



2021 INTERNATIONAL ASSEMBLY **LEADER'S GUIDE**

INTRODUCTION



The 2021 Virtual International Assembly Leader's Guide is designed to help you lead discussions in the breakout sessions of the assembly. The guide provides a detailed outline of the content to be covered.

We are pleased to welcome a select group of Rotaract participants to this year's International Assembly. Rotaractors will participate in all sessions with governors-elect.

The participant workbook, which each governor-elect and Rotaractor receives, is a companion to this leader's guide. You will also receive a copy.

In the discussions you will facilitate, participants will exchange ideas with fellow leaders by using the chat function or by being called on to share aloud. The discussions and activities will give participants a chance to learn from one another and share their knowledge and experiences. Although you will need to be flexible and sensitive to group dynamics during discussions, we ask that you cover all of the content for each session to ensure that all participants receive standardized training. Use the questions provided in this guide to direct the discussion.

Sessions are conducted by RI training leaders unless otherwise noted. If you have any questions about the content, please ask them at the leaders seminar.

HOW TO USE THE LEADER'S GUIDE

The guide for each session starts with these elements:

Learning objectives

This lists what each participant should learn during the session. Review the learning objectives with the participants at the start and end of each session. These objectives are also listed in the workbook.

Workbook

This lists the workbook pages and topics that the session will mention.

Timeline

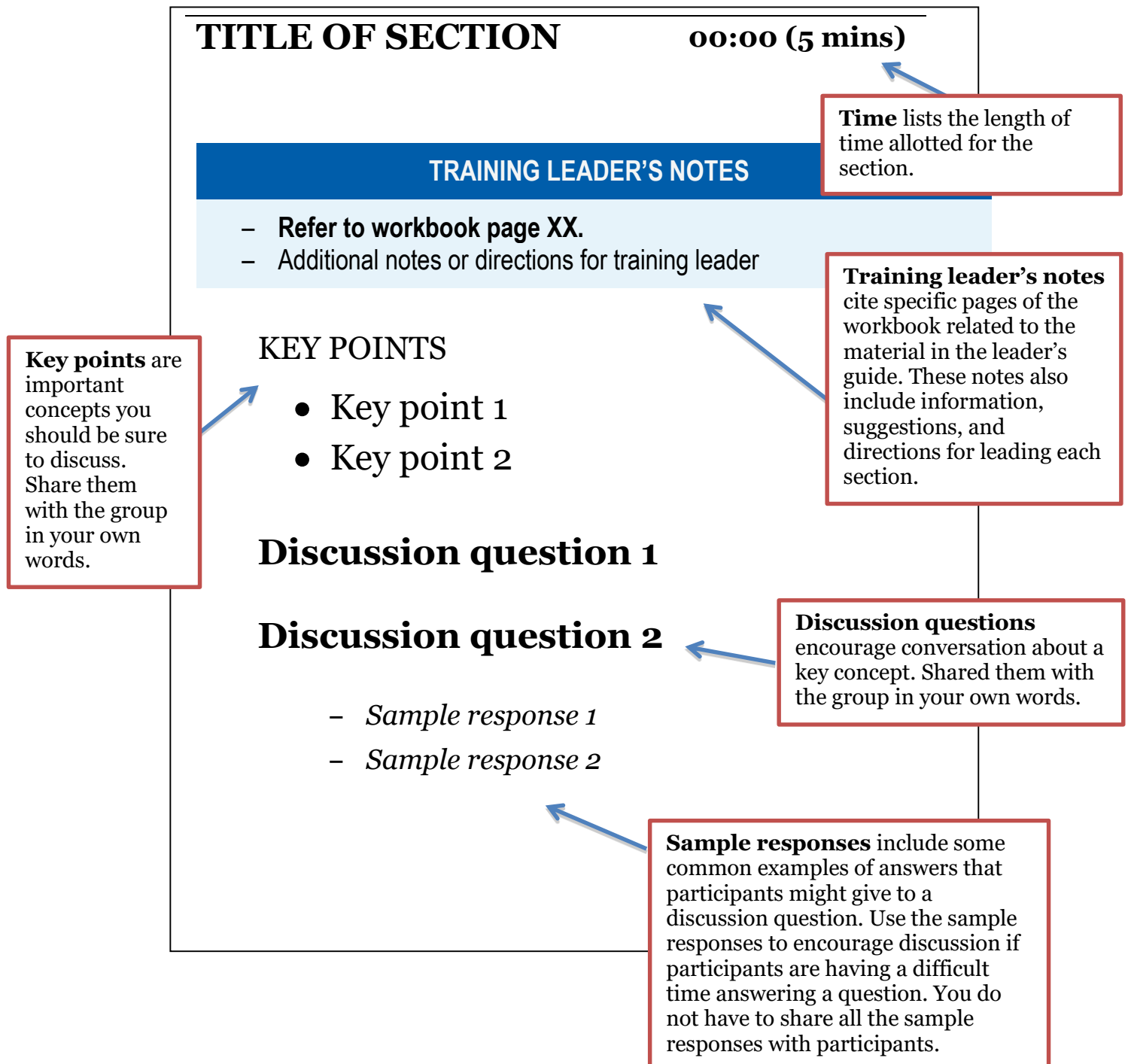
This lists the sections of the session and how much time to spend on each one. This is helpful for planning how to cover all the information in the allotted time.

Closing each session

At the end of each session, time is allotted for you to review the learning objectives and discuss any issues that were not covered. Time is also allotted for participants to write an action item in their workbooks.

INSIDE THE LEADER'S GUIDE

Each session guide contains these components:



SESSIONS

Our Journey Together

Expanding Our Reach

#PeopleOfAction

The Impact of Our Service

Enhancing the Rotary Experience

Ready, Set, ACTION!

Session 1

Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, participants will be able to:

1. Use the 2021-22 presidential theme to inspire clubs to adopt Rotary's vision statement.
2. Plan how to use goal setting to strengthen clubs.
3. Identify and apply a range of leadership styles.

WORKBOOK

Page 1	Learning Objectives
Page 1	Rotary's Past and Future
Page 2	Goal Setting Helps Grow Rotary
Page 3	Preparing to Lead
Page 3	Leadership Styles
Page 21	Action Plans for 2021-22

TIMELINE

Introduction	00:00 (10 min.)
The Year Ahead	00:10 (15 min.)
Rotary's Past and Future	00:25 (20 min.)
Goal Setting Helps Grow Rotary	00:45 (15 min.)
Preparing to Lead	01:00 (20 min.)
Review and Action Item	01:20 (10 min.)

TRAINING LEADER'S NOTES

- Welcome participants to the 2021 Virtual International Assembly.
- Note that Rotaractors and governors-elect are participating together in all sessions during the assembly.
- Ask participants to edit their screen name so it includes their name and country.
- Briefly introduce yourself by sharing your name and country and describing the role of the training leader.
- Using your participant list for reference, call on each participant individually. Ask participants to unmute their microphones and say their name and country when you call on them.
- Remind participants of the following:
 - Stay engaged in the session and refrain from browsing the internet or checking email.
 - Be respectful of your fellow participants and patient with one another and the technology.
 - Turn on your video whenever possible.
 - Mute your microphone unless you are speaking.
 - Have your workbook (printed or digital) available so you can follow along and take notes.
- **Refer to workbook page 1, Learning Objectives.**
- Ask participants to write your name at the top of the page to help them complete the session evaluation later.
- Review the learning objectives:
 1. *Use the 2021-22 presidential theme to inspire clubs to adopt Rotary's vision statement.*
 2. *Plan how to use goal setting to strengthen clubs.*
 3. *Identify and apply a range of leadership styles.*
- Tell participants that at the end of each session, they will write an action item. **They will use these action items to complete an activity in the last session.**

TRAINING LEADER'S NOTES

- For some questions in the leader's guide, you will invite one or two participants to unmute their microphones and speak. For other questions, you will encourage participants to respond in the chat box.
- When you ask participants to raise their hands, some may use the "raise hand" feature in the software, and some may raise their hands in their video. Look for both so everyone will have an opportunity to respond.
- Throughout the session, try to involve all participants and ensure that everyone who wants to speak has a chance.

KEY POINT

- You heard the presidential theme during the opening session. The theme helps communicate the president-elect's goals for the year and brings Rotarians and Rotaractors together around a common idea.

TRAINING LEADER'S NOTE

- Ask participants to use the chat box to answer the following question.

What are your first reactions to the theme?**TRAINING LEADER'S NOTES**

- As participants type comments, read a few aloud along with the commenters' first names.
- After sharing a few responses from the chat box, invite participants to raise their hands to answer the following question.
- Remind participants to unmute themselves when called on to speak.
- Call on two or three participants who raise their hands.

What other ideas from the president-elect's speech made an impact on you?

TRAINING LEADER'S NOTES

- Refer to workbook page 1, **Rotary's Past and Future**.
- Read Rotary's vision statement and core values aloud.
- Ask participants to use the chat box to answer the following question.

How does the presidential theme communicate our core values?**TRAINING LEADER'S NOTES**

- Remind governors-elect that they discussed Rotary's Action Plan at the governors-elect training seminar (GETS), focusing on opportunities and challenges the plan might present in their districts.
- Ask Rotaract participants to indicate whether they are familiar with the Action Plan by raising their hands.
- Refer to workbook page 26, **Rotary's Action Plan**.
- Allow 1-2 minutes to review.
- Allow 5 minutes for participants to raise their hands to answer the following question.

How are our core values evident in Rotary today?**KEY POINTS**

- Rotary's core values have always been at the center of our organization and still inspire our members, our clubs, and our strategic priorities.
- Rotary's Action Plan guides the actions of Rotary at every level.
- Some members may find it challenging to adapt to new strategic priorities. Throughout the week, we'll talk about how to help them through this change.

TRAINING LEADER'S NOTE

- Allow 5 minutes for participants to raise their hands to answer the following question.

How do you plan to help clubs understand and support Rotary's Action Plan?

KEY POINTS

- Our Action Plan is a roadmap for Rotary International and The Rotary Foundation.
- Every club will implement the Action Plan differently.
- Club leaders will need to think about what works best, and what is needed, in their club, community, and region.
- It is important for district governors to communicate the priorities and objectives of the Action Plan in their own words, and in ways that inspire club leaders.

GOAL SETTING HELPS GROW ROTARY

00:45 (15 min.)

Raise your hand if your club has ever received the Rotary Citation.

KEY POINTS

- Clubs in your district may have pursued the Rotary Citation in the past; however, Rotary is now taking a new approach.
- To shift the emphasis from earning the citation to making progress toward goals, we'll focus on clubs setting their own goals in Rotary Club Central and working to achieve them.
- We hope that as clubs set their own goals, they'll choose goals that are more meaningful and effective.
- Clubs should consider the citation to be a recognition of their great work rather than a driver of their priorities for the year.
- Rotary will no longer publish a citation brochure.

TRAINING LEADER'S NOTE

- Refer to workbook page 2, **Goal Setting Helps Grow Rotary**.
- Allow 3 minutes for participants to raise their hands to answer the following question.

How does goal setting help us achieve Rotary's strategic priorities and objectives?

TRAINING LEADER'S NOTES

- Allow 1-2 minutes for participants to review the workbook section What You Need to Know About the 2021-22 Rotary Citation and then ask the following question.

How will you support clubs' progress toward their goals?

PREPARING TO LEAD

01:00 (20 min.)

TRAINING LEADER'S NOTES

- **Refer to workbook page 3, Preparing to Lead.**
- Ask participants to think about a person who they think is a good leader. This person can be a world leader, historical figure, or someone they know. Ask participants to write a few qualities of a good leader in their workbook.
- Ask participants to take 1-2 minutes to write a few of their own leadership qualities and a few they strive for.
- Allow 2-3 minutes for participants to raise their hands to share the leadership qualities they have and those they strive for.

KEY POINTS

- Remember that you are leading leaders — other professionals with significant resources, experiences, and perspectives.
- Strategies for managing and motivating volunteers on the district team differ sharply from business management strategies.

TRAINING LEADER'S NOTES

- **Refer to workbook page 3, Leadership Styles.**
- Allow 1-2 minutes for participants to review the eight leadership archetypes identified by the Harvard Business Review, a management and leadership magazine from Harvard University.

KEY POINTS

- There are many different ways to identify and categorize leadership styles.
- This list from the Harvard Business Review is just one example. Styles toward the top of the list are more collaborative. Styles toward the bottom of the list are more independent.

TRAINING LEADER'S NOTE

- Let participants know they will work in small groups for 5-7 minutes to discuss which leadership styles they identify with and the two questions in their workbook below the leadership styles chart:
 - *What adaptations to your leadership approach have you made in the past year, or do you expect to make in the year ahead?*
 - *Though strong leadership is important at all times, what leadership skills become more important during times of crisis?*
- After 5-7 minutes, when participants return from their breakout rooms, ask them to use the chat to share which leadership styles they identified with most.
- Comment on any similarities or themes in what they share.
- With the remaining time, ask participants to raise their hands and share what they discussed in their breakout sessions.

KEY POINTS

- The COVID-19 pandemic has forced Rotary leaders at all levels to adapt the way they lead.
- When your district or a club within the district faces a crisis, you may need to adapt your leadership style to handle the situation.
- During times of crisis, your leadership style must be both collaborative and independent.
- As the leader of your district, you may have to speak for Rotary or make decisions quickly.
- In addition to a pandemic, you, your district, or clubs may face crises such as injury, assault or harassment of a member or program participant, or a crime committed by a member or program participant. Be prepared to lead.

TRAINING LEADER'S NOTES

- **Refer to workbook page 22, Action Plans for 2021-22, in the session Ready, Set, ACTION!**
- Allow 1-2 minutes for participants to read about action plans for 2021-22.
- Explain that they should be ready to discuss their action items for the coming year during the session **Ready, Set, ACTION!**
- Ask participants to choose a learning objective from this session and write an action item in their workbooks.
- Encourage participants to complete the next steps of the activity if time allows. If time does not allow, encourage participants to complete the activity for this session between sessions.
- Make sure that all questions from the discussion have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Refer to the list of linked resources in the back of the workbook.
- Thank participants.

EXPANDING OUR REACH



Session 2

Duration: 60 minutes

LEARNING OBJECTIVES

At the end of the session, participants will be able to:

1. Understand the current status of Rotary's membership.
2. Implement strategies for identifying and attracting new members.
3. Identify opportunities to start new clubs.

WORKBOOK

Page 5	Learning Objectives
Page 5	Our Membership
Page 6	Attracting New Members
Page 6	Each One, Bring One
Page 7	Starting New Clubs

TIMELINE

Introduction	00:00 (5 min.)
Our Membership	00:05 (15 min.)
Membership in the Year Ahead	00:20 (20 min.)
Starting New Clubs	00:40 (15 min.)
Review and Action Item	0:55 (5 min.)

TRAINING LEADER'S NOTES

- Welcome participants to the session.
- Ask participants to edit their screen name so it includes their name and country.
- Briefly introduce yourself by sharing your name and country and describing the role of the training leader.
- Using your participant list for reference, call on each participant individually. Ask participants to unmute their microphones and say their name and country when you call on them.
- Remind participants to mute their microphones unless they are speaking.
- Remind participants to follow along and take notes in their workbook during the session.
- **Refer to workbook page 5, Expanding Our Reach.**
- Ask participants to write your name at the top of the page to help them complete the session evaluation later.
- Review the learning objectives:
 1. *Understand the current status of Rotary's membership.*
 2. *Implement strategies for identifying and attracting new members.*
 3. *Identify opportunities to start new clubs.*

TRAINING LEADER'S NOTE

- Refer to workbook page 5, Our Membership.
- Allow 1-2 minutes for participants to look at the chart.
- Allow 3 minutes for participants to raise their hands to answer the following question.

Why has Rotaract continued to attract new members while Rotary has stopped growing?**KEY POINTS**

- Rotary's membership numbers have been stagnant for many years, and recent global circumstances have made engaging our members even more important.
- Elevating Rotaract's status within our organization has increased opportunities for Rotaractors to engage with Rotary.
- Rotary and Rotaract must continue to attract prospective members while also engaging current members.

TRAINING LEADER'S NOTE

- Allow 3-5 minutes for participants to raise their hands to answer the following question.

The 2019 Council on Legislation made Rotaract clubs a membership type. How has your district changed since?**TRAINING LEADER'S NOTE**

- Allow 3-5 minutes for participants to raise their hands to answer the following question.

What might be different about a club that attracts young leaders?

TRAINING LEADER'S NOTES

- Refer to workbook page 6, **Attracting New Members**.
- Tell participants that today you will focus on attracting new members. Later in the week, during the session **Enhancing the Rotary Experience**, they will discuss ways to keep current members and program participants involved.
- Ask participants to use the chat box to answer the following questions.

Who are potential members in your district? Are those potential members different for Rotary and Rotaract?

Raise your hand if you are familiar with membership leads.

KEY POINTS

- Last year, more than 20,000 membership candidates expressed interest in joining a club through rotary.org/join.
- Unfortunately, clubs contacted less than a third of the prospective members assigned to them.
- All clubs share similar values and a passion for service, but no two clubs are the same because each community has its own unique needs.
- One of the goals in the Grow Rotary initiative is to increase the accountability of district membership committees in managing member leads.

TRAINING LEADER'S NOTE

- Allow 3-5 minutes for participants to raise their hands to answer the following questions.

**Who are the underrepresented groups in your district?
How can you help clubs reach out to those potential members?**

TRAINING LEADER'S NOTES

- **Refer to workbook page 6, Each One, Bring One.**
- Ask participants to take 1 minute to think about the president-elect's comments in the general session about how the Each One, Bring One strategy can help grow our membership.
- Let participants know they will work in small groups for 5-7 minutes to write 3-5 messages they can share at club visits to promote the idea. *Sample: "New members are more likely to stay in Rotary if they have a friend or mentor. YOU can be that friend or mentor!"*
- After 5-7 minutes, when participants return from their breakout rooms, ask participants to raise their hands and share one of their messages. Encourage participants to collect as many new ideas as possible.

STARTING NEW CLUBS

00:40 (15 min.)

TRAINING LEADER'S NOTES

- **Refer to workbook page 7, Starting New Clubs.**
- Allow 5 minutes for participants to raise their hands to answer the following question.

If our clubs aren't meeting the needs of our current or prospective members, how can we offer new experiences?

- *Form a committee or empower the members to organize new opportunities in the club.*
- *Encourage the members to visit other clubs in the area to see if they might be a better fit or to get ideas.*
- *Connect the members with others of similar interests and help them form a new club.*
- *Form a satellite club with other interested members.*
- *Find opportunities in the larger Rotary world, such as attending the Rotary International Convention or joining a Rotary Action Group or Rotary Fellowship.*

KEY POINTS

- Clubs can sometimes accommodate the needs of current and prospective members by changing the schedule, frequency, or format of meetings, or offering additional membership types.
- New clubs can offer opportunities for service, fellowship, and leadership that are not currently available in existing clubs.
- New clubs can encourage groups of people not currently represented in your district to become involved in Rotary and Rotaract.

TRAINING LEADER'S NOTES

- Governors-elect should have discussed club models at GETS, but Rotaract participants may be less familiar with the models.
- Refer to the resource list in the back of the workbook for a link to full descriptions of club models.
- Ask participants to use the chat to respond to the following question.

Does anyone have experience starting a nontraditional club, such as a satellite club, a passport club, or a cause-based club?

TRAINING LEADER'S NOTE

- Read the following two questions aloud, then allow 3-5 minutes for participants to respond to the questions in their workbooks.

Existing clubs sometimes view new clubs as competitors. What are three examples of resistance to starting new clubs that you might hear from existing clubs?

What are three ways you can respond to that resistance?

TRAINING LEADER'S NOTES

- Allow 3-5 minutes for participants to raise their hands to share what they wrote in their workbooks.
- If time remains, allow 5 minutes for participants to raise their hands to answer the following question. If no time remains, encourage participants to continue the conversation on the discussion board.

Many new clubs don't survive the first year. How will you work with your successor to ensure new clubs are nurtured and receive the support they need to thrive?

REVIEW AND ACTION ITEM

00:55 (5 min.)

TRAINING LEADER'S NOTES

- **Refer to workbook page 23, Action Plans for 2021-22.**
- Ask participants to write an action item for this session.
- Make sure that all questions from the discussion have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Refer to the list of linked resources in the back of workbook.
- Thank participants.

Session 3

Duration: 75 minutes

LEARNING OBJECTIVES

At the end of the session, participants will be able to:

1. Identify how bigger, better service projects help us position ourselves as people of action.
2. Describe how Rotary's public image is the responsibility of every member.

WORKBOOK

Page 8	Learning Objectives
Page 8	We Are People of Action
Page 9	Our Service
Page 10	Promoting Rotary
Page 10	Case Study
Page 24	Action Plans for 2021-22

TIMELINE

Introduction	00:00 (5 min.)
We Are People of Action	00:05 (45 min.)
Promoting Rotary	00:50 (20 min.)
Review and Action Item	01:10 (5 min.)

TRAINING LEADER'S NOTES

- Welcome participants to the session.
- Ask participants to edit their screen name so it includes their name and country.
- Briefly introduce yourself by sharing your name and country and describing the role of the training leader.
- Using your participant list for reference, call on each participant individually. Ask participants to unmute their microphones and say their name and country when you call on them.
- Remind participants to mute their microphones unless they are speaking.
- Remind participants to follow along and take notes in their workbook during the session.
- **Refer to workbook page 8, #PeopleOfAction.**
- Ask participants to write your name at the top of the page to help them complete the session evaluation later.
- Review the learning objectives:
 1. *Identify how bigger, better service projects help us position ourselves as people of action.*
 2. *Describe how Rotary's public image is the responsibility of every member.*

TRAINING LEADER'S NOTE

- Refer to workbook page 8, We Are People of Action.
- Allow 5 minutes for participants to raise their hands to answer the following question.

How are Rotarians and Rotaractors people of action?**TRAINING LEADER'S NOTES**

- Refer to the 2021-22 Rotary Days of Service brochure.
- Allow participants 1-2 minutes to review the information.
- Allow 5-7 minutes for participants to raise their hands to answer the following question.

How can 2021-22 priorities, such as Rotary Days of Service and a focus on empowering girls, help us position ourselves as people of action?**KEY POINT**

- Rotary Days of Service are intended to inspire Rotary, Rotaract, and Interact clubs to plan hands-on, innovative service projects; to showcase our work as people of action; and to introduce prospective members to Rotary through an experiential day of service.
- We can make an impact in the lives of girls around the world by motivating the Rotary global network to address service projects through the lens of empowering girls.

Think about a recent service project you participated in, either before or during the pandemic. Raise your hand to answer “yes” to the following questions:

- **Were community members invited to participate?**
- **Were the outcomes of the project measurable (such as the number of meals provided, masks donated, or people trained)?**
- **Were these outcomes promoted to the media?**

TRAINING LEADER'S NOTES

- **Refer to workbook page 9, Our Service.**
- Let participants know they will work in small groups for 5-7 minutes to discuss the following questions in their workbook.

How do these three things — inviting community members to participate in projects, planning projects with measurable outcomes, and promoting those outcomes — help us support the priorities of our Action Plan?

How do these actions help us build bigger, better projects?

- Encourage participants to refer to Rotary's Action Plan if they need to.
- When participants return from their breakout rooms, allow 5-7 minutes for participants to raise their hands and share what they discussed.

TRAINING LEADER'S NOTE

- Allow 5 minutes for participants to raise their hands to answer the following question.

Can anyone share an example of a hands-on project in your club or district that was successfully promoted in local media?

What advice will you give Rotaract or Rotary club presidents to help them increase awareness of their clubs and projects?

TRAINING LEADER'S NOTES

- **Refer to workbook page 10, Promoting Rotary.**
- Allow 1-2 minutes for participants to review the Key Market Research Findings.
- Allow 3 minutes for participants to raise their hands to answer the following question.

Why do you think the general public expresses such limited recognition of our name and our work?**KEY POINTS**

- Key market research shows:
 - Most people don't know much about who we are or what we do, even if they recognize our logo or know our name.
 - Close to 60 percent of those surveyed did not know there was a Rotary club in their community.
- Better public awareness of Rotary and the good work that we do:
 - Leads to greater involvement and support
 - Helps us stand out as we compete with other organizations for time, money, and resources
 - Keeps members engaged and enthusiastic about their clubs

TRAINING LEADER'S NOTES

- **Refer to workbook page 10, Case Study.**
- Allow 2-3 minutes for participants to read about the Annual Run Toward Polio Eradication and answer the question in their workbook.
- Allow 3-5 more minutes for participants to raise their hands to answer the following question.

What can we do better to help the general public see us as people of action?

KEY POINTS

- It is important to choose projects that make a lasting impact in our communities and, following our brand guidelines, make sure the district's or club's name is prominent. This will help attract purpose-seeking members.
- It is the responsibility of every member of Rotary and Rotaract to promote Rotary's good work and raise awareness of our programs and offerings.
- The People of Action materials in the Brand Center help clubs tell stories in a consistent and compelling way, and show their communities how Rotary changes lives locally. People of Action ads should feature projects rather than social events or meetings.

TRAINING LEADER'S NOTES

- **Refer to workbook page 26, Rotary's Action Plan.**
- Ask participants to take 1-2 minutes to review the information, with a focus on the second priority, Expand Our Reach.
- Allow 5 minutes for participants to raise their hands to answer the following question.

How will you convey to clubs that enhancing Rotary's public image and expanding our reach is the responsibility of every member?

TRAINING LEADER'S NOTES

- **Refer to workbook page 24, Action Plans for 2021-22.**
- Ask participants to write an action item for this session.
- Make sure that all questions from the discussion have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Refer to the list of linked resources in the back of the workbook.
- Thank participants.

THE IMPACT OF OUR SERVICE



Session 4

Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, participants will be able to:

1. Describe how storytelling can help us engage donors and raise funds for The Rotary Foundation.
2. Assess clubs' involvement in polio eradication efforts.
3. Understand how the areas of focus and global grants increase our impact.
4. Engage the district international service chair to support projects.

WORKBOOK

Page 12	Learning Objectives
Page 12	Funding Our Service
Page 14	Our Role in Polio Eradication
Page 15	Your Polio Message Calendar
Page 16	Global Grants and Areas of Focus
Page 16	Sustainability
Page 17	The District International Service Chair
Page 24	Action Plans for 2021-22

TIMELINE

Introduction	00:00 (5 min.)
Funding Our Service	00:05 (20 min.)
Our Role in Polio Eradication	00:25 (15 min.)
Global Grants and Areas of Focus	00:40 (30 min.)
The District International Service Chair	01:10 (15 min.)
Review and Action Item	01:25 (5 min.)

TRAINING LEADER'S NOTES

- Welcome participants to the session.
- Ask participants to edit their screen name so it includes their name and country.
- Using your participant list for reference, call on each participant individually. Ask participants to unmute themselves and say their name and country when you call on them.
- Remind participants to mute their microphones unless they are speaking.
- Remind participants to follow along and take notes in their workbook during the session.
- **Refer to workbook page 12, Learning Objectives.**
- Ask participants to write your name at the top of the page to help them complete the session evaluation later.
- Review the learning objectives:
 1. *Describe how storytelling can help us engage donors and raise funds for The Rotary Foundation.*
 2. *Assess clubs' involvement in polio eradication efforts.*
 3. *Understand how the areas of focus and global grants increase our impact.*
 4. *Engage the district international service chair to support projects.*

TRAINING LEADER'S NOTES

- Refer to workbook page 12, *Funding Our Service*.
- Allow 5 minutes for participants to raise their hands to answer the following question.

Why do you give to The Rotary Foundation?**KEY POINTS**

- In order to do good in the world, we need to raise funds at the club and district level, and for our Foundation.
- The Annual Fund supports the current work of our clubs and districts and, through SHARE, helps grow our World Fund.
- Without donations to the Annual Fund today, global grants and District Designated Funds (DDF) won't be available for projects in the future.
- The Every Rotarian, Every Year initiative asks every Rotarian to support the Foundation every year.

TRAINING LEADER'S NOTE

- Ask participants to use the chat box to answer the following question.

In your experience, what is the most effective message to encourage members to support the Foundation?**TRAINING LEADER'S NOTE**

- Allow 5 minutes for participants to raise their hands to answer the following question.

How can we use storytelling to engage donors and raise funds for our Foundation?

KEY POINTS

- Personal stories can be an effective way to reinforce key messages.
- In addition to your own stories, you can use those featured on Rotary's communication channels, such as Rotary.org, from both members and project beneficiaries.
- Rotary has created three virtual reality films. Research shows that after watching a VR film, viewers often feel empathy and want to take action.

TRAINING LEADER'S NOTES

- **Refer to workbook page 13** and allow 1 minute for participants to read the information under Connecting a Donor's Passion With an Opportunity to Give and the list of opportunities to give.
- Read about the first prospective donor, opportunity to give, and story aloud.
- Allow 2-3 minutes for participants to read the chart and write one or two stories.
- If time allows, ask participants to raise their hands to share a story that has been effective in cultivating a donor.
- Encourage participants to complete the chart after the session, or to share it with club presidents to give them practice connecting donors with opportunities to give.

TRAINING LEADER'S NOTES

- **Refer to workbook page 14, Our Role in Polio Eradication.**
- Let participants know they will work in small groups for 5-7 minutes to answer the questions in their workbook about their district's efforts toward polio eradication.

Do the clubs in your district:

- *Consistently promote and raise funds for the PolioPlus Fund?*
- *Plan projects and events to promote public awareness of our polio eradication efforts?*
- *Observe World Polio Day?*
- *Know about the Bill & Melinda Gates Foundation's 2-to-1 matching agreement through 2023?*
- *Know that the Trustees of The Rotary Foundation have asked clubs to contribute at least \$1,500 to the PolioPlus Fund every year?*

Governors-elect, does your district:

- *Earmark 20% of its District Designated Funds (DDF) for PolioPlus?*
- *Know that DDF allocations to polio will be matched at 50% by the World Fund?*
- In addition to completing the chart, participants should also discuss the following question in their workbooks:
What is your role in ensuring that clubs know about the End Polio Now campaign and support these efforts?
- After 5-7 minutes, when participants return from their breakout rooms, allow 3-5 minutes for participants to raise their hands to share what they discussed.
- If time remains, discuss the following question.

Rotary has been working to eradicate polio for more than 30 years. Who can share an innovative event or idea to raise funds or awareness of polio eradication?

TRAINING LEADER'S NOTES

- Refer to workbook page 15, Your Polio Message Calendar.
- Tell participants that this sample calendar can be a helpful resource for planning polio communications in the year ahead or to share with club presidents to plan club communications.
- If time permits, invite two or three participants to raise their hands to answer the following question.

Does anyone have a polio-related event or communication already scheduled this year?

GLOBAL GRANTS AND AREAS OF FOCUS 00:40 (30 min.)

KEY POINT

- Although polio eradication is our top organizational priority, we also conduct projects in our areas of focus, often through global grants, to make an impact in communities around the world.

TRAINING LEADER'S NOTE

- Allow 5 minutes for participants to raise their hands to answer the following question.

Are any clubs in your district currently involved in a global grant project?

KEY POINTS

- Beginning on 1 July 2022, Rotaract clubs will be able to submit global grant applications.
- In 2020, Rotary added the environment as a new area of focus. Rotary will start accepting applications for global grants in this area on 1 July 2021.
- Activities eligible for global grants include humanitarian projects, vocational training, and scholarships.

TRAINING LEADER'S NOTES

- **Refer to workbook page 16, Global Grants and Areas of Focus.**
- Allow 1-2 minutes for participants to review the list of global grant requirements and note how many elements are often found in smaller, locally funded projects.
- After 1-2 more minutes, invite two or three participants to raise their hands and respond to the following question.

What does it mean for a project to be sustainable?

KEY POINT

- A sustainable project provides long-term solutions to a community's needs and can be maintained by the project beneficiaries after the grant funding ends.

TRAINING LEADER'S NOTES

- **Refer to workbook page 16, Sustainability.**
- Ask participants answer the following question in their workbook. After 2-3 minutes, invite participants to share what they wrote.

What role do community assessments play in sustainability?

KEY POINTS

- The most successful projects begin with a club working together with the community to identify its needs, build on its strengths, and ensure the proposed project aligns with its values and culture.
- A community assessment is required for all vocational training and humanitarian service global grant applications.
- All projects, regardless of their size or funding source, should begin with a community assessment.
- Successful projects are those that address a need and also are desired and supported by the community.

How do global grants and the areas of focus strengthen our projects and increase our impact?

KEY POINTS

- The areas of focus help us concentrate our work to contribute to lasting change.
- Projects funded by global grants support the areas of focus and offer Rotarians worldwide the opportunity to work together to create a large, measurable impact.
- Research has shown that the general public contributes to Rotary to support specific causes and projects. An increase in donors leads to a greater global impact.

TRAINING LEADER'S NOTES

- Ask participants to write their ideas for finding a global grant partner in their workbook.
- After 1-2 minutes, ask participants to raise their hands to answer the following question. Encourage participants to collect at least 5 ideas for finding a project partner.

For those of you whose clubs have received a global grant, how did you find your partner?

THE DISTRICT INTERNATIONAL SERVICE CHAIR

01:10 (15 min.)

TRAINING LEADER'S NOTES

- Refer to workbook page 17, The District International Service Chair.
- Allow 2-3 minutes for participants to review the information.
- Ask participants to raise their hands to answer the following question.

Whose district already has a district international service chair (DISC) in place?

TRAINING LEADER'S NOTE

- Allow 5-7 minutes for participants to raise their hands to answer the following question.

For those of you who have worked with a DISC, how has this partnership increased the impact of projects in your district?

KEY POINTS

- The district international service chair supports all international projects and can also help with global grants.
- The DISC can help clubs find international partners.
- Think of your district's resource network as a consulting firm. But rather than spending money to hire expensive, temporary consultants, we can get free help from our own Rotary members who have technical skills and experience and can mentor clubs as they develop their projects.

TRAINING LEADER'S NOTE

- Allow 5 minutes for participants to raise their hands to answer the following question.

How can clubs use your district resource network to plan a Rotary Day of Service?

REVIEW AND ACTION ITEM

01:25 (5 min.)

TRAINING LEADER'S NOTES

- **Refer to workbook page 24, Action Plans for 2021-22.**
- Ask participants to write an action item for this session.
- Make sure that all questions from the discussion have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Refer to the list of linked resources in the back of the workbook.
- Thank participants.

ENHANCING THE ROTARY EXPERIENCE



Session 5

Duration: 60 minutes

LEARNING OBJECTIVES

At the end of the session, participants will be able to:

1. Understand the reasons people join and stay in their clubs.
2. Support clubs in creating experiences that meet member needs.

WORKBOOK

Page 18 Learning Objectives
Page 18 What Members Want
Page 19 What Rotary Offers Members
Page 20 Creating a Welcoming Environment
Page 25 Action Plans for 2021-22

TIMELINE

Introduction	00:00 (5 min.)
What Members Want	00:05 (20 min.)
What Rotary Offers Members	00:25 (15 min.)
Creating a Welcoming Environment	00:40 (15 min.)
Review and Action Item	00:55 (5 min.)

TRAINING LEADER'S NOTES

- Welcome participants to the session.
- Ask participants to edit their screen name so it includes their name and country.
- Briefly introduce yourself by sharing your name and country and describing the role of the training leader.
- Using your participant list for reference, call on each participant individually. Ask participants to unmute themselves and say their name and country when you call on them.
- Remind participants to mute their microphones unless they are speaking.
- Remind participants to follow along and take notes in their workbook during the session.
- **Refer to workbook page 18, Learning Objectives.**
- Ask participants to write your name at the top of the page to help them complete the session evaluation later.
- Review the learning objectives:
 1. *Understand the reasons people join and stay in their clubs.*
 2. *Support clubs in creating experiences that meet member needs.*

TRAINING LEADER'S NOTE

- Allow 3-5 minutes for participants to raise their hands to answer the following question.

What are some of the reasons that people join and stay in Rotary and Rotaract clubs?**KEY POINTS**

- A recent survey of almost 6,000 Rotaractors showed that their top reason for joining Rotaract was the opportunity to participate in service in their communities.
- Multiple studies from Rotary show that most members hope to gain one of the following from their membership:
 1. Participation in grassroots, local service
 2. Social and professional connections
 3. Personal growth and learning
 4. Ability to make a difference globally

TRAINING LEADER'S NOTES

- **Refer to workbook page 18, What Members Want.**
- Allow participants 1 minute to consider the four common reasons people join Rotary and to answer the following questions in their workbook.

**Which of these do you value most in your own membership?
Did a specific program or offering initially attract you to Rotary or Rotaract?**

TRAINING LEADER'S NOTES

- Allow 3 minutes for participants to raise their hands to share what they wrote.
- Ask participants to respond to the following statements.

Thinking about the reason you joined, raise your hand if your club offers opportunities that meet your expectations.

Use the chat box to share your opinion: What percentage of our members would say their club experience meets their expectations?

KEY POINTS

- Last Rotary year, 145,000 new members joined Rotary. About 18,000 of these new members terminated their membership within their first year.
- In general, 52% of members who leave Rotary have been members for less than three years.
- In surveys, members who have left Rotary report the following reasons for leaving:
 - 30% cost and/or time
 - 23% club environment
 - 19% unmet expectations

TRAINING LEADER'S NOTES

- Let participants know they will work in small groups for 5-7 minutes to consider the reasons people join and leave Rotary and to answer the following question in their workbook.

What are some ways to increase the likelihood that new members will stay in their clubs?

- *Provide a new member orientation to teach them about Rotary and their club.*
- *Make them feel welcome by introducing them to members of the club.*
- *Get them involved immediately in ways that are meaningful to them.*
- *Start a mentor program that pairs a new member with an established one.*

TRAINING LEADER'S NOTES

- After 5-7 minutes, when participants return from their breakout rooms, ask participants to raise their hands to share their ideas in 10 words or fewer, with the goal of collecting as many ideas as possible in 3-5 minutes.

WHAT ROTARY OFFERS MEMBERS

00:25 (15 min.)

TRAINING LEADER'S NOTES

- **Refer to workbook page 19, What Rotary Offers Members.**
- Allow 3-5 minutes for participants to raise their hands to answer the following question.

How can club presidents learn what members expect from their membership — and meet those expectations?

KEY POINTS

- Consider surveying new members to learn about their interests and expectations, and check in with them throughout their first year of membership.

- Members have different needs. Ask current members about their ideas for enhancing the club experience.
- Find out what prospective members and other participants hope to gain from joining, and help meet their needs or connect them with a club that can.
- Encourage clubs to have a club membership committee to focus on member satisfaction.

TRAINING LEADER'S NOTES

- Refer to the chart on page 19 of the workbook that lists the four common reasons for joining alongside space to write in opportunities.
- Share the following example of opportunities, or one of your own:
“For a member who joined for social and networking connections, Rotary offers fellowships and events like the Rotary International Convention. My club offers a monthly wine-tasting event that raises funds for the Foundation and is also a lot of fun!”
- Allow 2-3 minutes for participants to think about each reason for joining and write in programs and opportunities offered by Rotary and their club.
- Allow 5 minutes for participants to share what they wrote.
- Ask participants to use the chat box to answer the following question.

How can changing the frequency and format of club meetings engage current members?

KEY POINTS

- When clubs have more freedom to determine how they hold their meetings, whom they invite to join, and how they define engagement, they are more vibrant and better able to grow.
- When members feel that meetings are interesting and relevant, they will be more motivated to attend and participate.

- When members see that their club considers their needs and makes changes to accommodate them, they feel valued and more committed to the club.
- When members attend meetings because they want to, rather than because of an attendance rule, the entire club benefits.

CREATING A WELCOMING ENVIRONMENT 00:40 (15 min.)

TRAINING LEADER'S NOTES

- **Refer to workbook page 20, Creating a Welcoming Environment.**
- Allow participants 1-2 minutes to read Rotary's Diversity, Equity, and Inclusion Statement.
- Allow 3-5 minutes for participants to raise their hands to answer the following question.

What does it mean for a club or event to have a welcoming environment?

KEY POINTS

- We've discussed how meeting flexibility can help address cost- and time-related issues for members, and how club presidents can learn about members' expectations to keep them engaged.
- Clubs can create a welcoming and inclusive culture by demonstrating the value each member brings to the club.
- When clubs embrace and acknowledge the multiple identities a member holds (cultural, ethnic, gender, sexual orientation, etc.), the member will feel welcome and will be more engaged.
- Being able to recognize and address conflict between members can lead to more welcoming club environments. The Essentials of Understanding Conflict course in the Learning Center can help learners understand, manage, and resolve conflict.

TRAINING LEADER'S NOTE

- Allow 3-5 minutes for participants to raise their hands to answer the following questions.

**Is your club membership representative of your community?
What are the benefits of having a membership that is
representative of your community?**

KEY POINTS

- Research tells us that organizations, workplaces, and enterprises that are diverse and reflect their communities are considered more welcoming, more creative, more productive, and more stable, and have more engaged participants.
- We need diversity in our clubs, and we need our leaders to reflect that diversity at all levels. We recognize that we have work to do. Globally, only 23% of our members are women, and only 5% of our members are under 40.
- Younger professionals, women, and people who are part of minority groups have unique experiences that shape their perspectives. Bringing together diverse perspectives helps us solve problems more effectively.

TRAINING LEADER'S NOTE

- Allow 3-5 minutes for participants to raise their hands to answer the following question.

**How can you help clubs invite people from more diverse
backgrounds to join, and support them after they become
members?**

TRAINING LEADER'S NOTE

- **Refer to workbook page 25, Action Plans for 2021-22.**
- Ask participants to write an action item for this session.
- Make sure that all questions from the discussion have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Refer to the list of linked resources in the back of the workbook.
- Thank participants.

Session 6

Duration: 60 minutes

LEARNING OBJECTIVE

At the end of the session, participants will be able to:

1. Develop an action plan to implement in the coming year.

WORKBOOK

Page 21	Learning Objective
Page 21	Reflecting on the Experience
Page 21	Looking Ahead
Page 22	Action Plans for 2021-22

TIMELINE

Introduction	00:00 (5 min.)
Reflecting on the Experience	00:05 (10 min.)
Action Planning	00:15 (20 min.)
Looking Ahead	00:35 (20 min.)
Review	00:55 (5 min.)

INTRODUCTION

00:00 (5 min.)

TRAINING LEADER'S NOTES

- Welcome participants to the session.
- Ask participants to edit their screen name so it includes their name and country.
- Briefly introduce yourself by sharing your name and country and describing the role of the training leader.
- Using your participant list for reference, call on each participant individually. Ask participants to unmute themselves and say their name and country when you call on them.
- Remind participants to mute their microphones unless they are speaking.
- Remind participants to follow along and take notes in their workbook during the session.
- **Refer to workbook page 21, Learning Objective.**
- Ask participants to write your name at the top of the page to help them complete the session evaluation later.
- Review the learning objective:
 1. *Develop an action plan to implement in the coming year.*
- Refer to the list of linked resources in the back of the workbook.

REFLECTING ON THE EXPERIENCE

00:05 (10 min.)

TRAINING LEADER'S NOTES

- **Refer to workbook page 21, Reflecting on the Experience.**
- Ask participants to take 1-2 minutes to write one or two of the most important things they learned during the assembly.
- Invite participants to raise their hands to share one of the most important things they learned during the assembly with the group.

ACTION PLANNING

00:15 (20 min.)

KEY POINTS

- Successful leaders set and achieve goals.
- The action items and goals you've developed throughout the week will help you succeed in the coming year

TRAINING LEADER'S NOTES

- **Refer to workbook page 22, Action Plans for 2021-22.**
- Allow 2-3 minutes for participants to review the action items they developed throughout the assembly.
- Remind participants to further develop their action items by answering the additional questions in their workbooks, and to share this resource with club presidents.
- Invite participants to raise their hands to share one of their action items.
- Encourage participants to take notes as they hear good ideas.

LOOKING AHEAD

00:35 (20 min.)

TRAINING LEADER'S NOTES

- **Refer to workbook page 21, Looking Ahead.**
- Let participants know they will work in small groups for 5-7 minutes to discuss the three topics in their workbook.
 - *How can Rotaract and Rotary work together in the coming year?*
 - *What can your club or district do to help Rotary grow in the year ahead?*
 - *What ideas do you have for Rotary Days of Service?*
- After 5-7 minutes, when participants return from their breakout rooms, ask participants to raise their hands and share what they discussed in their breakout sessions.

TRAINING LEADER'S NOTES

- Make sure that all questions from the discussion have been answered.
- Review the learning objective to ensure that all topics were covered sufficiently.
- Thank governors-elect and Rotaractors for their participation in the 2021 Virtual International Assembly.