Rotary Direct? If yes, can they explain it?
- Why is this the first choice?
- This is the default fund for money given while you are alive (PHF, Major Donor, EREY, etc)

NOTES:



The Endowment Fund



- Permanently invested, the corpus is never touched
- The interest is spent as directed by the donor
- Often designated in a will or as a beneficiary
- Ensures the long-term viability of the Foundation's grants & programs


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PROCESS:

- This is the default fund for money given after your death (Bequest, Benefactor)
- What is the estimated value of the Endowment Fund Today? As of June 2023 the fund has \$678.6 million in hand and commitments of \$948 million. (total: \$1.63 Billion)
- Only the earnings are spent. In 2022-23 that was \$25.8 Million
- By comparison, does anyone know the value of Harvard's endowed Fund?

Estimated to be over \$35 Billion!

NOTES:



Disaster Response



- Money cannot be designated for a particular disaster
- Can only be spent on Disasters


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PROCESS:


- This is a new fund created in 2019.
- It has been used for natural disasters, Covid response, and in Ukraine.
- Money can NOT be designated for a specific disaster.

NOTES:

- Only if you are asked – Yes, you get Paul Harris points for donating to this fund.



Polio Plus



- Money is committed and spent as it comes in
- Can only be spent on Polio
- Gates Foundation match is 2 to 1
- When Polio is gone, so is this account!

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Why is Rotary committed to eradicating polio?

Adopted by the Board of Trustees January 2015, submitted to the 2016 COL

IT IS RESOLVED by the 2016 Council on Legislation that Rotary International

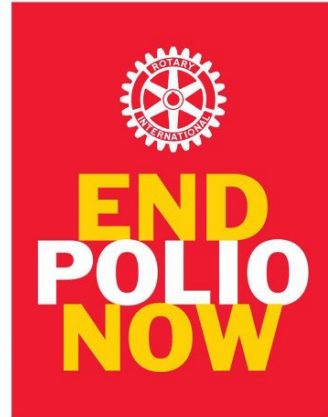
- affirms and endorses that the goal of certification of the worldwide eradication of all polioviruses is of the highest priority for this association,
- affirms that no other corporate project should be adopted until the certification of the eradication of the all polioviruses, and
- confirms that, in accordance with 2004 Council on Legislation Resolution 04-525, no other corporate program will be adopted until approved by a subsequent Council.

Note: This resolution stays in effect until Polio is eradicated or until the COL reverses it



Polio

The Rotary Board of Directors “affirms and endorses that the goal of certification of the worldwide eradication of all polioviruses is of the highest priority for this association”



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PROCESS:

- Ask the class for some current polio data: cases, where, etc?
- Come prepared with the current data.
- We already saw that Polio is the highest priority. What should Rotary do after polio?

NOTES:



Contribution Recognitions

- Sustaining Member
- Paul Harris Fellow
- Paul Harris Society
- Polio Plus Society
- Major Donor
- Arch Klumph Society
- Benefactor
- Bequest Society
- EREY/Sustaining
- 100% Foundation Giving Club
- 100% PHF Club
- 100% Paul Harris Society Club
- Rotary Promise Club
- Top 3 Per Capita Clubs



EVERY
ROTARIAN
EVERY
YEAR

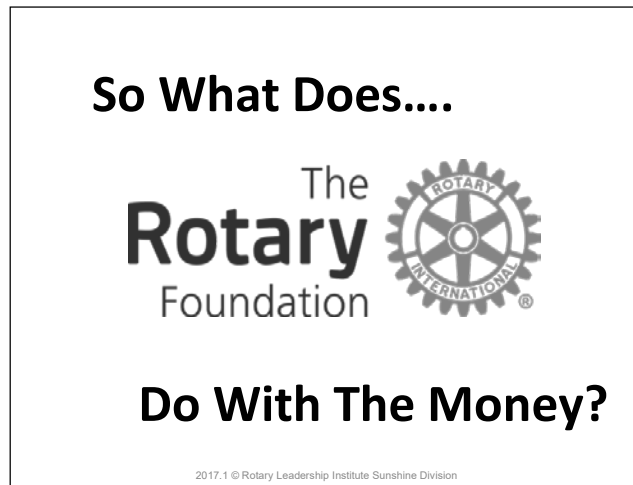


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PROCESS:

- Before showing the slide, let the class name the recognitions they are aware of. Use a scribe. See if they have some not on the slide.
- If you have a collection of recognition materials, please bring for show and tell.
- Ask who might be wearing some recognition pins today.
- The Paul Harris Society began in 2013 and now has members in 151 countries!
- The Polio Plus Society began in 2021 and recognizes your commitment to donate \$100 annually to Polio Plus
- Rotary Promise Club is a certificate to the club when all members commit to at least \$1000 to the Endowment Fund

NOTES:



PROCESS:

- Let the class discuss this question. Don't ask about programs yet. Go for the big picture – Doing Good in the World. Only clubs can submit grants, the Foundation can't spend a dime without them!

NOTES:

Rotary Foundation Basics

Doing Good in the World

The Rotary Foundation helps clubs coordinate and fund viable humanitarian projects and educational opportunities.



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Doing Good in the World



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Ask what programs the class is aware of before going to next slide.



Foundation Programs

- District Grants
- Global Grants
- Scholars
- Vocational Training Teams
- Polio eradication
- Peace Scholars
- Disaster Relief







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PROCESS:

- Did the class come up with others?

NOTES:

The pin in the picture is an Alumni pin.

The Foundation has awarded over \$4.9 BILLION in grants since 1947.



TRF Seven Areas of Focus

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development
- Supporting the Environment



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PROCESS:

- Ask the class if they know the areas of focus.
- Have a scribe list them.
- Ask for some project examples.
- Ask if they can think of anything worthy to fund, that doesn't fall in an area of focus.

NOTE: The areas of focus pictures are in the same order as the listing!!

NOTES:

Foundation Basics

Why should Rotarians care about
The Rotary Foundation?

What is the
Fourth Object of Rotary?

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

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PROCESS:

Why should your club and members care about the Foundation?

What is the Fourth Object of Rotary?

Do you see how the Foundation ties back to the Object of Rotary?

Do you see how the Foundation ties to our Vision Statement?



Rotary's Vision



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Check Out These Resources!

- ❖ Ask your club's Rotary Foundation Chair
- ❖ Attend your District's Rotary Foundation Seminar! Grant Seminar!
- ❖ Your District's Rotary Foundation Chair
- ❖ Your Assistant Governor
- ❖ Your District Governor
- ❖ Your Assistant Regional Rotary Foundation Coordinator
- ❖ Your Zone Regional Rotary Foundation Coordinator
- ❖ Parts 2 & 3 of Rotary Leadership Institute!

All these folks are here to help you & your club!

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PROCESS:

- Ask the class to list (use a scribe) the various Foundation resources they have.
- The list will come up on the next slide.
- What is the Fourth Object of Rotary?
- Ask if they see how the Foundation ties back to the Object of Rotary?

NOTES:

NOTE: additional resources; Zone Major Gifts Officer, an employee of TRF; The Annual Giving Officer, also an employee of TR.

Ask if they know who works with our area (they may not know the word zone yet)



Summary

- The Rotary Foundation is the resource for grants for both local and international service.
- The Rotary Foundation is separate from Rotary International
- The Rotary Foundation is top rated by independent charity rating agencies.

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NOTE: always take the opportunity to promote the next RLI!

NOTES:

Some Foundation Facts

Rotary Centers for International Studies in Peace and Conflict Resolution:

There are 7 Rotary Peace Centers located around the world,

- Bahçeşehir University (BAU), Istanbul, Turkey (certificate only)
- Duke University and UNC at Chapel Hill, USA
- International Christian University, Tokyo, Japan
- University of Bradford, Bradford, England
- University of Queensland, Brisbane, Australia
- Uppsala University, Uppsala, Sweden
- Makerere University, Kampala, Uganda (certificate only)

PolioPlus:

- PolioPlus grants provide polio vaccines and mobilize community resources to support international efforts to immunize children and eradicate polio worldwide. Rotarians' contributions to the global polio eradication effort exceed \$1.5 billion and have immunized over 2.5 billion children. The Bill and Melinda Gates Foundation has partnered with Rotary and to date contributed well over \$.5 billion to the effort. They continue to match the first \$50 million Rotary raises every year, through 2025, 2 to 1. That's up to \$100 million in additional funds to the effort, every year.
- The "Plus" in Polio Plus is for the 5 other children's diseases covered in the vaccination: Measles, diphtheria, tetanus, whooping cough, and tuberculosis.

PolioPlus Partners:

- Rotary has teamed up with the United National Foundation, World Health Organization, the US Centers for Disease Control (CDC), the Bill & Melinda Gates Foundation, United Nations Children's Fund (UNICEF)
- Rotary clubs, districts, and individual Rotarians may voluntarily help reach Rotary's goal of a polio-free world. As PolioPlus Partners, individuals may volunteer in National Immunization Days (NIDs) and provide resources at risk for polio.

ADDITIONAL FOUNDATION FACTS:

Humanitarian Programs

A prerequisite for Rotary Foundation grant support, except for District Grants is that a project must be international. To be considered international, a project must involve active participation by a reasonable number of Rotarians in the benefiting country and at least one other country.

- District Grants. District grants provide an opportunity for districts to use a portion of their District Designated Funds (DDF) to implement humanitarian projects. Districts may choose to undertake a large service project or support endeavors of clubs. Maximum funding is 50% of the district's newly credited DDF.
- Global Grants. Global Grants assist Rotary clubs and districts in carrying out humanitarian service projects in cooperation with a Rotary Club or district in another country. Grants fund projects addressing one or more of the Seven Areas of Focus, with required means to address sustainability after completion. The minimum project size is \$30,000.

Vocational Training Teams

Vocational training teams are groups of professionals traveling abroad to either learn more about their profession or teach local professionals about a particular field.

The team...

- May build the capacity of either the team itself or a specific beneficiary community
- May be carried out in conjunction with a humanitarian project or scholarship
- May be multi-vocational but must share a common purpose in support of the selected area of focus
- Must consist of a minimum of one Rotarian team leader and three non-Rotarian team members with no maximum limit of participants
- Have no restrictions on participant age or length of time for training
- Permit one or more teams to travel under each grant

Vocational training teams may have more than one Rotarian participant.

Wrap-Up

- ❖ **What did you get out of today?**
- ❖ **How are you going to use what you learned today?**
- ❖ **Could we have made the learning experience any better for you?**

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- Thank them again for sharing the day to learn a bit more about Rotary.
- Ask them to make sure they have filled out all the evaluations and hopefully made some comments.
- Inform them where to round up one last time for graduation ceremonies!
- Ask them to take the evaluations to the last general meeting and turn them in.
- Student guide includes one page of Rotary Acronyms

**Be sure to ask them back to Part 2
and remind them that RLI is also available online.**

Direct them to the room where class photos will be taken!