LEAD YOUR CLUB

President

2016-19 Edition

Rotary

222-EN—(315)

Rotary

This is the 2015 edition of the Lead Your Club: President manual for club presidents holding office in 2016-17, 2017-18, and 2018-19. The information in this publication is based on Rotary's constitution and policy documents. Please refer to those resources for exact Rotary policy. Changes to Rotary's constitution and policy documents override policy as stated in this publication.

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INTRODUCTION

As a member of Rotary's global network of more than 34,000 Rotary clubs, you have access to a wealth of Rotary services and resources available through Rotary.org. You'll find publications translated into nine languages; information, resources, and club data; Rotary grants to carry out effective and sustainable projects; and support from staff at Rotary headquarters and international offices.

Use this manual to learn more about your role as club president before you attend the presidents-elect training seminar (PETS) and district training assembly. If you have questions or comments about this manual or any of Rotary's training resources, please contact:

Learning and Development Team
Email: learn@rotary.org
Phone: +1-847-866-3000

WHAT ARE YOU WAITING FOR?
BE A VIBRANT CLUB

Be a Vibrant Club guide includes:

- A club success story from your region
- Ideas for your club to try
- Resources for your club on My Rotary

Get your free copy at
shop.rotary.org

Rotary

YOUR JOB AS CLUB PRESIDENT

As president you lead your club, engage and inspire members, and promote Rotary in your community.

Find detailed information in Lead Your Club: President.

AS PRESIDENT-ELECT

Consult the club president on decisions affecting the club
Serve as a director of your club's board
Appoint committee chairs and a trainer for your year*
Supervise preparation of the club budget
Encourage incoming club officers to attend district training assembly
Create an account on Rotary.org
Attend your presidents-elect training seminar (PETS), district training assembly, and district conference
Set and track goals for your club in Rotary Club Central at Rotary.org

*Responsibility is indicated in the Rotary Code of Policies.

AS PRESIDENT

Set goals for each committee. Encourage communication between club and district committees. Review activities, goals, and expenditures and participate in decisions.*
Supervise the preparation of a club budget and proper accounting practices, including an annual financial review*
Make sure your secretary and treasurer have an account on Rotary.org to update membership and club data regularly
Collaborate with the governor and assistant governor on club and district matters*
Communicate important information from the governor and the Secretariat to club members*
Prepare for the district governor's required visit
Follow Rotary's youth protection policies and the Statement of Conduct for Working With Youth and implement the requirements for the Youth Exchange program
Plan and lead monthly board meetings*
Plan and lead interesting and relevant club meetings and organize fun social events*
Ensure that comprehensive training is conducted for club members, as needed*
Involve members in carrying out your club's goals outlined in Rotary Club Central
Track your club goals in Rotary Club Central
Encourage members to attend district meetings, and promote the Rotary Convention
Attend the district conference*
Submit an annual report to your club on the club's status before leaving office*
Work with your successor before leaving office*
Arrange for a joint meeting of the incoming board of directors with the outgoing board*

*Responsibility is indicated in the Rotary Code of Policies.

Rotary **JOIN LEADERS:** www.rotary.org/myrotary/president

CHAPTER 1

PLAN YOUR YEAR

STRATEGIC PLANNING GUIDE

Strategic planning involves creating a vision, with supporting goals that can be regularly measured and adjusted as needed. Use this guide and the worksheet to develop a strategic plan that addresses your club's strategic gaps. The guide is designed for Rotary clubs but can be adapted for districts. Complete the worksheet on your own or with other club leaders before your first strategic planning meeting. Review the guide and prepare an agenda before conducting a strategic planning meeting. The agenda should alot the majority of time to the second and third steps of the process, which focus on the future, and less time to the current state of the club.

During the strategic planning process, keep the following tips in mind:

- Involve past, current, and incoming club leaders.
- Include a wide variety of perspectives by involving the full club or a diverse representation of your club's membership.
- Consider all ideas.
- Ask an unbiased facilitator or a small group of facilitators to run strategic planning meetings.
- Ensure that your club's goals align with those of your district and the priorities and goals of Rotary's Strategic Plan.
- Be prepared to revisit your plan each year and adjust your strategic priorities and annual goals as needed.

October 2014

Work with your club's leadership team to identify goals for your year as club president and after. Rely on the Strategic Planning Guide for developing goals and action plans.

What are your goals for your year as club president? How will you connect with leaders in your community, club, and district to make positive, lasting change? As president, you're in a unique position to strengthen relationships, discover and celebrate your club's diverse perspectives, and apply your members' professional expertise and experience to improve communities at home and around the world.

You can help your club reach its goals by inspiring members to:

- Attract and engage members
- Carry out projects
- Contribute to The Rotary Foundation
- Participate in Rotary programs
- Develop leadership skills
- Promote the club's good work

Rotary's guiding principles give members a common purpose and direction, serving as a foundation for our relationships with one another and for the action we take in the world.

GOAL-SETTING RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Develop and evaluate your club's strategic plan to make sure it's current and relevant	Implement and regularly evaluate your club's progress toward its goals
Set annual goals in Rotary Club Central that build toward your club's long-range goals	Inspire every club member to participate in club activities
Create an action plan for each goal	Celebrate accomplishments
Attend training to develop goals with your leadership team	

YOUR CLUB LEADERSHIP PLAN

Find ideas for making your club effective, fun, and relevant in Be a Vibrant Club: Your Club Leadership Plan. The guide includes regionalized best practices that you can use to develop your own club leadership plan.

Use the Creating Your Club Leadership Plan worksheet to create your own plan.

Review the Recommended Rotary Club Bylaws to create or revise your club's bylaws.

Review your club's current practices and talk with members to identify what's working and what isn't adding value. A well-thought-out club leadership plan can create:

- Members who are aware of club goals and willing to share their opinions about the club's future
- Members who are invested in their club's success
- Members who are engaged
- Club and district leaders
- Club succession plans that ease the transition from one Rotary year to the next

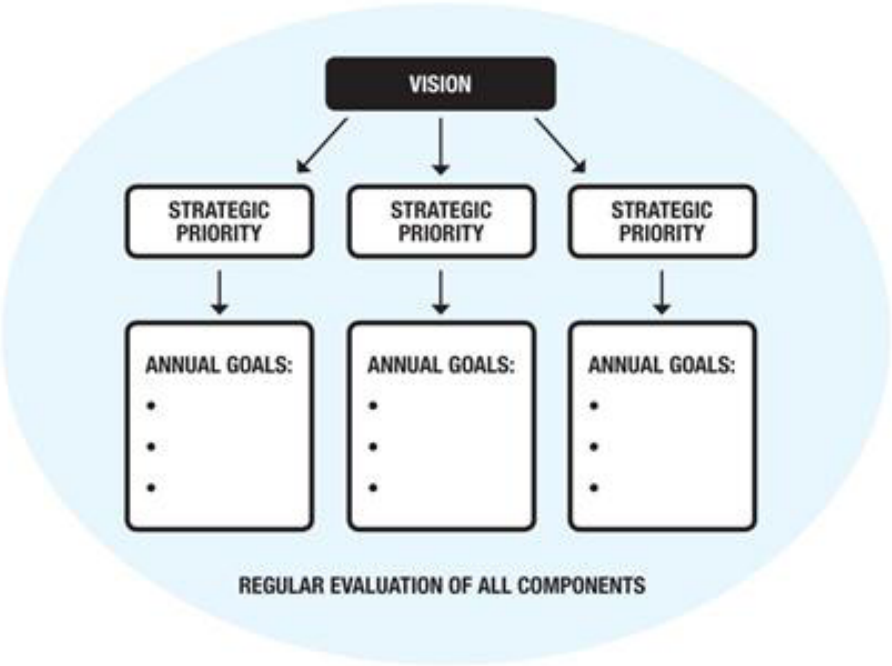
Your assistant governor can offer advice. To find other resources for strengthening your club, contact your Rotary coordinator, immediate past president, or Club and District Support representative.

STRATEGIC PLANNING

Find out more about Rotary's strategic plan at Rotary.org.

Your club's strategic plan is a long-term commitment requiring the support of all your members. Rotary International encourages Rotary clubs and districts to align their goals with Rotary's strategic plan (appendix 1).

Clubs that follow a strategic plan report higher levels of member engagement, retention, and satisfaction. Use the Strategic Planning Guide to develop a thoughtful and collaborative strategic plan that works for your club.



SETTING ANNUAL GOALS

Start by involving all members in setting club goals. Survey members to find out what they like about the club and what they would like to see changed. Find a sample membership questionnaire in Club Assessment Tools.

For best results, set goals that are specific, measurable, attainable, realistic, and time-specific. For example: "Increase membership by 10 percent by the end of the year" instead of "Add new members."

Rotary Club Central enables you to set and track your annual goals for membership, service, and Foundation giving. As a club leader, you can review a five-year history of your club's performance and use your strategic goals to help set annual goals. And you can assess your progress using Rotary Club Central's trend graphs and reports. Review your goals often to determine whether adjustments are needed.

After you've defined your goals, plan how you'll achieve them, using the Your Action Plan worksheet. Involve members in developing and implementing your club's action plans. Find out more by taking the Rotary Club Central Resources course in the Learning Center.

Although only designated club leaders can revise goals in Rotary Club Central, all members can view and track club achievements on Rotary.org. Encourage your members to review club reports regularly so they're informed about their club's progress.

EVALUATION

As you monitor progress toward your club's goals, talk with members to identify effective strategies. Then apply these insights and share them with the club president-elect and president-nominee.

Review long-term and annual goals with your assistant governor and district governor when they visit your club.

DISCUSSION QUESTIONS

Which part of your club's strategic plan has the biggest impact on your club?

How will you involve your members in setting goals?

APPENDIX 1

Rotary

STRATEGIC PLAN

OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

OUR STRATEGIC GOALS

Support and strengthen clubs

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels

Focus and increase humanitarian service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally

Enhance public image and awareness

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities

JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org/strategicplan

SUPPORT AND STRENGTHEN CLUBS
FOCUS AND INCREASE HUMANITARIAN SERVICE
ENHANCE PUBLIC IMAGE AND AWARENESS
FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP
We are leaders who act responsibly and take action to tackle some of the world's most pressing challenges.
Rotary
JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org/strategicplan
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NOTES

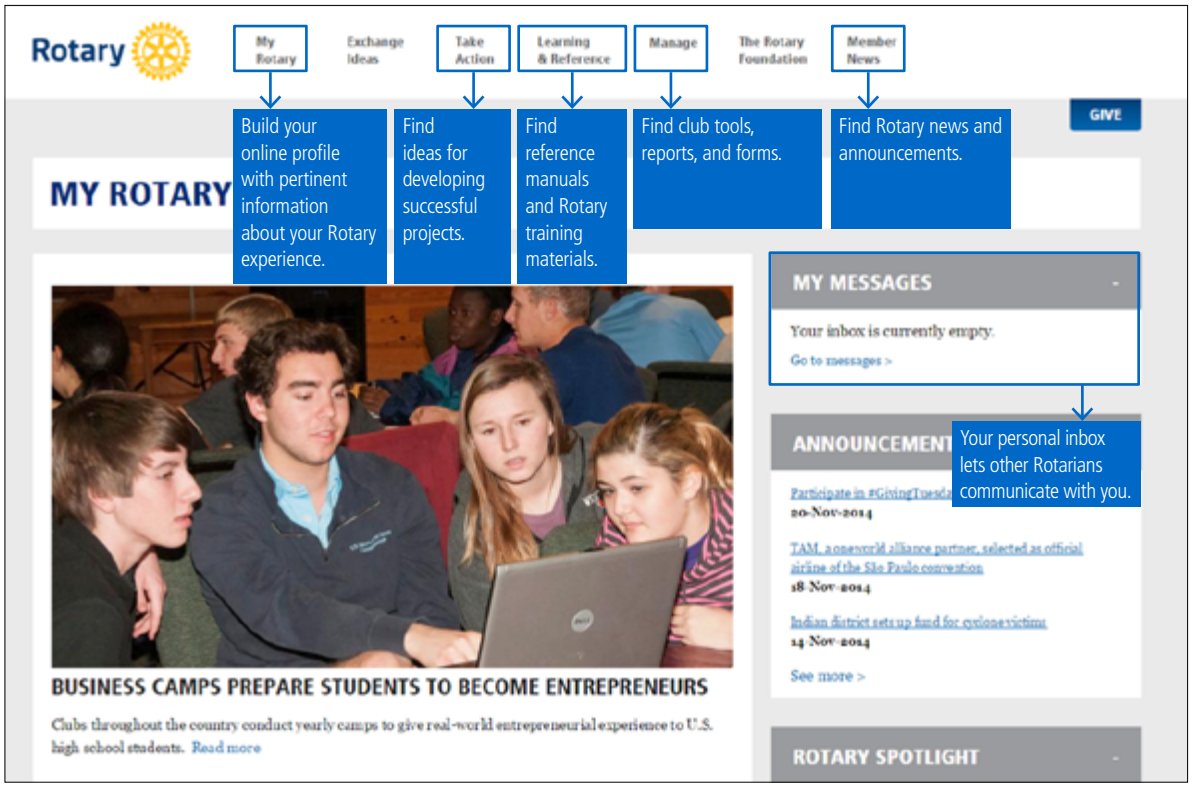
CHAPTER 2

CLUB MANAGEMENT

Although managing your club is the board's responsibility, as president you're charged with seeing that your club runs efficiently and effectively. Whether you're planning board meetings and club assemblies, preparing for required visits from district leaders, or overseeing club finances, your leadership is vital.

Rotary.org has resources to help you manage your club. Assistant governors and your Club and District Support representatives can also answer questions throughout the year.

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint and meet with your club administration committee	Run engaging and fun club meetings, board meetings, and club assemblies
Learn about club policies and procedures by reviewing the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws	Oversee the club's reporting requirements and check with the club secretary to make sure changes to your membership list are made within 30 days
Work with club leaders to update your club's constitution and bylaws	Prepare for the district governor's visit and visits from your assistant governor
	Oversee the management of club finances and make sure your club invoice is paid
	Encourage members to attend district training meetings
	Minimize risk associated with club activities
	Make certain the Rotary logos are used properly



MY ROTARY

By creating an account on Rotary.org you gain access to the latest reports, information, and tools. Your account helps you do Rotary business quickly and efficiently and ensures that Rotary has accurate records for your club. It also allows you to:

- Customize and share your profile
- Join or start a discussion group
- Find volunteers, partners, and donations for your projects
- View a dashboard of important links, documents, and online communities
- Take online courses to help you prepare for your year as club president

The Manage tab on Rotary.org reveals the tools and links you'll need to effectively manage your club. Use these features and resources to make your year a success.

You can carry out a variety of duties and stay informed on Rotary.org:

- Update personal information
- Rotary Club Central goals and reports (learn more)
- Club officer reports
- Update club data
- Update membership data (add, edit, or remove members)
- Daily club balance report
- Contribution and recognition reports
- SHARE and polio reports

- Contribution access and contribution history
- Manage newsletter subscriptions
- Search the Official Directory

Only you and your club secretary can activate access rights for other officers, so be sure that club officers are reported by 1 February for the following year. Add new officers by choosing the link on the Club Administration page of Rotary.org.

ROTARY CLUB STANDARDS

The Rotary International Board of Directors has adopted these minimum standards for an effective club:

- Pays its Rotary membership and district dues without outside assistance
- Meets regularly
- Makes sure its members subscribe to The Rotarian or a Rotary regional magazine
- Implements service projects that address needs in the local and international community
- Receives visits from the governor, assistant governor, or an RI officer
- Maintains appropriate liability insurance for the geographic region in which it is located, or pays mandatory liability insurance with the club dues invoice (United States and its territories only)
- Acts in a manner consistent with the Rotary International Constitution, Rotary International Bylaws, and Rotary Code of Policies
- Updates club membership and officers in a timely manner at Rotary.org, via data integration, or by sending information to data@rotary.org
- Resolves club disputes in an amicable manner
- Maintains cooperative relations with the district
- Cooperates with Rotary International by not initiating or maintaining litigation against it, The Rotary Foundation, associate foundations, or the international offices of the Secretariat
- Follows and completes the election review process established in the Rotary International Bylaws

These standards are only the beginning of what makes a successful Rotary club. Work with your assistant governor to ensure that your club reaches its full potential.

CLUB ADMINISTRATION COMMITTEE

Although you oversee the management of your club, your administration committee carries out the specific responsibilities. Your club can amend its bylaws to reflect the specific responsibilities you assign the committee, and any subcommittees you deem necessary.

Appoint your club secretary and treasurer to this committee. The committee chair, appointed by you, will be part of your club leadership team (see chapter 3 for more information).

Give your club administration committee these responsibilities:

- Help the club secretary track club attendance
- Maintain club membership information and report changes to Rotary International
- Help the club treasurer collect member dues
- Organize interesting and fun club meetings
- Organize social events for club members
- Produce club communications, such as the club newsletter and website

The Origin of Rotary

The name "Rotary" originated with the practice of rotating meeting sites among members' places of business. Use a variation on this idea to keep members connected and engaged in meetings.

ROTARY MEETINGS

Club, district, and international meetings enable club members to connect and share ideas for creating positive change. In the following sections, you'll find tips to help you prepare for such meetings.

Meeting with your club board is an important part of your role as president. At these meetings, decisions will be made about new members, club practices, and other matters affecting the whole club. Be sure to clearly communicate your expectations to your team and allow time for board members to report on and discuss concerns about their activities and projects. (See chapter 3 for more information.)

Be sure to promote the Rotary Convention, district training assembly, and district conference to your members.

For details on these Rotary training events, see appendix 2.

RUNNING SUCCESSFUL CLUB MEETINGS

Plan meetings to coincide with special observances on the Rotary calendar, such as Membership Month (August), Rotary Foundation Month (November), and Rotary Fellowships Month (June).

The club meeting is where most members experience Rotary. They catch up with friends, hear what's happening in their community, and organize club activities and projects. Make sure your meetings are connecting with members by creating programs that encourage a sense of pride in being a member, increase awareness of local and global issues, and keep members informed of Rotary initiatives. Show Rotary Videos to begin your meeting to showcase projects around the world. Display a slideshow of Rotary Images and your club's photos to show pride in Rotary members at work.

Your club administration committee can help you develop engaging club meeting agendas. Encourage innovative ideas for a fun, inspiring, and interesting meeting.

SAMPLE AGENDAS FOR CREATIVE CLUB MEETINGS

WEEK 1: REGULAR CLUB MEETING

- Welcome members and introduce guests
- President announcements
- Member profile: sharing about your profession, family, etc.
- Featured speaker or update on projects in progress or being planned
  - What have you achieved so far?
  - What is needed from the club?
  - What is the timeline?
  - How are we involving the community?
  - How are we promoting the project?
  - Which members are involved?
- Open forum
- Closing remarks

WEEK 2: AFTER HOURS MEETING

- Welcome members and introduce guests
- Hold at a different location and time from your regular meeting (perhaps a member's home or a bar or restaurant)
- Schedule a featured speaker or local personality
- Plan a speedmeet with timed conversations about project ideas
- Discuss ideas over snacks and drinks

WEEK 3: WORKING MEETING

- Welcome members and introduce guests
- President announcements
- Featured speaker, community organization presentation
- Strategic plan
  - Revisit the club's vision: Where do we want to be in three years, and are we on track?
  - What still needs to be done?
  - Has anything changed that affects our plan? Do we need to change the plan?
- Open forum
- Closing remarks

WEEK 4: BRING A FRIEND MEETING

- Welcome members and introduce guests
- President announcements
- "Guest" activity (ask a guest to speak, highlight a project related to the theme)
- Open forum
- Closing remarks

CLUB ASSEMBLIES

Club assemblies offer an opportunity to exchange ideas and share information about issues of importance to your members. Most clubs hold four to six assemblies per year.

Encourage attendance by all members, but especially new members. You, or another designated club officer, should lead club assemblies. Seek out member input to make certain that the meetings address their interests and concerns. Below are some suggested timeframes and topics for club assemblies.

TIMING	PURPOSE
Immediately after the district training assembly (before 1 July)	To share plans developed at the district training assembly (club president-elect presides)
After 1 July	To discuss goals for the year
Two weeks before the district governor's visit	To prepare for the visit
During the governor's visit	To discuss the club's status with the governor
Midpoint of year (January/February)	To review progress toward club goals and determine the plan for the rest of the year
April or May	To provide an opportunity for open discussion (ideas for bringing club projects and activities to completion)

GOVERNOR'S VISIT

One of your district governor's core responsibilities is to visit all clubs in the district, either individually or in groups, to provide support and present an update on district goals. This visit is an opportunity for your club to discuss your goals, achievements, and concerns with the district leader.

If possible, schedule the governor's visit to coincide with an event that highlights your club's accomplishments, such as a charter night, induction ceremony, new member orientation program, award presentation, or Rotary Foundation event.

To prepare for the visit:

- Review your club's progress toward its goals. Reflect on member morale. Identify questions or concerns you want to discuss with your district governor.
- Organize reports of committee plans, activities, and accomplishments.

ELECTIONS

During your first six months in office, you will oversee the election of club officers and the board of directors for the next Rotary year. The club board consists of the president, president-elect, secretary, and the immediate past president; vice presidents, if elected, may also serve on the board. Check your club's bylaws for information about the board selection process. Officers and directors must be members in good club standing.

Consider holding an officer installation meeting at the beginning of the Rotary year (see appendix 3 for a sample club officer installation agenda). It's a great way to bring members together to show support for their new club leaders and appreciation for the outgoing board.

REPORTING REQUIREMENTS

It is critical to keep your club information in Rotary's database up-to-date. Every club is required to submit the following:

- To Rotary International
  - Changes to club member data by 1 July and 1 January in order to receive a correct club invoice
  - New and terminated members within 30 days
  - New officers for the next Rotary year by 1 February or new club meeting information
  - Information for the Official Directory by 1 February
  - Use of Rotary Foundation funds, if your club has been awarded a grant
- To your district
  - Club goals (using Rotary Club Central)
  - Monthly attendance figures
  - Membership goals by 1 June (using Rotary Club Central)

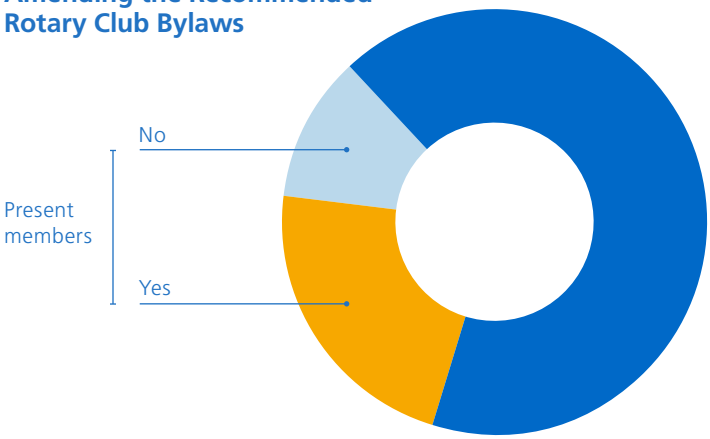
CLUB CONSTITUTION AND BYLAWS

The Standard Rotary Club Constitution provides the basic rules for all Rotary clubs. It is updated every three years to include changes enacted by the Council on Legislation. Your club's bylaws provide additional guidelines for managing your club. Use the Recommended Rotary Club Bylaws, which reflect current Rotary policy, as a template, adapting them to reflect your club's culture. Review your club bylaws regularly and update them as needed.

Your club members must vote on any proposed amendments to the bylaws. Be sure to notify members about the proposed amendment at least 10 days before a regular meeting, then be sure at least one-third of active members (a quorum) are present to vote. In order to pass, the amendment needs the votes of two-thirds of the members present.

Amendments must conform to the Standard Rotary Club Constitution and the Rotary International Constitution and Bylaws.

Amending the Recommended Rotary Club Bylaws



Quorum: 1/3 of members
Pass: ≥ 2/3 of quorum

Example:
63 Members in a club
21 Members are present
14 or more members need to vote yes to amend the bylaws

FINANCIAL MANAGEMENT

Your fiscal responsibilities include monitoring club funds, practicing good stewardship, and making sure that the club complies with all applicable local laws, including those concerning taxes and nonprofits. (See appendix 4 for financial management best practices.)

DUES AND FEES

Work with your club treasurer to review or establish a system for collecting and paying dues and fees.

Club dues. Club dues can be collected weekly, monthly, or quarterly, as determined by your club, with the dues amount set each year. These dues, which vary by club, generally fund operating expenses such as meetings, meals, speaker gifts, and supplies and should be based on your annual budget.

Admission fee. This fee for new members should be outlined in the club's bylaws. It applies to all members except transferring or former members of other clubs and Rotaractors.*

District dues. Many districts maintain funds for financing district-sponsored projects and supporting district administration, with each club contributing through per capita dues. The amount is approved each year at the presidents-elect training seminar, the district training assembly, or the district conference.

Rotary dues. Twice a year, clubs are charged per capita dues as follows:

2015-16: $27.50

2016-17: $28.00**

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* *See the Standard Rotary Club Constitution, Article 11, for more details.*

** *Dues will remain constant after 2016-17 unless changed by the Council on Legislation.*

All dues are payable on 1 July and 1 January. For each new member admitted within a club billing cycle, the club must pay prorated dues to Rotary International — one-sixth of the amounts listed above for each full month of membership.

These dues pay for the organization's general operating expenses and give you access to Rotary International services and resources, including publications in multiple languages; club, district, and project support; training, guidance, and resources for incoming club leaders; and the Rotary website.

Rotary fees. Besides dues, Rotary members are charged for required magazine subscriptions, Council on Legislation fees, and other expenses.

CLUB INVOICE

Rotary sends an invoice to the club secretary in July and in January, which is based on your club's membership list on 1 July and 1 January.

Your secretary is responsible for adding and removing members within 30 days. Be sure your club membership list is kept current so you receive an accurate invoice. You, the club secretary, or club treasurer can pay the invoice by credit card on Rotary.org/Manage/Club Administration.

Your club's invoice includes Rotary per capita dues and magazine subscriptions (two Rotarians residing at the same address can subscribe jointly to the official magazine). Your July invoice also includes Council on Legislation fees.

Submitting dues guarantees your club's membership and good financial standing in Rotary International as well as access to Rotary resources.

TERMINATION AND REINSTATEMENT

Any club that doesn't pay its dues and fees to Rotary on time will be terminated four months after the most recent invoice date. The club can also be suspended or terminated if any of its members has misused funds from The Rotary Foundation.

Termination. Four months after the 1 January or 1 July invoice date, clubs with unpaid per capita Rotary dues will be terminated. Clubs that have not fulfilled their entire financial responsibility within 150 days of termination will lose their original charter and will not be eligible for reinstatement.

Reinstatement. Within 150 days of termination, the club must pay all financial obligations to Rotary, including a reinstatement fee of $30 per member. The club must provide a current list of members to ensure that accurate data is recorded at the time of reinstatement.

Member termination. Your club secretary should contact any club member who fails to pay dues within 30 days after the deadline, communicating an absolute deadline and the amount owed in writing. If the dues aren't paid within 10 days of the notification date, membership may be terminated, if the board agrees. The board may reinstate membership if the terminated member petitions and pays all his or her club debts.

TAXES

Check with local and national tax codes to determine which forms your club must file, if any. Consult your district finance committee and assistant governor for more information.

All clubs in the United States are required by law to submit an informational return to the Internal Revenue Service every year. Contact the IRS for more information.

FUNDRAISING

Lead Your Club: Treasurer has more information about club foundations. Find more information about planning a fundraiser in Lead Your Club: Service Projects Committee.

Make an impact during your year as president with projects and activities that meet the needs of communities at home and around the world. An effective fundraising plan is key to supporting your projects and Rotary's global humanitarian efforts.

Make sure your members follow these financial best practices to promote transparency:

- Report money earned through fundraising to your local government.
- When promoting fundraising activities, clearly identify where the funds will go: to a local club, the district's own foundation, The Rotary Foundation, or some other entity.
- If a fundraising event qualifies as tax-deductible, issue receipts to donors.
- Submit contributions to The Rotary Foundation separately from payments to Rotary International.

Club foundations. If your club has or plans to set up a foundation or charitable trust, be sure it follows local laws. Consult with your local tax authority about reporting requirements, and contact your Club and District Support representative for more information.

RISK MANAGEMENT

To make certain that your club identifies and manages potential risk exposure and safeguards members, program participants, and assets, consider these basic questions when planning activities and events:

- What can go wrong?
- If something goes wrong, how will I or the club respond?
- How will any losses or damages be paid?

If there's a significant possibility that something could go wrong, you can reduce risk by:

- Not conducting the activity or event
- Modifying the activity or event to minimize risk
- Preparing a plan to address problems
- Finding or hiring another organization that will agree to participate and share the risk

Financial and risk management best practices are listed in appendix 4.

Although conducting business with handshakes or verbal agreements may be common, Rotary strongly recommends using written contracts. A contract should clearly define the roles and responsibilities of each party and may include provisions to limit or transfer risk. Involve a legal professional whenever working with contracts, and always read and be sure you understand the contract before signing. Keep contracts or other legal documents for several years after an event in case of a liability claim.

We urge clubs to obtain professional legal and insurance advice about liability protection. For example, seek professional advice about incorporating the club (or its activities) or purchasing appropriate liability insurance coverage. Clubs in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged by Rotary and paid for by U.S. Rotarians. Clubs outside the United States should consider purchasing insurance if they do not already have it. See the Manual of Procedure for additional information.

DISCUSSION QUESTIONS

What are your personal goals for managing your club?

What innovative ideas would you like to implement in your year?

How will you get members involved in planning for your governor's visit?

APPENDIX 2

ROTARY TRAINING EVENTS

District Training Events Convened by the Governor-elect

Training Events/ Time of Year	Purpose	Organizer	Materials
District team training seminar February	Assistant governors and district committee leaders learn their new roles and responsibilities and work on district goals and the district leadership plan.	District training committee	**For leaders:** District Team Training Seminar Leader's Guide **For participants:** Lead Your District manuals for assistant governors and committees
Presidents-elect training seminar (PETS) February or March	Club presidents-elect learn their new responsibilities and work with assistant governors to set their goals.	District training committee	**For leaders:** Presidents-elect Training Seminar Leader's Guide **For participants:** Lead Your Club: President training manual
District training assembly March-May (after PETS)	Club presidents-elect build on PETS training to gain leadership skills, while other incoming club leaders learn their new responsibilities. Club leadership teams refine their goals for the year.	District training committee	**For leaders:** District Assembly Leader's Guide **For participants:** Club Officers Kit manuals for: President Secretary Treasurer Committees
District membership seminar April or May (after district training assembly)	Club presidents, club membership committee chairs, interested Rotarians, and district leaders learn how to sustain and increase membership.	District membership committee	**For leaders:** District Membership Seminar Leader's Guide **For participants:** Determined by the district
Grant management seminar Determined by the district	Club presidents-elect (or club-designated appointees) learn how to manage Rotary grants. Clubs applying for global grants must attend.	District Rotary Foundation committee chair, grants subcommittee chair, district training committee	**For leaders:** Grant Management Seminar Leader's Guide **For participants:** Manage Your Global Grant manual

District Training Events Convened by the Governor

Training Events/ Time of Year	Purpose	Organizer	Materials
District Rotary Foundation seminar July-November	Club Rotary Foundation committee chairs and interested Rotarians learn about the Foundation and Rotary grants.	District Rotary Foundation committee, district training committee, regional Rotary Foundation coordinator	**For leaders:** District Rotary Foundation Seminar Leader's Guide **For participants:** Determined by the district
Leadership development program Determined by the club	Club members gain leadership skills that apply both to their professional lives and their leadership roles in Rotary.	Club trainer, president, assistant governor, district training committee	**For leaders:** Leadership Development: Your Guide to Starting a Program **For participants:** Materials developed by the club or district
District leadership seminar Immediately before or after the district conference	Current or past club presidents and other club leaders who have served three or more years learn about leadership opportunities in Rotary.	District training committee	**For leaders:** District Leadership Seminar Guide **For participants:** Determined by the district
District conference Any time except at the same time as the district training assembly, during the Rotary institute, the International Assembly, or the Rotary convention	Rotarians hear inspirational addresses and discuss matters of importance to clubs and Rotary International.	District training committee	**For leaders:** District Conference Manual
Rotaract district leadership training meeting Any time after club open elections and before 30 June	Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and the general public learn about Rotaract.	District Rotaract representative	**For leaders:** Guide for District Rotaract Leaders

APPENDIX 3

INSTALLATION OF CLUB OFFICERS

The following suggested agenda for the installation of officers can be adapted as needed.

1. Remarks from outgoing president (presider)
2. Outgoing officers and directors thanked
3. Continuing directors and officers acknowledged
4. New president installed

Oath for the president

I, _____ ,

as president of the Rotary Club of _____ ,

will, to the best of my ability, administer the duties of the office of president in a business-like manner and in accordance with the club's constitution and bylaws.

5. Presentation of past president pin to outgoing president
6. Installation of incoming officers and directors

Oath for officers and directors

I, _____ ,

do accept and understand the charges of the office to which I am elected and will work with diligence for the betterment of the club.

7. Introduction of committee chairs
8. Passing of the gavel

Outgoing president

I hereby declare the new officers and directors installed and give president

_____

the gavel as a symbol of the transfer of the club's administration.

9. New president's address

APPENDIX 4

FINANCIAL AND RISK MANAGEMENT BEST PRACTICES CHECKLIST

Review the items below to ensure that your club follows transparent and professional financial practices. Select qualified professionals to implement these best practices appropriately.

FINANCIAL MANAGEMENT

- Register the club with all government entities, as required.
- Submit club documentation and tax filings, as required by local and national tax codes.
- Set up club bank accounts appropriately and assign two signatories to each account.
- Establish procedures for handling club funds.
- Develop a budget and follow it.
- Make sure the club has procedures for sending contributions to The Rotary Foundation and sending dues, on time, to Rotary International.
- Make sure the club has a procedure for reporting officers and their contact information (including email addresses) to Rotary International.
- Comply with laws regarding donated funds and payment of dues.
- Have the annual financial report reviewed by a qualified accountant who is not involved with the regular management of club funds.
- Make sure club officers are educated about financial best practices and that there is continuity of procedures with incoming officers.

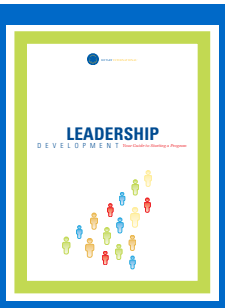
RISK MANAGEMENT

- Limit liability by anticipating what can go wrong, what the response will be, and how losses or damages will be paid.
- Use written contracts when appropriate, involve local legal counsel when working with written contracts, and retain contracts and other legal documentation appropriately.
- Consult with a legal and insurance professional about liability protection for your club's events and activities.
- Ensure your club has appropriate liability insurance for its activities and operations; consult a local insurance professional.
  - Clubs and districts in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged by Rotary and paid for by U.S. Rotarians.

NOTES

CHAPTER 3

YOUR LEADERSHIP



Cultivate club members' leadership skills by holding a workshop. Use Leadership Development: Your Guide to Starting a Program as a resource.

During your year as club president you'll have the opportunity to use your professional skills, club experience, and community connections to make a difference in your community and in your club.

You'll provide the vision to tackle social issues in your community and the leadership to strengthen your club as it joins with Rotary in addressing the world's toughest challenges. Take advantage of your members' expertise and your community's resources to carry out this work. Find support from your district leaders and Rotary International on topics including public relations, membership development, and more.

LEADERSHIP RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint club committee chairs based on their skills	Provide clear communication among your club and district leaders
Prepare your club's leadership team for the coming year	Recognize the accomplishments of club leaders and members
Understand the role of the district in supporting your club	Motivate members to reach goals
Provide continuity of leadership in the club and its committees	Listen to all members and make sure their needs are met

WORKING WITH YOUR CLUB

Your club leadership team will carry out the club's action plans, so be sure to involve the team in the development of club goals. Reach a consensus on goals and then plan how to achieve them. With responsibility delegated to your club leadership team, you will have more time for motivating members to participate in club projects and activities.

Encourage club leaders to attend district training meetings to prepare them for their roles. See appendix 2 for a table of Rotary training events.

CLUB BOARD

Your club leadership team includes club board members as well as the club trainer, sergeant-at-arms, and committee chairs.

Your club's board includes the president, vice president, president-elect (or president-nominee, if no successor has been elected), secretary, treasurer, immediate past president, and additional members as stated in your club's bylaws. Use board meetings to explore ideas, make decisions, and evaluate progress.

The board is elected to manage the interests of the club as a whole and to work closely with you to achieve club goals. You are responsible for running regular club board meetings. Based on the Recommended Rotary Club Bylaws, your club's board of directors has these responsibilities:

- Oversee the work being done by all club officers and committee members
- Review the monthly report of club finances, to
  - Make sure the budget includes realistic amounts for club operations and projects
  - Approve all expenditures not accounted for in the club budget
- Approve or reject proposed members and communicate the decision to those who proposed the members, within 30 days (club secretary communicates with the proposer)
- Review club policies to ensure they are being implemented as intended, and revise them if they are no longer current
- Consider innovative ways to make the club more vibrant, attractive to new members, and engaging to current members
- Explore the needs of your community and international communities to establish club goals

Your secretary is responsible for administering most day-to-day club operations, as detailed in Lead Your Club: Secretary.

Work with the secretary throughout the year to review your club's membership trends in Rotary Club Central. At the end of the year, ask your secretary to help you document achievements and activities, as well as goals that weren't met.

Meet with your club treasurer regularly to make sure club funds, transactions, and reports are being handled properly. The treasurer manages the club's financial transactions, keeps financial records, and helps plan the club budget, as detailed in Lead Your Club: Treasurer.

Your club's committees plan, promote, and implement activities and projects to meet the club's annual and long-range goals. Work with the committees to achieve your club's goals and develop leaders.

The sergeant-at-arms is responsible for maintaining orderly and effective Rotary club meetings, acting as greeter and usher.

CLUB COMMITTEES

See chapter 2 for details on amending club bylaws to alter your club's committee structure.

You're responsible for overseeing the work of all committees to help them reach their goals for the year.

The following club committees are recommended:

- Club administration (chapter 2)
- Membership (chapter 4)
- Public relations (chapter 5)
- Rotary Foundation (chapter 6)
- Service projects (chapter 7)

You may appoint additional committees and subcommittees as needed. See appendix 5 for examples of various club committee structures.

SELECTING COMMITTEE CHAIRS

Appoint your committee chairs based on their professional abilities, personal interests, and talents. Because committee activities may carry over from one year to the next, you may choose to make multiyear appointments or reappoint some members to ensure continuity. Each committee chair should have experience as a member of that committee.

PREPARING COMMITTEE CHAIRS

Give each committee chair a copy of the relevant committee manual. Encourage all chairs to attend the district training assembly to learn committee leadership skills.

WORKING WITH YOUR COMMITTEES

To support your club's committees, maximize their potential, and encourage their continuing effectiveness:

- Review and discuss the status of each committee's action plan
- Coordinate the sharing of ideas and actions among committees
- Motivate your committees to be innovative and take on new challenges

MEMBER EDUCATION

Make sure your club members have the tools, resources, and information they need to carry out the goals of your club and of Rotary. A designated club trainer can help members with topics including new member orientation, youth protection, and leadership development.

Have your club trainer work closely with club and district leaders to develop programs and activities that are relevant and informative. Also see the schedule of Rotary training events in appendix 2 for more information.

Independent study. Members can go to the Learning Center on learn.rotary.org and find courses to improve their Rotary knowledge. Encourage new and long-time members to explore the courses available for all members.

WORKING WITH YOUR DISTRICT

Your district leaders — governor, assistant governors, committees, trainer, secretary, and past governors — want your club to succeed. The district supports your club in many ways, including:

- Providing guidance on issues such as membership and projects
- Connecting clubs with similar issues or projects
- Offering leadership and service opportunities
- Communicating policy updates
- Coordinating Rotary programs such as district grants, global grants, RYLA, Rotary Youth Exchange, and Rotary Peace Fellowships

Your assistant governor is your district point person, available to support your club throughout the year.

YOUR SUCCESSION PLAN

You can help foster continuity in your leadership team, especially for activities extending beyond a single Rotary year, by developing a working relationship with your successor.

Work with your leadership team to create a smooth transition process. Help new team members hit the ground running by involving them in activities and leadership roles before they take office.

DISCUSSION QUESTIONS

How will you strengthen your relationships with your club leadership team?

How will you motivate your members to achieve club goals?

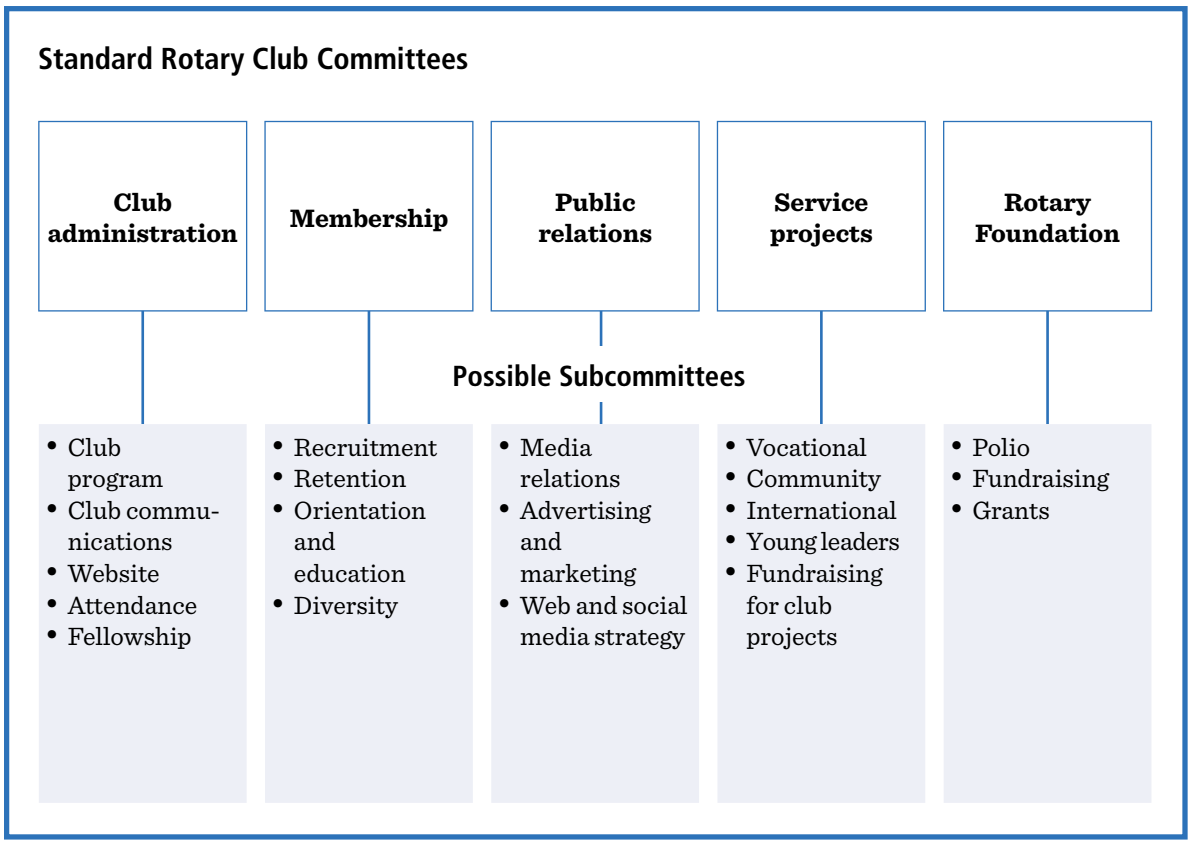
How will you develop future leaders?

What ideas do you have for working with your assistant governor and governor?

APPENDIX 5

SAMPLE CLUB COMMITTEE STRUCTURE

Rotary recommends five club committees. Clubs can add or eliminate committees or subcommittees according to their interests and activities. Assistant governors or district governors can help club leaders determine suitable subcommittees.



Large Rotary Club Committees

Club administration	Membership	Public relations	Service projects	Rotary Foundation
• Club program • Club communications • Website • Attendance • Archive • Fellowship • Family of Rotary • Sergeant-at-arms	• Recruitment • Retention • Orientation • Education • Mentoring • Membership assessment and planning • Diversity • Alumni	• Media relations • Advertising and marketing • Special events • External relations • Web and social media	• Vocational • Community • International • Young leaders • Fundraising for club projects • Others, for specific projects	• Stewardship • Scholarship • Vocational training teams • District grants • Global grants • Polio • Fundraising

Possible Subcommittees

Small Rotary Club Committees

Club administration	Membership	Public relations	Service projects	Rotary Foundation

NOTES

CHAPTER 4

YOUR MEMBERS

Your key resource is Strengthening Your Membership: Creating Your Membership Development Plan.

Engaged and active club members make it possible to serve communities at home and around the world, to support the work of The Rotary Foundation, and to develop into future leaders. But most of all, engaged and active members make your club a fun place for all members.

Make certain that your membership reflects the diverse professions and cultures of your community. A diverse membership not only attracts potential candidates, it also promotes innovation and provides the skills and experience your club needs to make positive changes in your community.

MEMBERSHIP DEVELOPMENT AND RECRUITMENT RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint and meet with your membership committee	Lead by example: Propose a new member and encourage each member to do the same
Assess your club's membership and analyze trends	Coordinate committee efforts to develop ways to engage members
Set your club's annual membership goals in Rotary Club Central; align your goals with district's goals	Conduct a club assembly on successful strategies to attract new members
Implement innovative strategies to attract and engage members	Work toward full representation of your community's diversity in your club
Promote training for members at all stages, including new and current members	Recognize club members for sponsoring new members
Look for opportunities to sponsor a new club in your area	Recognize members for their contributions to the club
Define a strategy for engaging program alumni in club events and activities	Modernize your policies and procedures, making them flexible to address the needs of today's professionals

CLUB MEMBERSHIP COMMITTEE

Developing a strong membership development plan is a strategic priority for Rotary. Your club membership committee is essential to implementing your membership plan. Its main role is to recruit, retain, and educate club members. Your club may amend its bylaws to reflect the specific responsibilities of your membership committee, adding subcommittees as needed. See appendix 5 for sample committee structures.

Plan meetings and activities during Membership Month (August) and Youth Services Month (May).

The membership committee should consist of Rotary members who have strong connections to a cross-section of the community, are interested in improving the membership experience for all your members, enjoy working with people, and have a thorough knowledge of Rotary.

Check in regularly with your membership committee to determine what new strategies are needed to achieve your membership goals.

Your membership committee has these responsibilities:

- Track your club membership goals in Rotary Club Central
- Promote the importance of attracting and engaging members
- Use classification surveys to target occupations and businesses in your community that are not reflected in your club
- Develop a plan for improving member engagement and for recruiting a membership that is diverse in age, gender, and ethnicity
- Survey members and initiate changes in response to feedback
- Use membership assessment tools to evaluate your club
- Sponsor new clubs in the community

5 THINGS YOU CAN DO NOW!

1. Make your meetings dynamic and inviting.
2. Give members the chance to use their knowledge and expertise, or learn new skills, by providing interesting and challenging assignments.
3. Provide flexible meeting times.
4. Plan family-friendly events.
5. Invite young professionals to experience Rotary by including them in your club's projects and social events.

ASSESS YOUR CLUB

Register for an upcoming membership webinar or view recordings of past sessions at www.rotary.org/webinars.

As president-elect, you should work closely with your club's membership committee to assess your club and to establish membership goals in Rotary Club Central. Find out how to evaluate your club in Membership Assessment Tools. To understand membership trends:

- Review your club's long-range membership goals: What should the club look like in three years? In five years?
- Review your club's five-year membership profile and trends (club retention statistics, number of new members, number of new members who remain with the club, member demographics)
- Complete a classification survey regularly to identify professions represented in the community but not in your club
- Consult with your district governor, assistant governor, district membership chair, or Rotary coordinator
- Encourage participation in the district membership seminar
- Assess your club culture regularly to ensure that it's relevant; suggest whatever changes are necessary to make your club attractive to current and prospective members

Subscribe to the Membership Minute e-newsletter and join the Membership Best Practices discussion group on Rotary.org.

Once you've evaluated your club's membership history and trends and drafted membership goals, develop an action plan for achieving them. Contact your Rotary coordinator.

DIVERSITY

A club that embraces and celebrates diverse perspectives is simply more interesting and relevant. A diverse club can draw from a greater pool of experience and knowledge for creating positive change in your community.

Your club's representation of different ages, genders, and ethnicities should be as diverse as your community. Use surveys and assessments to evaluate your club's diversity and create an action plan to address opportunities for expanding it.

Rotary policy prohibits limitations on membership based on gender, race, color, creed, or national origin. Refer to the Rotary International Bylaws for more information.

ATTRACTING MEMBERS

New members can bring new vitality to your club, fresh ideas and energy, increased capacity to serve your community, and potential future leaders, all of which can help ensure your club's long-term success.

To encourage club members to invite new members, work with your membership committee to:

- Implement innovative new projects that spark interest or address a pressing need in the community
- Promote club activities using social media, direct marketing, and local media to show your club's impact on the community
- Target members of groups or professions in the community that are not represented in your club
- Reach out to Rotary alumni
- Invite prospective members to participate in events or projects

Take the Strengthen Rotary course in the Learning Center for more ideas on connecting with potential new members in your community.

Celebrate new members by holding a meaningful induction ceremony. Find ideas in New Member Orientation: A How-to Guide for Clubs.

ENGAGING MEMBERS

Engaging current club members is as crucial as attracting new ones. To engage members, involve them in activities, assign them leadership roles, and communicate with them regularly. To devise a strategy for maintaining your club's membership, start by asking former members why they left.

Members who are engaged are dedicated, active, and motivated. Engaged members will make your club activities more fun and effective. They are also more likely to invite prospective members to join.

Use Membership Assessment Tools to identify your club's retention strengths and weaknesses, and then work with the membership committee to implement strategies for improvement.

Every member of your club should play an active role in introducing and welcoming new members. Assign a mentor to each new member to ease his or her transition into the club.

MOTIVATING MEMBERS

Common motivators include:

- Belief that goals will benefit the community and their club and that goals are achievable
- Social opportunities to connect with other volunteers
- Career networking opportunities
- Milestones showing progress
- Recognition of their efforts

RECOGNITION

Recognizing the efforts of club members is an important part of your role. See Rotary.org and appendix 6 for information about Rotary honors and awards.

Your district may have its own awards for clubs or individuals; ask your governor or assistant governor. Individual clubs are encouraged to develop their own awards.

As president, you present awards to club and community members. Maximize the motivational potential of such recognition events by:

- Inviting the governor to present the award
- Inviting family members to attend
- Photographing the presentation for club communications
- Inviting prospective members

YOUR ALUMNI CONNECTIONS

Subscribe to the quarterly e-newsletter Reconnect to learn about alumni activities, events, and news.

Your club has a valuable asset in the thousands of Rotary alumni who've participated in a Rotary program. They are powerful advocates for Rotary as well as potential members and donors. Rotary program alumni include those who have participated in any of the following programs:

- Interact
- Rotaract
- Rotary Youth Exchange
- New Generations Service Exchange
- Rotary Youth Leadership Awards
- Rotary Peace Fellowships
- Rotary Scholarships (funded by global grants and district grants)
- Vocational training teams (members and leaders)
- Ambassadorial Scholarships
- Grants for University Teachers
- Group Study Exchange (members and leaders)
- Rotary Volunteers

Club officers can access a report on Rotary.org that provides names, program details, and contact information for all former Rotary program participants associated with your district.

Invite alumni to become members. If they're not ready to join, encourage them to participate in club events and activities. Alumni can help your club:

- Connect with clubs from different countries for service and fellowship
- Promote Rotary by sharing their personal experiences of how Rotary changes lives with club members and the media
- Encourage involvement in Rotary programs to their peers
- Select, orient, and host program participants

Rotary offers alumni a global network of influencers, including community and business leaders, who can be a tremendous resource throughout their careers. Emphasize the opportunities and advantages of being involved in Rotary when speaking with alumni about their involvement in your club.

NEW CLUBS

Presidents of Rotary e-clubs have different club meeting responsibilities, noted in the Standard Rotary Club Constitution. Find additional information in What You Need to Know About Rotary E-Clubs, or contact your Club and District Support representative.

If your club sponsors a new Rotary club, be sure to assign members the following responsibilities:

- Assisting in planning and organizing the administrative processes of the new club
- Helping to organize the new club's programs and projects
- Reporting to the district governor as requested on the new club's progress during its first year
- Serving as a mentor to the new club for at least two years

When you hear of a group of committed Rotary members who'd like to meet at a different time or day, or a group of active and engaged community members who can't meet at your club's prescribed day and time, suggest they start a new club and offer to sponsor them.

For more information, contact your district governor, district membership committee, or district extension committee. Find information about how to start a club on Rotary.org.

DISCUSSION QUESTIONS

How will you engage your members?

How can you help your club become more innovative and flexible?

How will you attract new members to your club?

APPENDIX 6

ROTARY AWARDS

PRESIDENTIAL CITATION

Each year the Rotary president develops an array of goals to promote stronger, more effective clubs. Clubs that meet these goals can earn a Presidential Citation. Nominations are due to Rotary by 31 March.

SIGNIFICANT ACHIEVEMENT AWARD

District governors can nominate one outstanding club community service project to be recognized with this award. Contact your district governor if you wish to nominate your club's project. Nominations are due to Rotary by 15 March.

AVENUES OF SERVICE CITATION

Club presidents can nominate a club member who participates in service activities in each of the five Avenues of Service: Club, Vocational, Community, International, and Youth. Nominations are accepted throughout the Rotary year.

Find more information about these and other Rotary awards at Rotary.org.

NOTES

LEARN

EVERYWHERE WITH ROTARY'S LEARNING CENTER.

- Take courses
- Find resources
- Connect with an online community
- Talk with other registrants and course moderators
- Customize your user profile and track your progress

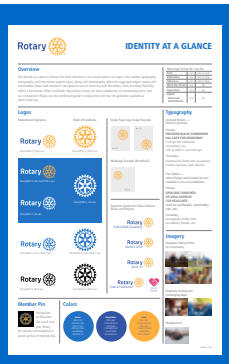
Learn how to tell your Rotary story, set goals in Rotary Club Central, apply for a grant, and much more.

Visit the Learning Center on www.rotary.org/myrotary to learn more.

Rotary

CHAPTER 5

PROMOTE ROTARY



Your key resources for public relations efforts are Rotary's Brand Center, where you'll find logos, guidelines, promotional ads, and templates, and the Effective Public Relations guide.

Our ability to tackle some of the world's biggest challenges, both locally and globally, comes from the combined strength of our 1.2 million members. Imagine what we could accomplish with even more members and more community support. Make sure your community knows what your club and Rotary as a whole is doing.

Your promotion of Rotary and the work your club is doing to improve your community is one way to grow your club and find volunteers and donors to support your service activities.

You're an integral part of Rotary's story. As president you have the opportunity to build relationships with club members, helping to connect their diverse perspectives and vocational expertise to make a positive difference in your community. Tell your story to promote your club, attract new members, and get community support.

PUBLIC RELATIONS RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Select and meet with your club public relations committee	Serve as the club spokesperson when working with the media, or identify a member to serve as spokesperson
Review your club's current public relations initiatives on Rotary Club Central	Provide updates on Rotary's mission and the club's community efforts to business and civic leaders, young professionals, and other organizations
Make sure your club is planning projects and activities that will attract positive media attention	Cultivate relationships with local media and other organizations
Set your club's public relations goals using Rotary Club Central	Promote Rotary to friends, family, and co-workers
	Promote projects or activities that illustrate Rotary's mission and values
	Use social media to make your community aware of club events

CLUB PUBLIC RELATIONS COMMITTEE

The club public relations committee develops and carries out a plan to keep the public informed about Rotary and your club's projects and activities. As club president, you can help implement and evaluate your club's public relations efforts. Your club may amend its bylaws to reflect the specific responsibilities of your public relations committee, adding subcommittees as needed.

Select members for your public relations committee who are articulate, enthusiastic, and knowledgeable about Rotary and your club. If possible, choose a committee chair with professional public relations or media experience and a working relationship with local media.

Your club public relations committee has the following responsibilities:

- Achieve club public relations goals for the coming year (see the Public Relations section of Rotary Club Central)
- Familiarize themselves with Rotary public relations resources, including Rotary's Brand Center
- Create awareness of club activities among club members, media, and the general public
- Enhance projects and activities to make them more appealing to the media
- Help create a public image that attracts new members

Effective public relations requires time, effort, and planning. Before the beginning of the Rotary year, ask the committee to develop an action plan that identifies the audience, strategies, and tools, as well as the projects and activities that they will promote. For more information, see Lead Your Club: Public Relations Committee.

GET SOCIAL

Share fun photos, fundraising events, calls for project volunteers, and so on through your club's social media and members' as well. Follow local groups to hear about community needs or possible service partners.

Your governor, assistant governor, district public relations chair, and Rotary public image coordinator can advise and assist you in public relations matters. The Media Crisis Handbook outlines how to handle adverse publicity.

ANSWERING QUESTIONS ABOUT ROTARY

As president you're the face of your club. You'll have opportunities to speak to the public at project events, dedications, and other occasions. You should be able to easily answer the basic questions: What is Rotary? What does it do? Who are Rotarians?

But if you're not sure how to answer, these suggestions from the Voice and Visual Identity Guidelines may help.

ROTARY UNITES LEADERS

- Rotary brings together leaders who use their combined expertise to tackle some of the toughest challenges facing our communities.
- Rotary harnesses the strength and experience of professional and community leaders from nearly every country around the world.

ROTARY EXCHANGES IDEAS

- At Rotary, we discover and celebrate our diverse perspectives during club meetings, conferences, service projects, and social events.
- Rotary finds a place for your expertise and passion. Whether you want to lead a project or participate in one, Rotary welcomes your involvement.

ROTARY TAKES ACTION

- Rotary creates positive change in communities around the world through our service projects.
- From stocking food pantries to providing clean water and improving maternal health, Rotary clubs join forces to carry out impactful and sustainable projects in communities around the world.

THROUGH ROTARY

- We build lifelong relationships.
- We honor our commitments.
- We connect diverse perspectives.
- We apply our leadership and expertise to address social issues.

Review the Rotary at a Glance information sheet for key points and data.

Your answers should be positive, factual, specific, and brief. Avoid using Rotary terms — governor, district, areas of focus, PolioPlus — that the public likely won't understand. Find key talking points in appendix 7.

USING ROTARY MARKS

Rotary's official logo identifies Rotary and our commitment to improve communities worldwide. Rotary International owns trademarks and service marks (referred to as Rotary Marks and listed in chapter 14 of the Manual of Procedure), for the benefit of Rotarians worldwide.

When developing your club's materials and club project materials, use the Voice and Visual Identity Guidelines in the Brand Center and the Rotary Code of Policies. Your Club and District Support representative can also assist you.

REPRODUCING THE ROTARY MARKS

When you reproduce the Rotary Marks, follow our Voice and Visual Identity Guidelines that allow a Rotary club and other Rotary Entity* to use them. The marks may not be altered, modified, or obstructed in any way or reproduced other than in their complete form. Clubs can download logos for Rotary, The Rotary Foundation, and other Rotary programs in the Brand Center.

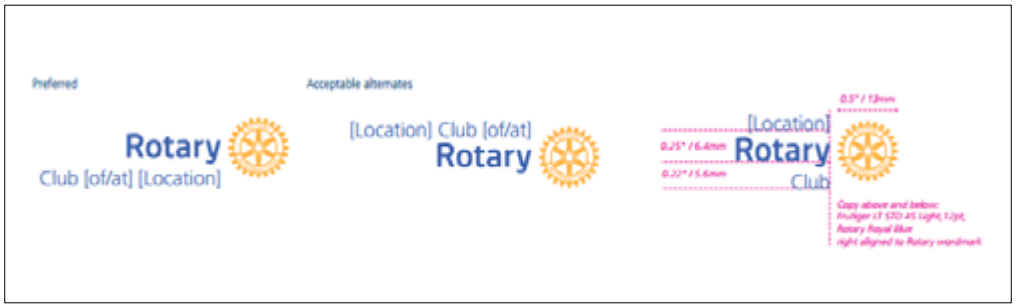
**A Rotary Entity is defined as Rotary International, The Rotary Foundation, a Rotary club or group of clubs, a Rotary district or group of districts (including a multidistrict activity or multidistrict administrative group), a Rotarian Action Group, a Rotary Fellowship, a Rotary Convention host committee, and administrative territorial units of Rotary International. Individual Rotary programs are not Rotary Entities.*

NAMING GUIDELINES

In naming an activity, project, program, website, or publication, the Rotary club or other Rotary Entity must use its name, and not just "Rotary" alone. Proper naming examples include:

- Rotary Valley Club Cleanup Project
- Rotary Centennial Park of the Club of Mountain City
- www.anycityrotaryclub.org

The Rotary club signature, which consists of the official Rotary logo plus the club name, should be used on all club communications and materials associated with a club activity, project, and program. For specific guidelines on naming club projects, see the Rotary Code of Policies or contact your Club and District Support representative.



ROTARY MARKS ON FUNDRAISING MERCHANDISE

Nearly 250 vendors are authorized to produce merchandise using the Rotary Marks. See Rotary.org or the Official Directory for a list of official licensees.

If your club wants to raise funds for a project of a limited duration by selling merchandise with the Rotary Marks, make certain that the merchandise displays your Rotary club name, Rotary club signature, fundraising event or project name, and project date(s) and that you purchase the merchandise from a Rotary official licensee. If your club wants to sell merchandise for a long-term fundraising project, you'll need to apply for a license. Send questions about licensing to rilicensingservices@rotary.org.

DISCUSSION QUESTIONS

How will you answer the question, What is Rotary?

How can you prepare to serve as your club's spokesperson?

What innovative awareness ideas will your club try?

APPENDIX 7

KEY POINTS FOR TALKING ABOUT ROTARY

Use these messages when talking about Rotary to media professionals and in your public relations materials and speeches.

Rotary brings together a global network of volunteer leaders dedicated to tackling the world's most pressing humanitarian challenges.

- Rotary harnesses the strength and experience of 1.2 million professional and community leaders from nearly every country to help families in need.
- From stocking local food pantries to providing clean water and improving maternal health, Rotary clubs join forces to carry out sustainable projects with real impact at home and abroad.
- Rotary provides a platform for successful men and women of all ethnicities, faiths, and cultures to make the world a better place through volunteer service.

Rotary's top goal is to end polio worldwide.

- Rotary and its partners are close to eliminating polio, having achieved a 99 percent reduction in cases since 1988. Polio would follow smallpox to become only the second human disease in history to be eradicated.
- Rotary's chief roles are fundraising, advocacy, and mobilizing volunteers.
- Rotary members have contributed more than $1.2 billion and countless volunteer hours to protect more than 2.5 billion children in 122 countries from polio.
- Rotary is working to raise an additional $35 million per year through 2018 for polio eradication, to be matched 2 to 1 by the Bill & Melinda Gates Foundation.

Rotary maximizes its impact through innovative partnerships.

- Rotary's goal-oriented, business-model approach emphasizes the need for community involvement, measurable goals, and maximum impact and sustainability.
- Rotary leverages resources through partnerships with other top-tier humanitarian organizations to effectively combat disease and illiteracy, improve maternal and child health, improve access to clean water, and reduce poverty and conflict worldwide.

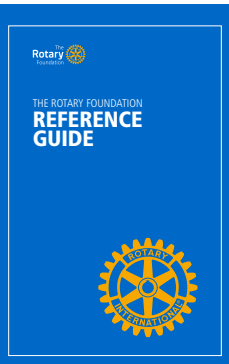
Rotary builds peace and international understanding through education and humanitarian service and by connecting young leaders.

- More than 600 graduates of the Rotary Peace Centers master's program are in key decision-making positions in governments, corporations, and organizations around the world.
- Rotary's humanitarian projects help prevent the underlying causes of conflict, such as poverty, illiteracy, and lack of clean water.
- Rotary Youth Exchange fosters international goodwill by enabling 8,500 high school students to live and study abroad each year in 100 countries.
- Rotary's two service organizations for young leaders — Interact and Rotaract — promote volunteer service, leadership, and professional development.

NOTES

CHAPTER 6

THE ROTARY FOUNDATION



Your key resource is the Rotary Foundation Reference Guide available at shop.rotary.org.

The mission of The Rotary Foundation is to enable Rotary members to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. Your club's support of The Rotary Foundation makes a difference in the lives of people around the globe.

The Foundation helps fund our humanitarian activities, from local service projects to global initiatives. Your club or district can apply for grants from the Foundation to participate in projects and provide scholarships. The Foundation also leads the charge on worldwide Rotary campaigns such as eradicating polio and promoting peace.

Participation in Foundation activities, such as scholarships and vocational training teams, can attract potential members and engage current ones, and inspire them to give.

ROTARY FOUNDATION RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint and meet with your club Rotary Foundation committee	Meet with your club Rotary Foundation committee
Review your club's involvement with Foundation programs using Rotary Club Central	Regularly review your club's financial contribution trends in Rotary Club Central
View your club's trends in financial contributions to The Rotary Foundation in Rotary Club Central	Meet with your Rotary Foundation committee to ensure that your club maintains its qualification to apply for Rotary grants and that reports are submitted on time
Set your club goals for financial contribution and program participation before the start of your year in Rotary Club Central	Understand and agree to the club memorandum of understanding
Work with your Foundation committee to make sure your club is qualified to apply for Rotary grants	Ensure that reports on open grants are submitted on time

Your leadership will be very important as your club makes steady progress toward its Foundation goals. Encourage members to participate by:

- Asking them to give to the Foundation; pay extra attention to members who have never given
- Acknowledging contributions and involvement in Rotary grants
- Practicing the proper management of Foundation grant funds
- Submitting a proposal idea for a district grant
- Leading by example and making a personal contribution

CLUB ROTARY FOUNDATION COMMITTEE

Club presidents, secretaries, treasurers, and Rotary Foundation committee chairs can review their club's Foundation contributions on Rotary.org.

The club Rotary Foundation committee structure is determined by your club's Foundation goals. If your plans include applying for a global grant, your club may want to have a grants subcommittee. Your club can make changes to its bylaws to reflect the specific responsibilities of your Foundation committee, adding subcommittees as needed (appendix 5). Choose committee members with excellent communication skills, international experience, and community or international volunteer experience. Former grant participants are also good candidates.

Your Rotary Foundation committee has these responsibilities:

- Conduct inspirational Rotary Foundation programs
- Ask alumni or volunteers to share their experiences with the Foundation at a club meeting
- Achieve your club's Foundation contribution goals for the year
- Educate club members about the Foundation
- Encourage club members to participate in Rotary grants and activities and to make a contribution
- Communicate the Foundation goals set by the district and the Trustees of The Rotary Foundation
- Ensure proper stewardship of grant funds

Find more information in Lead Your Club: Rotary Foundation Committee.

DISTRICT SUPPORT

Members of the district Rotary Foundation committee can put your club in contact with other Rotary clubs working on similar projects. The Rotary Foundation Reference Guide describes how clubs can participate in Foundation programs.

DISTRICT ROTARY FOUNDATION SEMINAR

The district Rotary Foundation seminar is for every Rotary member to learn about The Rotary Foundation's message of achieving world understanding and peace. Club presidents, club Foundation committee members, and other interested club members should attend to learn more about programs, grants, and fundraising.

GRANT MANAGEMENT SEMINAR

At the grant management seminar, club members learn how to successfully manage a Rotary grant, meet the Foundation's stewardship expectations, and implement the club memorandum of understanding. One member of your club must attend this seminar for club qualification. Find more information in the Manage Your Global Grant manual.

STEWARDSHIP AND QUALIFICATION

To show your commitment to the ethical management of Rotary Foundation grant funds, grant sponsors must be qualified by their district. Once the district qualifies your club, you may apply for a global grant. The Foundation has two minimum requirements for club qualification:

- The club president-elect or a club-designated appointee attends the district grant management seminar.
- The club president and president-elect sign the club memorandum of understanding on behalf of their club.

Your district may have additional requirements.

ROTARY GRANTS AND PROGRAMS

Rotary grants. There are two types of grants:

1. District grants are block grants that enable clubs and districts to address immediate needs in their communities and abroad. Districts manage and disburse these funds for activities that are aligned with the Foundation's mission.
2. Global grants offer clubs and districts opportunities to participate in strategically focused, high-impact activities. These grants fund large-scale international humanitarian projects, vocational training teams, and scholarships that have sustainable, measurable outcomes in one or more of Rotary's areas of focus:
   - Peace and conflict prevention/resolution
   - Disease prevention and treatment
   - Water and sanitation
   - Maternal and child health
   - Basic education and literacy
   - Economic and community development

PolioPlus. Rotary has a goal to eradicate polio. Our members have contributed over $1 billion to this effort. In addition, we serve as a powerful volunteer network at the local level, providing support at clinics and mobilizing their communities for immunization or other polio eradication activities.

Your club can help us reach this goal by:

- Holding a public event to raise funds and awareness for PolioPlus
- Devoting a club program to polio eradication
- Holding a club or district event on World Polio Day, 24 October, to raise awareness for Rotary's work to end polio

If your club is in a polio-endemic country:

- Contact your national PolioPlus committee chair to assist with surveillance.
- Work with local health officials to maintain high rates of immunization for polio and other diseases.

Rotary Peace Centers. The Rotary Peace Centers program provides fellowships to individuals pursuing either a master's degree in international relations, peace studies, conflict resolution, and related subjects, or a professional development certificate in peace and conflict studies at one of the Rotary Peace Centers.

Your club should submit any Rotary Peace Fellowship applications to your district by 31 May. Districts must submit applications to The Rotary Foundation by 1 July.

Your club can get involved in several ways:

- Invite current and past Rotary Peace Fellows to share their experiences with your club
- Nominate candidates for district consideration
- Serve as hosts and counselors to fellows

FOUNDATION FUNDING

The Rotary Foundation is dedicated to funding its programs. To ensure that our Foundation has sufficient and reliable resources in the future, the Trustees approved a funding model, effective 1 July 2015, that will augment the funding sources used to cover administrative and fund development expenses. A small portion of Endowment Fund earnings will provide some funding for operating expenses.

Additional sources of funds will be used to pay for the Foundation's operating expenses and fund the operating reserve.

- Five percent of contributions to the Annual Fund will be earmarked and may be used to pay for operating expenses and/or to build the operating reserve.
- An additional 5 percent for cash contributions to global grants will be used to help cover the costs of processing these gifts.

Learn more about the model.

SHARE *AND THE DISTRICT DESIGNATED FUND*

Contributions to The Rotary Foundation are transformed into grants that improve our world and change lives. The Trustees involve Rotarians worldwide in the decision-making process for Foundation grants and programs.

At the end of every Rotary year, contributions to the Annual Fund-SHARE from every Rotary club in a district are divided into two funds:

- 50 percent credited to the District Designated Fund (DDF)
- 50 percent credited to the World Fund

The Foundation uses the World Fund portion to pay for the worldwide programs available to all Rotary districts. Your district uses the DDF portion to fund the Foundation grants and programs of its choice.

Your district Rotary Foundation committee decides how to use the district's available DDF, in consultation with the clubs in your district. Contact your district chair to learn more.

CONTRIBUTIONS TO THE ROTARY FOUNDATION

Rotary members and friends of Rotary support the Foundation's work through voluntary contributions. When Rotarians see the extraordinary results of educational and humanitarian activities, they understand why supporting The Rotary Foundation financially is vital to making the world a better place. Among other options, contributions can be directed to the Annual Fund, the Endowment Fund, or a specific global grant, the PolioPlus Fund, and the Rotary Peace Centers. Contributions can be made at Rotary.org or with The Rotary Foundation Contribution Form or the Multiple Donor Form.

As president-elect, you will enter your Foundation fund development club goals in Rotary Club Central.

The sincere acknowledgment of a donor's gift is the first step toward additional financial support. The Rotary Foundation recognizes clubs and donors for financial contributions or commitments for future contributions. See appendix 6 for awards information.

For additional support on Foundation matters, contact your regional Rotary Foundation coordinators and endowment/major gifts advisers.

DISCUSSION QUESTIONS

How will you encourage members to get involved with The Rotary Foundation?

How will you ensure stewardship of club funds?

What is your personal goal to support The Rotary Foundation?

NOTES

GET CONNECTED!

Make your Rotary experience truly international with these networking opportunities.

CONNECT ONLINE

Engage with other members: **Online Discussion Groups**

Enhance service projects: **Rotarian Action Groups**

Make new friends: **Rotary Fellowships**

Share your service accomplishments: **Rotary Showcase**

Collaborate on service projects: **Rotary Ideas**

Build peace and strengthen relationships: **Intercountry Committees**

Share your professional talents: **Vocational Training Team**

Meet prospective partners: **Project Fairs**

Share international hospitality: **Rotary Friendship Exchange**

CONNECT WITH A GROUP

Celebrate club partnerships: **Twin Clubs**

CONNECT IN PERSON

Rotary

EXCHANGE IDEAS: www.rotary.org/myrotary

CHAPTER 7

YOUR PROJECTS

Communities in Action: A Guide to Effective Projects and Community Assessment Tools are key resources for developing your goals and action plan for your year.

The top two reasons people join Rotary are to give back to their local community and to connect with friends. A successful service project can do both! By working together, Rotary members and the community develop lasting friendships as your club makes a real difference in the world.

Find out what issues matter to members of your club. Invite a panel of local leaders to discuss the challenges facing your community. Reach out to youth and young adults, including Interactors and Rotaractors, and listen to what they have to say.

Identify an issue that takes advantage of your members' skills, builds effective networks, and involves community members as partners. When your Rotary club takes action, you'll engage your club's members and show your community how Rotary creates positive change.

SERVICE RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Select and meet with your service projects committee members	Make sure projects follow the steps for a successful project: conducting a needs assessment, planning and implementation, and evaluation
Assess your club's current projects using Rotary Club Central	Provide support to your club-sponsored organizations: Interact, Rotaract, and Rotary Community Corps (RCC)
Determine service goals using Rotary Club Central	Invite Rotaractors, youth program participants, and local Rotary alumni to help or collaborate on projects
Work with your committee to determine whether projects in progress will continue into next year	Make sure that your members follow all applicable program and youth protection policies (appendix 9)

SERVICE PROJECTS COMMITTEE

The service projects committee's main purpose is to lead your club's humanitarian service initiatives. Your club can make changes to its bylaws to reflect the specific responsibilities of your service projects committee, adding subcommittees as needed (appendix 5).

Projects committee members should know the community and have community volunteer experience.

The service projects committee has these responsibilities:

- Conduct a needs assessment of the community and the club
- Plan projects, both local and international, using club, district, and Rotary resources such as Rotary Ideas and Rotary Showcase
- Work with the club public relations committee to promote projects
- Carry out projects and involve all members
- Evaluate all projects and use the findings to strengthen future projects
- Reach out to clubs in other countries for international projects and volunteer activities

For more information, see the Lead Your Club: Service Projects Committee manual. Learn more about developing and promoting your service project on learn.rotary.org.

ROTARY SERVICE PROGRAMS

Rotary offers a broad range of humanitarian, intercultural, and educational programs to help clubs and districts achieve their service goals. For detailed descriptions, see appendix 8.

Projects provide an opportunity for members to network and have fun. Involve all members in projects to keep everyone invested in your club's success. Increase your club's impact and demonstrate how Rotary takes action in your community by inviting young leaders, friends, family, community partners, and colleagues to your next project.

For more information on planning and implementing a successful project, review the project resources at Rotary.org.

Rotary's programs for young leaders. Your club can develop leadership skills and instill a passion for service through programs such as Interact, Rotary Youth Exchange, and Rotary Youth Leadership Awards (RYLA). Clubs can also engage university students and young professionals through Rotaract. Rotaract gives young adults the chance to develop as leaders, take action, and serve their communities alongside Rotarians.

Or your club can develop its own projects that address the needs of local youth and young adults. Reach out to youth-serving organizations to understand the issues in your community. Your club may provide a vital service by supporting children's literacy skills, mentoring at-risk youth, or providing vocational service to university students.

When conducting a service project where volunteers will be working directly with youth, review the Youth Protection Manual for screening and training resources. Make sure your club members are familiar with the guidelines on working with youth in appendix 9. Learn more about working with youth in the Learning Center.

Local and international projects. Clubs can partner with local clubs or clubs in other countries on projects that address community needs. The basic strategies for carrying out local projects can be applied to your international projects. To participate in an international project, your club will need to find an international partner. For details see Communities in Action: A Guide to Effective Projects.

You can approach this in various ways. Explore partners, funding, resources, and materials at Rotary Ideas. Connect to partners using these methods:

- Contact your district Rotary Foundation committee chair
- Network with Rotary members at district and international meetings
- Expand your international connections through visits with other clubs and the Rotary Friendship Exchange
- Attend a Rotary-sponsored project fair
- Network and partner with your club's Rotaract club
- Connect with fellow Rotary members on social networking sites

Looking for a project idea? The Rotary's Areas of Focus guide provides examples of projects in each area. For additional resources:

- Begin your project using the Community Assessment Tools
- Review the Manage Your Global Grant manual for service project best practices
- Watch the Lifecycle of a Service Project webinar series at Rotary.org

DISCUSSION QUESTIONS

What will you do to support your club's projects?

How will you engage Rotaract members, Rotary alumni, and other young professionals in your community to participate in club projects?

How do the club's projects fit into the strategic plan for the club?

APPENDIX 8

ROTARY SERVICE

Consider the following Rotary service options:

PolioPlus	Rotary and Rotary Foundation corporate program that supports global polio eradication efforts
Community Service	Projects that respond to the needs of local communities
Vocational Service	Activity that encourages Rotary members to model high ethical standards and apply their business knowledge and skills to benefit others
International Service	Projects that involve efforts from Rotary members in more than one country
Youth Service	Programs and activities that engage youth and young adults up to age 30 in community and international service
New Generations Service Exchange	Activity for young adults up to age 30 to conduct service or gain professional or vocational training in another country
Interact	Service clubs for young people ages 12-18
Rotary Youth Exchange	Program that promotes international understanding and peace through long- and short-term exchanges for young people ages 15-19
Rotaract	Service clubs for young professionals and university students ages 18-30 sponsored by their local Rotary club
Rotary Youth Leadership Awards (RYLA)	Leadership training for youth, university students, and young adult professionals
Rotary Community Corps (RCC)	Service groups of non-Rotary members sponsored by their local Rotary club
Rotary Fellowships	International groups of Rotary members, Rotary spouses, and Rotaract members who share a common recreational or vocational interest
Rotary Friendship Exchange	International exchange program for Rotary members and their families that builds relationships, which can lead to international project partners
Rotarian Action Groups (RAGs)	International groups of Rotary members and the family of Rotary who join together to conduct and collaborate on international projects related to an area of expertise
Rotary Peace Centers	International educational program that offers a fellowship for a master's degree or professional development certificate in peace and conflict resolution
Rotary Grants	Financial support for clubs and districts to participate in humanitarian and educational activities locally and abroad

APPENDIX 9

RISK MANAGEMENT FOR WORKING WITH YOUTH

When Rotary clubs work with youth, they make an investment in the future of their communities and Rotary itself — but this investment is only successful if these activities are administered responsibly. Our youth programs do not exist in vacuum; they operate in a world that is sometimes dangerous. Risk management involves understanding possible risks involved with youth activities, such as injury, illness, and abuse, so that they can be prevented and their impact reduced. Your club should consider the following points when developing safe processes for working with youth:

- Develop and implement a club youth protection policy that addresses physical, sexual, and emotional abuse or harassment. Ensure that any reports of abuse or harassment are communicated to district leadership and/or local law enforcement immediately. Contact your district for additional policy details and requirements.
- Establish a code of conduct for adult and youth participants. These rules should reflect local laws, cultural standards, and any applicable policies of the district or club, as well as best practices for youth protection.
- Review your club's policies to ensure they are in line with the district's policies and with specific Rotary Board-guidelines for each youth program.
- Stay in regular communication with district leaders to coordinate fast action during potentially dangerous situations.
- Consider these questions when sponsoring a youth program or event:
  - What happens if someone is injured?
  - What happens if a participant reports inappropriate or dangerous behavior?
  - What happens if a natural disaster strikes during the program or event?
- Work to minimize potential risks in these ways:
  - Implementing volunteer screening and training programs as required by your district policies and in line with best practices
  - Teaching participants about safe behavior during the program
  - Developing a disaster emergency plan and practicing it
  - Purchasing adequate liability insurance coverage for your region

If any club activities involve the travel of minors outside of their home communities, contact your district to guarantee all youth travel guidelines are followed. All activities where the responsibility for organizing the hosting arrangements and travel of youth participants is transferred to a foreign Rotary entity, such as Rotary Youth Exchange, must be administered with the approval and oversight of a certified Rotary district.

Many health insurance policies provide only limited coverage when traveling or living away from home. For this reason, all participants that will be traveling are required to verify that their health and life insurance provides adequate coverage. Participants should consider obtaining travel insurance that includes coverage for medical expense reimbursement, repatriation of remains, emergency evacuation, and accidental death and dismemberment. Clubs and districts are urged to contact a local insurance professional to determine whether their insurance policies provide adequate coverage for their youth programs.

It is also recommended that clubs consult local legal counsel before signing any agreement or contract with another youth-serving organization. These documents may contain waivers, hold-harmless, or indemnification agreements that may attempt to release a party from liability and transfer the risk to the club or district. Be aware that Rotary International is not liable for any illness or injury to persons, including participants and organizers, or for damage to any property.

Rotary's Statement of Conduct for Working With Youth

Rotary International strives to create and maintain a safe environment for all youth who participate in Rotary activities. To the best of their ability, Rotarians, Rotarians' spouse, and partners, and other volunteers must safeguard the children and young people they come into contact with and protect them from physical, sexual, and emotional abuse.

NOTES

ROTARY CLUB CENTRAL
PLAN TOGETHER
TRACK PROGRESS
ACHIEVE GOALS

Why should clubs use Rotary Club Central?

- It's a one-stop shop.
- It eliminates paper.
- It fosters continuity in leadership.
- It enables clubs to track their progress.
- It creates transparency.
- It showcases the important work that Rotary clubs do worldwide.

How do I get to Rotary Club Central?

Go to www.rotary.org/clubcentral.

Who can use Rotary Club Central?

All Rotarians can view the goals and achievements for their club. The current and incoming club president, secretary, executive secretary, treasurer, Foundation chair, and membership chair can add and edit the goals and achievements for their club.

Rotary

One Rotary Center
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Evanston, IL 60201-3698 USA
www.rotary.org

222-EN—(315)