

Collaboration and Funding to Meet Needs (2022-23)

PDG Art Harrington (in collaboration with PDG Norma Taylor-Roderique)

ABOUT THIS COURSE AND ITS REQUIREMENTS

This course consists of eight chapters. Two of the chapters (6 & 7) contain linked resource documents. In conjunction with Chapter 6, review the copy of the dedication program, to read about a major collaborative project, "The Field of Dreams," undertaken by the Phoenix 100 Rotary Club several years ago. In chapter 7 the *History of the Sierra Norte de Puebla Projects* needs to be read in its entirety.

Chapters 1, 2, 3 & 5 require an e-mailed response to the instructor, PDG Art Harrington (arthts@msn.com). Chapter 7 requires on-line participation in a scheduled video conference session. Chapters 4 and 8 have application exercises, but they require no written response.

PREFACE

As a preface to this course, one might ask why this subject, among all of the others that might have been included in the Academy curriculum, was chosen as one of the six.

Gloria Clinton, DG of D5230 in northern California, stated several years ago in her district newsletter, "Rotary is an international organization of business and professional people who come together to do great works — works that no one could ever imagine doing on their own."

Is that the essence of Rotary for those individuals who comprise the membership of your Rotary club?

Indeed, that small fellowship of a few of Chicago attorney Paul Harris' friends has grown over the past 100 years to become one of the most powerful forces on the earth for accomplishing good. Having developed a network of personal relationships over the last century through Rotary Youth Exchanges, Ambassadorial Scholarships, Group Study Exchanges, Friendship Exchanges and a host of other programs and projects, Rotary is recognized and respected as the most effective "Can Do Organization" in the world. The United Nations, World Health Organization and others increasingly call on Rotary to help solve problems and address needs that they are unable to handle. Rotary knows the people, has the resources and has developed the connections to get the job done outside the politics and governmental red tape that perpetually prevent problems from being resolved in a timely and efficient manner.

Consequently, when an individual joins your Rotary club, he/she becomes a part of this huge, powerful force for good.

But does that member ever realize Rotary's potential, or ever personally become involved in taking advantage of the tremendous power and resources of Rotary to accomplish great things — or does he/she just become a nominal member of a local social club — a "RINO" (Rotarian In Name Only)?

With our Rotary Foundation's current grants structure and requirements, this course becomes increasingly relevant. There is a recognition that larger, collaborative projects that meet greater needs and are more sustainable are a much better way to invest our Foundation dollars in accomplishing good in the world.

Chapter 1

The Motivation for Meaningful Service Projects

The Motivation for the Individual

For many years, internationally acclaimed economist Ben Stein wrote a bi-weekly column for the online website called "Monday Night at Morton's." Morton's is a famous chain of steakhouses known to be frequented by movie stars and famous people from around the globe. When Ben terminated that column to move on to other things in his life, he wrote a final column we believe is worth reading and discussing.

Ben Stein's Last Column

How Can Someone Who Lives in Insane Luxury Be a Star in Today's World? As I begin to write this, I "slug" it, as we writers say, which means I put a heading on top of the document to identify it. This heading is "eonlineFINAL," and it gives me a shiver to write it. I have been doing this column for so long that I cannot even recall when I started. I loved writing this column so much for so long I came to believe it would never end. It worked well for a long time, but gradually, my changing as a person and the world's change have overtaken it.

On a small scale, Morton's, while better than ever, no longer attracts as many stars as it used to. It still brings in the rich people in droves and definitely some stars. I saw Samuel L. Jackson there a few days ago, and we had a nice visit, and right before that, I saw and had a splendid talk with Warren Beatty in an elevator, in which we agreed that Splendor in the Grass was a super movie. But Morton's is not the star galaxy it once was, though it probably will be again.

Beyond that, a bigger change has happened. I no longer think Hollywood stars are terribly important. They are uniformly pleasant, friendly people, and they treat me better than I deserve to be treated. But a man or woman who makes a huge wage for memorizing lines and reciting them in front of a camera is no longer my idea of a shining star we should all look up to.

How can a man or woman who makes an eight-figure wage and lives in insane luxury really be a star in today's world, if by a "star" we mean someone bright and powerful and attractive as a role model? Real stars are not riding around in the backs of limousines or in Porsches or getting trained in yoga or Pilates and eating only raw fruit while they have Vietnamese girls do their nails. They can be interesting, nice people, but they are not heroes to me any longer.

A real star is the soldier of the 4th Infantry Division who poked his head into a hole on a farm near Tikrit, Iraq. He could have been met by a bomb or a hail of AK-47 bullets. Instead, he faced an abject Saddam Hussein and the gratitude of all of the decent people of the world.

A real star is the U.S. soldier who was sent to disarm a bomb next to a road north of Baghdad. He approached it, and the bomb went off and killed him.

A real star, the kind who haunts my memory night and day, is the U.S. soldier in Baghdad who saw a little girl playing with a piece of unexploded ordnance on a street near where he was guarding a station. He pushed her aside and threw himself on it just as it exploded. He left a family desolate in California and a little girl alive in Baghdad.

The stars who deserve media attention are not the ones who have lavish weddings on TV but the ones who patrol the streets of Mosul even after two of their buddies were murdered and their bodies battered and stripped for the sin of trying to protect Iraqis from terrorists.

We put couples with incomes of \$100 million a year on the covers of our magazines. The noncoms and officers who barely scrape by on military pay but stand on guard in Afghanistan and Iraq and on ships and in submarines and near the Arctic Circle are anonymous as they live and die.

I am no longer comfortable being a part of the system that has such poor values, and I do not want to perpetuate those values by pretending that who is eating at Morton's is a big subject. There are plenty of other stars in the American firmament....the police men and women who go off on patrol and have no idea if they will return alive; the orderlies and paramedics who bring in people who have been in terrible accidents and prepare them for surgery; the teachers and nurses who throw their whole spirits into caring for autistic children; the kind men and women who work in hospices and in cancer wards.

Think of each and every fireman who was running up the stairs at the World Trade Center as the towers began to collapse. Now you have my idea of a real hero. We are not responsible for the operation of the universe, and what happens to us is not terribly important. God is real, not a fiction; and when we turn over our lives to Him, He takes far better care of us than we could ever do for ourselves. In a word, we make ourselves sane when we fire ourselves as the directors of the movie of our lives and turn the power over to Him.

I came to realize that life lived to help others is the only one that matters. This is my highest and best use as a human. I can put it another way. Years ago, I realized I could never be as great an actor as Olivier or as good a comic as Steve Martin....or Martin Mull or Fred Willard--or as good an economist as Samuelson or Friedman or as good a writer as Fitzgerald. Or even remotely close to any of them. But I could be a devoted father to my son, husband to my wife and, above all, a good son to the parents who had done so much for me. This came to be my main task in life. I did it moderately well with my son, pretty well with my wife and well indeed with my parents (with my sister's help). I cared for and paid attention to them in their declining years. I stayed with my father as he got sick, went into extremis and then into a coma and then entered immortality with my sister and me reading him the Psalms.

This was the only point at which my life touched the lives of the soldiers in Iraq or the firefighters in New York. I came to realize that life lived to help others is the only one that matters and that it is my duty, in return for the lavish life God has devolved upon me, to help others He has placed in my path. This is my highest and best use as a human.

Faith is not believing that God can. It is knowing that God will.

By Ben Stein

Speaking of the experience of caring for his elderly parents, and particularly ministering to his father as he lay dying, Ben says, *"This was the only point at which my life touched the lives of the soldiers in Iraq or the firefighters in New York. I came to realize that life lived to help others is the only one that matters and that it is my duty, in return for the lavish life God has devolved upon me, to help others He has placed in my path. This is my highest and best use as a human."*

How do you feel about what Ben said? Touched? Moved? Inspired? Perhaps one would feel all of those in response to his affirmation of this great truth.

But on the other hand, are you not appalled by his admission that this was the *only* point in his life that he had experienced something like this?

We have to ask, "Where was Rotary for this man?" Ben Stein is a brilliant, talented professional who is at the height of his career and at the top of his field. Rotary is in the business of enlisting top professionals like Ben, and enabling them as Rotarians to touch and change lives in a profound way around the world.

How did we miss Ben? Or did he perhaps get recruited into a Rotary club that is itself disconnected from the transforming power of Rotary — or perhaps one that just never gave him the opportunity to personally experience it?

Regardless, the fact is that Ben had missed this kind of life-changing experience until then.

He said, *"I came to realize that life lived to help others is the only one that matters. This is my highest and best use as a human."*

Ben is right. **Meaningful service defines the individual's reason for being.**

The Motivation for a Rotary Club

Robert Putnam, Dillon Professor of International Affairs, and the Director of the Center for International Affairs, at Harvard University, provided some very interesting and helpful statistics and conclusions from the field of Sociology concerning trends that have developed in America over the last quarter century in his scholarly essay titled "Bowling Alone: America's Declining Social Capital."

Putnam calls attention to the fact that, when Alexis de Tocqueville visited the U.S. in the 1930s, it was the Americans' propensity for civic association that most impressed him as the key to their unprecedented ability to make democracy work. Putnam also points out: "Recently, American social scientists of a neo-Tocquevillean bent have unearthed a wide range of empirical evidence that the quality of public life and the performance of social institutions (and not only in America) are indeed powerfully influenced by norms and networks of civic engagement. Researchers in such fields as education, urban poverty, unemployment, the control of crime and drug abuse, and even health have discovered that successful outcomes are more likely in civically engaged communities. Similarly, research on the varying economic attainments of different ethnic groups in the United States has demonstrated the importance of social bonds within each group. These results are consistent with research in a wide range of settings that demonstrates the vital importance of social networks for job placement and many other economic outcomes."

However, he presents disturbing evidence that Americans have been retreating from civic engagement, including disengaging psychologically from both politics and government in recent decades. This is evidenced by much lower voter turnouts. He also notes the trends in lower weekly churchgoing, falling labor union membership, and such indicators as participation in parent-teacher organizations, that fell from more than 12 million in 1964 to barely 5 million in 1982, before recovering to around 7 million now.

Putnam's statistics reflecting what has happened to membership and volunteerism in America over the last 30 years in civic and fraternal organizations show some striking patterns: "First, membership in traditional women's groups has declined more or less steadily since the mid-1960s. For example, membership in the national Federation of Women's Clubs is down by more than half (59 percent) since 1964, while membership in the League of Women Voters (LWV) is off 42 percent since 1969. Similar reductions are apparent in the numbers of volunteers for mainline civic organizations, such as the Boy Scouts (off by 26 percent since 1970) and the Red Cross (off by 61 percent since 1970)."

He says, "Fraternal organizations have also witnessed a substantial drop in membership during the 1980s and 1990s. Membership is down significantly in such groups as the Lions (off 12 percent since 1983), the Elks (off 18 percent since 1979), the Shriners (off 27 percent since 1979), the Jaycees (off 44 percent since 1979), and the Masons (down 39 percent since 1959). In sum, after expanding steadily throughout most of this century, many major civic organizations have experienced a sudden, substantial, and nearly simultaneous decline in membership over the last decade or two."

While never mentioning Rotary, Putnam does describe what has happened to another well-known service organization that, at least for a time, became larger than Rotary. However, it is interesting that he does not classify them as a service organization, but groups them with the Elks, Shriners and Masons. What is the category he put them in? Could this perception of being "fraternal organizations" provide a clue as to why their membership is "off 12% since 1983?"

In seeking to answer the question, "Why is U.S. social capital eroding," Putnam offers several possible explanations:

The movement of women into the labor force. "Over these same two or three decades, many millions of American women have moved out of the home into paid employment. This is the primary, though not the sole, reason why the weekly working hours of the average American have increased significantly during these years. It seems highly plausible that this social revolution should have reduced the time and energy available for building social capital."

Mobility: "The "re-potting" hypothesis. Numerous studies of organizational involvement have shown that residential stability and such related phenomena as homeownership are clearly associated with greater civic engagement. Mobility, like frequent re-potting of plants, tends to disrupt root systems, and it takes time for an uprooted individual to put down new roots."

Other demographic transformations. “A range of additional changes have transformed the American family since the 1960s--fewer marriages, more divorces, fewer children, lower real wages, and so on. Each of these changes might account for some of the slackening of civic engagement, since married, middle-class parents are generally more socially involved than other people. Moreover, the changes in scale that have swept over the American economy in these years--illustrated by the replacement of the corner grocery by the supermarket and now perhaps of the supermarket by electronic shopping at home, or the replacement of community-based enterprises by outposts of distant multinational firms--may perhaps have undermined the material and even physical basis for civic engagement.”

The technological transformation of leisure. “There is reason to believe that deep-seated technological trends are radically “privatizing” or “individualizing” our use of leisure time and thus disrupting many opportunities for social-capital formation. The most obvious and probably the most powerful instrument of this revolution is television. Time-budget studies in the 1960s showed that the growth in time spent watching television dwarfed all other changes in the way Americans passed their days and nights. Television has made our communities (or, rather, what we experience as our communities) wider and shallower.”

Several members of our Academy class have mentioned that they are members of Rotary clubs that were, at one time, much larger than they are now. Could any of the factors that Putnam mentions have been responsible for the reduction in membership of these clubs? If so, which ones?

Putnam questions in his concluding section what impact electronic networks will have on social capital. He says his “hunch is that meeting in an electronic forum is not the equivalent of meeting in a bowling alley – or even a saloon....” What do you think about that? Is that not something we are testing with the format of this Academy? What role do you see Rotary’s new e-Clubs playing, in comparison to traditional Rotary clubs?

Also in his concluding section Putnam mentions “insights offered by Mancur Olson and others who stress that closely knit social, economic, and political organizations are prone to inefficient cartelization and to what political economists term ‘rent seeking’ and ordinary men and women call corruption.” We would encourage you to recall this quotation when you are tackling the 6th Academy course on Rotary’s Fiduciary Responsibilities. We would ask at this juncture, though, “Have you have seen any evidence of what Olson warns about in Rotary clubs?”

Having read these excerpts from Putnam, what application do you feel would be appropriate to make to Rotary?

We would suggest several conclusions might be supported by Putnam’s research and our experience:

1. Meaningful service projects define a club’s or organization’s reason for being.
2. Meaningful service projects define an individual’s reason for being a member of a Rotary club.
3. To the degree that any organization loses its perceived relevance to the meeting of recognized needs, the interest, commitment, involvement and association of its membership will decline.
4. Conversely stated, it is equally true that to the degree any organization is deemed to be relevant to the meeting of recognized needs, the interest, commitment, involvement and association of its membership will increase.
5. Therefore, it is in the vital interest of every Rotary club to address significant and relevant needs, and to involve as many of its members as possible in the process of meeting those needs.

ASSIGNMENT: Please e-mail your answers to the following questions to Art Harrington:
arthts@msn.com

What factors have you seen that may have eroded Rotary club members’ perception of the relevance of their club, and caused them to leave Rotary?

(Reminder: This is the only question you need to make a written response to from chapter 1. The other questions included in the text are rhetorical, designed to guide you in your thinking, rather than requiring written answers.)

Chapter 2

Where To Begin — What Will Be Your Project?

Identification of Needs

Local Needs

Rotary's Five Avenues of Service should serve as a reminder to each Rotary club that our approach to meeting needs and providing service should be a balance one. There are needs that exist within every community that could and should be addressed by Rotarians.

The difficulty lies in the fact that many Rotarians and Rotary clubs are out-of-touch with the current, and perhaps the most pressing, needs within their communities. What was begun as a program to meet an urgent need at one time in a community's existence often grows into an annual tradition for the club that consumes all of the available attention, energy and resources of that club. The need being addressed may have long-since ceased to be as serious or urgent as it once was.

Meanwhile, the community continues to change; and with its changes come new problems and needs. Recognizing this, it is recommended that every Rotary club conduct an annual Needs Assessment within its community, to make certain that the attention and resources of Rotarians continue to be focused on the most important needs to be addressed.

Where does a club begin? Rotarians generally do not live in close contact with the most needy, and many times their opinions about a community's most pressing needs are out-of-date and ill-informed. Furthermore, the needs that are brought to a Rotary club to consider funding are more often than not less-urgent and severe needs than others that exist beyond the periphery of Rotarians' vision. Others who are closer to the problems of a community need to be consulted in order for a club's leadership to get an accurate picture of the most serious and urgent problems that need to be addressed. Schools, churches, social welfare agencies and other non-profit organizations committed to serving the poor and needy are good sources of information to help a club conduct its annual assessment of needs.

International Needs

It is selfish, unhealthy and imbalanced for a Rotary club's attention to be focused entirely upon its own immediate community. Rotary continually reminds us that we are citizens of a world community. We are Rotary International – not Rotary Local, or Rotary National.

Fortunately, Rotary offers many ways for a Rotary club to expand its vision beyond its immediate horizon.

1. Needs in other countries have often been recognized in conjunction with a GSE Team visit, and by Rotary Scholars studying in a foreign country.
2. Needs can also be recognized in conjunction with a Rotary Friendship Exchange. International projects fairs sponsored jointly by Rotary clubs and districts can be a great source to learn about needs that could be addressed with either single club or multi-club projects.
3. Needs in other countries can also be discovered by visiting Rotary's website and viewing its current list of World Community Service Projects.
4. Visit the www.matchinggrants.org website, created by PDG Philippe Lamoise and Rotary District 5340 in Southern California. It is excellent!
5. Finally, don't overlook the fact that traveling members of your club may discover needs that they happen upon and recognize. Indeed some of the greatest projects have grown out of personal and/or business travel by Rotarians that fortuitously brought them face-to-face with a serious need, and the realization that "My club and I could do something about this."

Determining the Relative Importance of Needs

It is important to evaluate how important and/or urgent the need is that you have identified. It may be an easy need to address, and you may believe it would make a great project for your club. It is essential that certain evaluation be done of the need itself before you commit your club to it.

1. Compared to other needs that may also exist, how does this one stack up in importance and urgency?
2. Compared to other things your club *could* be spending its time, money and resources on, how important is this need?
3. How relevant will your members be able to perceive this need to be, compared to other needs they see?
4. Even if you believe the need you have identified is the most urgent and important that your club could possibly address, how can you convince the members of your club of its importance, relevance and urgency?

Such evaluation is not only desirable, it is essential if you are going to be able to sell a project to your club members. They are busy people with many demands on their time and resources. Unless convinced that this need is more important than what they are already dealing with in their hectic lives, they will not buy into it.

Defining Your Project

Before you go too far with the defining and development of your project, it is critical to determine how the people you intend to help view this problem you have identified. How important is it to them to get outside help to meet this need? What do they think of your proposed solution? Do they have a better solution that would be more acceptable to them in their particular culture and circumstances? Recognize that we may not fully understand all of their circumstances or their culture, and the solutions we may propose may not fit their situation, and consequently may not be acceptable to them or welcomed by them.

Once you have identified a project, and are confident that the solution being proposed is the best and most acceptable one to the people being served, you need to begin defining that project. Exactly what do you hope to accomplish? The scope of the project must be clearly defined with concisely stated objectives.

For example, you may have found a school in a poor section of town or in a foreign village that has no computers or internet access for its students. How many computers do you propose to provide? Where would they be located? What would be required to obtain internet access? How would the computers be managed, utilized and secured? What peripheral equipment would be required?

What would it take to accomplish your objectives? If the school is in another country, where would it be best to purchase the equipment? If purchased here, how would you get it to that country, into that country and installed at its destination? What importation problems and expense would be encountered, and how would you deal with that? What insights and advice can you obtain from Rotarians in that country? How could your members be involved in implementing this project?

How many really worthwhile projects have been thwarted, and even abandoned, because the planners failed to ask these questions and obtain reliable answers to them before they began raising funds and making purchases. Importation problems and expenses can be a huge factor in whether a project succeeds or fails. And in many cases, it makes more sense to buy what is needed from a source within that country. Investigate what may be available there, and at what comparative net cost.

Installation and maintenance of equipment are other factors to be considered in determining the long-term success or failure of a project. Is there the kind of local "buy-in" and support that will assure sustainability? What good has been accomplished if equipment is delivered that no one there knows how to install, use or maintain, or is committed to maintaining it if they are able? It is a sad fact that well-meaning Rotarians have

wasted a lot of money, and have dumped a lot of essentially useless equipment in locations around the world, attempting to address problems and meet needs – but ultimately have failed to make any difference in those places, because these critical issues were never considered.

The total cost of your project must also be determined. Every possible aspect of the project, within the parameters you have set, needs to be considered. Have several people work with you at this stage, to make certain you have not omitted any essential aspects of the project in counting the cost. If this is an international project, be sure you have obtained the valuable input from your partner Rotary club and district in that country where your project will be implemented. They may be aware of factors, costs and savings we would never consider in our country. Nothing is more difficult or embarrassing than to have to go back to your members for more money to cover something you forgot, after they have finally succeeded in raising the amount you had told them it would take to accomplish the project. Therefore, carefully count the cost before you announce it and set your goal.

Consider utilizing the knowledge, experience and resources of a **Rotary Action Group** that specializes in the kind of project you are proposing. These groups operate in accordance with Rotary International policy but are not agencies of or controlled by Rotary International. Here is a list of the current approved RAGs:

Rotary Action Groups by area of focus

Promoting peace

[Domestic Violence Prevention](#)

[Peace](#)

[Refugees](#)

[Slavery Prevention](#)

Fighting disease

[Addiction Prevention](#)

[Alzheimer's/Dementia](#)

[Blindness Prevention](#)

[Blood Donation](#)

[Diabetes](#)

[Family Health/AIDS Prevention](#)

[Health Education and Wellness](#)

[Hearing](#)

[Hepatitis Eradication](#)

[Malaria](#)

[Mental Health](#)

[Multiple Sclerosis](#)

[Polio Survivors](#)

Providing clean water and sanitation

[Menstrual Health and Hygiene](#)

[Water, Sanitation and Hygiene](#)

Saving mothers and children

Clubfoot

Reproductive Maternal and Child Health

Supporting education

Basic Education and Literacy

Growing local economies

Community Economic Development

Disaster Assistance

Protecting the environment

Endangered Species

Environmental Sustainability

Action groups that work in more than one area of focus

Food Plant Solutions

Related publications you may find helpful:

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- *Rotary's 7 Areas of Focus* www.explorelondonrotary.org/sevenareasoffocus
- Rotarian Action Groups Officer Directory www.rotary.org/myrotary/en/document/714
- Rotarian Action Groups Annual Report www.rotary.org/myrotary/en/document/713
- *Communities in Action: A Guide to Effective Projects* www.rotary.org/myrotary/en/document/577
- *Community Assessment Tools* www.rotary.org/myrotary/en/document/578

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Questions for Chapter 2

1. What is the largest service project you can recall your club ever undertaking?
2. What was the scope of that project?
3. Where was that project located?
4. What was the approximate total cost of the project?
5. What difficulties were encountered in completing the project?
6. After its completion, how was the project perceived by your club members?

Chapter 3

The Motivation and Rationale for Collaboration

The Size of a Project

We have discussed the need to define the scope and to count the cost of your project. How big is the need to be met?

Every club needs a number of small, hands-on projects each year that can be relatively quickly accomplished by anywhere from a handful to a good number of members. In fact, if a club doesn't get a new member's hands dirty with the first six months of that person's membership, you can probably kiss that new member goodbye. They may become a member by induction, but they become a Rotarian by personally participating in meaningful service. If they don't see something significant happening as the result of their becoming a member of your club within those first six months, they will generally conclude that your club has little or no relevance within the community, and they will be gone.

Consequently, small, meaningful hands-on projects need to be developed in abundance every year for every club. Writing checks, however impressive in size, will never replace this requirement for a healthy, growing Rotary club. There is no quicker way for complacency, sterility and attrition to set in within a club than for it to devolve into a club of check-writers. We cannot over-emphasize the need for personal involvement in hands-on service projects for the health and well-being of any Rotary club. This is especially essential for younger new members.

Having said that, there is also a need for clubs to be periodically challenged to tackle a project to meet a need that is bigger than the members have ever imagined would be possible for their club to accomplish. Unfortunately, the leadership of perhaps the majority of Rotary clubs tends to think too small, and thereby limits the potential of their club for accomplishing good, and fails to challenge their members. Realistically, the needs being addressed, and the annual goals being set, in those clubs could in fact be accomplished by one or two of their members, acting on their own, if they chose to do so. They are *not* worthy goals to challenge a club of Rotarians. What a tragedy and a waste! Rotarians will rise to a challenge when it is given, but too many Rotarians are never really challenged by their clubs.

Rotary has a global network of clubs and one of the largest and most effective foundations on earth. Why would any Rotary club ever be satisfied to tackle and meet only those needs their club can easily handle alone? The real magic of Rotary lies in its connections – not in its clubs' autonomy. It is those connections and cooperative action that tap the potential and unleash the awesome power of Rotary.

Several years ago RI President Jim Lacy adopted the theme, "Follow Your Rotary Dream." Rotary clubs desperately need more leaders who will dare to dream of what could be accomplished, and who are willing to follow their Rotary dreams. RI President Bill Boyd challenged us with the theme, "Lead the Way." We need to both dream big and lead the way in accomplishing the incredible things Rotary has the potential to do.

In determining the scope of a project in response to a recognized need, it often becomes apparent that the problem is really bigger, broader and deeper than it first appeared to be. Perhaps there are actually 300 communities in that country, instead of just the one you heard about, that badly need a well drilled to provide a safe drinking water supply. Do you tackle the task of drilling only one well for one community, because you are only one club with limited resources? Or do you begin to imagine what could be done with some help – and the magic of Rotary?

The motivation and rationale for collaboration begins with the identification of a need that is greater than the resources your club has, or can raise.

This is where the real thrill begins, as well as the realization of the enormous potential of Rotary, as we start looking beyond our own club for help. There are the members and resources of other Rotary clubs and districts that could be tapped, and there is The Rotary Foundation's grants options. Smaller projects can utilize District Grants, which are not required to have international partner districts. Larger international projects can utilize Global Grants, which do require a Rotary club or district partner in another country. Beyond Rotary, there are a host of other organizations, foundations and corporations that are often eager to partner with Rotary to accomplish significant goals. We discover there are numerous ways to combine and leverage the resources our club alone could ever commit or raise. As the result, we are able to meet more needs than we had ever thought possible.

The Duration of a Project

In addressing a need, it often becomes apparent that there is no way the need could be met within a single Rotary year. Yet that is a parameter that tends to characterize most Rotary projects. Our leaders are elected annually, usually serve one-year terms and want to take credit for all of the projects initiated and completed during their year. Unfortunately, this selfish perspective has too-often caused Rotary leaders to avoid addressing needs, and to bypass potential projects, that they believe would require more than a year to accomplish.

In some cases, collaboration is recognized as a way to marshal the necessary resources to accomplish a larger goal within a year. While that may be admirable when it can be done, there is an increasing realization that a huge number of the most serious problems yet remaining in the world can never be addressed and resolved with any quick-fix applied during a single Rotary year.

Could the need be met quicker through collaboration? Could more Rotarians be involved, and more people helped, through a collaborative effort? Are there other organizations & resources outside Rotary that could be involved in doing the job better than we can on our own?

There is a growing need for Rotary leaders to collaborate with their successors and their predecessors, as well as with other clubs and other organizations, in utilizing more responsibly Rotary Foundation resources to address greater and more serious problems that will require a multi-year commitment.

Rotary is capable of much more than our haphazard and disjointed single-year efforts have yielded in many cases. But to do better, we must get past the inflated egos of selfish agendas that have too often characterized both club and district projects. It is absolutely incredible what Rotary can accomplish — as long as we focus upon a need until it is met, *and we don't care who gets the credit.*

Addressing the Problem at the Core

Does your project address the problem at the core, or are you only proposing to apply a Band-Aid? Is that an unfair question? We think not. In the stewardship and economy of Rotary resources, it is indeed better to teach a man how to fish for life, than to provide for him a fish for a day.

Is your project going to prevent the problem from continuing to occur, or will we be facing it again tomorrow? Admittedly, these are tough questions, but they are the kind we need to be asking. There are crises in which all we can do is meet immediate needs. We suggest, though, that long-term answers and remedies need to be addressed by Rotary, and they will require more collaboration.

There is another aspect that we also need to consider. When you complete your project, will there be local ownership of the problem and its solution? The solution may make great sense to you and your club, along with all who may be collaborating with you. But does it make sense to the people you are trying to help, and will they accept the solution you have provided? Have you asked them if they have a better one?

It must be recognized that the perspective in other cultures may differ dramatically with yours. You may be sending wonderfully nutritious meals to feed 1,000 families for the next month. But will they eat the food you are sending? They may not, if it is significantly different from their normal diet.

Over 25 years ago a Rotary club in India worked with the government to provide power to an impoverished village of tribal people. Those people didn't know Rotary or Rotarians, and they knew they did not trust the government. So they stripped the power poles and sold the materials for whatever they would bring on the local market. Twenty-five years later, that village was still impoverished and without power. But working with those local Rotarians, we learned that a solution to their problem was going to have to be understood, approved, and in some way owned by those people, if it was ever going to work.

We have seen this kind of thing happen many times and in many ways. We must remember that not everyone thinks and lives like Americans. Our solutions may not fit in another culture. This is again another important reason for collaboration with Rotarians who are closer to the culture and the context of the people whose need you are seeking to meet. Ask for their input — and listen to their suggestions.

Learning from the Experience of Others

With Rotary's century of meeting needs throughout the world, it is pretty difficult for any club to come up with a project that is completely unique. The probability is that someone somewhere has done something similar to what you are proposing to do. Therefore, it is not necessary for every Rotary club to re-invent the wheel. We can learn from the successes and failures of others who have done this before — if we are willing to do some research and to ask.

What you will usually find in Rotary is that those who have been down the same road ahead of you will be more than willing to share their experience — and even to offer a helping hand with your project. Rotary is like that. Most Rotarians feel no proprietary ownership of the secrets and solutions they have discovered. If someone else can use what they have learned and developed to help others, they are welcome to it. There are no copyrights of ideas or experience in Rotary. Take advantage of that.

We also called attention in the previous chapter to the Rotary Action Groups (RAGs). They can be of tremendous help.

ASSIGNMENT:

A Case Study

During one Arizona governor's year of service, it was discovered that there was an enormous opportunity to link a collaborative effort involving this district, Arizona State University, a technical university in India and a Rotary club and district in India to address the needs of a tribal village in India that was a microcosm of the world's most serious problems: poverty, malnutrition, illiteracy, deforestation and other challenges. The village had no power or irrigation system, it could grow only a single crop that would only feed the village at best for 10 months of each year, and its economy consisted of cutting down what trees remained in the area and selling them in nearby towns for firewood. Some brick-making was done, but the quality was too poor to compete in the market, and there was enormous waste from the wood-fueled brick firing process.

ASU was looking for a place it could demonstrate the viability of hydrogen as an alternative energy source, but they needed a test site that had no existing power source. India was an acceptable option to them, and it appeared that such a village would be ideal. A plan was developed whereby a deep well would be dug and an irrigation system installed, enabling the village to grow multiple crops each year, and begin to have something to market that would help to halt the serious deforestation problem. In addition, it was proposed that dairy cows be purchased, milk be produced for the large co-op dairy in the area, and that ASU develop from the manure, via a biogas device, hydrogen that could fuel a generator to provide power for the village, as well as a

hotter and more reliable fuel source to fire a better quality brick — yielding both milk and bricks to add to the village's economy. Plans also included upgrading the education available, and including the girls of the village, who had previously been almost totally excluded from any educational opportunities. There was even a possibility that the carbon dioxide gas produced as a byproduct of the hydrogen generation could be used for hydroponic greenhouses that could produce additional high quality-produce for market. If such a plan were successful with this village, it was obvious that it could become a model for similar villages around the world.

The governor, however, faced several dilemmas. First of all, such a plan was not a part of his agenda for his term of office. He was already involved in a huge collaborative project to drill safe water wells for over 120 villages in Nigeria that had no safe drinking water supply, and were consequently plagued by the debilitating Guinea Work Disease. And he had another large collaborative project involving training for teachers for 46 Rotary-sponsored schools for the handicapped in southern India.

In addition, the governor's successor had already announced that he had his own agenda, which was primarily that of exchanging a GSE team with the RI President's home district, that he thought too many demands had recently been made on the clubs and the district, so he intended to neither continue any major international projects, nor undertake any new ones during his year as DG.

It was obvious that such a collaborative venture in India for the benefit of this village would require far more than a one-year commitment. Yet, it seemed like such a great need and an immense opportunity for Rotary to partner with universities to utilize the results of their research.

If you were the district governor, faced with such an opportunity and dilemma, what would you do?

Please e-mail your answer to this question to Art Harrington: arthts@msn.com

Chapter 4

Choosing Your Partner(s) in the Project

Consider Possible Partners

Who else would possibly be willing to buy into your project and help you? If your project is located in another country, you immediately consider the closest Rotary club and its district as possible partners, along with your own district, since you would want to leverage your own club's funds with help from the other club, along with some of both districts' District Designated Funds (DDF).

Amazingly, though, clubs seldom consider neighboring clubs and districts here in this country as potential partners. We have previously mentioned the advisability of finding and discussing your club's proposed project with those clubs and districts that have operated similar projects in the past, in order to learn from their experience. We also mentioned, though, that these experienced clubs and districts may be willing to collaborate with you in developing your project as well.

The fact is that there are often other clubs and districts known to your DG and neighboring districts' DGs who have available funds and DDF, who may be searching for a project such as yours. In addition, there are some great benefits from having neighboring clubs in a geographical area participate in a common project. They can encourage each other, and even motivate each other through the spark of competition. Consider also smaller neighboring clubs who have some funds and resources, but could never on their own initiate and manage an international service project. These clubs may be happy to partner with your club, and their club would benefit greatly from participation in a significant project.

If your project is local, consider also partnering with other service organizations, such as Kiwanis, Lions and Optimist clubs, as well as sororities. Corporate sponsorships and professional sports teams' participation may also be desirable, along with cooperation that may be needed, and funding that could be possible, from local, state and federal governments and their agencies.

Certainly not all projects require such extensive partnerships, but to address the most serious problems at their core, no single club will have the resources necessary. The most important thing is to do some brainstorming with a group to consider both expanding the scope of your project and the potential participants.

In too many instances, clubs have no help, simply because they have not asked for it.

Evaluate Potential Partners

What could each partner "bring to the table" that you need? The most obvious answer to this question is, of course, additional funding. Matching funding from individuals, clubs, other organizations and corporations can often be used to motivate greater personal financial commitments from your own club members. In addition, funding from other Rotary clubs within your district increases the possibilities for gaining a greater matching slice from your district's available DDF. Participation from clubs outside your district opens the possibilities for also accessing some of their districts' DDF. Additional partners may also have valuable expertise, connections and other resources that your own club may lack.

Partnering with a Rotary club in another country is essential in order to gain matching funding from The Rotary Foundation. In addition, if that club is situated near your project, its leadership can provide counsel and help secure local products, materials and equipment, as well as secure essential government consent and cooperation. Such a club can also give local oversight to your project's construction or implementation, and can help form and work with a Rotary Community Corps organization within the beneficiary community. The creation of such a representative group from that village or town helps to assure both local ownership of the

problem and its solution, as well as making certain that equipment and buildings will be maintained, and programs continued. Increasingly The Rotary Foundation is requiring the formation of an RCC within a project community, to assure that funding from TRF will not be wasted.

Evaluate Qualifications, Commitment and Dependability of Potential Partners

How qualified, committed and dependable would each partner be? These may be among the toughest questions to answer.

Past performance by these partners under similar circumstances is probably the best predictor of how they might be expected to function with you in your project. That record needs to be tempered, however, with the realization that the Rotary leadership in place at that time will have changed, and past performance under their leadership may not be a reliable indicator of what the club or district may do under its present leadership – for better or for worse.

However, examining the record of accomplishments of a club or other organization can give an indication of the kind and size of challenges they have undertaken in the past, and how consistent, or inconsistent they have been in follow-through.

Assessing the Liabilities and Baggage

When evaluating potential partners, in addition to looking at what they could bring to the table, you also need to consider any possible downside to having them as part of your team. If you intend to seek any kind of Rotary Foundation grant, one of the first things you must determine is whether or not the district they represent has any outstanding grants from previous years. In other words, do they have any grants for which no final report has been written, submitted and accepted by TRF? If they have any of these, the Foundation will not fund any new grants on which they are partnering, until those old grant requirements have been completely satisfied.

It is also important to determine how many grants a potential partner may already be a party to in the same country where your project would be located. Foundation rules limits the number of grants to five that will be approved within the same country for a district.

Beyond those considerations, there are also reasons to look for partners who are able and willing to financially participate to an equal degree in your project. You will find there are many clubs and districts around the world that are eager to have your club and district pay most of the cost of the project, and they will facilitate the purchases and provide the local supervision. Remember that Rotarians around the globe are generally the “haves,” rather than the “have nots.” If you have made up your Rotary attendance in foreign countries, you have seen this. There is usually no good reason why a Rotary partner, if they are committed to a project, should not be paying a fair share of the expenses. You will discover that, when seeking TRF matches for Global Grant projects, this equal, or near-equal, participation by the partners will get a project approved and funded much more readily than obviously one-sided projects. TRF requires International Partners to contribute at least 30% of the project cost.

Before committing and entrusting project funds to a partner to spend, it is prudent to inquire with The Rotary Foundation to determine if that club or district has had any problems in the past with financial accountability. *Nothing* can be more disappointing or disillusioning to your Rotary club than to discover that the funds they have worked so hard to raise have been mismanaged or misappropriated. It happens. Believe it. For example, TRF restricted grants for a time with Rotary partners in India to those who have completed required courses in proper stewardship of Foundation funds. More consideration of this subject will be included in the Academy course dealing with Rotary’s fiduciary responsibilities. The Foundation is also preventing clubs and districts from obtaining any further funding of grants if they have still-open grants, for which an acceptable final report and accounting has not yet been filed. Under the new grant guidelines, since the implementation of the Future Vision Plan, clubs who plan to utilize TRF grant funds for their projects must have club representatives attend an annual Grants Management Seminar.

So choose your partners carefully. Determine if the relationship with a particular partner will be a truly collaborative venture, with required participation, accounting and reporting, or will one or more of the partners be expected to simply “rubber stamp” and fund what a dominant partner decides should be done. The long-term interests and welfare of the beneficiaries must be the uppermost consideration, rather than what one strong-willed, or possibly irresponsible, partner insists on doing.

The Bottom Line

Ultimately your club must decide: Are you going to be better, or worse off, with this potential partner on board?

You need assets, not liabilities, in your partners. Larger size and more partners may not necessarily always be good. Collaborative projects that work best are those that bring together partners who can be near equals in their participation. While this is not always possible, it is definitely preferable.

You will discover that this factor also makes a significant difference to those in your own club that you will be asking to financially support the project. They will be impressed, and more willing to give, if they see your stated partners are also trying to do their share.

Expect Challenges

ALWAYS expect challenges and some obstacles. Nothing worthwhile ever comes easily.

During the time we were doing the testing of our Foundation’s new Future Vision Plan by 100 selected districts around the world, challenges arose for the Pilot Districts who had long-term partnerships with clubs in Non-Pilot Districts. While the Pilot Districts had to use the new District Grants and Global Grants, the Non-Pilot Districts were still operating under Matching Grants and District Simplified Grants. The two were not allowed to be mixed during this test period of 3 years. So how were these often frustrating new challenges met?

Download and scroll down through Heather Frankle’s Adobe Acrobat PDFdocument, “*Making Matching Grants Work in Changing Circumstances.*” Rather than simply giving you the PowerPoint images, this document also includes the moving narration that she gavel in her presentation at a Zone Assembly in Monterey, CA. This is innovation and collaboration at its best.

Making Matching Grants Work in Changing Circumstances

ASSIGNMENT:

Chapter Exercise (*No written response is required to the following questions. They are intended to help you apply the principles presented in this chapter to your own club’s past experience.*)

Look back over your club’s service record and select one collaborative project in which your club was a partner. Then answer the following questions:

1. What was the nature of the project (a brief description of its location and goals)?
2. Who were the partners in the project?
3. What did each partner “bring to the table?”
4. How qualified, committed and dependable was each partner?
5. What liabilities or baggage did any of the partners bring?
6. In retrospect, do you think your club would have been better off without one or more of the partners?
7. If your club were to undertake another similar project in the future, do you believe they would be willing to choose the same partners as they worked with before?

Chapter 5

Packaging Your Project

Conveying Your Vision

You have chosen your project. You have selected your partners. Now you must decide how you are going to help your club members catch your vision of your project, along with others you hope to persuade to support it. How will you go about showing them both the need and your proposed solution?

It is vitally important that you understand that not everyone sees things from the same perspective. A presentation that makes sense to you, and motivates you, may not do it for the next person. All some people need is a brief verbal recitation of the facts. Others need to see it in some visual form. Still others need to be able to add up the numbers. Others don't act unless moved by a heart-tugging story personalizing the need.

In developing the presentation of your project, therefore, it is helpful to have a representative group provide input, to assure that you are effectively communicating with all types of people.

Realizing that many do require some visualization, you may want to develop a brochure with photos and/or sketches, or possibly a video or PowerPoint presentation. As they say, "A picture is worth a thousand words." In fact, it is most effective if you can develop multiple promotional pieces, with each targeted for different audiences.

The bottom line is that if they can't clearly visualize what you have in mind, they will never buy into it. Take the time, and spend the money, necessary to effectively convey your vision.

Portraying the Need

Just how important and urgent is the need you are addressing with your project?

The fact is that millions of needs exist in this world. There are serious needs close at home, as well as those that exist off in the far corners of the earth. There always have been, and there always will be. It is also a fact that many of those needs may be more serious and heart-wrenching than the one you have chosen to try to resolve with your project.

Another key fact, though, is that people generally respond only to those needs that are brought to their immediate attention, and especially those for which they recognize there is something they *could* and *should* do to help.

Think about that for a minute. All kinds of needs exist out there, many of which we are vaguely aware. But until we are confronted with a specific need, most of us never do much about all of the other needs that exist beyond the perimeter of our attention.

Consequently, our presentation of the need must break through that perimeter and capture the attention of a person before we can expect any response. Perhaps it is one or more photos of the deplorable conditions, combined with your verbal description of the situation, that will succeed in grabbing the person's attention.

Understand that it doesn't have to be the most devastating problem in the world, nor do you need to portray it as such. You simply need to be able to convince your audience that it is a problem, and that it is a serious one.

Once you have effectively portrayed the problem, do everything you can to convey the importance and the urgency of doing something to correct the problem.

Establishing the Viability of Your Solution

That brings us to our next key point. Your solution must make sense to your audience. What can you tell them that will assure them that your solution will work? What evidence can you present that would convince them?

Remember again the admonition regarding the differing perspectives within your audience. Nowhere is this more important than when presenting your proposed solution. Your steps toward resolving the problem must be logical. Your projections and estimates must be able to be substantiated. Your figures must add up.

Before making any presentations, it is always helpful to enlist the aid of a concerned group that will help critique your presentation, raise tough questions and try to poke holes in your solution. Such will be invaluable in preparing you to deal with a critical or resistant audience. The more consensus you can build before taking your presentation to the whole group, the better chance you will have of selling the club on your project.

Most important, though, your presentation must clearly answer the key questions, “What is it that you expect me to do?” and “What difference would it make if I do what you ask?”

Not only must a person be confronted with a need, that person must be convinced that the solution you are proposing could indeed work – if you secured his/her help. You must be specific about what you are asking that person to do, and you must also convince the person that doing their part will certainly help.

Most people are glad to assist in resolving a problem that has come to their attention, as long as they understand how they could reasonably help. They must be convinced, though, that their help is needed.

Accomplishing a Sense of Ownership

You have discovered the need and devised the solution. Therefore, it is your project. There is no question about the fact that you feel an ownership of the project.

How do you get others, though, to buy into the project to the extent that it will become *their* project as well? This is critical to the success of your venture. As long as others can think of your project as being “Bill’s project,” they can continue to ignore it and will not feel compelled to invest in it.

What was it that made it *your* project in the first place? It was the fact that you exercised a choice. You personally chose to become involved with this particular need. Furthermore, you invested time and effort into coming up with a solution you believe would meet that need.

When you confront another person with this need, along with the response you are asking them to make to help resolve the problem, you are calling for a decision on their part. You are asking them to choose between walking away from the need you have presented to them, or investing in what you have proposed as the solution.

If you are asking for little from them in response to the need, the probability is they will feel little ownership in the project and its solution. The greater their investment, though, the more ownership they will feel. It was Jesus who told His disciples, “Where your treasure is, there will your heart be also.” Stated simply, “Interest follows money.”

The same is true, however, for an investment of time and effort. The more time and effort you spend working to resolve a problem, the greater your sense of responsibility and ownership will be.

There is an interesting corollary to this premise. It provides the secret to working with people who are always opposed to every new idea and project that is presented to a group. Most of us have encountered that type of person, who seems to have been born in the “objective case.” Such a person can be counted on to find fault with, and object to, everything anyone ever suggests.

The secret is that you first do whatever is necessary to convince such a person that a serious problem or need does in fact exist. Once the person has acknowledged that fact, then you move on to the next step. You ask them to come up with a solution to the problem that they believe would work (since they will invariably criticize and reject everyone else’s proposed solutions). This answer is going to be different, though, because it will be *their* solution – in the possessive case – something they thereby own. And because it is *their* proposed solution, it becomes very difficult for them to object to that solution to the problem.

The trick, of course, when dealing with this type of negative person, is to lay a sufficient number of clues along the trail so they will come up with the same solution you already discovered. When they do, they will regard it as being *their* discovery and solution, rather than yours. You congratulate them on their great idea, and ask them and the others to support it.

Ownership is important. We mentioned earlier that it is essential that the beneficiaries of a project feel some ownership of the solution that has been proposed before they will accept the solution you have proposed to their problem. It is also vital, though, that a sponsoring group feel ownership of a project in order to successfully obtain their financial support of it.

ASSIGNMENT:

Chapter Exercise *Please e-mail your proposed packaging suggestions for this project to Art Harrington: arthts@msn.com*

The project you have chosen is to provide an ambulance and emergency response equipment for a hospital in India that treats leprosy and related problems. You plan to raise the funds with the aid of a Global Grant through The Rotary Foundation. You have determined that the ambulance can be purchased in India by your partner club, the Dhanbad Rotary Club, located in the state of Bihar, India. The hospital is also situated in Dhanbad.

The total cost of the project is going to be US \$35,000. Your club needs to raise \$5,000, which you plan to get matched by your district’s DDF. The Dhanbad Rotary Club also has committed to raise US \$5,000, and obtain a match from their district’s DDF, with a \$15,000 final match being sought from the Foundation.

How would you package this project?

Chapter 6

Promoting Your Project

Choosing the Best Presentation Method

When you begin to choose your presentation method, or methods, it is again important to look at the audience you are trying to reach. What will it take to capture the attention of your audience, enthuse them, persuade them and provide them with the information they need to have in order to make a positive decision?

There is always an advantage to a personal and persuasive presentation by a well-informed representative of your project. The ability to personally confront an audience face-to-face is invaluable. The value of personal charisma at work, along with the ability to personalize and adapt your message to the people and the circumstances, is significant.

There are certainly limitations, though, to such personal presentations. One individual can only be in so many places at one time, or speak to so many audiences within any given period of time. Others can be deputized, but not everyone will be as well-informed, as personable or as capable of delivering your message convincingly and persuasively.

Therefore it is particularly helpful to develop a brief, well-made video or PowerPoint presentation that can be utilized as a sharp, persuasive standardized portrayal of the need, the proposed solution, how the project is being structured and what you are asking of your audience in support of the project. Such a presentation can be utilized in most venues, as long as the essential equipment is available. This AV tool can then be augmented with a brief presentation adapted for the particular audience. It is absolutely imperative that any visual representation of your project be kept as brief and concise as possible. Generally a good, high-impact 10-minute AV package is the ideal.

You will discover, however, that producing such a concise, effective package will be far more difficult than preparing a half-hour documentary. Editing is always difficult work. You must determine what is most important that absolutely *must* be included. What is less important that can be cut? What visual images will be the most representative and best touch the heart? How can you word your message in the clearest and most persuasive way? If you are doing a video, who can make the most effective and highest quality presentation of your case? In many instances, it is better to find a person with some broadcasting or other public speaking experience, than to have an amateur as the spokesperson on camera. It is also better to find a production company that has experience in making such a video, and has the equipment to do the best job possible.

The Value of Utilizing Networks

Your Club's Network

Every person has a network of acquaintances, including personal friends, those with whom you do business and others with whom you interact in various organizations and other associations. Your club members will always have a combined network of contacts that will exceed those of any one member. How can this help you to promote your project? How can you capitalize on the network that exists within your club and extends out beyond your club into the community through your members' friends and associations? Many are successfully using the powerful and dynamic new social networking tools, such as Facebook and Twitter. Have you considered these?

There are several “givens” you can count on. People will *do* what they *want* to do. Everyone is “busy.” However, most of us *make* the time to do what we really want to do – or at least manage to accomplish those things we consider to be most important. If your project enthruses and becomes important to them, they will arrange the necessary time to become involved in it. You can count on that to always be true.

Secondly, people will talk about whatever they are excited and enthused about. If your project does become important to them, they will just naturally want to talk about it with their friends and associates. And if you will give them some kind of printed piece they can easily pass along to others, they will do it. (Again such vehicles as Facebook are incredibly effective in sharing your story to people you would never otherwise touch via your normal publicity.) The fact is that they have the ability to get word and images about your project into hands and places *you* would never otherwise be able to reach.

This is all predicated, though, on your ability to (1) enthuse and sell your members on your project; (2) develop a printed piece you can place in their hands in sufficient quantity that it can be passed on to others; and (3) encourage them to spread the word and tell their friends.

We would encourage you to spend the extra money necessary to go first class with any printed materials you develop for your project. The quality of your materials tends to reflect, in most peoples’ minds, the value you place on your project. You will not make much of an impression with cheap, poorly-produced black-and-white flyers. Like your AV presentation, any printed representation of your project needs to be carefully and concisely worded, and utilize your best and most persuasive pictures. High quality color is always a good investment.

Your club’s network of associates can also be utilized to solicit “in-kind” contributions and technical assistance. Your project may need a particular piece of equipment, or some kind of specialized service. A brainstorming session with club members is in order to ask, “Who do you know that is in this kind of business?” The follow-up question, of course, is, “Would you be willing to talk to them about our project and our special need?”

The Network Within Rotary

We have previously mentioned the value of researching to discover what other clubs may have done similar projects as yours in the past, and learning from their experience. On the other hand, there are also a number of Rotary clubs that have *little* or no experience in planning projects. These clubs really do need to be participating in a good, well-organized project with someone. And it is far easier for them to get on a train that is already moving, than to create a train of their own for their club to ride.

In addition, it would amaze you to learn how many clubs are sitting on surprisingly large sums in their bank accounts and in their club foundations. These resources can and should be tapped and used, rather than hoarded. The key is to get one or more of their members sold on your project, and then let them sell their club.

Other clubs and their networks can also be utilized when you are searching for that particular specialized equipment or service that may be needed for your project. The object of your search may or may not exist within a Rotary club; but ask enough Rotarians, and someone will know who to talk to and how to find what you are looking for.

It is important to remember that any club that can be persuaded to participate in a well-run project will benefit from the experience. Likewise, any person who invests in meeting a need for someone else finds some measure of personal happiness and fulfillment. It is one of the great paradoxes of life. ***It is in giving to others that we discover our greatest personal happiness.***

These points are mentioned because we too often associate asking others for contributions with a negative -- as if we were victimizing them in some way by asking them to participate and contribute. Quite the contrary, when you enlist their help with one of these projects, you open up an opportunity for them to have a positive and beneficial experience. In turn, that experience will contribute to the health and growth of their Rotary club. It is a win – win proposition. You are doing them a great favor. Remember that.

Networks Outside Rotary

Obtaining corporate participation and sponsorships, along with locating non-Rotarian humanitarians and private foundations that may be interested in your kind of project, should also be considered within the realm of possibilities.

How do you find these? Both internet research and exploring your network within Rotary can be utilized to locate leads that may pay immense dividends, if followed up on and cultivated.

Successfully accessing these sources of funding, though, requires lead time and considerable preparation and work. It cannot be counted on as a last-minute bail-out for your project when your other funding has fallen short.

If you plan to tap these networks outside Rotary, it is particularly important that professionally-produced materials be developed. In addition, special presentation packets should be prepared for each potential contributor you plan to solicit.

ASSIGNMENT:

Chapter Exercise, Part 1: (No written response is required to either part of this chapter exercise.)

Please read about how the Phoenix 100 Rotary Club put together the 3-H Grant for their incredible “Field of Dreams” project they undertook a couple of years ago. The account is available, in the form of the dedication program, for download on the Academy website.

Howard “Howie” Simon, past-president of Phoenix 100, and a graduate of our Academy writes: *“I was fortunate to be president in the second year of the Field of Dreams project. The project began in the presidency of Phyllis Metcalf Senseman. During my term, the project was completed and dedicated. I have attached some pages from the dedication booklet that I hope will give you some good background about the project.*

“If you would like more details, I highly recommend talking to Roger Marce; Roger also subsequently served as president of Phoenix Rotary 100. As an attorney, Roger was intimately involved in the project from start to finish and I am sure he can fill in some details for you if needed. In addition, you may want to talk to Barry Peretz, where the concept of building the sports complex began. He was of course intimately involved from start to finish as well.”

Chapter Exercise, Part 2: Case Study:

You have identified a poverty class area of town that is served by an elementary school, but there is no athletic field, or other recreational facilities, for the children. Your project is to develop a combined multi-purpose athletic field and park with playground equipment and public restrooms adjacent to the school to serve the children of that neighborhood. Your estimate of the cost of the project is somewhere between \$600,000 and \$750,000, depending on how extensively you equip the park and the athletic field.

You have determined that this will need to be a multi-year project with a considerable amount of support that will be required from the community and any other organizations that will assist.

How would you package and promote this project?

Chapter 7

Financing Your Project

Your Club's Financial Commitment

Does your club allocate any portion of its budget for service projects? This may sound like a strange question to ask a service club. However, it is amazing that many Rotary clubs never budget anything for service. If a need arises, they “pass the hat.” They have no plan as a club for what they will spend in any given year on service projects – either local or international.

“To fail to plan is to plan to fail.” A club that makes no plans and budgets no money for service will predictably perform little service each year. While it may not be possible to anticipate each particular need that will arise in your community during the year ahead, there should always be a certainty that needs do in fact exist, and that they either will, or should somehow, come to the attention of your club. If nothing has been planned and set aside to meet these needs, few of them will be met by the “passing the hat at the moment” method.

Every healthy Rotary club needs to budget for service. Part of the funds may come from club dues and the fines assessed at the meetings. But generally a club needs one or more major fund-raisers each year to generate the kind of money required to tackle projects of any size or substance. The clubs that raise the most money each year have usually established at least one major event that has been built and expanded over a period of years. Usually they plan several such events.

Few successful fundraising activities reach their potential the first year they are launched. If a fundraiser has any potential, clubs need to work it at least three years in order to give it a chance to succeed. How many clubs have tossed really great ideas in the trash basket after their first year failed to produce big dollars! Their impatience has cost them success. The fact is that *good* fundraisers take time to grow into *great* fundraisers. Expectations and a tradition need to be developed. Don't expect overnight success.

The bottom line is, “How much is your club willing to raise for its service projects this year?” There are some clubs that are traditionally unwilling to raise anything beyond what the members are willing to contribute out of their own pockets. While we don't want to discourage check-writing Rotarians, we would suggest that such clubs have an extremely limited vision of their service potential – and many serious needs will go un-met each year in their communities and around the world, if it is up to those clubs. Rotary needs to “Lead the Way” — not do it all ourselves, out of our own pockets. When Rotary speaks, others *do* listen; and when Rotary leads, others *will* follow. Count on that!

Some clubs have established their own foundations. Those clubs need to be asked, “How much from your club foundation are you willing to commit and budget for service this year?” It would astonish you to discover the huge stash of funds that some of these clubs have been sitting on for years. Little or nothing is budgeted from them for service each year. Some have been waiting for “just the right need to come along,” or have used some similar flimsy excuse to justify their hoarding of the money that they and others have given.

We are not knocking club foundations. They can be great tools for picking up substantial tax-deductible gifts and bequests. However, foundations of service clubs need to be used to provide service on an on-going basis – not simply when the spirit moves the trustees to release a token amount every dozen years.

The Commitment of Your Partner(s)

There are times when a partner in a project is actually incapable of committing more than physical labor or “in-kind” donations. That is understood, and such partners should not be excluded, simply because they cannot come up with cash. If possible, though, as we have previously noted, it is usually best if partners in a collaborative project have as nearly equal financial commitments as possible.

Equal, or near-equal commitments to a project can serve as a motivator of each other to succeed in each of their fundraising efforts. Such challenges to each meet the goals they have set are good for clubs. Almost everyone succeeds better in a race if they are racing against a worthy competitor.

Leveraging Your Resources with Foundation Grants

If one or more of your partners are Rotary clubs in another country, there is no reason why Global Grants from The Rotary Foundation should not be sought – as long as they are not seeking funds to pay for construction of buildings. Most construction costs are excluded under the terms of these grants.

A separate Academy course is designed to help acquaint you with how our Foundation works, the different kinds of grants that are available to help a club succeed with its project, and the limitations that may apply.

Even if your project is local, District Grants are available. These are fast-track grants, administered by the districts, that require no match at the Foundation level. The grants are usually not large – usually between \$500 and \$2,500 dollars, depending on your district's guidelines; but that may be exactly what you are lacking to complete your project.

Filling the Gap

There often is a gap between the total cost of meeting the need and the combined leveraged resources of the partner clubs in a project.

At that point it is time for some creative thinking by all of the partners. Who else do we collectively know? What else could we somehow get donated, in order to help reduce the cost? What resources outside Rotary, and any non-Rotarian partners you may already have, could be solicited?

A shortfall is no excuse to give up on a project and toss in the towel. Rather, it is an opportunity to involve someone else in helping to meet this need. You just have to decide who that might be, and go ask them. Sometimes desperation drives us to amazing discoveries of resources that have been lying there all along just waiting to be tapped. It can even drive us to sometimes ask those whom we have heretofore intentionally excluded from consideration, for whatever the reason.

The important thing to remember is that the size of the need should set the budget, not the amount your club has available in the bank.

The Sierra Norte de Puebla Projects

One of the all-time great success stories of collaboration to meet needs grew out of the vision of one of our best District 5510 governors – in fact, our first women governor.

Let PDG Norma Taylor-Roderique tell you in her own words the story of how this truly amazing succession of projects came into being – along with the lessons, sometimes profound and sometimes painful, that she learned in the process.

Norma Taylor-Roderique's History of the Sierra Norte de Puebla Projects

ASSIGNMENT:

Class Exercise:

We will be scheduling several video conference discussions sometime after the middle of November. You will be reminded by email about the time and the dates, which were announced in the Syllabus for this course. You are expected to participate in one of these video conferences, if at all possible.

The primary purpose of these video conferences will be to give you an opportunity, once you have read Norma's history of the Sierra Norte projects, to discuss with your instructor and fellow class members how this project evolved, some of the key decisions that were made, some of the problems encountered along the way, and lessons that can be learned that may relate to projects that class members and their clubs are currently planning or participating in.

Chapter 8

Perpetuating Your Project

The Essential Requirements: Norma's Six "P"s

Do you have the essential requirements to invest in the success of your project? Major projects don't just happen, and sustaining long-term projects to their completion has been more the exception than the rule in Rotary.

Why is this? One of the key reasons we have already cited is that Rotary leaders have had a single-year mentality and scope of vision. Most terms of office in Rotary are only for one year, and there has been a tendency of club presidents and governors to want to independently "do their own thing" in their year, not having to consider or be fettered by the emphases or commitments of either their predecessors or successors.

While this annual "changing of the guard" has been viewed as one of Rotary's greatest strengths, it has simultaneously been one of Rotary's greatest weaknesses. It has led to a lack of consistency and continuity. This is one of the key reasons many positions in Rotary are now moving to either 3-year terms of office (such as District Foundation Chair), or at least recommended annual renewable terms of up to 3 years (such as District Trainer). In our district we have staggered 3-year terms on a number of our key standing committees.

The success of major service projects in Rotary depends on both consistency and continuity in leadership. Without such, the required multi-year commitments wind up faltering and are too often abandoned short of reaching their goal. It is to Rotary's discredit that many needs have never been adequately met, due to its leaders' egos and insistence upon the right to carry out personal independent and unrelated agendas. Follow-through to completion has been all too rare in Rotary.

PDG Norma Taylor-Roderique has identified Six "P"s that she contends are essential to the success of major collaborative efforts.

1. *Passion for Your Project*

This is, above all else, absolutely essential. Every project requires a driving force behind it – a leader who has come to passionately believe in the urgency of the need, and the importance of Rotary somehow meeting that need at this particular time.

With a collaborative, multi-year project this passionate leader is all the more essential. The passion has to exceed the boundaries of any immediate responsibilities as a Rotary officer. The passion has to go beyond the desire to chalk up credits for accomplishment "in my year." This kind of passion must be driven by the need to be met – regardless of the time it will require to meet it.

2. *Patience — Infinite Patience*

Nothing will ever go as smoothly or as swiftly as planned. Begin with that premise. Remember that you are working with volunteers, who have many other distractions and responsibilities in their busy lives. Expect complications. Expect delays. Expect follow-up to be essential, and that it will be necessary to repeatedly remind people of their assigned responsibilities, until those have been completed.

Patience is never needed or tested until something that is planned doesn't happen on schedule, or until a change in plan is required. There will be disappointments, and you will become frustrated. Keep your eyes on your goal. Don't allow yourself to become side-lined or diverted by personalities or failures. Stay focused on

what you are trying to accomplish. Your team is dependent on your leadership, guiding them along the chosen course.

On the positive side, in almost every project there will be those people who will catch fire and exceed your expectations. There will be those who will step up from the sidelines and offer their assistance. And there will be other entities that will be inspired and motivated to further action by your example.

3. Perseverance

You must keep on keeping on — even when it seems like your goal is slipping beyond your reach. In order to maintain your project over whatever period of time it takes to reach your goal, you must exhibit the kind of dogged determination that refuses to give up until the job has been finished.

There can never be any genuine pride or satisfaction in half-completed tasks. Even when leaders' egos have caused them to gloss over the incompletes in order to put the best face on their accomplishments during "their year," those who know better will still be plagued by the nagging reminder that the job was never finished as it should have been.

There is justifiable pride only in completion. Unless you have the perseverance to see your project through to its completion, you will only be deceiving yourself and others when you pretend to have done the job that needed to be done. We believe that Rotary's Four-Way Test calls us to a higher standard than that.

4. Personal Commitment

Leadership by example is one of the most critical aspects of successfully leading volunteers. No matter what you say, it is what your team sees you actually doing that makes the difference in whether they will respect and follow you, or whether they will be disillusioned and abandon you.

Plan to commit whatever time it takes to see your project through to its completion. Bottom line: If you are not willing to devote that kind of time to it, no one else will either.

Plan to commit some of your personal finances to see your project accomplished. Your leadership team and club members will follow your lead in this respect. Don't expect them to contribute their hard-earned money to your project unless you are willing to contribute your own. If your project hasn't cost you something personally, you probably are not committed enough to it for it to succeed.

5. People Who Will Help You

No collaborative service project can be done by any one individual. You *need* others to help. Remember that.

Yes, there will be times when you are convinced you could have accomplished a particular task yourself in a tenth of the time it took someone else to do it, and that you could have done it far better. That may all be true. But if you begin to criticize and try to micromanage your partners and team members, you will soon find yourself resented, abandoned and faced with the impossible task of having to do it all yourself.

You need people who have caught your vision, who believe in your project as you do and who are as committed to seeing it through as you are.

When you find those people, take care of them. Appreciate them. Encourage them. Cultivate them. And let them complete their assignments *in their own way*. That quite often will *not* be the way you would have done it. That doesn't matter. Let them do it *their way*. All that matters is that the job gets done, and that you have retained those people on your team. You have respected them, and they in turn will respect, support and follow you.

6. Plurality

What other needs are there to be met, beyond those you have addressed with your project? What else could be done?

As you get to know the people who are the beneficiaries of your project, you will inevitably discover other needs that should be addressed. It is only natural that you will be touched by those needs and will want to add auxiliary projects or programs to augment your original project.

You have seen how this happened with the Sierra Norte de Puebla projects in Mexico. One project just naturally developed out of another. Some of these may require your leadership and assistance, while others will evolve on their own.

One of the greatest concepts developed and encouraged by The Rotary Foundation has been The Rotary Community Corps (previously known as The Rotary Village Corps). Once these have been established in your beneficiary community — usually for a specific purpose of preserving and maintaining equipment and systems installed in a village via a TRF Matching Grant — these local organizations often catch the vision of what can be accomplished collectively, and begin to recognize and address other needs in their communities.

Beyond that, other Rotary clubs and districts will hear about your successful project and will ask about what else may need to be done for those people. They in turn will either develop their own projects, or they may ask you to collaborate with them in tackling one or more of those needs.

Success begets success. We would suggest that no one should sit back on their laurels and be satisfied with a single success. That should always be a catalyst for accomplishing more.

Follow-up

We have already noted the necessity of perpetual follow-up when working on a project with volunteers. It is an absolute necessity. With the advancements in communications technology over the past decade, it is immensely easier to keep in touch and follow up with partners on international projects than it was 10 or 20 years ago.

There is nothing, however, that will take the place of your personal follow-up visit to your project. It will not only be one of the most gratifying experiences of your life to personally witness what you have helped to bring about, but it will also be a tremendous encouragement to your partners in the project. They will be enormously impressed by the fact that you have invested the time and expense to come and personally see what you have accomplished together.

Your scheduled personal visit will also help to assure that final aspects of the project that may have been procrastinated, or otherwise delayed, will be completed in time for your arrival and inspection. Make no mistake about it. Your personal visit will be a powerful motivator.

One of the best things you can possibly do is to enlist others who would be willing to go with you to visit your project. You will be surprised at the number that may be interested in going with you. Once they have personally visited your project, you can expect them to recognize other needs and to be motivated to plan other projects.

Most important, try to persuade some of your major donors to go with you to visit their project. With few exceptions, their response will be dramatic. The experience will reaffirm for them their wisdom in making the decision to invest in the project, and they will be much more likely to make significant additional donations to other Rotary projects in the future.

ASSIGNMENT:

Final Exercise (No written response is required for this assignment.)

1. If your club currently has, or is planning to have, a collaborative project:
 - a. Evaluate that project from the standpoint of the criteria identified in this course.
 - b. Attempt to strengthen that project by incorporating the principles and insights learned in this course.
2. If your club does *not* have a collaborative project underway, either:
 - a. Determine what critical need in your community could be met with a collaborative effort, and begin trying to sell the idea to your club leadership, or
 - b. Find a project on the World Community Service (WCS) Project Exchange Database (accessed from the Rotary International website www.rotary.org — or at Matching Grants.Com www.matchinggrants.com that you believe might fit and interest your club, and begin selling the idea to your club leadership.