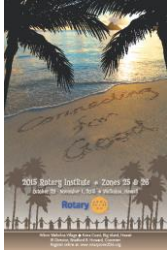


## Call to Action from the 2015 Institute in Hawaii

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### Reflections and Call to Action from the 2015 Zone 25/26 Institute in Waikoloa Hawaii

To my Fellow Rotarians in Zones 25/26

During the weekend of October 29 to November 1, 2015, over 550 Rotary leaders from throughout the West Coast of North America gathered in Waikoloa, Hawaii at the Rotary Institute. We had extraordinary speakers, entertainment, and purpose. Rotary's President Elect John Germ, General Secretary John Hewko, four members of the Board of Directors, and two Trustees of the Rotary Foundation participated in the event.

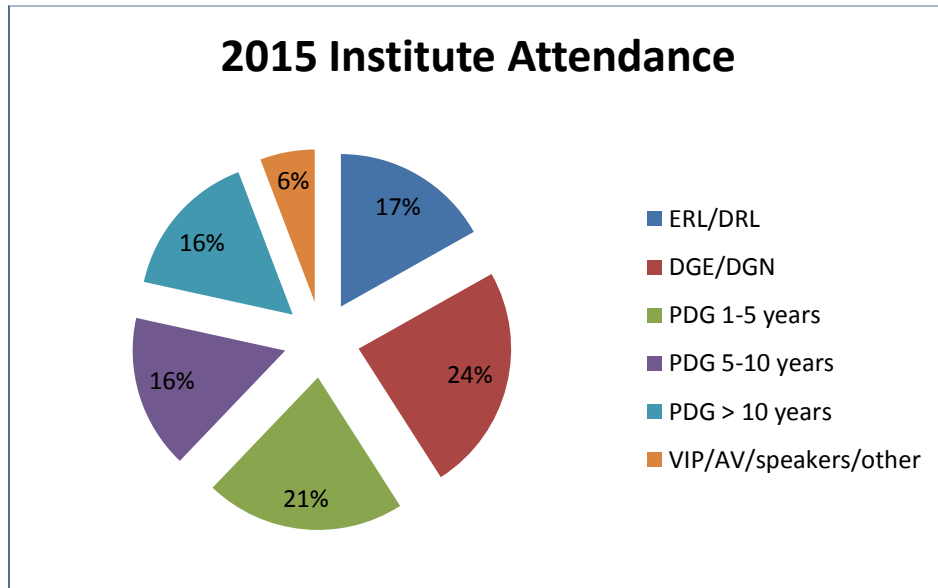
Our overall theme was **CONNECTING FOR GOOD**, with the emphasis on connecting. There were a number of supportive themes, which the Keynote speakers and the breakout sessions further explored.

Attending a Zone Institute can be a way to increase your Rotary knowledge, connect with old friends and connect with Rotary's senior leadership. It can also be an opportunity to connect that knowledge back to your District and Club.

Now that you have returned home, the memories of the outstanding speakers and breakout sessions will begin to dim. In an effort to facilitate the process of connecting what you learned into steps of action, we have created a summary of simple actions steps that you can use in your District or Club....yes..and even in your vocation.

Bradford R. Howard  
Zones 25/26 Director





The 2015 Institute began Thursday night when we all got together for the first time. We **CONNECTED WITH FAMILY**. This luau and social event also included the presentation of the DGE's---our 2016-17 Governors.



## **FRIDAY MORNING**

Our Friday **morning Theme** was **CONNECTING ME WITH ROTARY**. We revisited the reason we joined and remain in Rotary, We looked at what brought us together and why Rotary remains relevant today. The Keynoter and the breakout speakers explored different elements of this theme.



### **KEYNOTE**

**Dr. Matthew Lieberman** discussed “**Why we are wired to connect**”.

His key message was that all people need connection with each other. *“All people need social connection The pleasure center of the brain lights up when we are liked, respected, loved, understood and when we do something to help others. We cannot do amazing things alone; we must connect with others”.*

The take-away to Rotary: **Use the power and importance of social connection and helping others to attract members.**

See his TED talk at  
<https://www.youtube.com/watch?v=NNhk3owF7RQ>

Actions we can take:

1. Make our members wanted and respected. This is also why the message of Rotary is so important--“*we are in it together: we are in a community*”.
2. Identify the rational self-interest of members. In organizations like Rotary, we need to pursue members’ self-interest and their social interest. That usually equates to working together.
3. Great leaders are both results oriented and have social skills. We should develop this in our club leaders

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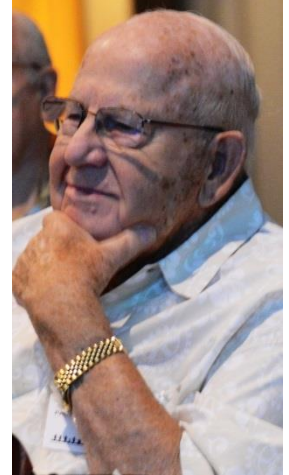
## Call to Action from the 2015 Institute in Hawaii

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**“Connecting with our History”**. Always thinking and offering us his wisdom, our own **Cliff Dochterman** reminded us that Rotary fulfills the basic need of a real social connection.

A few points about the value of being a Rotarian:

- Expanding our circle of friends improves our businesses (which is necessary to one’s well-being).
- Networking and associating with successful people is good for our business.
- Helping others by acts of service and kindness helps us as well. It creates happiness.



Cliff posed the following actions we can take with our fellow Rotarians and at our clubs:

1. Enhance lives through friendship and being part of a group (connection).
2. Offer more than a meal – by thinking about business, professional opportunities and social connections. One thought-provoking suggestion was that Club members present a business problem (a case study) for discussion and exploration at the club meeting. This engages members’ business experience as well as gives them new insights.

Another suggestion, at a club assembly, discuss a particular community problem the members see. Then explore how to identify the real underlying needs. Then what steps the club can take, and with whom, to address those needs in the community.

Director Jennifer Jones and Trustee Tom Thorfinnson explored the topic **“Connecting with our DNA”**. They suggested the following:

- Share our stories of service and helping others in Rotary to attract and motivate members. Each of us also has a story about how Rotary provides friendships that last a lifetime.
- Look for opportunities to give every Rotarian a chance to experience service.
- Look for young thinkers and flexible people in your clubs. Use their insights Learn from each other.
- Bring young leaders into the mix. What do they want? Ask them.

# Call to Action from the 2015 Institute in Hawaii

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## **FRIDAY AFTERNOON**

The Friday lunch and Afternoon theme was **CONNECTING WITH ROTARY NOW.**

The goal for the afternoon's general session and subsequent breakout sessions was to explore how clubs work, how they can adapt, and what changes may be beneficial in the future. Speakers will address the question of how to be relevant to leaders active in business, professions, family, and community.

The desired take-away for attendees was a better understanding of the challenges and the opportunities to improve clubs in this present day environment

### **KEYNOTE**

“**Making Rotary Relevant**” was Michael **McQueen’s** focus. “Shift happens – change or go away. It is not the strongest that survive or the most intelligent, but those most responsive to change”:

Hear him speak at <https://www.youtube.com/watch?v=zR7reXnQsY>



Michael gave us 4 questions to ask—and subsequent actions to take—to make our clubs and Rotary continuously relevant. He asked the Institute attendees can encourage and validate this change

1. **Recalibrate**: What we do and who we are? What would be lost if you ceased to exist? We are really in the atmosphere business.
2. **Reengineer**: Consider the relevance of what Rotary does and how Rotary does it. Look at our internal process: how meetings are run, the projects and programs we support and how we express who we are. What do we do that makes sense? What is making people leave? What doesn't add value? **TRY OUT NEW STUFF.**
3. **Reframe**: Innovate and be creative. Look to the young professionals and in particular the West Coast Young Professional Summit to see us for we are and to allow us to do things differently
4. **Reposition**: Validate and encourage continued development of our brand: to connect with the changing business marketplace.



## Call to Action from the 2015 Institute in Hawaii

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He further asked Rotary leaders to ask hard questions of our Districts and Clubs. Then, as appropriate, TAKE ACTION:

- What is it that motivates or impresses new or potential members?
- What is it that confuses, disappoints or frustrates them?
- How are we seen or perceived in the marketplace?
- What is the one thing that we do that no one else really does or can?
- Where are the gaps? What future needs can members see?
- Who aren't we connecting with?

**“Connecting with our Image”**. Director Jennifer Jones with RPIC's Tim Bewley & Michael Boyer.

This energizing discussion raised the question: how to build on our organization's very visible image in the world once our war on polio is finally won. We, as leaders in our clubs, must be ready for that opportunity. This ties right back to our club's websites, social media, and print documents portraying the correct global message of the various opportunities that comes with 'personal' membership in a local Rotary Club.



Call to action:

- Get your club's website updated with the new Rotary logo within the next 60 days! Change your website to focus more on local events and past local accomplishments within the next 60 days!
- Assure that clubs understand that people join a LOCAL Rotary Club to 'connect' with local community & civic leaders, business owners, etc. International opportunities will come naturally once a member is introduced to the myriad of other Rotary value propositions.
- Have local Rotary Clubs use our new branding and the upcoming new 'verbal' message RI will soon be broadcasting globally: that Rotary is a leadership organization - we meet regularly, make new friends and we get things done in our local community.

*“Join Leaders, Exchange Ideas and Take Action”*.

## Call to Action from the 2015 Institute in Hawaii

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**“Connecting with Today’s Rotarians”** was an interactive discussion with Rotarian Danielle Lallement & RI Senior Regional Membership Officer Nicole Jones. While their focus was on younger business and professional people, they were clear that AGE was not the operative factor: it was younger thinking.

Their call to action:

- **Connect with people in your district:** Find people in your District (especially those who attended the **West Coast Young Professionals Summit** and talk about your ideas, what has been started, goals and how you can work together with today’s younger Rotarians.
- **Create a plan to strengthen the working relationships of younger and more senior Rotarians:** Get on board with the plan and strategies that were created at the West Coast summit or create a plan in your District. This could be a social media strategy, an event or service project, or come up with ways that younger professionals, district leaders, and members can enjoy Rotary together (*The West Coast Summit plan will soon be posted on the Zone Website* )
- **Host a District Summit:** Young Professionals Summits have been hosted by RI and at the Zone level. Continue the conversation at the district level. Gather members, district leaders, and young leaders and have a dialogue about membership in your district. Are there opportunities to improve the member experience or enhance engagement within clubs, or are there events/projects that speak to issues in your local communities that can improve Rotary’s awareness?
- **Utilize Rotary Young Professionals Campaign and West Coast Summit resources:** Access the report from both the Chicago Young Professionals Summit and the West Coast YP Summit, as well as best practices and tips on how you can plan and host your own summit. (*They will be posted soon on the Zone 25/26 Website* )

## Call to Action from the 2015 Institute in Hawaii

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In “**Broadening your connections**”, Director Karen Wentz, PDG Don Kremer & Zone Membership Chair Steve Lingenbrink discussed the West Coast Diversity Initiative that was announced in early August 2015. The initiative’s goal is to provide on demand assistance to Districts who want to grow membership by increasing cultural, gender and age diversity of business, professional and community leaders. A consultancy of experienced Rotarians is ready to help. Contact Don Kremer [dekremer@pacbell.net](mailto:dekremer@pacbell.net)

During year 2015-16 the initiative team will focus on developing four areas of diversity:

1. Ethnic Based Rotary Clubs: Rotary Clubs where members have a common cultural background, a first language other than English or some other affinity that brings them together.
2. Diverse Cultural Clubs: Rotary clubs with a strong cultural diversity among the members. Note – The general population of our two zones is approximately 32% Latino and 11% Asian, and both segments are growing and substantially underrepresented in our membership.
3. Gender Diversity (women): Only 26-28% of members in our zones are women, whereas 51% of the people in professions are women. The goal is 40% or greater.
4. Age Diversity: Every year, thousands of young professional leaders seek ways to expand their circle of friends. Numerous efforts are in progress to attract younger professionals into Rotary. At the same time thousands of “baby boomers,” are reaching retirement age. These people are educated, healthy, have discretionary time and funds and they are looking for ways to be active in their local community. During 2015-16 the initiative will focus on “baby boomers.”

At this session, there were examples for clubs that have uniquely attracted leaders that mimic the business and professional makeup of the community. A key action step was to focus on the demographics throughout the communities within the district when creating new, more diverse clubs.

**Rotarian Partner program.** The “**Connecting our Family to Rotary**” panel was composed of Rotarian leader partners: Marcia Howard, Nick Krayacich, Ron Appuhn, Marga Hewko, Terri Lingenbrink, and Diane Netzel.

The Call to Action for the partners was:

- Learn more about Rotary so Partner could help your DG partner.
- Find your passion and then look for ways to realize it through and with Rotary.
- Identify and put into words what you love about Rotary for yourself or your family whether you are a Rotarian yourself or not.



## SATURDAY MORNING

### OUR PAST AND FUTURE—VOCATIONAL CONNECTIONS

Saturday morning was intended to look at Vocational Service a new way. Vocational Service really focuses heavily on three of the five core values—leadership, diversity, and integrity...not just integrity. Vocational Service is about networking in business and personal life; it's about a collection of unique peers with which to share ideas, concerns, challenges and it's about learning and developing with a positive, ethical approach to life.

At the institute, we explored the vocational, social, and personal relationships that one makes as they enter the club: all in addition to service. The 2015 District Resource Leaders (DRL's) were District Vocational Services Chairs: emphasizing the importance we are placing on Vocational Service as a value-added aspect of Rotary.



#### KEYNOTE

**“Connecting to Good.....at Work”**. Dr. David Shaner stated that the Four Way Test can transform a business.

*“If we want to Transform a business or a Club and secure our future we must invest in the people and give them a stake in the outcome. If we are not willing to look at our Club or businesses others will. When we change the way we look at things, things change.”*

See a TEDxGreenville talk at  
<https://www.youtube.com/watch?v=eyBEIx7fCfY> or  
<https://www.youtube.com/watch?v=9h4u0eSVJfw>

David gave us six questions to use to facilitate change in our clubs and districts. These can be translated into actions:

1. Where is the Culture of your Club or business? Don't ask senior management or leadership. Ask the rank and file. Listen, listen, listen! It is in minds of all involved.
2. Whose culture is it? It's ours-the people involved. View the world from where they are.

## Call to Action from the 2015 Institute in Hawaii

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3. When? We have to examine it NOW. Past is only present memory--change the relationship with the past.
4. How do we know the culture is changing? Target behaviors: energy, productivity, engagement etc.
5. What gets the ball rolling? What is the current condition? What's going on?
6. Why? Here is how we are behaving now. If I/we change, what is the benefit?

**“Rotary’s Core Ethical Core Value”**\_with Panelists: Cozette Vergari, Jerry Hall, & John Matthews, and Moderated by Trustee Paul Netzel.

The panel suggested the following actions:

- Use the Four Way Test as a way of doing business.
- Lead with integrity as others watching.
- Serve first before choosing to lead (Servant leadership at work)
- Service above self at all times: Good leaders must first be good servants.
- Take care of our members and “do the right thing” by them.
- Tell the stories of the behaviors you want to see.



### KEYNOTE

**“High Performance Group Connection: Combining Vulnerability and Challenge”.**

**Bob Dabic** challenged us to be in the “best person” club business, by strengthening our leaders’ in their vocations. *“Find a Find a way to develop the leaders in their clubs as challenges in their business and personal lives bleed over”*



Actions we can take:

- Provide value and people will find the time and money
- Develop a monthly leadership group where members can bring their biggest decision/issue to the group: *(An Issue named is an issue solved)*
  - How do I.....

## Call to Action from the 2015 Institute in Hawaii

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- Why is it
  - What I have done to date
  - What help do you need from the group?
  - Clarifying questions
- 
- Be willing to challenge others and be challenged.
  - Be vulnerable and establish trust by saying “*I need help.*” “*I made a mistake.*”
  - Create value for your Club by developing leaders willing to ask for and receive help from others in the Club

**Rotary’s Leadership Core Value**, a discussion with panelists George Chaffey, Nicole Jones, Steve Snyder. Brad Howard Moderated.

The Panel Suggested:

- Vocational service is one of key reasons people join Rotary. Clubs should support members in their vocation, recognizing their successes, instead of minimizing them.
- Vocational connectivity and mentorship are two key reasons that young professionals join Rotary. They want to learn from the experience, insights and connections of other members.
- The lessons and values of Rotary can help our members in their work environment. A story was told by Steve Snyder of how he successfully used the principles of Rotary to negotiate with General Motors to keep his dealership open.
- Rotary was the original “LinkedIn.” We bring people together to share their vocations and to help each other’s businesses, not by being customers, but rather in the way we support, engage and learn from each other’s business.

### **SATURDAY AFTERNOON**

#### **CONNECTING US TO THE FUTURE.**

This afternoon, the Institute examined how we connect to our future as a corporate organization. We heard from our present and future corporate leadership-RI President Elect John Germ, TRF Trustee Tom Thorfinnson, and General Secretary John Hewko.

Rotary is the intersection between commerce and cause that allows us to network and get involved in service and community projects. Rotary is uniquely local, yet global at the same time-- allowing us to serve our community and be part of projects bigger than our own Clubs such as the Eradication of Polio.

## Call to Action from the 2015 Institute in Hawaii

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Rotarians and Rotary should promote ourselves in the non-Rotary world so we are seen as thought leaders by organizing events that are geared to non-Rotary audiences, such as Universities.

John Hewko encouraged us to take advantage of the unique attributes of Rotary by taking the following actions:

- **Staying relevant in today's changing world** where technology and other factors are changing the way in which humans interact and do business. We can do that by looking to and attractive to two key demographics:
  - Recently retired who have expertise, experience, energy, time and money to bring to the table.
  - Up and coming emerging leaders who are the future of Rotary, our future leaders and our future standard bearers
- **Realizing that we are selling a product – which is the club experience.** It all begins and ends with the club and what the club offers its members.
- **Examining our Clubs.** Is the value proposition that we are offering prospective and current members different and better than the hundreds of other options that are available to them in the wider marketplace? We were challenged to delivering a product that is seen as valuable. If it is, they will stay and we will grow and prosper; if it doesn't, they will leave.

**Saturday afternoon breakouts** were working sessions.

Representatives and Alternates to the 2016 **Council on Legislation** reviewed and presented a number of resolutions being considered at the 2016 COL.

## Call to Action from the 2015 Institute in Hawaii

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The Rotary Foundation breakout had three calls to action:

1. Participate in TRF comprehensive evaluation of new grant model.  
Institute attendees and Rotarians who have not yet been asked and would like to provide comments, please do so.  
Take action by contacting Pam Russell [pdgpam0809@gmail.com](mailto:pdgpam0809@gmail.com) . One notable request was for Trustees to consider allowing unused District Grant funds to roll over to next year's District Grant dollars rather than to global DDF
2. On July 1, Rotary will launch an Areas of Focus (AOF) Major Gift initiative-focused on Water and Sanitation. AOF. The Major Gift Initiative will build on the experiences and success of the Rotary Peace Centers Major Gift Initiative. Contributions of \$100,000 or more will be requested, although any size gifts welcome. Attendees were asked to support this initiative.

In the same light, attendees were asked to raise awareness about the clean water and sanitation challenges in the developing world. They were also asked to raise aware that the developed world also grapples with infrastructure issues, including aging sewer pipes, water quality, and the risks of water scarcity. Rotarians can play an important role in raising awareness of the importance and scope of the challenge worldwide.

3. Learn about the Project Enhancement Process which will leverage Rotarian volunteer and staff expertise to enhance the technical quality of projects, initially focused on Water & Sanitation projects. TRF Trustees will reviewing at January 2016 meeting, Watch for further announcements in the spring of 2016

### **SUNDAY MORNING**

#### **CONNECTING TO THE 21<sup>ST</sup> CENTURY**

Paul Harris said "*there is nothing in Rotary so sacred that it cannot be set aside in favor of things better*"

The Keynoters explored marketing and communication in the information age—by informing attendees about tools as well as by demonstrating how to maximize communication using technology.



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## Call to Action from the 2015 Institute in Hawaii

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**Peter Markos, General Manager and Chief Information Officer**, discussed “**Connecting to Technology**”. He presented information on the tools and resources available to Rotarians on Rotary.org (Showcase, Rotary club Central, Rotary global Rewards and more).

**Director Jennifer Jones** gave an inspirational address, accompanied by video, addressing the topic of “**Connecting to Perception**”. She showed the power of visual imagery to leverage the spoken word.



General Secretary **John Hewko** pulled it all together with his remarks entitled “**Rotary Yesterday, Today, and Tomorrow**”

John highlighted three key aspects that were explored this weekend:

**First: The social impact of being a member of Rotary.**

He asks Rotarians to have clarity about this value and to communicate to other members.

- Personal benefits of Rotary membership: friendship, professional networking, the opportunity to serve; to personal growth and development, and cultural diversity.
- The Social impact of being a Rotary member is expressed in **two key ways**: in the benefits to the individual in being a part of the Rotary family; and in the benefits to the millions of people whose lives have been transformed by our initiatives, from the local to the global.

**Second: Rotary’s strength lies in connecting people for positive impact.**

John suggests that PDG’s have clarity about this and put it into words as well as action.

- The importance of Rotary’s transparency and ethical approach
- The opportunities for personal connection and participation
- The measurable impact of our work, no better example of our impact than that of our amazing progress on Polio.

## Call to Action from the 2015 Institute in Hawaii

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- The partnerships with other key public and private organizations, namely CDC, WHO, UNICEF and the Bill and Melinda Gates foundation to maximize our impact.

### **Third: How Rotary can and must evolve with the times, without compromising its very identity.**

- How do we as an organization stay relevant? How do we Re-calibrate, Re-Engineer, Re-Frame and Re-Position our great organization?
- How do we take the best lessons of the tech world's innovation, while keeping the Rotary ethos and identity, and become advocates for thoughtful, positive and lasting change?
- How do we honor Paul Harris, our great founder when he stated: "there is nothing in Rotary so sacred that it cannot be set aside in favor of things better"?

*"We have a great tradition in Rotary, but it's our tradition. We made it, and we own it — it doesn't own us — and if it no longer serves its purpose, we can change it."*



**ALOHA**