

# Reflections and Call to Action from the 2016 Zone 25/26 Institute in Santa Barbara, California

To my Fellow Rotarians in Zones 25/26

During the weekend of November 10-13, 2016 over 589 Rotary leaders from throughout the West Coast of North America gathered in Santa Barbara, California at the Rotary Institute. Our overall theme was CONNECTING FOR GOOD, with the emphasis on connecting and "doing good".

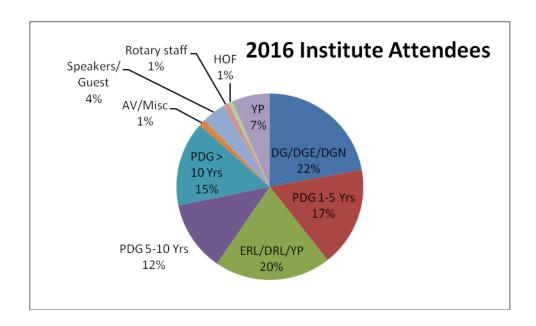
We had extraordinary speakers, entertainment, and experienced the joy of Rotary by working together on a service project to help local Boys and Girls Clubs. Besides organizing the Friday Project, our Young Professionals also led a 14-city bus trip with local projects performed at every site. On Saturday, our focus was 'The Rotary Foundation: Yesterday, Today and Tomorrow'. On Sunday, we looked to the future with speakers and panels focused on 'Together as Rotarians: Changing Rotary and the World Tomorrow'.

We enjoyed provocative and motivational remarks by Paul Shoemaker and John O'Leary, and Saturday and Sunday panel members. Two Rotary International Past Presidents, Cliff Dochterman and Bill Boyd, Rotary International President-elect Ian Riseley and his wife PDG Juliet, RI Vice President Jennifer Jones, The Rotary Foundation Chair-elect Paul Netzel, Foundation Trustee Mario Cesar de Camargo, and Rotary International Director-elect John Matthews all participated.

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. We truly hope that you spread the word about what you have learned.

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

Bradford R. Howard Zones 25/26 Director



### THURSDAY NIGHT: CONNECTING for GOOD: INSPIRING ROTARIANS TODAY and TOMORROW

The 2016 Institute began Thursday night when we all got together for the first time. The dinner and social event also included the presentation of the DGE's -- our 2017-18 Governors.



Rotary District Governor Class of 2017-2018 Zone 25 / 26



Our MC was our friend, colleague, and Honorary Rotarian Penny LeGate. Penny surprised us all by removing her hair---actually her wig. She is successfully recovering from breast cancer. She acknowledged the many women in the audience who also had fought that fight.

RIPE Ian Riseley shared "My personal story-How Rotary has enabled me to 'Connect for Good' both locally and globally".



In addition to talking about his journey through Rotary, RIPE Riseley concluded his message by reviewing the challenges facing Rotary International: challenges about which we Rotary leaders can take action.

- Build membership;
- Attract younger members;
- Improve retention by keeping members satisfied;
- Make a major effort to attract more women into Rotary;
- Take full promotional advantage of the eradication of polio when it comes.

He told the Governor Class of 2017-18 that he was counting on them to make the coming Rotary year as successful a year as ever. He said: "Do your best. Innovate. Pass the baton and move on."

### FRIDAY MORNING AND AFTERNOON: CHANGING LIVES ONE CHILD AT A TIME with hands on service projects with the Santa Barbara area Boys & Girls Clubs





## <u>SATURDAY MORNING: THE ROTARY FOUNDATION -- DOING GOOD IN THE WORLD YESTERDAY, TODAY AND TOMORROW.</u>



**PRIP Cliff Dochterman** gave a review of The Rotary Foundation's Early Years: **The Rotary Foundation Yesterday.** 

- PRIP Dochterman gave an historical perspective of the first 100 years of our Foundation;
- His key points and stories demonstrated how The Rotary Foundation has evolved into its current impact felt around the world;
- As always, his message was balanced with insights from his personal experience and as typical was sprinkled with 'Cliff-style' humor.

Dochterman said, "It is difficult for us to imagine how impossible it was for Arch Klumph to get even modest support for this endowment fund. The Rotary International Board and many of the Presidents of Rotary International would barely give encouragement or even a modest support to the Foundation. Arch Klumph pleaded with the General Secretary and Board of Directors to just set up a small office and assign one staff member to assist in promoting the Foundation. Klumph was told 'no way', you are promoting this endowment fund, so you do the work in your own business establishment in Cleveland, Ohio. And that is what Arch Klumph did for several years."

It took eleven years until The Rotary Foundation was formally named and Trustees appointed. And it was a couple years more before the very first grant of \$500 was awarded to the International Society for Crippled Children, which is now called "Easter Seals." And actually that \$500 was the personal gift of Paul Harris.



**PRIP Bill Boyd** gave a review of The Rotary Foundation – **Today and Tomorrow.** 

- PRIP Boyd gave us updates about the Rotary Peace Centers and polio eradication;
- He spoke about the value of partnerships current and future ones.

PRIP Boyd noted that our Rotary Peace Centers have been running for 13 years. He told the attendees that The Rotary Foundation has decided to "see how the centers are doing to make sure that we are getting the 'best' we can from the funds dedicated to this program. We want to explore ways to take our program forward to another level… and changes to the program could be sweeping." He noted that over all others, "our scholarships are the best available."

#### PRIP Bill Boyd The Rotary Foundation – Today and Tomorrow -- cont'd

Boyd also reviewed our Polio Milestones including the contributions from the Gates Foundation with a point that the End of Polio will not be the end of TRF's relationship with the Gates Foundation. He also noted that 130 people have given their lives in helping eradicate this disease since the polio campaign began in 1985.

He talked about Rotary Partnerships and that The Rotary Foundation is looking for larger and more impactful projects;

He agreed with Mother Teresa that the "biggest disease today is in not caring for the unwanted and those in need". Boyd feels that Rotarians care and that expression of love is The Rotary Foundation.

#### SATURDAY MORNING BREAKOUTS: THE ROTARY FOUNDATION TODAY

The Breakout Sessions continued with Rotarians hearing about two important Rotary Foundation priorities. Remarks demonstrated why Rotary remains relevant today and why it is important for Rotarians to remain actively involved, working together to address these significant issues.

#### Topic #1: Our Peace Efforts – Fighting Human Trafficking

#### PRESENTERS:

Pennsylvania Rotarian Carol Hart Metzker shared her views and experience based on her book Facing the Monster: How One Person Can Fight Child Slavery. Consultant, writer, fighting child slavery. Awarded Service Above Self recognition for her work.

Oregon Rotarian Adrienne Livingston, Director of Anti-Sex Trafficking Initiatives with WorldVenture. Ambassadorial Scholar to Dominican Republic, Rotarian in East Portland, Oregon.

The most profound take away was that everyone believes human trafficking is somewhere else. Americans assume this issue is happening in other countries and not here while people from other nations think that the US is a bastion for human trafficking and sex slavery. They believe that it's a US problem and doesn't exist in their country. According to Carol Metzker, "We of course think that it is a developing world issue. We are all wrong: 100,000 - 300,000 children in the USA are victims as well".

#### Topic #1: Our Peace Efforts - Fighting Human Trafficking -- cont'd

#### Call to Action -- what WE Rotarians can do:

- Work to address homelessness in our communities. 1 in 3 homeless youth become involved in trafficking within 48 hours.
- Know what to watch for. Watch for 'red flags' in our families and acquaintances. Look for an older boyfriend; new expensive jewelry or clothing; tattoo of money, name or barcode; isolation from friends and family.
- **Take action individually.** Take action when we see recruiting of victims. Recruiting is ubiquitous! It's in schools, parties, theaters, malls, fake modeling agencies, and the street. Recruiters prey on runaways, abused, naïve, children in foster care, immigrants, refugees, people experiencing poverty, the disabled, and the disaffected. They build relationships and then slide victims into sex trade. Victims need support and reeducation about their worth. Let's all consider joining the Rotarian Action Group Against Child Slavery.
- Take action collectively. Get our Clubs involved in awareness of and projects to reduce human trafficking. Work with partners on project development—many of which are safety-net providers.
- **Promote policy change.** Engage national leaders to end slavery. Editor's note. "In January 2017, US Government pressure succeeded in pushing Backpage.com to close its adult ads section. This action was the result of a US Senate report linking this site to criminal activity involving sex trafficking of children. According to Law Enforcement officials, before Backpage.com closed this ad section it was the busiest place online for sex-trafficking activities!"
- Bring this travesty out in the open. Sponsor and participate in the Red Sand Project to raise awareness in our neighborhoods and home towns. https://redsandproject.org/: In this art effort, participants put sand in sidewalk cracks symbolizing preventing people from "falling through the cracks" and becoming more susceptible to human trafficking.

#### Topic #2: Water is Life

#### PRESENTERS:

Current WASRAG (Water & Sanitation Rotarian Action Group) Chair, PRIP Bill **Boyd** set the stage for this Breakout session.

WASRAG Water Specialist Michael Pollen, used a WinS Water project with NGO Water for Life as the foundation for his remarks from work with three schools in Belize.

Water, Sanitation, and Hygiene Rotarian Action Group (WASRAG) website: <a href="http://www.wasrag.org/">http://www.wasrag.org/</a>

WASRAG Facebook: https://www.facebook.com/Wasrag-Water-Sanitation-Rotarian-Action-Group-173320991763/

WASRAG Foundation (a new tax exempt foundation that has been started to help fund water and sanitation projects beyond TRF): http://www.wasragfoundation.org/Welcome.html

#### Topic #2: Water is Life -- cont'd

#### Call to Action -- what WE Rotarians can do:

 The primary focus of this session was on what is called WinS and WASH in Schools. WASH is the acronym for Water, Sanitation and Hygiene and the WinS program is promoting the construction of sanitation facilities in schools, along with hygiene education. Learn from best practices.

With the help of water project experts and a '100 water project' initiative, the outcome of the findings produced a template for projects in all Six Areas of Focus to cover the following action steps:

- Ensure local community buy-in;
- Ensure local and country government buy-in;
- Consider technical requirements necessary for practical project outputs and impact:
- Place a value on every gallon of water to be obtained and validate the numbers:
- Collect funds for maintenance;
- Engage community members in the process and the on-going success of the project by helping local leaders set up and operate 'water committees' to ensure long-term stewardship of the project.
- Look at using UNICEF'S 'Toilet Block Floor Plan'. https://www.unicef.org/somalia/SOM\_ConstructionGuidelinesHealthFacilitiesREPORT\_1 2 WEB.pdf
- Remember that this work is about BOTH access to clean water AND sanitation. Sanitation is a current challenge as much as obtaining clean water. Remember to include bathrooms if your clubs build or refurbish school. Bathrooms are most often left out. Girls need private bathrooms of their own! Rotary is calling this effort WinS.

#### SATURDAY NOON: THE ROTARY FOUNDATION TOMORROW



#### KEYNOTE

Paul Shoemaker is the Founding President of Social Venture Partners International (SVPI) and was Social Venture Partners Seattle's (SVP) Executive Director for 17 years.

SVPI is a global network of thousands of social innovators, entrepreneurs, philanthropists, and business and community leaders who fund and support social change agents in nearly 40 cities and 8 countries.

Shoemaker's most recent book is *Can't Not Do*.

"Connecting the Right People, In the Right Ways" | Paul Shoemaker | TEDxFargo

https://www.youtube.com/watch?v=8p\_cD\_4cCf0

#### Paul Shoemaker: The Rotary Foundation Tomorrow - cont'd

Shoemaker finds that it's people who make the difference – like with polio, human trafficking, and clean water. Using graphic images he shared his philosophy about the interconnectedness of being engaged with one another philosophically, having collective impact, and the value of investing collaboratively.

He noted that Rotarians are the fulcrum. That 'connecting for good' is the imperative to create social change. We have a positive impact in the world because we have the financial resources and the people capable of getting the job done.

He left us with at least four actions we can implement:

- 1) Think of roles that we want to assume and then assume them. **Be a difference** maker.
- 2) Think about The Rotary Foundation and the people we serve, and, about how we do our best work. Align what we are doing and integrate alignment with our resources.
- 3) **Be more involved** because we will be going home to disconnected communities a situation resulting from the recent US election.
- 4) **Use the power of personal stories and use them with intention.** If we do, we can 'Tip the Balance' to a favorable conclusion by 'connecting for good'.

### SATURDAY AFTERNOON BREAKOUT: THE FUTURE OF THE ROTARY FOUNDATION



Left to right: PDG Johrita Solari, PRIP Bill Boyd, PRID and TRF Chair-elect Paul Netzel, Trustee Mario Cesar De Camargo, SVPI Founding President and Author Paul Shoemaker

Each of the four panelists brought their unique perspectives to the conversation from questions generated by Moderator Johrita Solari. Valuable information was provided and is summarized below.

#### **PANELISTS** and their Calls to Action:

#### PRIP and TRF Trustee Bill Boyd

- Measure results better and then share the information because there is a knowledge disconnect between Trustees and Rotarians;
- Our non-Rotarian partners do not understand Rotary Club autonomy.

#### PRID and TRF Chair-elect Paul Netzel

- Educate more Rotarians about TRF. Only 1/3 of Rotarians donate anything to TRF because they don't understand what TRF does. Governors and other District leaders are key to getting this information out to the field:
- In order to maximize the benefit to both Rotary and The Rotary Foundation, prepare local plans for telling the polio story when full eradication happens.

#### TRF Trustee Mario Cesar De Camargo

Rotarians and Clubs need a better understanding of the benefits of our partnerships with other large humanitarian organizations because of the great leverage these partnerships provide.

#### **Author and Speaker Bill Shoemaker**

- TRF's goal should be to think about doing things differently; to think about 'HOW' the organization will get things done in the future;
- Look into creating better alignment with Clubs, members, and The Rotary Foundation;
- Work to discover how Trustees can connect to members.

#### MODERATOR: PDG Johrita Solari

• Gave us an ending quote: "Real change begins with the simple act of people talking about what they care about." Meg Wheatley, Organizational Behavior Consultant

#### Call to Action -- what WE Rotarians can do:

- Talk more to our Club members about The Rotary Foundation;
- Overcome the notion that "the money is going "over there";
- Ask our Clubs if they are willing to admit that there are needs elsewhere;
- Buy Paul Shoemaker's book Can't Not Do.

#### What is the Rotary Foundation structure and what changes are being considered or should be made? (Paul Netzel)

- Trustees have job descriptions, but not a set of goals or specific outcomes. There has been some discussion on measurements; it is a work in progress;
- There is now a Joint committee of Trustees and the RI Board plus coordination with the Secretariat, but the structure is missing Rotarians;
- We need to be looking at the big picture 'One Rotary'; the organization is going through a metamorphosis. RI, TRF, the Secretariat, and individual Rotarians are now working better together;
- There has been a huge leap with regard to Directors in working with the Clubs. Directors are better connected with the Districts than ever before and better connected than Trustees.

#### PANELISTS and their Calls to Action -- cont'd

#### How have Foundation Trustees been selected? (Bill Boyd)

- It has been an evolving process --
  - Initially they were selected by the president:
  - When he was RI President (2006-07), Boyd said he selected a person who had managed a foundation that was similar The Rotary Foundation:
- The current process is that a slate is prepared by the Board of Directors and the RIPE ultimately nominates the people to serve starting the following 1 July. The board elects the Trustees. There is a "panel" which gathers names and submits a list of top candidates to the RIPE.
- For vacancies that occur during a Rotary year, the sitting RIP nominates the individual to fill the vacancy.

#### New Trustee selection process being considered (Paul Netzel)

- Paul Netzel offered one idea that is being discussed in some circles regarding modifications to the Trustee Selection Process. The idea is that every paired zone would have both a RID and a Trustee at any given time. Such a plan would require adoption by the (2019) COL with an increased budget allocation. However, the inherent benefits and results would be expected to provide a strong return-on-investment by positioning Rotary to better meet the opportunities and challenges of the coming decades.
- To implement such a plan, it would require certain structural and procedural changes phased-in over a four to six year period to allow for an orderly transition. The number of Trustees would be increased from 15 to 19. Seventeen (17) Trustees would be selected at the paired-zone level, similar to the manner in which RIDs are selected. In addition, only two (2) past RI Presidents would serve as Trustees at one time rather than the current policy requirement of four (4) PRIPs.
- The terms of service for both the RI Directors and TRF Trustees would be changed to three (3) years. At any given time, once the plan is fully implemented, each zone would have either a RID or a TRF Trustee. Benefits of such a structure would include, but not be limited to: (i) a closer linkage between TRF and Districts; (ii) it would enable a partnership to be developed between the RI Director and TRF Trustee in paired zones; and (iii) it would create clearer reporting ties and promote a stronger sense of teamwork between regional coordinators and advisors and their respective governing boards.

#### **♦ NOTE:**

Trustees -- The Board of Trustees manages the business of The Rotary Foundation, the charitable arm of our organization. The Rotary International President-elect nominates the Trustees, and the Board of Directors elects them to four-year terms.

Directors -- The Board of Directors establishes Rotary International's policies and provides quidance that helps our clubs thrive. Clubs elect the Directors every year at Rotary's international convention, and each director serves for two years. Every other year, Zone leaders vet and nominate qualified Rotarians to serve as their representatives on the RI Board of Directors. For our Zone 25 and Zone 26 Directors, a nominating committee of leaders from both zones alternates between Zone 25 and Zone 26 in selecting a candidate every two years.

#### PANELISTS and their Calls to Action -- cont'd

#### What might the Rotary Foundation look like in the future? (Paul Netzel, Mario de Camargo and Bill Boyd)

- (Paul) The RI Board and TRF are engaged in Strategic Planning including the following issues: 1) Expanding One Rotary (RI, TRF, Secretariat) along the spectrum to each individual Club and Rotarian; 2) Maintaining our believability and credibility in what we accomplish (We must finish polio); and, 3) Post polio will we think big and boldly enough?
- (Bill) Peace programs are an example of our success and place in the world and yet we still need to ask "what should our mission be, what should Rotary's place be?"
- (Mario) We will build on creating partners (such as the Bill & Melinda Gates Foundation). We currently have added key partners like Lufthansa. There are 16 more in the works.

#### **SATURDAY AFTERNOON BREAKOUT for Partners**



#### PRESENTATION

PDG Juliet Riseley, wife of Rotary International President-elect, was interviewed by Rotarian Betsy Koefoed.

Her advice to partners:

- Do things that bring new people into your life.
- Take actions about which you are proud.
- **Do what you love** in your home, business or family life in Rotary. She gave an example of "meeting and working with people".
- Listen and do 'people watching'. We all can learn from developing these skills.

#### SATURDAY EVENING WE CELEBRATED ROTARY'S POLIO EFFORT



"We are 'this close' and cannot and will not stop until polio is eradicated."

We honored four Polio Champions: Joe Serra, Ezra Teshome, Anil Garg, and Brad Howard. Joe was honored for his orthopedic work with Malawi crawlers. He was a pioneer in the Polio effort. Ezra, Anil, and Brad were honored for leading many polio NIDs. These individuals inspired the Rotarians who followed them and took up the challenge to eradicate polio.









**Anil Garg** 

**Brad Howard** 

#### SUNDAY MORNING: TOGETHER AS ROTARIANS, CHANGING ROTARY AND THE WORLD TOMORROW



#### **KEYNOTE**

#### Brian King, R. I. Director of Membership Development

"Take membership seriously. Don't let romantic things from the past cloud your decisions. Change!"

#### Call to Action -- what WE Rotarians can do:

- Take advantage of where we are today. With a seven second attention span these days the marketplace has created a critical turning point for Rotary. King noted four trends related to volunteerism that we should consider in our own Rotary approach: 1) Virtual volunteerism; 2) Skills volunteerism; 3) Workplace volunteerism; and, 4) Episodic volunteerism.
- Be creative. Some clubs have organized successfully around a cause-based culture.
- Be innovative. People want more leadership opportunities, but also more flexibility to carry out those roles. People want what they want when they want it.
- Consider the value of measurement. For example, use a business model to measure value vs. membership attendance. Also leverage technology and use consumer behavior research.

#### TOGETHER AS ROTARIANS, CHANGING ROTARY WORLD TOMORROW, CELEBRATING WOMEN ROTARIANS - PANEL DISCUSSION:



Left to right: Seattle 4 President Cathy Gibson, Rtn. Danielle Lallement, RI VP Jennifer Jones, PDG & Institute Chair Rosemary Barker Aragon, MC Journalist Penny Legate

#### **PANELISTS:**

#### RI Vice President Jennifer Jones

- Our words are our power; we need to expand our appeal.
- There are great advantages to attracting "young thinking" men and women of any age.

Panelists: Celebrating Women in Rotary - cont'd

#### **PDG Rosemary Barker Aragon**

- Take action to grow our clubs with women members beyond 30%. Women, of all ages, are an important missed opportunity. Women want professional leadership growth, to see leaders that look like them, and the opportunity to make a difference.
- Be intentional about developing our future club leaders.

#### **Seattle 4 Club President Cathy Gibson**

- Provide opportunities for younger Rotarians to have one-on-one interactions with seasoned business professionals in the Club. This mentoring is real value added.
- Be strategic in selecting leadership: leaders need to look like the leaders in our communities.

#### Young Professional Rtn. Danielle Lallement

- Some Rotarians do not want the moniker of age. Let's just call us all ROTARIANS.
- Remember: 25-40 year olds tend to be social cause focused. Showcase what Rotary and Rotarians do best, particularly using social media as the delivery mechanism.

#### **MODERATOR Journalist Penny Legate**

Recommends "talk less and do more".

#### SUNDAY MORNING FINAL KEYNOTE



#### **KEYNOTE**

John O'Leary: The Choices to Ignite a Radically Inspired Life.

https://www.johnolearyinspires.com

John is an inspirational speaker and author of 'On Fire – The 7 Choices to Ignite a Radically Inspired Life'.

See John O'Leary's Message https://www.youtube.com/watch?v=XNravQNa 5E.

#### O'Leary: The Choices to Ignite a Radically Inspired Life -- cont'd

According to John, we tend to have favorite questions we ask when troubles occur.

They are: Why me? Who Cares? And What more can I do? These same guestions, however, can be the questions asked when we are victorious or when looking at life's positives. Why me - Why am I so lucky? Who Cares - Our problems are so minimal. What more can I do to make life even better?

- O'Leary exemplified a positive way of looking at life through his own life experience. When he was 9 years old he played with fire and was burned severely in a gasoline fire explosion.
- Why me? Don't talk about how much is broken, but that we are in a strong place. He did that with the love and support of his father and mother, but with a determination that grew with an honesty that led to progress. Through his father's love and St. Louis Cardinal Announcer Jack Buck's visits at the hospital, he developed a determination that allowed him to defy experts who believed he would die. He survived.
- Who cares? What more Can I do? O'Leary pointed out that in his early days of recovery he learned how much you hear when your eyes are shut - something he experienced when the burn glued his eyes shut. During this time Jack Buck visited him regularly telling him in his gruff voice to "Wake Up, Kid" and talking to him and giving him strength. After surviving, Jack Buck arranged a "John O'Leary Day" at a Cardinals baseball game. He also told John that he could have an Ozzie Smith signed baseball if he wrote a thank you letter with his deformed, almost fingerless hand. When O'Leary accomplished the task, Buck asked if he wanted another baseball on the same terms. Eventually John became the owner of dozens of baseballs. His mother took a similar approach when she insisted John learn to play the piano which O'Leary demonstrated during his talk.
- What more Can I do? O'Leary illustrated that if one looks at love, not skin color, not religion, not hair color, not disabling conditions, there are no limits. His life has been committed to fighting negative thinking and to creating accomplishments such as speaking here and writing a book because of the reality of his condition.



"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." John Hewko, RI General Secretary

### UNTIL WE MEET AGAIN at the 2017 INSTITUTE in RENO, NV! Nov 9-12, 2017

http://www.zone2526.org/2017-zone-2526-institute/

