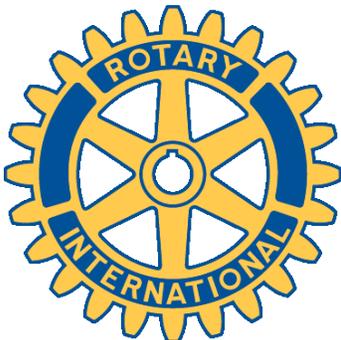
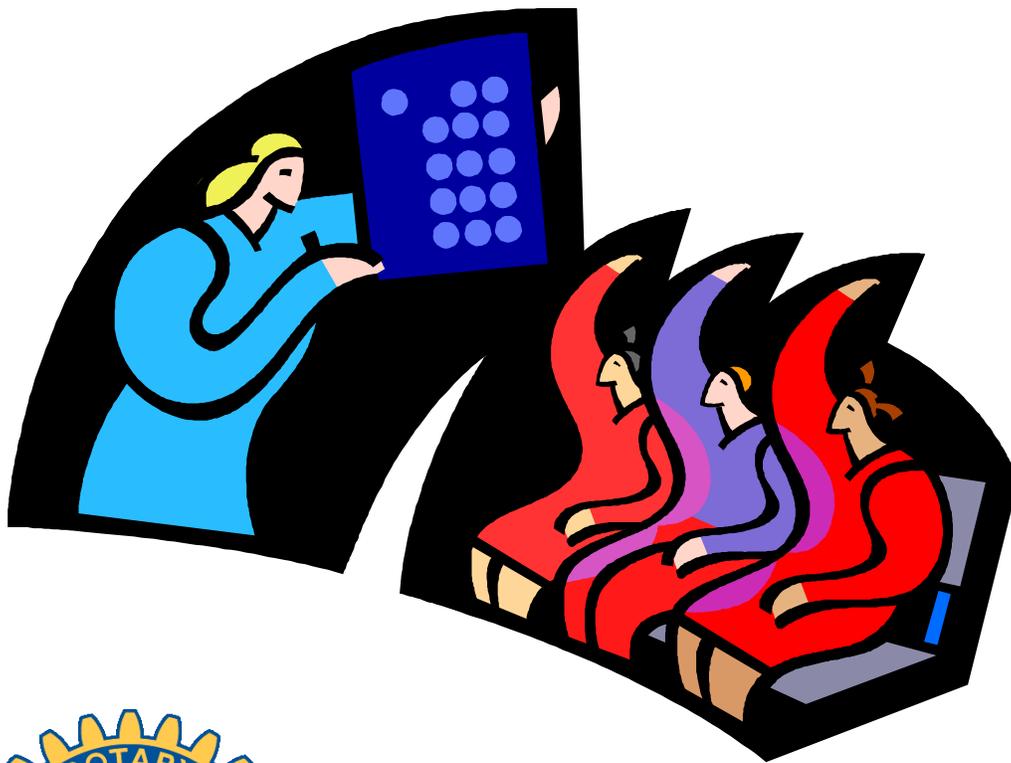


Eagan Rotary Ethics Workshop Toolkit

Planning Guide for Hosting a Rotary Ethics Workshop



Developed by Eagan Rotary

Eagan Rotary - Ethics Workshop Toolkit

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Introduction

This Eagan Rotary Ethics Workshop Toolkit is a collection of the processes, checklists and other resources needed for your Rotary Club to host an Ethics Workshop for high school students together with the assistance of the Eagan Rotary and University of St. Thomas MBA students. The approaches, timelines, and checklists shown are the result of over 16 years of experience, student feedback, and improvements to provide a meaningful ethics experience for the students and Rotarians. It is our goal to provide a framework of ethical decision making tools that has relevance to the student's daily life both now and into their careers.

Eagan Rotary is excited to partner with you on this workshop. It has been our experience that providing this opportunity to the students is a highly rewarding and gratifying endeavor, one that the Rotarians will often value as much as the students.

This toolkit is meant to outline all the steps necessary for the Rotary Club, local high school, and host facility to prepare for and host an Ethics Workshop. If, however, there are questions about the intent of any of the steps, please feel free to connect with your Eagan Rotary contact to discuss the background, get clarifications or possible variations to best meet the needs of your event.

Congratulations on committing to put into action the Rotary motto of "Service Above Self" to make a difference in the lives of your community's youth.

Best Regards,

Eagan Rotary Ethics Workshop Expansion Committee

Workshop Overview

Workshop Goals

The Eagan Rotary Ethics Workshop is a full-day immersion into the field of ethics for high school students from your local high school.

The program has been conducted since 1994 by the Eagan Rotary Club for students from Eagan High School. In Eagan, the Ethics Workshop (EWS) is led primarily by an ethics professor from the University of St. Thomas in St. Paul, MN. He is Dr. Kenneth Goodpaster and has worked with the Eagan Rotary Club to develop and fine tune this program over the years. In recent years, Mr. David Rodbourne, a vice president at the Center of Ethical Business Cultures at the University of St. Thomas, has also assisted with the EWS and has led the student role-playing exercise. It is with the consent of Dr. Goodpaster, Mr. Rodbourne, and the University of St. Thomas that the Eagan Rotary Club is now embarking on this EWS Expansion Project to take this highly successful program to Rotary Clubs and high schools throughout Minnesota and beyond.

Each Ethics Workshop is composed of two or three instructors, any number of high school juniors and seniors in multiples of 6 students per table group (up to 54 students is quite workable), and one Rotarian volunteer to join each small group of six students. The members of each small group remain together for all aspects of the day.

Description of Day

The day begins with registration and a continental-style breakfast is provided for the students and Rotarians. A welcome is then presented from the host Rotary Club and perhaps from the host facility where the EWS is being conducted. All participants are then introduced to the students.

The first portion of the EWS will be taught by a trained Eagan Rotarian. It is highlighted by a video which presents a challenging ethical dilemma that the students have most likely never faced before. There is a lecture which helps build the students' ethical foundation and then some focused small group discussions. After a break the Eagan Rotarian leads a report back session where each of the small groups get to discuss their thoughts and observations for the benefit of all in attendance.

The second portion, after a break, is a lecture led by either an Eagan Rotarian or an MBA student from the University of St. Thomas. It focuses on an appropriate response to ethical dilemmas (hazards in our lives) and gives the students some tools to use as they go forward in their high school lives and beyond. Rotary's Four-Way Test is also inter-woven into this solution.

Just prior to lunch the role-playing case (simulation) is introduced and the students are told of the activities awaiting them later in the day. This will be the time when the students get to put into practice the ethical training to which they were exposed in the morning. A small amount of pre-reading will be asked of each student prior to attending the EWS.

The role-playing exercise commences after lunch under the guidance of an Eagan Rotarian. It is a rapid-fire period for the students to assimilate a set of facts about a company, of which they play the roles of its officers, and discuss their way through a web of ethical dilemmas confronting their company. In the end, the officers of the company (students) must decide how they plan to proceed, which actions they'll be taking, and why they feel that their chosen course is the right one. The Rotarians at each table will have a few minutes to discuss how the Four-Way Test can be useful in their situation. After another break, the student leader from each small group is asked to present the group's conclusion and the rationale behind their decision, and then face questioning from the other members of their audience. This portion of the EWS is often the highlight for the students and always rates very high in their evaluations.

To wrap-up the day, an Eagan Rotarian will reflect back on the lessons learned, highlight some key points for the students to take away from the day and finally show another short video to help put emphasis on a key point made early in the day.

Sample Schedule

Duration	SESSIONS & TIMES	PROGRAM
15 minutes	REGISTRATION & BREAKFAST 7:00 am - 7:15 am (Group Room)	Register at entry lobby Eat with Table Group in Group Room
20 minutes	WELCOME & INTRODUCTIONS 7:15 am - 7:35 am (Group Room)	Welcomes – Local Rotary & Host Representative “What does Ethics Mean – for individuals, for organizations?” (Eagan Rotary Presenter)
5 minutes	Transit to Lecture Room	
45 minutes	SESSION #1 – AN OCCUPATIONAL HAZARD 7:40 am – 8:25 am	A parable and a pathology (video)
30 minutes	SESSION #2 – REFLECTION 8:25 am – 8:55 am	Table group discussions (handout) Sadhus in our lives
5 minutes	STRETCH BREAK 8:55 am – 9:00 am	
35 minutes	SESSION #3 – SHARING 9:00 am – 9:35 am	Table group reports
10 minutes	BREAK 9:35 am – 9:45 am	
55 minutes	SESSION #4 – CONSCIENCE: RESPONSE TO THE HAZARD 9:45 am – 10:40 am	The development of conscience and its place in our lives including Rotary’s Four-Way Test
15 minutes	SESSION #5 – INTRODUCTION TO SIMULATION 10:40 am – 10:55 am	Description of simulation process
5 minutes	Transit to Group Room	
20 minutes	LUNCH 11:00 am – 11:20 am	
65 minutes	SESSION #6 – SIMULATION EXERCISE 11:20 am – 12:25 pm	Round 1, round 2, and final decision
10 minutes	SESSION #7 – FOUR-WAY TEST EXERCISE 12:25 am – 12:35 pm	Review assigned question (Table Rotarian)
5 minutes	Transit to Lecture Room	
65 minutes	SESSION #8 – SIMULATION ANNUAL MEETING SUMMARY 12:40 pm – 1:45 pm	Table group reports SIMULATION summary
5 minutes	STRETCH BREAK 1:45 PM – 1:50 PM	
20 minutes	SESSION #9 – Sadhu Revisited 1:50 pm – 2:10 pm	Video and discussion
20 minutes	SESSION #10 – WRAP-UP 2:10 pm – 2:30 pm	Summary Going forward – Walk the Talk (Rotary) Workshop Evaluations

Total 7 1/2 hours

The above schedule is based on a 7:00 am workshop start time and the times budgeted are based on a 9 table (54 student) workshop size. In particular, Session #8 allots an average of 7 minutes per table to present each group’s Summary and some Q & A time. The final schedule should be adjusted based on the actual start time and number of tables.

Also this sample schedule assumes that the host facility is one in which a Group Room and a Lecture Room are both available, see Host Location for description of each room how to adjust if only one room is available. The “transit” time shown in this schedule should be changed to short “stretch breaks” if only one room is used. It is important to get the students up often as they are accustomed to moving from one class to another and can otherwise get drowsy.

Overview of Responsibilities

This section outlines an overview of the responsibilities of each main group involved in running the Ethics Workshop. The lead of course is taken by the sponsoring Rotary Club. At the same time it is essential that the local High School be a committed partner in selecting the students and supporting their involvement in this day away from school. Finally, trained Eagan Rotarians will be available as a resource during the planning stages and will lead the lecture, discussion and simulation sessions on the day of the event. In addition to the Overview of Responsibilities below, there is also a detailed item by item checklist for each of these groups.

Local Rotary Club Responsibilities

The local Rotary Club is responsible for developing the interest and support for the Ethics Workshop within their club and establishing a partnership with their local High School. The detailed planning and follow-up is also a part of the local club's responsibility. While Eagan Rotarians will assist with the workshop, the enjoyment and accomplishment of this great event belongs to the sponsoring Rotarians.

It is recommended that an Ethics Workshop Steering Committee be formed under the Vocational Service Avenue to lead the efforts in planning and coordinating the event. There should be 5 to 8 members of this steering committee with regularly scheduled meetings. Having sufficient steering committee members to divide up responsibilities helps keep the tasks manageable and everyone involved. We also recommend some thought be put into providing a transition for workshop leadership in following years. This may either be a co-chair or incoming-chair that commits to leading the ethics workshop the following year.

Early on it is imperative to provide a strong connection to the local High School. When the Ethics Workshop Steering Committee approach their high school principals to promote the Rotary Ethics Workshop Day, there will inevitably be several questions regarding which students should be selected and how the selection process should work. It is important to understand that the Principal is the key leader at every high school. If the Principal does not support the Ethics Workshop, it's very likely that the program will be marginalized. For that reason, Rotarians must engage the Principal early in the planning process. We suggest that you invite the Principal and even Superintendent to the initial Rotary meetings as you listen to the Eagan Rotary representatives explain the workshop, its timelines, process and desired outcomes. We firmly believe that, once the Principal understands the Ethics Workshop and what it can do for his/her student leaders, you will enjoy a predictably positive outcome.

The steering committee would meet with the Eagan Rotarian volunteers during the two planning meetings that they attend. We also recommend inviting the high school staff contact to some of the planning meetings to keep them informed and to include their perspective. Eagan Rotary has found the Assistant Principal on our team to have great insight into what works best for the students. Other meetings should be called as necessary to track checklist progress and make planning decisions to keep the process on the recommended timeline.

The sponsoring Rotary club will also need to recruit additional Rotarians along with those of the steering committee to volunteer the day of the Ethics Workshop as Table Rotarians. The Ethics Workshop Chair or lead Co-Chair, however your steering committee is setup, should not be assigned a table so that they are available to oversee the day and work out any bumps that may arise. The other steering committee members typically are free to be some of the Table Rotarians. Previous ethics workshop or committee experience, however, is not a prerequisite for Rotarians interested in volunteering on that day. In fact, most of our past Ethics Workshop chairs have found their passion for the Ethics Workshop as a Table Rotarian with no prior knowledge of the workshop other than a brief Rotarian training session provided.

The sponsoring Rotary Club should also consider whether to include the optional Essay Contest for the students as a follow-up to the Ethics Workshop. This contest if included is for those students who decide to write a 2 to 3 page essay about ethics based on one of a handful of topics provided in the Student Binder essay handout. The essay is written only by those students interested in competing in the contest and is due about 3 weeks after the Ethics Workshop. The essays are judged by the EWS Steering Committee and a winner selected. Eagan Rotary has found that due to the busy lives of today's students it takes a sizable monetary reward (typically \$500) and plenty of advertising the Essay Contest in order encourage a participation rate of 10% to 15%. However, the submitted essays have been excellent. In addition, having the winning student come to a Rotary meeting to receive their award and read their essay is also a great way to expose the rest of the club to the Ethics Workshop.

Local High School Responsibilities

It has been the experience of Eagan High School over the past 19 years that the ability for their students to attend the Ethics Workshop is truly an outstanding opportunity both to provide a challenging university level introduction to ethics as well as a great way to partner with the business community. While there are important responsibilities for the High School, the majority of the Ethics Workshop is planned and presented for them and their students by Rotary.

The local High School is responsible for taking the lead in all preparations directly related to the students. The High School should appoint a staff liaison to the Ethics Workshop Steering committee to become familiar with the basic planning process and the elements of the actual workshop. It is recommended that the High School staff member attend a few of the planning meetings to facilitate communications and track the checklist of High School responsibilities.

The first major responsibility of the High School is selecting juniors and seniors students for the workshop (younger students, even top achievers, should be saved for future workshops). The High School should start by setting up a process for the teachers with classes of juniors and seniors to nominate students that they feel show current leadership or have a strong potential to be future leaders within their peer groups. The goal is to get a list including approximately 5% to 10% more students than targeted for the actual event. The following is the suggested criteria and rationale for the student to be selected:

1. This Rotary program is different from the Rotary Strive Program. That is, we are looking for “natural leaders,” also called “emergent leaders.” Emergent leaders are not necessarily elected or appointed leaders. Rather, they are students whom other students will follow because they believe the leader has something special to offer.
2. Because the afternoon of the workshop will involve several teams of six students each assuming responsibilities for managing a corporation, the total number of students selected should be a multiple of six.
3. One-half of the students should be juniors and one-half should be seniors.
4. Selected students should include both genders, racial and ethnic minorities.
5. The Principal or High School staff liaison should be encouraged to consider including “negative” student leaders. While these students can be problematic for the principal and faculty, the fact remains that they lead. Why not work with them to help them discover ethical leadership?
6. There should be **NO REPEAT STUDENTS!** Schools don’t allow students to repeat courses for credit for good reason and this program is no different.
7. To identify the optimal students, the Principal or High School staff liaison should issue a memo to his/her faculty, inviting faculty to identify six to ten natural or emergent student leaders per their observations. (See sample principal memo in the Local High School Responsibilities section of the Toolkit.)
8. Once the faculty members have provided student names to the Principal or High School staff liaison, he or she should meet with the school’s assistant principals and counselors to winnow the list to the desired number of attendees. Consider which students could profit most from the experience and which students might be most likely to put their learning experience into practice in the school after the workshop. (By the way, we recommend a fall workshop, which will provide the benefit of a full school year with a full complement

of trained ethical leaders. Also, all the junior participants will offer two full years of ethical leadership.)

Once a suitable list of appropriate students is established, the Principal should meet with those students to explain the program, its origin with the local Rotary Club (why not include a Rotarian in the meeting?), the reason for their selection, the importance of the opportunity and details about time, place and agenda. This would also be an excellent time to remind students that the Ethics Workshop experience should be included in their resume and college application materials. If selected students understand how important the opportunity is to the principal, they will likely invest more in the process.

Next, these students are asked whether they can commit to attendance. There are always some students within this group with conflicts on the day of the event or who decide not to attend. Care should be taken to select exactly 6 students per table since that is the maximum roles available for the simulation as well as not exceeding the maximum set by the Host Rotary Club, usually 54 for one High School or 60 for workshops involving two or more High Schools. It is recommended that two or three alternates be selected to cover for last minute absences on the day of the workshop.

Now that a final attendee list has been developed, we recommend the Principal issue a memo to the faculty, identifying the names of selected students and inviting faculty to congratulate the students on their selection. We also recommend the principal give recognition to the selected students via a letter to parents, as well as the school newsletter, blog, email messages and any other media the school typically utilizes. Each of these steps will enhance student perceptions of their experience. A list of the identified students can also be provided to the local newspaper, radio and television media. They are typically anxious to report positive school events.

The Principal or High School staff liaison should review the list of students and select one leader for each table of 6 students provided (9 tables in the typical group of 54 students, fewer tables for a smaller workshop). There is typically a mixture of junior and senior selected as Table Leaders. Next the High School assigns the remaining students to each table under the Table Leader already selected. Again this table group should be a mixture of juniors and seniors as well as trying to separate close friends from being at the same table. This listing of Table Leaders and their table groups (numbered 1 through 9 for a 54 student workshop) is to be provided to the local Rotary Club for name tags and inclusion in the Binder.

The High School is also responsible for copying and distributing the student handouts prior to the Ethics Workshop. These handouts include the directions to the workshop's host facility, time to arrive, and the pre-reading for the simulation (stress the importance of doing pre-reading).

The week before the EWS the Student Leader Training session is typically held at the High School. This training session is run by an Eagan Rotarian and includes only the 9 or 10 students selected as table leaders and a few Rotary trainers. The high school is responsible for providing a room, releasing the students, and lunch if done over the students lunch period.

The High School staff liaison should plan on attending the entire Ethics Workshop (at least the first few years) which allows them to get a better impression of the benefits of the event. It is also

imperative that the Principal (if different than the staff liaison) attend at least one-half day of the workshop. Besides understanding more about the content of the workshop material, the principal's presence will send an important message to the participating students and give them common understandings and mutual talking points.

Finally, the principal should find ways to communicate to the faculty about the workshop, its activities, content and outcomes. The product of the workshop should provide ample opportunities to improve the "ethos" of the school environment in very positive ways!

**EAGAN ROTARY ETHICS WORKSHOP
IDENTIFYING THE APPROPRIATE STUDENTS
SAMPLE PRINCIPAL MEMO TO FACULTY**

**(YOUR LOCAL) HIGH SCHOOL
M E M O R A N D U M**

FROM: (Principal)
TO: (Your) High School Faculty
DATE: (Date of your Workshop)
SUBJECT: (Your Community) Rotary Ethics Workshop

Good Morning,

Juniors and seniors from (Your) High School will be participating in the annual Eagan Rotary Ethics workshop on (Your selected date) at (Your selected off-site facility). This is an awesome day for students. They get the opportunity to explore ethical issues in their personal and business lives while working with (Your community) Rotarians and Eagan, MN Rotarians.

According to our local Rotarians, this workshop can have a huge influence on ethical thought and behavior for our students! Once again, I am asking you to nominate juniors and seniors whom you see as natural or emergent leaders within our student body. Please email from six to ten suggested names to me by (Your deadline).

Thanks for taking your time for this important project. We expect to see positive results from those students attending the workshop as they influence other students positively and ethically!

Eagan Rotary Responsibilities

Eagan Rotary's Ethics Workshop Expansion Committee is responsible for supporting the local Rotary Club throughout the information gathering, planning, and implementation of the Ethics Workshop. This starts with Eagan Rotarians coming to the potential host club and explaining the benefits and process of holding an Ethics Workshop for your local high school students. They will assist in presenting the concept to the whole club as well as meet with the potential EWS Steering Committee leaders.

After the local Rotary Club has committed to holding an Ethics Workshop, Eagan Rotary will assign two to three contacts to meet with the local club's Steering Committee at least twice during the planning process. These contacts will also be available by telephone or email to answer whatever questions come up during the planning process. Eagan Rotary will also provide this Ethics Workshop Toolkit binder as a resource during the planning process. Eagan Rotary will also provide emails with handouts for printing, sample forms and other digital files to be filled in or modified to fit this particular Ethics Workshop.

As the Ethics Workshop approaches, an Eagan Rotarian will come to assist with the two training sessions. At the Student Table Leader Training Session the Eagan Rotarian will lead the training with assistance from the local EWS Steering Committee. This training session will prepare the students leaders for their special role as facilitator and simulation CEO. On the same day, the Rotarian Table Volunteer Training Session should also be setup. The Eagan Rotarian coming for the Student Training will lead this training as well again with assistance from the local EWS Steering Committee.

On the day of the event, volunteers from Eagan Rotary will present all the lecture sessions, they will provide the DVD programs and PowerPoint presentations that will be shown, and will lead the simulation exercise. In addition, Eagan Rotary will bring all the simulation messages in separate envelopes for each student. Eagan Rotarians will bring one laptop and LCD projector (see Host Location section for the need for a second LCD projector if two rooms are used).

After the student portion of the event day, Eagan Rotarians will join the local Steering Committee and Rotarian Table Volunteers in the debriefing session to discuss successes and areas where the EWS can be improved for the following year.

Planning Timeline for local Rotary Club

Task	Deadline	Weeks Before Workshop
1. Formally commit to Eagan Rotary to host an EWS	_____	15+
2. Determine Rotarians for EWS Steering Committee	_____	14
3. Gain local High School commitment	_____	13
4. Kickoff meeting with Eagan Rotarians	_____	12
5. Determine host location for EWS	_____	12
6. Select date for EWS	_____	11
7. Coordinate event site & food	_____	10
8. Sign-up Rotarian Table Volunteers	_____	8
9. Progress / support meeting with Eagan Rotarians	_____	6
10. Purchase student binder materials	_____	4
11. High School selects and confirms student list	_____	3
12. Deadline for all student binder printing submittals	_____	2
13. Student binder insert printing complete	_____	1.5
14. Assembly of student binders by Rotarians	_____	1
15. Student Table Leader training	_____	1
16. Rotarian Table Volunteer training	_____	1
17. Ethics Workshop	_____	0
18. Optional Essay Contest	_____	-3

Developing a Budget

The following is a typical budget for the Ethics Workshop based on 54 students (9 tables of 6) plus Rotarians. Review any potential extra costs and number of students to develop a specific budget for your Ethics Workshop.

Sample Budget	
Eagan Rotary Costs <ul style="list-style-type: none"> \$200 Commitment Fee (plus mileage, room and food if out of metro area) 	\$200
Simulation Licensing Fee <ul style="list-style-type: none"> \$300 to \$500 Licensing Fee (amount depends on number of students) 	\$500
Catering <ul style="list-style-type: none"> Continental breakfast and buffet lunch (food for 70 people) (This is often donated or sponsored - value up to \$1,000)	\$0
Office Supplies <ul style="list-style-type: none"> Binders, tabs, name tags, envelopes (54 students + 9 Rotarian table volunteers + 4 admin = approx 70 binders) 	\$250
Printing <ul style="list-style-type: none"> Training materials (10 CEO student leader training handouts + 10 Rotarian table volunteer training handouts = ~100 pages) Binder inserts (70 copies x est 70 pages = est 5000 pages) Signage for host facility (Printing also is often donated)	\$500
Room Rentals <ul style="list-style-type: none"> Renting workshop rooms (typically donated by a facility host - value up to \$700) Audio / Visual equipment rental (if needed) 	\$0
Optional Essay Contest <ul style="list-style-type: none"> \$500 Prize for winning essay, multiple \$25 gift cards drawn from all non-winning submittals (\$600 total if Essay Contest is included by Sponsoring Club) 	\$0
Contingency <ul style="list-style-type: none"> Add contingency if desired by individual club 	\$0
Total Estimated Budget (modify for any item noted above as typically donated but a sponsor/donor not found)	\$1,450

Detailed Checklists

The following section provides individual detailed checklists for each of the main elements of the Ethics Workshop from planning to the final day. There is a separate checklist for the High School and one for the Host Facility as well. It is recommended that copies of these checklists be made and distributed to the appropriate individuals or groups responsible for coordinating the element shown.

These checklists provide only brief descriptions of each task and are meant as a method to assist in assuring nothing is overlooked during the process. The entire Toolkit should be reviewed to find in-depth descriptions of the elements shown in the checklist. The checklists are in approximate chronological order but some variation is would be anticipated. The checklists are not necessarily exhaustive of all steps in the Ethics Workshop preparation and presentation. There may be additional items each person or group would like to add to their checklist as items occur to them.

The individual checklists shown below are included in the following pages:

- Steering Committee Planning Checklist
- Local High School Planning Checklist
- Student Selection Process Checklist
- Student Binder Checklist
- Training Session Checklist
- Host Facility Checklist
- Day of the Event Checklist
- Essay Contest Checklist (Optional)

Steering Committee Planning Checklist

The following detailed checklist covers the majority of responsibilities of the Ethics Workshop Steering Committee. The items shown below are generally in chronological order, but some variation for minor steps is anticipated. This list is not necessarily exhaustive, feel free to add any items that come up as the Committee discusses and prepares for the workshop.

	Item	Completed
1	Review Eagan Rotary presentation and video to assure full club support.	
2	Determine Rotarians members to staff the Steering Committee.	_____
3	Select a chair (co-chairs) for a Steering Committee.	_____
4	Contact local High School – sell event to Principal getting preliminary agreement.	_____
5	Draft budget for event based on sample provided.	_____
6	Get approval from Rotary Club Board including budget for event.	_____
7	Formally commit to Eagan Rotary – Submit Commitment Fee.	_____
8	Meet with the lead Eagan Rotarian(s) to review this Toolkit.	_____
9	Gain local High School commitment, determine staff liaison. Review school’s responsibilities with staff liaison providing partial or complete Toolkit for their use.	_____
10	Find Host Facility – looking first for places that might donate their facility - assign a facility subcommittee to coordinate all facility needs.	_____
11	Coordinate food requirements with Host Facility or separate caterer - facility subcommittee follows up	_____
12	Select a date for the Ethics Workshop coordinating with the High School and Host Facility.	_____
13	Assign a Student Binder subcommittee (or individual) to coordinate Student Binder responsibilities	_____
14	Mid-planning Progress Meeting with Steering Committee and Eagan Rotarians. Review progress on all checklists.	_____
15	Signup additional Rotarians to fill out the required number of Table Volunteers.	_____

Item		Completed
16	Decide if the optional Essay Contest is to be included in EWS	
17	Schedule the Training Sessions coordinating with High School. Inform Eagan Rotarian Contact of Training times for them to schedule a Trainer.	_____
18	Update EWS Schedule document based on start time determined along with High School staff liaison. Send to Eagan Rotary contact for final review.	_____
19	Arrange any photographic capabilities desired by the local club to record the EWS.	_____
20	Select enough Rotarians to staff administrative task on the day of the EWS and assign tasks, refer to Day of Event Checklist.	_____ _____

Local High School Planning Checklist

The following detailed checklist covers the majority of responsibilities of the local High School in preparation for the Ethics Workshop. This list is not necessarily exhaustive, feel free to add any items that come up as preparation for the workshop proceeds.

	Item	Completed
1	Review Ethics Workshop background information and commit to partner with the Sponsoring Rotary	
2	Confirm dates for EWS along with Sponsoring Rotary Club	
3	Assign staff liaison contact (e.g.- assistant principal, counselor, etc.)	
4	Determine number of student to participate (<u>must be divisible by six</u>). Should be 54 students for workshop with one High School and 60 students for workshop including two or more High Schools. We recommend also selecting two to three student alternates to cover for last minute absences on the day of the Workshop.	
5	Select students as shown on the separate Student Selection Process Checklist.	
6	Solicit students (half juniors and half seniors - <u>NO</u> freshmen or sophomores and <u>NO REPEATS</u>)	
7	Confirm student availability	
8	Select student table leaders from the group of 54 or 60 students	
9	Coordinate student training for just student table leaders (date, location, food & beverage)	
10	Determine possible financial contribution to local Rotary Club	
11	Participate in planning meetings with local Rotary and Eagan Rotary Clubs	
12	Provide EWS pre-reading and logistical instructions (map, time...) to all students	
13	Join students on the day of the EWS as an observer	
14	Participate in the Rotary debriefing	

Student Selection Process Checklist

The following detailed checklist covers the process for the local High School in selecting the students for the Ethics Workshop. This list is not necessarily exhaustive, feel free to add any items that come up as preparation for the workshop proceeds.

	Item	Completed
1	Review the detailed selection criteria discussion in the Local High School Responsibilities section of the Toolkit.	
2	The Principal or Staff Liaison sends out letter to Faculty requesting student nominations and providing criteria for selection (see Sample Letter in Toolkit)	
3	The Principal or Staff Liaison gathers nominations from faculty and winnows down to target number. Selection should keep in mind the target number set by the local Rotary Club, must be a multiple of 6 (usually 54 for a single High School), include both Juniors and Seniors, be inclusive of both genders and minorities, and include No Repeats from previous years. In addition, select 2 or 3 student alternates to fill any absences on the day of the Workshop.	
4	The Principal or Staff Liaison should meet with students to congratulate them on their selection, describe the event, and confirm availability. (If permission slips are required, these should be distributed at this time.)	
5	The Principal or Staff Liaison should issue a memo to faculty listing the students that have been selected and encouraging the faculty to congratulate the students.	
6	The Principal or Staff Liaison may send a letter to the parents recognizing their student's selection to this workshop, as well as provide school newsletter, blog, email messages and any other media the school typically utilizes.	

Student Binder Checklist

The following detailed checklist covers the majority of responsibilities related to the creation and assembly of the Student Binder.

	Item	Completed
1	Determine if printing will be donated or locate a local print shop.	
2	Purchase binders and dividers.	_____
3	Revise standard forms and add them to the “pdf files” all provided by Eagan Rotary.	_____
4	Obtain binder submittals.	_____
5	Submit binder materials for printing.	_____
6	Pick up materials.	_____
7	Assemble student binders with Rotarians. Place in order shown in Index.	_____
8	Deliver student binders to host location.	_____
9	Hand out binders to students and Rotarians at check-in table.	_____

Training Session Checklist

The following detailed checklist covers the majority of responsibilities related to the Student Leader Training and the Rotarian Table Volunteer Training. This list is not necessarily exhaustive, feel free to add any items that come up as preparation for the workshop proceeds.

	Item	Completed
1	Coordinate with the High School to pick a date for the Student Leader Training Session that also works for the Rotarian Table Volunteer Training. Clarify that this training is just for the 7 - 9 Student Table Leaders, not all students.	
2	Verify Eagan Rotarian trainer is available for the proposed date.	_____
3	Verify that the High School has provided a room for Student Leader Training.	_____
4	Verify that High School is providing lunch for Students and trainers if during the students lunch period (or have local Rotary bring lunch).	_____
5	Verify that High School has notified Student Leaders about time and room for Training Session.	_____
6	Invite and then remind Rotarian Table Volunteers to attend training session.	_____
7	Print handouts for Student Leader Training (files provide by Eagan Rotary), bring to session.	_____
8	Print handouts for Rotarian Table Volunteer Training (files provided by Eagan Rotary), bring to session.	_____
9	Assign one of the Four-Way Test questions to each Table Group. Write group number and question number on each of the handouts.	_____
10	Assign six of the Rotarian Table Volunteers to do Corporate Officer descriptions at Ethics Workshop based on handout provided at Training.	_____
11	Meet Eagan Rotarian Trainer and escort them to each session.	_____
12	The Steering Committee member that attended the Rotarian Table Volunteer Training is to train any Rotarian Table Volunteers that did not make the session. All Volunteers need to be trained prior to the Ethics Workshop.	_____

Host Facility Checklist

The following detailed checklist covers the majority of responsibilities related to planning the host location, A/V needs, setup and food for the Ethics Workshop event. This list is not necessarily exhaustive, feel free to add any items that come up as preparation for the workshop proceeds.

	Item	Completed
1	Contact Rotarian businesses or ones in the general community as possible Host Facility.	_____
2	Determine if two rooms are available or if just one will be used.	_____
3	Coordinate table and chair quantities and layout with Facility.	_____
4	Verify availability of podium, A/V requirements, screens, etc. Make arrangements to rent any missing required elements.	_____
5	Determine if Host Facility has on-site food or if outside catering needs to be arranged.	_____
6	Coordinate menu and timeline with food provider. <u>Food should arrive 20 minutes prior to lunch time shown on final schedule.</u>	_____
7	Provide for registration table and buffet tables within Facility.	_____
8	Invite a Host Facility Representative to provide Welcome to their facility at the start of the EWS.	_____
9	Insure a whiteboard and colored pens are available or make arrangements to bring flip chart and markers.	_____
10	Assure the necessary podium, microphones, projection screen are in place before the start of the EWS event.	_____
11	Assure the necessary audio visual equipment/ staff are all in place before the start of the EWS event.	_____

Day of the Event Checklist

The following detailed checklist covers the majority of responsibilities related to responsibilities on the day of the Ethics Workshop. This list is not necessarily exhaustive, feel free to add any items that come up as preparation for the workshop proceeds.

	Item	Completed
1	Assure local Rotarians (Table and administrative) arrive 45 minutes early.	
2	Registration...Assign a Rotarian to get an updated Student participant list from the Student Binder subcommittee prior to the workshop. Merge this list with the list of Rotarians who will be at each table. Have this list forwarded to the workshop coordinator.	
3	Assign a Rotarian to develop a name tag for all participants. Put a table / group number on each name tag or title for participants that are not assigned a table. (EWS Chair, Eagan Rotarians, MBA students, High School staff, Host Facility representative, etc.)	
4	Assign a Rotarian to coordinate with the Student Binder subcommittee to make sure the finished binders are delivered to the Host Facility early on the morning of the event.	
5	Set up a Registration Table containing name tags for all attendees and the student binders. The same Rotarian that made the name tags can register the students/adults and pass out the binders to all participants as they arrive.	
6	Set up tables with Table Number tents.	
7	Hang the Rotary Four-Way Test banner in the lecture room.	
8	The facility subcommittee should arrive early and verify that the room(s) are setup correctly and all A/V items are available (except those being brought by Eagan Rotarians)	
9	The facility subcommittee, or catering subcommittee if separate, should arrive early and verify that the continental breakfast is setup.	
10	Assign Rotarians to welcome and assist directing students from building entry to Group room.	
11	Welcome comments from the EWS Chair. They should also review the list of participants to determine if there will be any dignitaries, guests, etc. These individuals, as well as all those responsible for setting up the event, should be recognized during the welcome.	

	Item	Completed
12	Welcome comments from the Host Facility Representative.	<hr/>
13	Provide students with verbal directions to restrooms and lecture rooms (dependent upon the facility).	<hr/>
14	The EWS Chair should introduce the Eagan Rotarian Presenter and they will begin the workshop.	<hr/>
15	Just before the start of Session #1 (the Sadhu video), the High School staff liaison (or EWS Chair if need be) should check with the Rotarian that staffed the registration table to see if any Table is missing more than one student. If so, invite a student from a full table to switch groups.	<hr/>
16	As lunch approaches, the facility subcommittee, or catering subcommittee if separate, should make sure that the food has arrived and is being setup for the buffet line.	<hr/>
17	At the end of Session #10 – Wrap-up, remind students to complete the EWS evaluation form and leave with Rotarians as they exit the room.	<hr/>
18	One Rotarian for each exit should be assigned to collect the evaluations give them to the Chair.	<hr/>
19	Debriefing... The facility subcommittee should make sure that there is space set aside for a meeting debriefing and that tablets are available for note taking. This can be the same room as the Group Room. The EWS Chair should remind all Rotary Table Volunteers and Steering Committee members of the debriefing prior to the close of the workshop.	<hr/>

Essay Contest Checklist (Optional)

The following detailed checklist covers the majority of responsibilities related to setting up, advertising, grading and distributing the awards for the Essay Contest. This list is not necessarily exhaustive, feel free to add any items that come up as preparation for the workshop proceeds.

Item	Completed
1 Determine/publish the ground rules for the students essays (length, due dates, writing format, review committee, award(s) size and method of recognition.	
2 Determine the essay topics (two to four selections).	_____
3 Prepare presentation material (offer voluntary participation) for use at end of EWS.	_____
4 Collect all submitted essays and forward to review committee.	_____
5 Select/rank essays.	_____
6 Award winner(s) (school awards assembly and/or Rotary meeting works well)	_____

Training Sessions

There are two training sessions in preparation for the Ethics Workshop. The goal of these sessions is to provide the Student Leaders and the Rotarian Table Volunteers additional background on the flow of the day, their specific roles, and provide some team leadership tools for the students to use in managing the different personalities and team dynamics of the students they may find at their table group. These training sessions will be run by an Eagan Rotarian Trainer but at least one Steering Committee member should also be in attendance as the coordinator and as a potential trainer in future years. Both training sessions should occur on the same day within the last week prior to the actual Ethics Workshop.

Rotarian Table Volunteer Training

This training session should include all Rotarian Table Volunteers whether they are on the Steering Committee or not. The goal of this short session is to inform the Rotarians of the flow of the day and help guide them in their different roles during the different sessions. This training session will be led by an Eagan Rotarian Trainer but one of the Steering Committee should also be assigned to attend. At Eagan, we have found that having the training session 30 minutes before the regular club meeting the week prior to the EWS has often been efficient for the Rotarians, but coordinate date with the High School staff liaison. This training session should be on the same day as the Student Leader Training (be careful to not plan it at the same time as the Student Binder assembly.)

In preparation for the training session, the Steering Committee member should print and prepare the handouts provided ahead of time by Eagan Rotary including the selection of which tables are assigned which one of the Four-Way Test items to discuss after the simulation. The Table Number should be written on each copy as well as the Four-Way Test item assigned.

During the training session the Eagan Rotarian Trainer will go through the items listed in the following Rotarian Table Volunteer Training Handout.

In particular, we have found that the Rotarian Table Volunteers by their nature as business and community leaders if left to their own tend to dominate the table discussion. While this is natural, it is important to allow the students to be the focus of the day. During the morning sessions there are times when equal participation by the Rotarian Table Volunteers is desirable. However, restraint is especially needed during the simulation where the Student Table Leader as CEO is charged with running the “meeting”. The Trainer will encourage the Rotarians to sit back and observe during the simulation; to only ask a directed question to a quiet student or answer a procedural question. The Rotarian is to support the Student Table Leader, not replace them.

Remind the Rotarians to arrive plenty early on the day of the EWS to assist in last minute preparations and welcome the students. This is also an opportunity for the Steering Committee to assign additional tasks such as check in table, student evaluation collection, or other small tasks during the event as long as they don’t disrupt the table activities.

Ethics Workshop

Rotarian Table Volunteer Training Handout

- Ethics workshop history and overview
 - Partnership between local club, local high school, Eagan Rotary, University of St. Thomas, & Center for Ethical Business Cultures
- Location information
 - Workshop event host location and parking instructions (if any) Rotarian arrival time - 20 minutes prior to start of workshop minimum
- Agenda overview
 - Fast moving tight schedule
- Role of the Rotarian
 - Sit with table group throughout day – see List of Rotarians with Table Assignments
 - Student table leaders assigned
 - Share some of your own examples during the lecture discussion & assist table leader and make sure that everyone has chance to participate
- Pre-reading materials
 - Handout pre-reading for simulation
- Simulation Case overview
 - Focus of simulation – describe case
 - Unique messages given to each student “Board Member” (CEO, CFO, VP Marketing, etc) in two separate rounds.
 - During simulation: Assist student table leader **only** when needed, do **not** guide or direct students to your desired outcome, mostly **observe** during this session.
 - You can ask the student who is not participating a question such as “Isn’t there some message from ____ in your packet? Tell us more about that.” or “Do you have any information regarding _____ that might be relevant here?” Then let the student provide input.
- Corporate Officer Role Descriptions
 - Six volunteers to describe role of each officer to students (CEO, VP Marketing, etc).
 - Handout description sheet of one of the officers to each volunteer.
- Four-Way Test Assignment
 - Four-Way Test - last 10 minutes of group discussion is Rotarian’s chance to lead group discussion
 - Each table assign one of the Four-Way Test questions (Is it the Truth?, etc.); Rotarian table volunteer leads students in discussing in which ways the table met and didn’t meet the ethical values of this Four-Way Test question.
 - The student’s corporate announcement should not change based on this discussion.
 - Handout “Applying the Rotary Four-Way Test to the Simulation” to each Rotarian with their Table Number and Assigned Four-Way Test question. Rotarians are not to tell the students which question they are assigned until the start of this session.
- Questions and Answers

Attachments:

Site Map

Ethics Workshop Agenda

List of Rotarians w/ Table Assignments

Applying the Rotary Four-Way Test to the Simulation

Student Table Leader Training

The following outlines the typical student table leader training session along with the handout on the next page. This training is led by an Eagan Rotarian accompanied by members of the host Rotary Club and is held at the local High School. The High School staff liaison typically arranges a time near the student's lunch period for this 50 to 60 minute training session and arranges pizza and soft drinks (or other easy meal) for the group. This needs to be coordinated by the High School staff liaison for a start time, conference room, and to get the student table leaders released to the training session.

Topics to be discussed with the Student Table Leaders are the following:

Ethics Workshop history and background

- Partnership between the local Rotary Club, local High School, Eagan Rotary, the University of St. Thomas, and the Center for Ethical Business Cultures.
- Based on an Ethics Workshop developed at Eagan Rotary - refined over 16 years

Location Information

- Provide the location of Ethics Workshop
- Check-in time
- Parking instructions (if any)

Review the Workshop Schedule with the students

Role of the Student Leaders

- Table composition (6 students and 1 Rotarian)
 - Assigned table group to stick together all day including meals
- Review Student Table Leader Handout (see next page)
 - Active Listening
 - Involvement of all students
- Discuss simulation process – role play exercise
 - Student Table Leader is the CEO and leads discussion process
 - Rotarian is not to have active role in simulation, may help redirect if group gets side tracked or ask a question of one of the students if not everyone is participating
- Discuss background of actual simulation that will be used

Pre-reading materials

- Discuss importance of being familiar with the background information in the pre-reading

Four-Way Test

- Four-Way Test was developed for Rotarians as an ethical review of our daily actions.
- Discussion of one pre-assigned Test (not known by the group during the simulation)
 - This session is led by the Rotarian assigned to each table.

Questions and Answers

Ethics Workshop

Student Table Leader Training Handout

Tips for Student Table Leaders

- Each table will consist of 5 or 6 students and 1 Rotarian.
- Introductions: Ask each individual to introduce themselves: name, grade / occupation. Ask each to give “their own understanding of ‘ethics’.”
- Session #2: Give the group an overview / summary of their purpose and task. Restate the presenter’s guidance to the table groups.
- Appoint a TIMEKEEPER (a student other than yourself) to track time and to alert the group to 10 minutes before the end of Session #2.
- Appoint a REPORTER (a student other than yourself) to report the table group’s ideas to the full group. Use the final 10 minutes to wrap up and gather a summary for your reporter’s feedback to the large group in Session #3.
- Encourage participants to take notes to assist the reporter with the summary ideas.
- Focus the group on the task at hand in each session.
- The main task of the Table Leader in any group is: TO LISTEN ACTIVELY!!!
Some suggestions for “active listening” follow:
 - RESTATE what was said by a group member.
 - REFLECT the emotion of the speaker’s statement (label the emotion.)
“You seem bothered by . . .” or “You sound adamant...”
 - CLARIFY the meaning of the statement.
“Do you mean . . .? or “You sound adamant . . .”
 - ENCOURAGE participation from each participant.
 - SUPPORT diverse opinions within the group.
 - USE EYE CONTACT – look directly at the member speaking.
 - USE NON-VERBALS – acknowledge and encourage open discussion
 - SET LIMITS on overly vocal table participants.
“Let’s hear from everyone in the group about this topic.”
 - REFOCUS, again and again, to accomplish the assigned task.
 - REFRAIN from dominating the group with your own opinions.
 - REDIRECT those when they go off on a tangent.
- It’s hard work to be a good listener and stay focused on the task. Be persistent.
- PREPARE WELL and keep yourself centered. It will be a lot of fun!!

Attachments:
Ethics Workshop Agenda
List of Students w/ Table Assignments

Student Binder

One of the Ethics Workshop Steering Committee members should be assigned as the lead for the Student Binder. This will include collecting insert masters, revising standard forms provided by Eagan Rotary where required, purchasing supplies, arranging for printing and supervising the assembly of Student Binders.

Supplies Needed

1. 1” (minimum) 3-ring binder with inside pocket and front slide-in cover
2. 5 tab-insert for binders

Purchasing of the 3-ring binders and tabs can be accomplished at OfficeMax, Walmart, Sam’s Club, etc. Wherever the materials are purchased, explain what the materials are for because many stores are willing to provide a discount.

Inserts

The following is a list of typical inserts for the Student Binder.

Cover Insert (slide into front of binder)

Index (before tab 1)

What is Rotary? (before tab 1)

Tab 1

Welcome Letter (EWS Chair)

Biographies of Presenters

Tab 2

Schedule

List of Student Participants (by table)

List of Rotarian Participants and Chairs

Tab 3

Lecture Handouts

Tab 4

Simulation Reference Materials

Tab 5

Workshop Evaluation Form

Printing

Try to find a local company, Rotarian business, or the local high school itself that would be willing to do the printing at little or no cost. If not donated, take the binder to a local printer. It is highly recommended that cover be printed in color. Many of the inside sheets will be provided in color, but black and white printing of these is acceptable. Make sure that the pages are either printed on 3-ring binder paper or that the holes are punched after printing. Make sure that the binder is collated and separated with a colored sheet or some other method of preparing for the assembly. In total, approximately 5,000 pages of printed material are required for an Ethics Workshop assuming binders for 54 students + 6 Rotarian table volunteers,

Assembly

Gather a group of Rotarians (usually works best immediately following a regular weekly club meeting) and create an assembly line for putting together the binders. Seventy binders, front covers, five divider tabs, and the inserts for each will need to be assembled. This process can take up to an hour depending on the number of Rotarians staying to assist. The Rotarians participating in the binder assembly need not be limited to those serving on the Steering Committee or the Ethics Workshop Table Volunteers – get the whole club involved.

Suggested Timeline

Purchase binders and dividers:	4 weeks prior to Workshop (pre-order if necessary)
Obtain all binder submittals:	3 weeks prior to Workshop
Submit binder materials for printing:	2-3 weeks prior to Workshop (depending on company or school and how much time is needed)
Pick-up materials and assembly of Student Binders by Rotarians:	1 week prior to Workshop

Delivery and Handout

Take the Student Binders to the host location of the EWS either the day before or well early of the start of the event. Handout binders to each student and Rotarian as they arrive at the check-in table.

Host Location

Facility & Setup

Select a location for the day's activities that is known to most of the students and that is within a reasonable travel distance. You'll be asking students to report directly to the location at the beginning of the day to avoid bussing the students, but that will also require adequate parking space for the visitors or some form of carpooling.

Look around your own Rotary Club and around your community. Think about the facilities in your community that might accommodate a group of this size. In the best case, you would hold the program at a corporate facility that would be willing to donate the space for the day and even offer to participate in some other way (perhaps they would volunteer to provide the food or cover the printing costs). A facility that has its own catering would be very nice, but you could also cater the meals in from an off-campus vendor.

Think about a space that will hold about seventy people with seven persons to a table, a speaker's podium, a microphone, a projection screen and access to electricity that would support a laptop computer and LCD projector. There should be 9 tables (assuming a workshop of 54 students) with some extra chairs along one wall for observers. The space should be air conditioned if the weather is warm.

This space (Group Room) will be used for activities throughout the day, including the continental breakfast, welcome and introductions, lunch, the simulation exercise, and the post EWS Rotarian debriefing. It should be close to restroom facilities as well.

While it may not be possible to secure a second large room in the same building for the lecture and presentation activities (Lecture Room), that would be ideal. Either way, you'll want to develop some kind of plan that allows students and adults to walk around and get some restorative exercise after lunch. This will be important to refresh students and adults and get them physically and mentally prepared for the afternoon simulation exercise. Additionally, this break will allow you to vent the stale air from the room.

The separate Lecture Room, if provided, should have seating for the student corporate teams setup in a lecture style facing a front presentation area. Theater seating with sloped floor would be ideal if available. No tables are needed in this room. The front of the room should have a podium and microphone for the morning lecturer and the student's simulation presentations. It must have projection capability to support a laptop computer and LCD projector.

Audio / Visual Requirements

The Eagan Rotary Club will provide a laptop computer, all of the software and projection materials, an LCD projector and a power cord. You will be expected to provide a projection screen, a podium with a mic. Depending on the lighting conditions in the facility, we may ask your club to provide some help with lighting control during the day. If a second room is provided

as described above, a second LCD projector should be available. The Eagan Rotarian's laptop can be moved from the Group Room to the Lecture Room as required.

Catering – Breakfast & Lunch

We recommend a continental breakfast for the students and adults as they arrive in the morning. Suggestions include fruit, sweet rolls, donuts, bagels with condiments, juice, water and coffee. Remember that high school boys tend to “vacuum up” food, so be sure to include plentiful food supplies along with disposable plates, drinking cups, forks, spoons and napkins.

The lunch planning can also be fairly simple. High school youngsters will enjoy pizza. We suggest you add bread rolls, one or two types of salad, cookies or bars, soft drinks, bottled water and the disposable plates, cups forks, spoons and napkins for this meal.

It would also be appropriate to have bottled water available during the morning and afternoon sessions. There will be a few five-minute breaks during the day and the water will be a popular item.

Have the facility or caterer bring the food **at least 20 minutes prior** to the start of the workshop and prior to the time shown for lunch on the final workshop schedule. Lunch is typically well before noon so take care to provide the correct arrival time, again 20 minutes prior to lunch break shown on schedule to allow for late deliveries and / or setup time.

The Big Day – Running the Ethics Workshop

Registration

Prior to the day of the Ethics Workshop, a list of all participants should be prepared. Name tags should be available the morning of the event. Table seating should be pre-assigned by the high school and the nametags should have the participant's table number on the tag. Someone should be coordinating registration, handing out Student Binders and checking off who has arrived.

Welcome

The coordinator of the event should welcome the group. He/she would thank those responsible for making the event possible and recognize any dignitaries in the group. Issues like bathroom locations and the availability of food should be noted.

Review of Agenda by Session

The schedule of the day and appropriate role information should already be on the tables. The coordinator should go over the agenda and the timeline...asking the participants to review the materials.

Rotarian Debrief

During the welcoming, the Rotarians should be informed that there will be a debriefing following the workshop. The Rotarians should be already aware of this. Towards the end of the day, they should again be reminded of this. The debriefing will be run by the meeting coordinator. All Rotarians will be given the opportunity to provide feedback on their table discussions, the general tenure of the meeting, and any comments regarding the day itself.

Contacts and Resources

Contacts at Eagan Rotary

Your contacts from Eagan Rotary are (hand enter individuals assigned to each club):

Name: _____ Telephone: _____

Email: _____

Name: _____ Telephone: _____

Email: _____

Name: _____ Telephone: _____

Email: _____

Additional Resources

Eagan Rotary website:

www.eaganrotary.org

Background on Four-Way Test:

<http://www.rotaryfirst100.org/presidents/1954taylor/taylor/index.htm>

http://www.rotary.org/en/MediaAndNews/News/Pages/070917_news_Four-WayTest.aspx

University of St. Thomas:

<http://www.stthomas.edu/>

Center for Ethical Business Cultures (CEBC)

<http://www.cebcglobal.org>