



Rotary Made Easy Handbook 2024-2025

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1.

Rotary International

Who we are: Rotary is a global network of 35,000+ clubs, with more than 1.4 million total members. They are neighbors, friends, leaders and problem-solvers who volunteer their skills and resources to solve issues and address community needs.

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

- Solving real problems takes commitment and vision.
- Since Rotary's founding in 1905, Rotary's people of action have used their passion, energy, and intelligence to take action on sustainable projects. From literacy and peace to water and health, we are always working to better our world, and we stay committed to the end.

What we do: Rotary members believe that we have a shared responsibility to take action on our world's most persistent issues. Our 34,000+ clubs work together to:

- Promote peace
- Fight disease
- Provide clean water, sanitation, and hygiene
- Save mothers and children
- Support education
- Grow local economies
- Protect the environment

We are people of action: We connect passionate people with diverse perspectives to exchange ideas, forge lifelong friendships, and, above all, take action to change the world.

We work differently:

- We see differently: Our multidisciplinary perspective helps us see challenges in unique ways.
- We think differently: We apply leadership and expertise to social issues – and find unique solutions.
- We act responsibly: Our passion and perseverance create lasting change; We make a difference at home and around the world:

2.

Guiding Principles

Guiding principles have been developed over the years to provide Rotarians with strong, common purpose and direction. They serve as a foundation for our relationships with each other and the actions we take in the world.

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

- First - The development of acquaintances as an opportunity for service;

- Second - High ethical standards in business and professions, recognition of the worthiness of all useful occupations, and dignifying each Rotarian's occupation as an opportunity to serve society;
- Third – The application of the ideal of service in each Rotarian's personal, business, and community life; and
- Fourth – The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

The Four-Way Test is a nonpartisan and nonsectarian ethical guide for Rotarians to use for their personal and professional relationships. The test has been translated into more than 100 languages, and many Rotarians recite it at club meetings: Of the things we think, say or do...

1. Is it the TRUTH?
2. Is it FAIR to all concerned?
3. Will it build GOODWILL and Better Friendships?
4. Will it be BENEFICIAL to all Concerned?

Avenues of Service: We channel our commitment to service at home and abroad through five Avenues of Service, which are the foundation of club activity.

- **Vocational Service** calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society.
- **Community Service** encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest.
- **International Service** exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.
- **Youth Service** recognizes the importance of empowering youth and young professionals through leadership development programs such as Rotaract, Interact, Rotary Youth Leadership Awards (RYLA), and Rotary Youth Exchange.
- **Club Service** focuses on making our club strong. A thriving club is anchored by strong relationships and an active membership development plan.

Statement on Social Justice and Racism:

There is no room for racism in our communities, and the very concept of such is against everything that Rotary Clubs and members of Rotary stand for and believe. Promoting respect, celebrating diversity, demanding ethical leadership, and working to advance peace and conflict resolution are central tenets of our work. We recognize that focusing on and promoting community-based projects, as we have done for generations, is no longer sufficient. In addition, we need to work to eliminate policies, actions, and unjust practices that promote privilege or subjugate the rights of any human being.

Rotary's vision is to bring people together and create lasting change in our communities and in ourselves. We will unite around that vision and stand with those who are working for peace, justice, and equality for all members of our society. Black lives matter, and we believe that reform and change are necessary so that one day we can live in a society truly beneficial to all. We will continue to work to create a more just, open, and welcoming society for all people.

3.

Structure of Rotary Club of Oakland and Related Organizations

The **Rotary Club of Oakland (RCO)** is an IRS recognized 501(c)(4) corporation and is organized as follows:

RCO Officers

President (elected to a one-year term), President Elect (elected to a one-year term), Secretary (selected by the Board of Directors) Treasurer (selected by the Board of Directors), Immediate Past President (elected to a one-year term)

RCO Board of Directors

Eleven directors are elected to the board at annual elections of the membership, with staggered terms of three years.

RCO Committees

There are more than twenty (20) committees of the club, through which the members carry out the club's mission.

RCO Committee Chairs/Co-Chairs

Each committee is headed by a chair or two co-chairs who are appointed for a term of one year by the president.

The tradition of banners

You are encouraged to visit other Rotary clubs near Oakland and in other areas, states and countries. Rotary clubs have a tradition of exchanging banners when members visit other clubs. If you would like to exchange banners while visiting another club, ask the executive administrator for banners. When you return to Oakland, you may present the banners you receive to our president at a meeting. Just notify the president in advance of the meeting.

Oakland Rotary Endowment (ORE) is RCO's charitable affiliate. It is a separate corporation, an IRS recognized 501(c)(3) corporation with its own officers, board and structure. (*See section 9. The Oakland Rotary Endowment.*) ORE is organized as follows:

ORE Officers

President (selected by the Board of Trustees), Vice President (selected by the Board of Trustees), Secretary (selected by the Board of Trustees) Treasurer (selected by the Board of Trustees)

ORE Board of Trustees

Fifteen trustees, including RCO's President, President Elect, Treasurer and immediate Past President, plus eleven other trustees elected annually by the membership and serving staggered 3-year terms.

Rotary District 5170

Rotary International organizes clubs into zones and districts. RCO is part of District 5170, which consists of about sixty (60) clubs from Morgan Hill and Santa Cruz at the south end of the bay to Oakland at the north end of the East Bay. Each Rotary district is headed by a district governor, who serves for one year. A Rotary district is divided into areas, each of which is headed by an assistant district governor. RCO is in Area 1 of District 5170. Area 1 consists of RCO and the Rotary Clubs of San Leandro, Oakland Uptown, Alameda, and Piedmont/Montclair.

4. Your “Red Badge”

When you joined RCO, you became part of Oakland’s oldest and most prestigious service club. In fact, RCO is the third oldest of over 35,000 Rotary Clubs in the world, all affiliated with Rotary International. The first club was founded by Paul Harris in Chicago, Illinois in 1905; the second was formed in San Francisco (1908), and the third club, known then as the Tri-Cities Rotary Club (Oakland, Alameda and Berkeley) was formed in Oakland in 1909. The club changed its name to Rotary Club of Oakland in 1910.

A mainstay of our club is the weekly lunch meeting, which usually includes both club business and an interesting outside speaker. You are encouraged to attend as many lunch meetings as you can – whether in person, on Zoom, or on social media (livestreamed to Facebook and/or YouTube, with recordings saved for later viewing saved on the same platforms).

When you joined the club, you received a “red badge.” This badge identifies you as a new member and will provide you with many opportunities to meet other Rotarians, form new friendships, and build your network of colleagues and business associates. During your first year, you are expected to accomplish several activities to help introduce you to all the club has to offer. Once you have accomplished this list of activities, you should notify the president and schedule club meeting time to receive your “blue,” permanent badge. (From time to time, the club’s board of directors reviews and updates this list.)

1. Attend a new member orientation
2. Participate in a committee of the club. Participation can mean becoming an active member of a committee, or contributing your time to a significant committee event such as attending Enterprise Institute, traveling to an international committee fair as part of the Karl Stucki World Community Service committee, or playing an active role in a fund-raising event of the Oakland Rotary Endowment. You are encouraged to take your time in selecting a committee that matches your interest. Your engagement in a committee benefits the club and usually also benefits the community of Oakland or the international community.
3. Contribute, in whatever way is affordable and meaningful to you, to the Oakland Rotary Endowment and The Rotary Foundation (*See 9– The Oakland Rotary Endowment and 10 – The Rotary Foundation*). It is only through the raising of funds that RCO and ORE are able to financially support service to our

community. As a member of RCO, it is important that you assist in reaching our fundraising goals. A popular saying in our Club is “Every Rotarian Every Year.”

4. Deliver a three (3) minute self-introduction before the club. This is your opportunity to introduce yourself to a broad group of your fellow Rotarians including those you have not yet met. This can be an entertaining way to show a side of yourself that you would like the members to see and get to know. Be creative. For the inexperienced public speaker, this is an opportunity for professional growth and development. If you would like, the club can identify a coach to help you prepare.

5.

Meeting Guests and Meeting Sponsorships

Now that you are a member of RCO, **be proud** of your membership, share your experiences, and provide others with the opportunities now being made available to you. Please **invite a guest** ... a friend, an acquaintance, a colleague, a relative. Rotary and RCO provide you with great potential for friendship, opportunity to serve the community, leadership development, business networking and more. Why not share this opportunity? If your guest is a prospective member, please check in with the executive administrator who will assist you by providing a complimentary lunch ticket for your guest (one time only). If they are not a potential member or have already received one free lunch, the cost of their lunch should be borne by you or the guest.

Introducing guests at meetings: When you bring your guest to a weekly Thursday lunch, please follow this outline. Stand up when the president invites Rotarians with guests to make introductions. When you receive the microphone, hold it directly in front of your mouth and speak clearly into the mic. Introduce yourself and identify your position, such as “attorney for Blarney and Blarney.” Then introduce your guest, providing only their name and their position. Introductions need to be kept short to keep the meeting flowing. If your guest later becomes a member, they will receive a full introduction to the club.

Meeting sponsorships: You may sponsor a Thursday lunch meeting and have your company/nonprofit highlighted to members and meeting guests. The sponsor fee is \$250 for three minutes to speak about your business/nonprofit and put a flyer/brochure on tables (if the meeting is not in-person, the sponsor may ask the executive administrator to email a “pdf” copy of the document to members after the meeting). Please don’t directly solicit purchases/donations during your presentation.

6.

Committees: “Where the Rubber Meets the Road”

RCO and ORE are both volunteer organizations. While we employ an executive administrator to support our organization and functions, our service activities are carried out by the membership. We depend on the members and our committees to move projects and objectives forward. The club has a diverse menu of meetings, service, events, and social outings. This diversity of opportunity ensures that you will find something that will spark your interest and enthusiasm.

Each of the club's committees focuses on at least one of the five Avenues of Service that provide the foundation of Rotary. These are: Community Service, International Service, Youth Service, Vocational Service, and Club Service. RCO has several committees that focus on Community Service, several that focus on Youth Service, etc. You will learn about the various committees during your attendance at the new member events. You may visit committee meetings at any time, and you are encouraged to attend meetings of several committees before making a commitment to join a committee. Most committee meetings are posted on the calendar on the club's website.

7.

Website and Social Media

Website: RCO maintains a website that is open and accessible to anyone. It is www.oakland-rotary.org. There you will find an events calendar, committee listings, and links to donate and pay your dues. You will also see a 'member access' link that takes you to a members-only area called DACdb. You may email members, see information on your committees, and manage your profile. If you change contact information in your profile, notify the executive administrator, who will then make the changes in the club's other databases. We encourage you to download the DACdb app called "Ignite" to your smartphone; then the club directory is always with you, and you may use your phone to call, text and send emails to members, as well as register for events.

Social Media: RCO has Facebook, Instagram, LinkedIn, Twitter and YouTube accounts (*links provided in Section 13). Resources*). You are strongly encouraged to engage on the club's social media pages by liking, commenting, and sharing with friends, colleagues and family. Your social media use helps you build visibility and connect with others. Also, the club appreciates you using social media to spread the word about our club's speaker series, other events, activities, and service work.

8.

Dues and Other Financial Matters

Your RCO dues pay for the operating costs of the club, which include dues to Rotary International and Rotary District 5170 based on the number of members in the club, rent for the RCO office and ballroom, salary for the executive administrator, office supplies and software, and other necessary club expenses. As a member of RCO, you have an obligation to pay your dues and pay for events in a timely fashion. You are also expected to make contributions to ORE and to the Rotary Foundation.

Club Dues: You will receive an invoice for your club dues once every six months (June and December). Payment is due in full on each of January 1 and July 1, and should be paid within 30 days of receipt of the invoice. While you always will receive these semi-annual invoices, RCO prefers that members pay their dues via automatic monthly credit card payments, which you may set up with the executive administrator. If you do not set up automatic monthly credit card payments, you may pay your dues online at the link on the website. It is understood that, from time to time, members may face challenges in meeting their dues obligation. If you have difficulty making the payment, speak to the executive administrator, who will assist you and explore available payment options. If you do not contact the executive administrator, you will

continue to receive invoices and past-due notices. Members who fail to pay their dues are subject to termination at the discretion of the board of directors.

Paying for events, dinners and trips: When signing up for an event, a space will be held for you, at times to the exclusion of another Rotarian. Payment for the event should be made prior to the event whenever possible. Payment is due for any event you have reserved, whether or not you attend.

Participation in Rotary events often involves some travel. This could be simply driving and parking at a Rotary committee meeting. But it can also involve more extensive travel to Rotary District events or even an international destination. Members should expect to cover their own travel expenses except in highly unusual situations where travel might be a part of some specially funded program.

Resigning from RCO: If you need to resign from the club for any reason, please send a notice of resignation to the executive administrator and pay any amounts owed, including any outstanding dues for the current semi-annual period. Your resignation will be presented to the board of directors. To avoid being obligated for the next six months of dues, present your resignation to the executive administrator by June 30 or December 31.

9.

Oakland Rotary Endowment

ORE is an IRS recognized 501(c)(3) tax exempt organization affiliated with RCO. Its purpose is to support charitable activities undertaken by the membership and RCO committees. ORE consists of a permanently restricted corpus and unrestricted funds. As of June 2024, the corpus was about \$4.9 million. Each year the ORE board is mandated to take a portion of earnings from the investment account that holds the permanently restricted corpus and a portion of unrestricted funds and provide them to the club to do its philanthropic work. Unless a donor specifies otherwise, donations made to the yearly ORE campaign are divided 75% to the corpus and 25% to unrestricted funds.

While ORE will designate a month (usually March) for the yearly ORE campaign, donations to the campaign may be made at any time of the year. A member who contributes a total of at least \$1000 to the ORE campaign becomes an ORE patron. Additional levels of recognition are given for higher levels of contributions to the Oakland Rotary Endowment.

In addition to the yearly campaign, the club provides other opportunities to provide unrestricted donations to be used next year. "Ring the bell" is a \$100 unrestricted contribution to ORE. Club members ring the bell for many different occasions such as birthdays, anniversaries, births or weddings of children or grandchildren, new jobs, promotions, beneficial publicity, and recognition of good deeds by other members.

The ORE fund-raising event/gala is usually held once a year. The net income from this event goes to unrestricted funds to be used for programs the following year. Members may support the event through sponsorship (by an individual member or their business), by buying tickets for the event, and participating in an auction or similar activity.

ORE makes grants to the club and its committees to do the club's philanthropic work. The committees vet activities, outside organizations and individuals to receive scholarships, grants or other funds related to the club's service activities. Committees then make funding recommendations to the club's board of directors and the ORE Board of Trustees for final approval.

10.

The Rotary Foundation

Similar to the relation between RCO and ORE, Rotary International maintains an affiliate Section 501(c)(3) charitable organization. The Rotary Foundation (TRF) carries out the charitable purposes of Rotary International. Collectively, Rotary clubs and TRF are the largest source of student scholarships in the world. The Rotary Foundation is also known for its 40+-year effort to eradicate polio from the face of the earth and has nearly completed the job. Donations to the Rotary Foundation also benefit our club because a portion of the money we donate comes back as matching grants to fund club projects.

Once a year, our club conducts a campaign (usually in the fall) to support The Rotary Foundation. A member whose contributions accumulate to a total of \$1000 is recognized as a Paul Harris Fellow. Once a member becomes a Paul Harris Fellow, subsequent contributions totaling \$1000 entitle the member to name someone else (a family member or other individual they wish to honor) a Paul Harris Fellow. Additional levels of recognition are given for higher levels of contribution.

11.

Courtesies to the Club and Fellow Members

No mass mailings or e-mail blasts: When you join RCO, you are given access to the names, addresses, emails, and phone numbers of your fellow Rotarian business and community leaders. These members joined Rotary for many of the same reasons you did: to be of service to their community, to make new friends, and, as a side benefit, to enhance their business networking contacts.

You have access to member information through DACdb (including the DACdb app called "Ignite" on your smartphone) and a directory that is available in print and pdf format. This information is for your use as a Rotarian: to make personal connections, conduct Rotary business, and inquire about a business-related service you may need. The roster should not be used as a vehicle for mass mailings nor a vehicle to promote personal, business, or charitable interests/events that are not sanctioned by RCO.

Courtesies: Rotary membership includes a commitment of service to your club and to other Rotarians. When you make a commitment to serve on a committee, attend an event, work on a project, or meet someone for a lunch appointment, it is important to fulfill your commitment. If you cannot complete your commitment, let the other individual(s) know. If it is a committee or other club matter, call the committee chair or find another Rotarian to take your place. We all depend on each other.

Role of the Executive Administrator: Most Rotary clubs are 100% volunteer organizations. Because of the size of RCO, we employ a paid executive administrator to perform a number of functions at the direction of the board of directors. The executive administrator is an important resource to all the members and is available to answer questions, point you in the right direction, etc. However, the executive administrator carries an important workload of assignments from the board of directors and is generally not available to carry out unassigned work or responsibilities of individuals or committees. Please be respectful of the role of the executive administrator and seek assistance from other members whenever possible.

Opportunities to promote your business, non-profit or organization: In addition to personal connections, RCO offers business networking opportunities through the Business Development Committee. Also, RCO offers the opportunity to promote your business through a meeting sponsorship (*as described in section 5 above*). Contact the chair of the Business Development Committee if this is an area of interest to you.

12.

Youth Protection Program

A lot of what we do at RCO involves working with kids of all ages. Our Rotary District and Rotary International require that each Rotarian who works with children participate in our Youth Protection Training Program. You must complete an on-line process which can be found at <http://rotarydistrict5170.org/sitepage/youth-protection-1>. Questions may be directed to the executive administrator.

13.

Resources

Club Event Page on Eventbrite: <https://www.eventbrite.com/o/rotary-club-of-oakland-39700067693>

Rotary Club of Oakland website: <https://www.oakland-rotary.org/>

DacDB <https://dacdb.com/> and its associated app to download on your phone: Ignite

Rotary International website: <https://www.rotary.org/en> (remember to set up your MyRotary account)

Facebook: <https://www.facebook.com/OaklandRotary3/>

Instagram: <https://www.instagram.com/rotaryoakland/>

LinkedIn: <https://www.linkedin.com/company/oaklandrotary3>

YouTube: <https://www.youtube.com/channel/UCjh-qvFDHqjpHGwFTTssvvg>