

Find Your Passion in Rotary



Mid-Atlantic RLI

MD • DE • DC • WV • TN • VA • NC • SC

2021-2022 Participant Materials

PART I



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MD • DE • DC • WV • TN • VA • NC • SC

Division History

Rotary Leadership Institute courses were first offered within the boundaries of Zone 33 in Rotary District 7570 (Western part of Virginia, Eastern Tennessee) in 1997. In 2004, Rotary International Director Ken Morgan appointed representatives to an Executive Committee to establish an RLI presence across the Zone. Led by future Rotary International Vice-President Eric Adamson of Virginia as Executive Committee Chair, the committee of PDG Ken Tillman of Virginia, PDG Jack Porter of West Virginia, PDG Bevin Wall of North Carolina and PDG Sue Poss of South Carolina, and the 2004-05 Governors of each district, established RLI as a multi-district project of all 13 then-Zone 33 Rotary Districts, 7530, 7550, 7570, 7600, 7610, 7670, 7680, 7690, 7710, 7720, 7730, 7750 and 7770. It became the second division established of The Rotary Leadership Institute, after the "Home Division" in the northeast United States. District 7030 in the Southern Caribbean was in the Division from 2005-2013. Districts 7620 & 7630 DC/MD/DE joined after the 2009 Zone expansion. A Board structure was adopted in 2005, with the Institute being led by Chairs Adamson, Wall, PDG Sandra Duckworth, PDG Abe Clymer, PDG Jayne Sullivan, PDG Michael Ellington, and PDG Leigh Hudson. In 2011, a Staff–Policy Board structure was adopted, and Bevin Wall was appointed RLI Executive Director. On his retirement in 2019, there was a return to a Board governance model.

2022-2023 Leadership (all-volunteer)

Mid-Atlantic RLI Board of Directors. Marcia Scheideman (Chair), Dr. Sean McAlister (Vice-Chair), Chris Stevenson (Secretary), Barbara Dresser (Treasurer), Lorraine Angelino (Immediate Past Chair; Finance Committee Chair) Judith Cocherell, Public Image Chair, The Reverend Patrick J. Rooney, Faculty Trainer, Roger Harrell, Sean Sawyer, Tarek Moneir, Ralph Menzel, PDG Bevin Wall (Chairman Emeritus), Past RI Vice-President Eric Adamson (Chairman Emeritus),

RLI Executive Staff. IT Chair: PDG Ken Dresser; Registrar: Lin Kelly

Regional Coordinators. South Carolina Region (Districts 7750, 7770): PDG Rod Funderburk, North Carolina East Region (Districts 7710, 7720, 7730): Steve Hellersperk, North Carolina West Region (Districts 7670, 7680, 7690): Cristina Capello, Chesapeake Region (Districts 7600, 7610, 7620, 7630): PDG Roger Harrell, Mountain-Valley Region (Districts 7545, 7570): PDG Sean Sawyer

District Chairs (Appointed Annually by District Governor of each Member District), District 7545: Craig Stout, District 7570: Leslie Lynch, District 7600: SuAnne Bryant, District 7610: Ralph Menzel, District 7620: Pam Kreis, District 7630: Steven Grossman, District 7670: OPEN 7710: Elisabeth Weiner, District 7720: Stan Keller, District 7730: RB Richey, District 7750: Carol Burdette, District 7770: Tom Ledbetter.

RLI Faculty & Staff. Many dedicated Rotarians make RLI work. View the RLI Page at www.midatlanticrli.org for additional information.

RLI Part I – THE ROTARY CLUB MEMBER

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The Rotary Leadership Institute (RLI) is a grass roots, multi-district leadership and Rotary development program using facilitation and activity-based learning in a small group setting to engage Rotary members and strengthen clubs.

RLI is not an official program of Rotary International and is not under its control.

Our Mission: To help Rotary members find their **Passion through Rotary**, and to engage them to make their clubs stronger.

COURSE MATERIALS

Event Agenda, Faculty, Upcoming RLI Events, Division Leadership, and Welcome Letter are included as a supplement to the course materials or online. Materials are online at www.midatlanticrli.org.



The Roots of Rotary

As a Rotarian, I am the beneficiary of a historical legacy of service that guides today's Rotary commitment. What is my role?

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My Club & Beyond

As a Rotarian, I am part of a worldwide organization of like-minded people. Take some time to truly understand the purpose and structure of Rotary. Can these resources help me?

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Engaging Members

I make my club and Rotary stronger by my active participation. Engaged club members have fun, make friends, and effectively serve. This is why I joined Rotary!

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Our Foundation

I am "doing good" in my local community and around the world. Learn about the basic goals and programs of our Foundation. I am a force for good in the world!

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Creating Service Projects

I am a vital part of a worldwide service organization of business, professional and community leaders meeting needs in communities. I can build, run and promote service.

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The Roots of Rotary

As a Rotarian, I am the beneficiary of a historical legacy of service that guides today's Rotary commitment.



Session Goals

- Discuss Rotary's earliest Guiding Principles
- Develop a Shared Understanding of what Rotary's Guiding Principles mean today
- Reflect on how this understanding affects your role and the role of your community in your community and world

This is a course in the Leadership Spiral going across RLI Parts 1, 2, and 3. Additional courses building on this session are Strategic Planning, Team Building, Effective Leadership Strategies, and Public Image & PR. Service and Membership have separate spirals.

Did you Know that your Rotary membership came with a set of instructions? The early Rotarians developed the "Object of Rotary".

The Object of Rotary

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

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

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

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

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

"Life in Rotary should consist of a rational mixture of business with civic activities and good fellowship".

*Rotary Founder Paul P. Harris
— Rational Rotarianism
THE NATIONAL ROTARIAN,
January 1911*



Along the same time as The Object of Rotary was being developed, the Avenues of Service were written to guide and support club activities in support of The Object of Rotary.

Five Avenues of Service:

- Club Service,
- Community Service,
- Vocational Service,
- International Service,
- Youth Service



How does each Avenue of Service support the Object of Rotary?

The First 100 (or so) Years

Exploring the first 100 (or so) Years what are three things you learned that you didn't know before?

1. _____
2. _____
3. _____

What did you hear about that you can take back to your club?



People of Action Campaign

People of Action is a research-based public image campaign that is designed to tell Rotary's story in a consistent and compelling way. More than an advertising campaign, it's a tool member can use to show the impact that Rotary clubs make. The campaign portrays Rotarians as people of action — professional, community, and civic leaders who share a passion for taking action to improve the world around them. The campaign supports Rotary's vision and reflects its essence.

Our vision: Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

Our essence: Rotary joins leaders from all continents, cultures, and occupations to exchange ideas and take action for communities around the world.

How is the People of Action Campaign consistent with the Object of Rotary?

How has this study of the Object of Rotary reshaped your perception of what it means to be a Rotarian?

NOTES:



ROR 1: “Good to Know” Information for The Roots of Rotary

- 1905. Rotary founded by Chicago Attorney Paul Harris with three business acquaintances to promote business opportunities and friendships. They were all in their thirties.
- 1906. Chicago Rotary club admits Attorney Donald M. Carter, who was encouraged to join the club and challenge the club from within to engage needs in the local community.
- 1908. Rotary Club of Chicago incorporated with initial three objectives: promotion of the business interests of the members; advance the best interests of the City of Chicago; and spread the spirit of city pride and loyalty among its citizens.
- 1911. National Association of Rotary Clubs Platform with Objects 1-3.
- 1912. International Association of Rotary Clubs Platform with Objects 1-5, which contained most of today’s Objects 1-3 of The Object of Rotary.
- 1916. Community Service adopted as an Individual, not corporate responsibility.
- 1927. Aims and Objects Plan adopted by RI Convention including club, community and vocational service (later to become the "Avenues of Service").
- 1928. "International Service" added to Aims and Objects Plan.
- 2010. Fifth Avenue of Service approved by Council on Legislation, now “Youth Service”.

Historical Brief

- Paul Harris had a small-town upbringing in Vermont, and a grandfather role model of service to others, ethics and hard work. He moved to the big city of Chicago to practice law, by himself, in a community where he didn’t know anyone. Rotary allowed him to “network” and build relationships.
- Rotary developed in the early Twentieth Century before and during the development of consumer protection “Buyer Beware” and worker protection laws. Business community, trade association and union developed “codes” were the building blocks of developing and advocating for these legal protections. Rotary clubs and Rotarians often served as the moral and ethical voice of a business community.
- As Rotary developed there were few other examples of secular volunteer groups doing service. It was a relatively novel concept as it developed. There were no “government programs”, with the exception of a few “pensions” for war veterans and their widows. Rotary’s philosophy of “Service above Self”, and the supporting writings of Paul Harris provided a framework for the “civic service” movement.
- The World was rapidly changing and becoming more interconnected with industrialization and technology. Travel was becoming easier and leisure time more prevalent. The Chicago World Fair in 1893, attended by over 26 million people, introduced many new internationally available products and technologies including Wrigley’s gum, the zipper, spray paint, Pabst Blue Ribbon beer, the dishwasher, instant cake mix, and the Ferris Wheel. There was a shared idea, ahead of World War I and culminating with the formation of the League of Nations thereafter, that a “new age” of peace and prosperity was occurring. There was a new sense of an international community and an optimism that anything was possible.



My Club & Beyond

As a Rotarian, I am part of a worldwide organization of like-minded people.

Session Goals

- Discuss the Purpose of Rotary
- Understand the Layers of Our Organization
- How Can People at each Level Help your Club

This is a course in the Rotary Membership Spiral going across RLI Parts 1, 2, and 3. Other courses in this session include Engaging Members. Additional courses building on this session are Attracting Members, Rotary & Ethics, and Club Communications. Service and Leadership have separate spirals.

Session Topics

- 1) Why did you join Rotary?
- 2) What benefits have you gained from being a part of Rotary?
- 3) What do you personally bring to Rotary?
- 4) Has anyone ever asked you what Rotary is all about? What do you tell them?

“Rotary must be renewed constantly at the club level to avoid stagnation and at the international level to avoid retrogression. But Rotary at all levels depends on the individual Rotarian.”

*1969-70 RI President
James F. Conway
— The Challenge: Review & Renew
THE ROTARIAN, July 1969*



Role Play “A Real Elevator Speech”

– An “Elevator Speech” is a common approach to developing a concise, catchy, and compelling answer to the question “What is Rotary?” posed by a stranger or acquaintance

- a) With your partner, develop an elevator speech that works for the two of you.
- b) Check that your speech is Concise – Catchy – Compelling.
- c) What is the purpose of your “elevator speech”? Is there some action or reaction that you are seeking?
- d) What is the most important thing about an “elevator speech”?

“Rotary is so simple that many people do not understand it, and some even misunderstand it. Rotary is not a philosophy...not an all-embracing world point of view which answers every question...and satisfies all the dictates of the heart and mind. Rotary is merely an association of business and professional men united in the ideal of service.”

1937-38 RI Pres. Maurice Duperrey
— Address to 1938 Rotary
Convention
San Francisco, California, USA

Bullseye on Rotary Activity

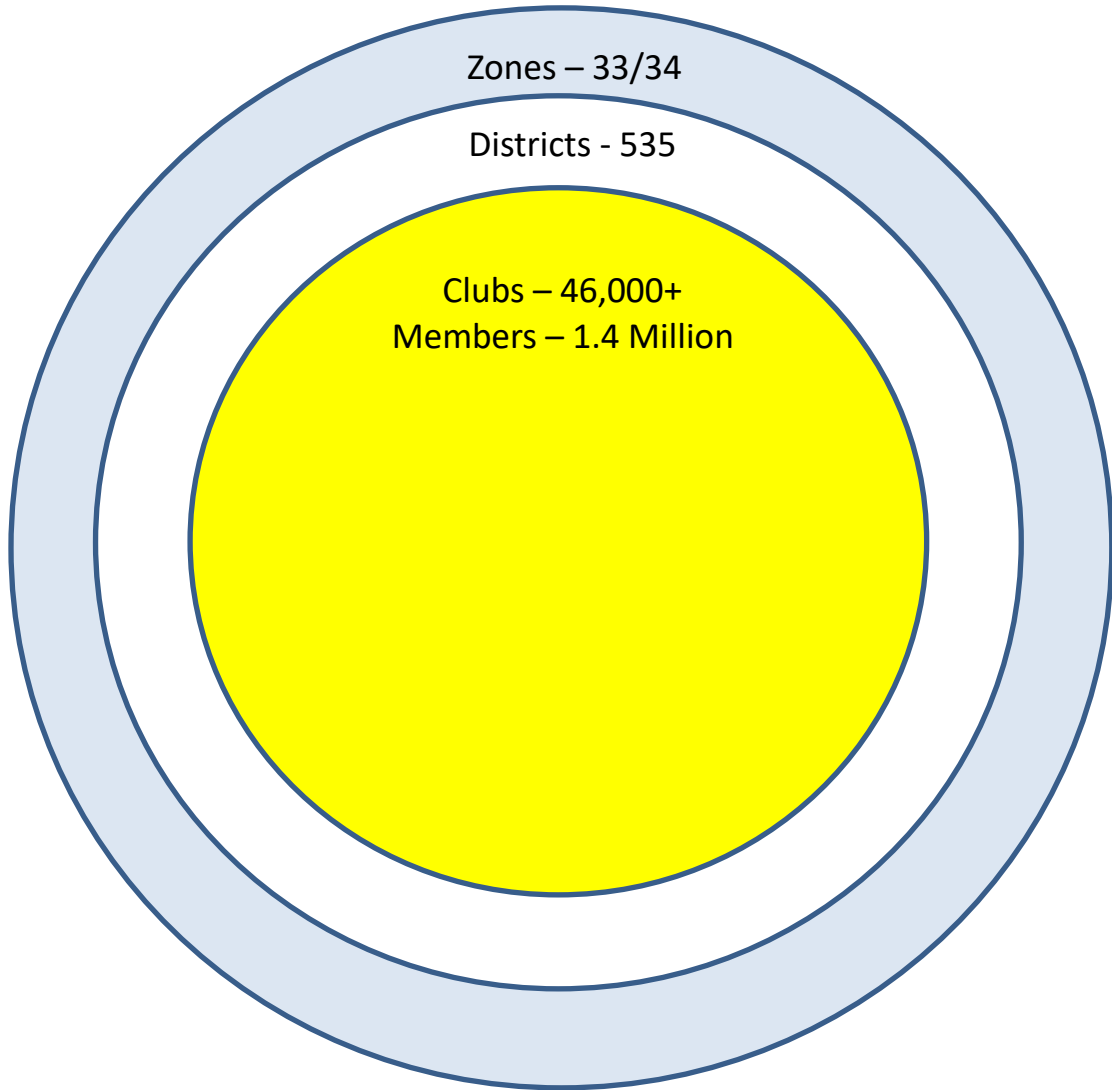
- e) What are three (3) Rotary activities in which you participate?
- f) Where do these activities belong in the diagram and why?

What does your district do to support your club? What would you like to see from your district?

Describe the Zone’s relationship to the club? What advantages are there to knowing about and participating in zone activities.

Are there any advantages in being an international organization?

Is my Rotary club a change agent in my community and world? If not, how can I promote change from within?



Bullseye Chart



MCB 1: “Good to Know” Information for My Club & Beyond

- “Rotary”, a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.
- "Rotary club", a member club of Rotary International (RI). A Rotary club is a local chartered club with Rotary members (“Rotarians”) who are volunteer business, professional and community leaders.
- "RI" - Rotary International, the worldwide association of Rotary clubs. Governed by a nominated 17-member Board of Directors, all - volunteer.
- "RF" or "TRF" - The Rotary Foundation, the foundation associated with Rotary that "does good in the world". Governed by a nominated Board of 15 Trustees, all - volunteer.
- "DG" - District Governor, volunteer "Officer of Rotary International" within the district, whose sole job is to assist Rotary clubs.
- "AG" - Assistant Governor, volunteer who helps the District Governor assist Rotary clubs, usually organized in smaller geographic areas called “Areas”.
- "District" - an administrative grouping of Rotary’s clubs. 535+/- worldwide.
- "Zone" - an administrative and voting grouping of Rotary districts. 34 worldwide.
- "Avenues of Service", Rotary clubs' approved emphases of club, community, vocational, international and youth service.
- Rotary motto – “Service above Self”.
- Rotary’s mission statement - We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.



Engaging Members

I make my club and Rotary stronger by my active participation

Session Goals

- Identify the Value of Engaging Our Members
- Discuss Ways that I can be Involved in Club Activities
- Explore Options for Engagement

This is a course in the Rotary Membership Spiral going across the three days of RLI. The other course in this session includes My Club & Beyond. Additional courses building on this session are Attracting Members, Rotary & Ethics, and Club Communications. Service and Leadership have separate spirals.

Session Topics

- 1) Why are you in your Rotary club?
- 2) What keeps you in your Rotary club?
- 3) Are Rotary Clubs member organizations that do service or service organizations that have members?

“Rotary club membership must offer opportunities for meaningful service and friendships for all Rotarians. At the same time, we must maintain high standards. If we begin to simply look for dues-paying members as a means of increasing our budget, it will severely damage our credibility and signal the end of our organization.”

1999-00 RI Pres. Carlo Ravizza

What practical suggestion(s) do you want to take back to your club?



EM 1: “Good to Know” Information for Engaging Members











- "Engaging Members" is Rotary-speak for what clubs need to do to retain existing members.
- Fair question: Are Rotary clubs membership organizations that do service or are they service organizations that have members?
- Rotarians who feel they are obtaining value for their time, energy and money are more likely to remain in their Rotary club and be productive members.
- Rotary clubs that have fun together are more likely to retain their members.
- Rotary clubs that accomplish things together are more likely to retain their members.
- Clubs are given great flexibility to design dues, meeting and attendance structures that will meet their members' needs.
- Clubs can now form Satellite clubs that meet on different days with different cost and requirement structures.
- E-Clubs are available to all Rotarians and many are geographically located within district or zone boundaries.
- A significant portion of club dues in most clubs is for food.
- For 2019-20 in North America annual, per-person RI Dues are \$68.00, (increasing \$1 per year for 2020-21 and 2021-22) plus \$1.00 for The Council on Legislation, plus \$12.00 for The Rotarian magazine, plus \$3.57 for General Liability and Directors & Officers Insurance, for a total of \$84.57 annually, per Rotarian.
- Rotary District Dues vary in amount. Anecdotally, an average is between \$50.00 and \$70.00 per Rotarian annually, depending on the district. (unaudited)



Insert EM-2: Engagement Ideas: Delivering Value- Keeping Rotarians

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

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

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

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



Insert EM-3: Membership Satisfaction Survey (RI)

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

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

- Satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Dissatisfied

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

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Club meetings are a good use of my time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job involving new members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club’s members care about one another	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club actively seeks to involve all members in projects and activities according to their interests, skills, and availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The amount of fundraising activities is appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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

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

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

	Just right	Too many	Too few
Total number of service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of community service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of international service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Disagree	No opinion
Service projects are well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service projects make a difference in the community or the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service projects are meaningful to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club does a good job communicating to members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job listening to members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club seeks input and ideas from members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club regularly acts upon members' input and ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am comfortable with the pace of change in my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club works to update club processes and rules to meet the needs of its members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel welcome in my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I make valuable connections through my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club provides opportunities to use my talents and skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the money I spend on Rotary participation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the time I give to Rotary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My family sees value in my Rotary membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My friends see value in my Rotary membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in my community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I invite my friends, family, and colleagues to club events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I invite qualified prospective members to join my Rotary club	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I frequently participate in my club's activities, projects, and programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm proud of my Rotary club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

	Too low	Just right	Too high	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals at weekly meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club assessments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for donations for service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Our Foundation

I am “doing good” in my local community and around the world

Session Goals

Understand the Basic Goals, Programs & Financing of our Rotary Foundation

Discuss the Importance & Value of our Rotary Foundation to your Club

This is a course in the Service Spiral going across RLI Parts 1, 2, and 3. Additional courses building on this session are Creating Service Projects, Targeted Service, and International Service. Leadership and Membership have separate spirals.

While this course and others within RLI discuss Rotary Foundation topics, you should consult your district for specific Rotary Foundation training, especially regarding grants availability & procedure.

Session Topics

- 1) When you hear the word “Foundation” do any foundations come to mind?
- 2) Why is the Rotary Foundation separate from Rotary International?
- 3) After review of the Rotary News Inserts (Inserts 1A-1E), discuss the following questions: Why this project? Why now? Why Rotary?
- 4) What current or past projects has your club done using the programs of our Rotary Foundation?
- 5) How does the Rotary Foundation help you “do good in the world”? How do you help the Rotary Foundation “do good in the world”?

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

*... it seems eminently
proper that we should
accept endowments for
the purpose of doing
good in the world, in
charitable, educational or
other avenues of
community progress...*

1916-17 RI Pres. Arch Klumph
RI Convention, Atlanta GA
June 18, 1917



ROTARY'S AREAS OF FOCUS



Foundation Giving & Recognition Terms	Annual Fund	Endowment Fund
"Every Rotarian, Every Year" or "EREY" recognizes clubs in which all members contribute to the Annual Fund each year	"Annual Fund" is TRF's "checking account", to be spent on programs in the 3 rd year	"Rotary's Endowment" is TRF's "savings account", formerly the "Permanent Fund"
"100% Sustaining Club" is when all club members attain sustaining member status	"Sustaining Member" or "Sustainer" recognizes a cumulative US \$100 gift each year to the Annual Fund	"Benefactor" recognizes a cumulative US \$1,000 gift or pledge to Rotary's Endowment
"100% Paul Harris Fellow Club" is when all club members attain PHF status	"Paul Harris Fellow" or "PHF" recognizes a cumulative US \$1,000 gift to the Annual Fund	"Bequest Society" recognizes a cumulative US \$10,000 gift or pledge to Rotary's Endowment
"Triple Crown Club" is when all club members attain Sustaining, PHF, and Benefactor status	"Paul Harris Society" recognizes a cumulative US \$1,000 gift each year to the Annual Fund	"Major Donor" recognizes a cumulative US \$10,000 gift to TRF
No portion of your Rotary dues are required to go to TRF. All contributions are voluntary.	"Polio Plus" are funds given to TRF for the eradication of polio worldwide	"Arch Klumph Society" recognizes a cumulative US \$250,000 gift to TRF



Insert OF-1: “Good to Know” Information for Our Foundation

- "RF" or "TRF" - The Rotary Foundation, the foundation associated with Rotary that "does good in the world". Governed by a nominated Board of 15 Trustees, all- volunteer.
- The idea for the Rotary Foundation was planted in 1917 at the Atlanta, Georgia RI Convention where RI President Arch Klumph proposed a "foundation for doing good in the world". It was funded by a \$26.50 donation from the Rotary Club of Kansas City, Mo USA. TRF was formally named in 1928.
- Significant financial support of TRF did not occur until memorial gifts were made after Rotary's founder, Paul P. Harris' death in 1947. The "Paul Harris Fellow" was established in 1957.
- No portion of your RI dues go to TRF. All donations by Rotarians to TRF are voluntary. Many Rotarians support our Foundation by club giving or direct giving online through “TRF Direct”.
- TRF can be financially supported in many ways by Rotarians, and different recognitions are available for that support. See chart at the end of the Session Topics for the details.
- TRF has an "Annual Fund" (like a checking account) and "Rotary’s Endowment” (formerly “Permanent Fund" (like a savings account).
- TRF Programs include numerous Grant programs, Scholarship programs, Peace Fellows, Vocational Training Teams (VTTs), and its Polio Eradication Campaign.
- Rotary "Areas of Focus" to build international relationships, improve lives, and create a better world to support our peace efforts and end polio forever are: (1) Promoting peace, (2) Fighting disease, (3) Providing clean water, sanitation and hygiene, (4) Saving mothers and children, (5) Supporting education, (6) Growing local economies, and (7) Supporting the Environment.
- Rotary launched its PolioPlus Program targeting worldwide polio eradication in 1985 after a successful grant project eliminated polio in the Philippines.
- Rotary co-founded the Global Polio Eradication Initiative (GPEI) in 1988 with WHO, CDC, UNICEF, The Bill & Melinda Gates Foundation, and world governments.
- Rotary has raised over \$1.8 Billion Dollars, to immunize over 2.5 Billion children in 200 countries and is a leader in polio advocacy efforts.
- At printing, polio cases have been reduced by 99.9% and is endemic in only a few countries.
- We are "this close" to eradicating polio worldwide.



Insert OF-1A: Rotary News:

Rotary and Partners “this close” to Eradicating Polio Worldwide

Kabul, Afghanistan – January 1
 – In 1985, after successfully eradicating polio in a project in the Philippines, Rotary launched its PolioPlus program to eradicate polio worldwide. Today, over a million Rotarians, joined by an impressive list of partners, are “this close” to eradicating polio in the world, seeing a 99.9% reduction in cases since the 1980s, fewer than 17 cases reported in 2018, and only 3 polio endemic countries left, conflict-ridden Afghanistan, Pakistan, and Nigeria. Over 2.5 billion children in over 200 countries are now protected from polio. But, the risk of resurgence of the virus is real.

Poliomyelitis (polio) is a crippling and potentially fatal disease that still threatens children in parts of the world. The poliovirus invades the nervous system and can cause paralysis in a matter of hours. It can strike at any age but mainly affects children under five. Over 1,000 children per day were contracting polio in 1985. If polio is not completely eradicated from the earth, experts believe polio could rebound to 10 million cases in the next 40 years. The public health and global economic impact of these future polio cases is significant.

As for Rotarians, for more than 30 years club members have donated their time and personal



Polio survivors in Africa. Photo Credit: WHO/Rotary International

resources to end polio. Every year, hundreds of Rotary members work side-by-side with health workers to vaccinate children in polio-affected countries. Rotarians work with partners like UNICEF to prepare and distribute mass communication tools to share the message with those isolated by conflict, geography, or poverty. Rotary members also recruit fellow volunteers, assist with transporting the vaccine, and provide other logistical support.

Rotary’s early successes brought on an impressive list of partners that are necessary to eliminate polio worldwide. The Global Polio Eradication Initiative, formed in 1988, is a public-private partnership including Rotary, the World Health Organization, the U.S. Centers for

Disease Control and Prevention, UNICEF, the Bill & Melinda Gates Foundation, and governments of the world. Rotary’s focus is advocacy, fundraising, volunteer recruitment and awareness-building. Fundraising led by Rotarians helps to provide much-needed operational support, medical personnel, laboratory equipment, and educational materials for health workers and parents. Rotary has contributed more than US\$1.8 billion and countless volunteer hours. In addition, Rotary’s advocacy efforts have played a role in decisions by donor governments and corporations to contribute over \$16 billion to the effort.

Rotarians vow not to quit the effort until all cases of polio are gone.

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?



Insert OF-1B: Rotary News: Rotary Peace Fellow Helps Build New Countries and Old

Brasilia, Brazil– September 10
- Through her work for the UN Development Program Brazil, 2005-07 former Rotary Peace Fellow at Universidad del Salvador Izabela da Costa Pereira advises the Brazilian government on how best to support reconstruction and development projects in Haiti.

“I learn how to deal with the unexpected and how to overcome obstacles. What motivates me is that I help my country to help another nation in need,” she says. Previously, Pereira worked as a democratic governance officer with the UN Integrated Mission in Timor-Leste (UNMIT), monitoring the country’s institutions and helping them determine how to operate democratically to best serve their people.

Pereira’s experience as a Rotary Peace Fellow prepared her well for her career. During her fellowship, she served as an electoral observer with Organization of American States missions in Colombia and Nicaragua; explored conflict prevention strategies with the United Nations Development Fund for Women in Senegal; and served on a UN peace building mission for women in Côte d’Ivoire.

Each year, Rotary selects “Peace Fellows”, individuals from around the world to receive fully funded academic fellowships at one of the Rotary Peace Centers. These fellowships cover tuition



Izabela da Costa Pereira with children outside a rural village in Timor-Leste where she is a Democratic governance officer with U.N. Integrated Mission in Timor-Leste.

and fees, room and board, round-trip transportation, and all internship and field study expenses. The program offers master’s degree fellowships at premier universities around the world in fields related to peace and conflict resolution and prevention. Programs last 15–24 months and require a practical internship of 2–3 months during the academic break. Each year up to 50 master’s fellowships are awarded.

Pereira states: *“the Rotary Foundation has opened so many doors of opportunity. No doubt, all my experiences in Africa, South Asia, and Latin America are the results of the great experience I had as a Rotary Peace Fellow.”*

In an interview with the global affairs magazine, *Diplomatic Courier*, she described her proudest personal contribution to foreign policy as *“...having contributed to the nation building of one of the newest states of the 21st century... As a Democratic*

Governance Officer at Timor-Leste UNMIT, I directly assisted on political issues related to democratic consolidation and institution strengthening... in strategic policies reforms, anti-corruption, gender, civil service, media, transparency, decentralization, elections, and sustainable socio-economic development. As a new sovereign nation-state, it is fundamental to guarantee its path towards a democratic governance culture that will assure peace, socio-economic development, and stability in a post-conflict scenario.

[B]esides my background in international relations, I could use on a daily basis my specialization on peace, conflict resolution, economy, and political affairs for an effective aid.”

Pereira said *“the need for trained peace-makers has never been greater... more leaders are needed on the local, national and international arena, particularly young professionals”.*

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?



Insert OF-1C: Rotary News: Cambodia's Children "Waste-Pickers" Receive Vital Services

Phnom Penh, Cambodia – February 12. Phnom Penh's city landfill is at capacity. As in many developing countries, "Waste-pickers" support themselves and their families by sorting garbage for sellable goods. Nearly half are children. They are highly visible as they push their handcarts around the city calling "Hychai".

A local non-profit organization, *Community Sanitation and Recycling Organization* or *CSARO* tries to address the needs of these waste-pickers. Through a variety of programs, *CSARO* helps adults improve their living and working conditions, while also providing educational outreach to the children.

CSARO is one of the many locally originating humanitarian projects worldwide that receive funding from *The Global Fund for Children (GFC)*.

GFC was the vision of a Rotary Foundation Ambassadorial Scholar traveling in India in 1990, Scholar Maya Ajmera witnessed a group of children sitting in a circle at a train station, listening and answering questions while a teacher led them in simple learning exercises. She learned that the children lived, played, and begged on the train platforms. Seeking a pathway out of poverty, two teachers offered the children free education, clothing, and food. The school operated on only \$400 per year,



serving 40 students who had no other opportunity to learn.

Inspired by this powerful model, Maya founded *GFC* in 1993 based on the belief that small amounts of money, when given to innovative, community-based organizations, could make a lasting impact on the lives of the world's most vulnerable children. Over time, *GFC* had launched additional services to help its grantees grow and thrive, including management support, technical assistance, and networking opportunities. *GFC* also attracts other funders to its grantees and increases grantees' visibility to help them garner international recognition for their work. The result: a global community of strong grassroots organizations that are tackling some of the world's biggest problems.

Now President of the Society for

Science & the Public and publisher of *Science News*, Maya stepped down from her position as president of *GFC* to teach at Duke University and Johns Hopkins, having grown her initial vision into a thriving global organization. *GFC* has awarded more than \$43 million to more than 700 organizations in over 80 countries, touching the lives of over 10 million children worldwide.

Maya Ajmera received her Ambassadorial Scholarship from District 5240 in California, USA, to study at St. Xavier's College in India. From 1947 to 2013, nearly 38,000 men and women from about 100 nations studied abroad as Ambassadorial Scholars. The purpose of the program was to further international understanding, peace and goodwill among the peoples of the world. Credits: CSARO/GFC

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?



Insert OF-2: Rotary Foundation Grants & Related Programs

Rotary Foundation grants support Rotarians' efforts to change lives and serve communities. Rotary's grant model includes:

District grants

District grants are funded by The Rotary Foundation solely with allocations from the District Designated Fund (DDF). A district may apply for a single grant each Rotary year to support one or more projects using up to 47.5 percent of its SHARE allocation, which represents 50 percent of its annual giving from the previous three years plus any Endowment SHARE earnings. These grants are used to support district and club sponsored activities, including vocational training teams, scholarships, humanitarian service projects and cultural exchanges that align with the Foundation's mission.

Global grants

Global grants offer clubs and districts opportunities to participate in strategically focused, high-impact activities. These grants fund large-scale international humanitarian projects, vocational training teams, and scholarships that have sustainable, measurable outcomes in one or more areas of focus. Activities may be carried out individually or in combination — for example, one grant may support a vocational training team and a related humanitarian project.

Global grants have a minimum budget of \$30,000 and maximum World Fund award of \$400,000. Grant sponsors can use a combination of District Designated Funds (DDF), cash, and/or directed gifts and endowment earnings to fund a global grant. The Foundation will provide an 80 percent World Fund match for all DDF contributions. There is no minimum World Fund match. Sponsors also have the option of financing global grants without a World Fund match using any combination of cash, DDF and/or directed gifts and endowment earnings to reach a minimum budget of \$30,000.

Grant sponsors may contribute cash toward a global grant, but it will not be matched by the Foundation. Non-Rotarian contributions may also be added to a grant, as long as they don't come from a cooperating organization, a project supplier or vendor, or someone who benefits from the grant. Non-Rotarian contributions will not be matched by the foundation.

When planning a global grant project, sponsors should conduct a thorough needs assessment that explores the pressing concerns in the project location along with the club and community resources available to address them. Work with your district international service committee chair and other district leaders to improve the global grant planning process and development of project partnerships to improve the quality, impact, and sustainability of your global grants. Connect with local Rotarian and Rotary alumni experts who can offer valuable guidance early in the planning process.

Editor's Note: Each District is different. Districts have resources available to help with Grant planning, qualification, applications, execution, and reporting. Contact your District Rotary Foundation Chair for more information and appropriate referrals.

Reprinted from [Terms and Conditions for District and Global Grants](#), Rotary_Grants_terms_conditions_en (7).pdf



Insert OF-3: Foundation Facts - Giving

Most recent data available at time of publishing, from Rotary Pub. 159-EN (1120)
159_rotary_foundation_facts_en.pdf

PROGRAMS

(All figures are as of 30 June 2020 and in U.S. dollars.)

PolioPlus

Since 1988, Rotary and our partners have immunized nearly 3 billion children against polio. As of June 2020, Rotary had committed more than \$2.1 billion to global polio eradication, seeking to eliminate the wild poliovirus in the last two countries where it remains endemic and to ensure that it does not return elsewhere. **In 2019-20, program awards, including PolioPlus Partners grants, totaled \$151.8 million.**

Rotary Peace Centers

Each year, the Foundation supports the training of peace fellows at six Rotary Peace Centers, where they earn master's degrees or professional development certificates. Since 2002-03, 1,370 fellows from more than 110 countries have participated. **In 2019-20, 69 fellows from 35 countries began their studies at the Rotary Peace Centers, and program awards for the fellows and centers totaled \$4.5 million.**

District grants

District grants support small-scale, short-term projects related to the Foundation's mission. **In 2019-20, the Foundation approved 490 district grants, and program awards totaled \$33.6 million.**

Global grants

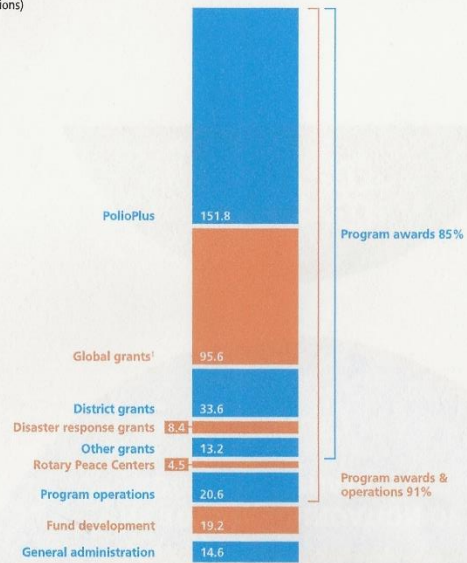
Global grants fund large-scale international activities with sustainable, measurable results that support Rotary's areas of focus. Activities include humanitarian projects, scholarships, and vocational training teams. **In 2019-20, the Foundation approved 1,359 global grants, and program awards totaled \$95.6 million.**

Disaster response grants

Rotary's disaster response grants support relief and recovery efforts in areas that have been affected by natural disasters within the past six months. **In 2019-20, the Foundation approved 339 disaster response grants, and program awards totaled \$8.4 million.**

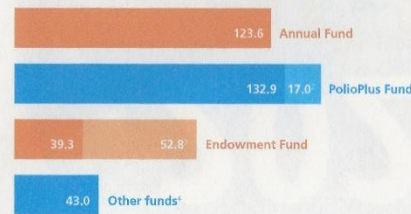
2019-20 TOTAL EXPENDITURES: \$362 million

(in millions)



2019-20 TOTAL CONTRIBUTIONS: \$408.6 million

(in millions)



¹ Net of returned funds and other adjustments
² Polio transfers
³ Total new commitments to the Endowment Fund
⁴ Includes cash contributions to global grants, the Disaster Response and donor advised funds, and directed gifts

SUMMARY STATISTICS

Contribution summary	2019-20 unaudited	Cumulative
Annual Fund	\$123.6 million	\$2.9 billion
Endowment Fund	\$39.3 million	\$414.3 million
PolioPlus Fund	\$132.9 million	\$1.8 billion
Other*	\$43.0 million	\$278.3 million
Total outright contributions	\$338.8 million	\$5.4 billion
Total new commitments to the Endowment Fund	\$52.8 million	\$838.3 million
Polio transfers**	\$17.0 million	-
Grand total	\$408.6 million	-
Program awards & operations	\$327.7 million	Since 1947: \$4.9 billion

* Includes cash contributions to global grants, directed gifts, and the Disaster Response and donor advised funds

** District Designated Fund transfers and the resulting World Fund match to PolioPlus, affinity card royalties, and donor advised fund transfers to PolioPlus

Latest statistics available here:

<https://www.rotary.nl/d1610/TRF/159-rotary-foundation-facts-en.pdf/>



Creating Service Projects



I am a vital part of a worldwide service organization of business, professional and community leaders meeting needs in communities

Session Goals

How can I, as an individual Rotarian, plan, lead and implement a service project in my club?

How can I encourage creativity and sustainability in my club's projects?

This is a course in the Service Spiral going across RLI Parts 1, 2, and 3. Our Foundation is also a course in this session. Additional courses building on this session are Targeted Service, Vocational Service Expectations and International Service. Leadership and Membership have separate spirals.

Session Topics

Brainstorming First Steps

a) You have been appointed to chair a committee to develop a new service project for your Rotary Club.

i) How do you start?

ii) Delineate the first steps you should take.

2) Consensus Building: Focus the Project

a) Your committee now has to come up with an actual project idea. It does not have to be Rotary Foundation eligible. With your partner, agree on a project idea to present to the group.

b) Write down a descriptive 3–6-word title.

3) Outline a “business plan” for a service project.

“The time we take to serve those who need us can be the turning point, not only in their lives but also in our own.”

*1980-81 RI Pres. Rolf Klarich
— Take Time to Serve
THE ROTARIAN, July 1980*



- a) Funding and Partnerships
 - b) Publicity
 - c) Gaining support of club members and the community
 - d) Procedure and Timeline
- 4) After completion, review the plan for “outside the box”, creative alternatives or additions to the project. How can you make it “bigger, better, and bolder”?

SUMMARY

Good Rotary Service projects require:

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



Insert CSP-1: “Good to Know” Information for Creating Service Projects

- "Service projects" are identified needs with a Rotary club plan and deliberate action.
- Service projects can be of any size and scope.
- All service projects don't have to cost money.
- Rotarians are a part of their community and in a position to identify and raise perceived needs to their club.
- Rotarians, and their network of support, can focus their vocational and other expertise on simple and complex problems.
- Rotarians and Rotary clubs are free to do whatever service projects they see fit to do.
- Originality, creativity, and thinking "outside the box" are encouraged in this process.
- Team building and communication skills are key to developing a truly "club" project.
- Projects should have "buy-in" from the community being helped.
- Projects should involve other organizations as needed for expertise, manpower, financing, etc.
- Rotarians (and others) want to be part of a club that is doing something, and service clubs do service.
- Your club will benefit if others know about your club's projects. Publicity is not a bad word.
- Use Rotary's website tools and guidance. It is a valuable resource.



Insert CSP-2: Service Project Questions

1. Can a Rotary club do anything to help?
2. If so, what can Rotarians do "hands on" to help?
3. How much funding is required? Fundraising?
4. How can the project be designed? What is needed?
5. Will the project generate good publicity for the club?
6. Can the members be "sold" on the project?
7. Is this a one-year project or a continuing project?
8. What other community resources are available or what other organizations should be involved?
9. What are the steps necessary to move forward?



Coming Attractions Previewing RLI Part 2

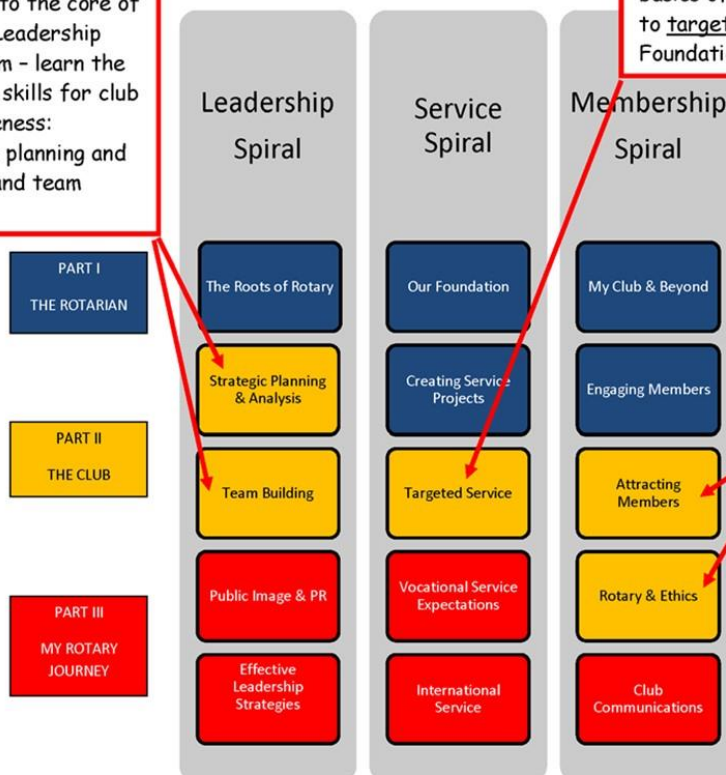
Part I centered on the basics of being a Rotarian. Part II builds on the Part I courses, and seeks to increase your effectiveness in your Rotary club!

Spring from the introductory Roots of Rotary into the core of the RLI Leadership curriculum - learn the essential skills for club effectiveness: strategic planning and analysis and team building!

Combine the practical mechanics of building a **Service** project with the basics of how our Foundation works to target service using Rotary Foundation resources!

Clarity of purpose and knowledge of what it means to be an engaged, ethical Rotarian leads to analysis of some of the most difficult issues facing Rotary clubs: How can my club attract **Members** that share our values and commitment and what does it mean to act ethically?

RLI CURRICULUM SPIRALS



Sign up for RLI Part 2 at midatlanticrli.org