

# Club President's Manual

*A part of the Club Officers' Kit*

For clubs in Future Vision pilot districts,  
an addendum is available at [www.rotary.org](http://www.rotary.org).

ROTARY INTERNATIONAL®



This is the 2010 edition of the *Club President's Manual* (222-EN). It is intended for use by club presidents holding office in 2010-11, 2011-12, and 2012-13. The information contained in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution and Bylaws of Rotary International, the Rotary Code of Policies, and The Rotary Foundation Code of Policies. Please refer to those resources for exact guidelines. Changes to these documents, by the Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.

Photos in this manual were taken by RI staff photographers Alyce Henson and Monika Lozinska-Lee.

# 2010 Addendum to the *Club President's Manual* (222)

The following changes to the *Club President's Manual* reflect decisions taken by the 2010 Council on Legislation, the RI Board of Directors, or the Foundation Trustees since its publication. The most recent club constitution and bylaws are included as appendixes J and K.

## General Information

New Generations Service is the new fifth Avenue of Service, which recognizes the positive change implemented by youth and young adults through leadership development activities, service projects, and exchange programs.

A new kind of Rotary club is possible: e-clubs. Districts can have up to two e-clubs, and e-club membership can be worldwide or restricted — either within a district or geographical area or by language. All e-clubs, similar to all new Rotary clubs, must first be approved by the RI Board. Please note the separate sections for each type of club in the Standard Rotary Club Constitution.\*

The immediate past president is an officer of the club and a member of the board.

*Rotary World* has been replaced by *Rotary Leader*. Subscribe to this bimonthly, electronic publication for Rotary club and district officers.

The Regional Rotary International Membership Coordinators program has been discontinued.

The Rotary Coordinators program has started. The RI president appointed 41 new Rotary coordinators to serve in the same geographical regions as the regional Rotary Foundation coordinators in 2010-11. Rotary coordinators will provide information and assistance from RI to clubs and districts in order to support the strengthening of clubs and districts. Questions: E-mail RI staff at [rotary.coordinators@rotary.org](mailto:rotary.coordinators@rotary.org).

Presidents-elect training seminars (PETS) can be held in February or March.

District assemblies can be held in March, April, or May.

## Chapter 2: Working with Your Club and District Leaders

### Page 27

Under Individual Rotarian Awards, add the following awards:

Award	Honorees	Nominated by	Awarded by
Individual Rotarian Awards			
Reach One, Keep One Award	New member sponsors	Club presidents	Rotary club
Club Builder Award	Rotarians who have made a significant impact in supporting and strengthening their Rotary club	District governor	RI president

Change Four Avenues of Service Citation to Avenues of Service Citation.

External Relations Best Cooperative Projects Award has been discontinued.

\* Questions: Contact your Club and District Support representative.

## **Chapter 3: Club Administration**

### **Page 32**

Under minimum standards, the RI Board has adopted these additional minimum standards for clubs:

- Acts in a manner consistent with the RI Constitution and Bylaws and the Rotary Code of Policies
- Pays its RI membership and district dues without outside assistance
- Provides accurate membership lists to RI in a timely manner
- Resolves club disputes amicably
- Maintains cooperative relations with the district
- Cooperates with RI by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, associate foundations, and the international offices of the Secretariat

### **Page 35**

Add: The new RI per capita dues per half year are as follows:

- 2010-11: US\$25.00
- 2011-12: US\$25.50
- 2012-13: US\$26.00

Add: Clubs accepting a transferring or former Rotarian must first secure a certificate from the former club confirming that person's membership. The former club is obligated to verify that the member does not owe any debts to the club. A prospective member cannot join a new club until all debts have been paid.

### **Page 36**

Add: The club's membership can be suspended or terminated if any member of that club has misused funds from The Rotary Foundation.

## **Chapter 5: Service Projects**

### **Page 81**

Worksheet 14: A Balanced Program of Service. Add the fifth Avenue of Service: New Generations Service

## **Chapter 6: The Rotary Foundation**

### **Page 91**

For questions on the Future Vision Plan, e-mail [futurevision@rotary.org](mailto:futurevision@rotary.org).

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# Introduction



## **Rotary Reminder**

For clubs in Future Vision pilot districts, use the 2010-11 Future Vision Addendum to the *Club President's Manual* available at [www.rotary.org](http://www.rotary.org).

As club president, your role is to lead an effective Rotary club. As president-elect, you will receive training to prepare for your responsibilities. This training includes this *Club President's Manual*, your presidents-elect training seminar (PETS), and the district assembly.

Before PETS, review this manual to understand your role and responsibilities. Each chapter corresponds to a session you will attend at the seminar and provides specific details about your year in office and the resources available to support you and your club. Throughout the manual, general tips are offered in the Rotary Reminder boxes. At the end of each chapter are questions to help you prepare for the seminar and participate more fully in discussions. Because every chapter includes worksheets to be completed during PETS, you should bring your manual with you.

Once you have reviewed this manual, work with your club to set goals before you attend PETS. Chapter 8 focuses on strategic planning, long-range goals, and annual goals. Drafting long-range and annual goals in advance will ensure a more effective goal-setting session when you meet with your assistant governor at the seminar. Chapter 9 contains important documents, such as the *Planning Guide for Effective Rotary Clubs*, that you'll work on with your assistant governor at PETS.

The district assembly will build on what you learn from this manual and at PETS and allow you to finalize your plans for the year. Because chapter 9 contains a short list of discussion questions to prepare you for your district assembly and worksheets to be completed during the assembly, you should bring your manual with you to the district assembly as a reference. After you've completed your training, this manual will serve as a resource during your year as club president.

The *Club President's Manual* provides an overview of the information in each of the five *Club Committee Manuals*, *Club Secretary's Manual*, and *Club Treasurer's Manual*. Together, these eight manuals make up the *Club Officers' Kit*. Give each manual to your incoming club leaders to assist them with their responsibilities in the coming year.

As you prepare to help lead your club, remember that your Rotary club is a member of Rotary International. Through this membership, it is linked to more than 33,000 Rotary clubs worldwide and granted access to the organization’s services and resources, including publications in nine languages, information at [www.rotary.org](http://www.rotary.org), grants from The Rotary Foundation, and staff support at world headquarters and the seven international offices.

For PETS

Worksheet 1: Summary

Notes

Role and Responsibilities

I learned ...

I will ...

Contacts

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All PETS worksheets are to be completed at your presidents-elect training seminar.

### Comments?

If you have questions or comments about this manual or any of RI’s training resources, please direct them to:

Leadership Education and Training Division  
Rotary International  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
E-mail: [leadership.training@rotary.org](mailto:leadership.training@rotary.org)  
Phone: 847-866-3000  
Fax: 847-866-9446





# Role and Responsibilities



Your role as club president is to lead your club, ensuring it functions effectively. An effective Rotary club is able to

- Sustain or increase its membership base
- Implement successful projects that address the needs of its community and communities in other countries
- Support The Rotary Foundation through both program participation and financial contributions
- Develop leaders capable of serving in Rotary beyond the club level

The elements of an effective club can help clubs increase their ability to meet their goals in each Avenue of Service. Implementing successful service projects affects Vocational, Community, and International Service. Increased membership gives a club a greater pool of Rotarians working in each avenue. Supporting The Rotary Foundation affects both Community and International Service. Streamlined processes, better communication, strategic planning, and increased member involvement will improve Club Service. With efficient operations in place, your club can become more effective in achieving the Object of Rotary.

OBJECT OF ROTARY	AVENUES OF SERVICE
The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:	The Avenues of Service were developed in the 1920s to clarify the Object of Rotary.
<b>FIRST.</b> The development of acquaintance as an opportunity for service;	 <b>Club Service</b> focuses on strengthening fellowship and ensuring the effective functioning of the club.
<b>SECOND.</b> High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;	 <b>Vocational Service</b> encourages Rotarians to serve others through their vocations and practice high ethical standards.
<b>THIRD.</b> The application of the ideal of service in each Rotarian's personal, business, and community life;	 <b>Community Service</b> covers the projects and activities the club undertakes to improve life in its community.
<b>FOURTH.</b> The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.	 <b>International Service</b> encompasses actions taken to expand Rotary's humanitarian reach around the globe and promote world understanding and peace.

## Club President-elect Responsibilities

Your responsibilities as club president-elect are summarized below and explained throughout this manual (see chapter references in parentheses):

Note: An asterisk (\*) indicates a responsibility outlined in the Recommended Rotary Club Bylaws or Standard Rotary Club Constitution.

- Reviewing this *Club President's Manual* and preparing for the presidents-elect training seminar
- Serving as a director of your club's board, performing responsibilities prescribed by the president or the board\*
- Reviewing your club's long-range goals, using the elements of an effective club as a guide (chapter 8)
- Setting your club's annual goals, which support long-range goals, using the *Planning Guide for Effective Rotary Clubs* (chapters 8 and 9)
  - Assessing your club's membership situation
  - Discussing and organizing service projects
  - Identifying ways to support The Rotary Foundation
  - Developing future leaders
  - Developing a public relations plan
  - Planning action steps to carry out your club's administrative responsibilities

- Working with your club and district leaders (chapters 2 and 3)
  - Holding one or more meetings with your board of directors; reviewing the provisions of your club's constitution and bylaws (chapter 3)
  - Serving as an ex officio member of all club committees\* (chapter 2)
  - Supervising preparation of the club budget\* (chapter 3)
  - Meeting with your assistant governor at PETS and your district assembly (chapter 2)
- Ensuring continuity in leadership and service projects\* (chapter 2)
  - Appointing committee chairs\*
  - Appointing committee members to the same committee for three years to ensure continuity, when possible\*
  - Conferring with your predecessor\*
  - Arranging a joint meeting of the incoming board of directors with the retiring board
- Ensuring regular and consistent training (chapter 3)
  - Attending your presidents-elect training seminar and district assembly\*
  - Encouraging all club leaders to attend the district assembly
  - Holding a club assembly immediately following the district assembly
  - Attending the district conference

## **Club President Responsibilities**

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Your responsibilities as club president are summarized below and explained throughout this manual (see chapter references in parentheses):

Note: An asterisk (\*) indicates a responsibility outlined in the Recommended Rotary Club Bylaws and Standard Rotary Club Constitution.

- Registering for Member Access at [www.rotary.org](http://www.rotary.org) to obtain your club's administrative data from RI
- Ensuring that your secretary and treasurer has registered for Member Access in order to keep membership and club data current
- Implementing and continually evaluating your club's goals for your year in office, ensuring that all club members are involved and informed (chapter 8)
- Ensuring that each committee has defined goals\* (chapter 2)
  - Encouraging communication between club and district committee chairs
  - Conducting periodic reviews of all committee activities, goals, and expenditures\*
- Presiding at all meetings of the club\* (chapter 3)
  - Ensuring that all meetings are carefully planned
  - Communicating important information to club members
  - Providing regular fellowship opportunities for members

- Preparing for and encouraging participation in club and district meetings (chapter 3)
  - Planning for all monthly board meetings\*
  - Ensuring the club is represented at the district conference and other district meetings
  - Promoting attendance at the annual RI Convention
- Working with your club and district leaders (chapter 2)
  - Developing, approving, and monitoring the club budget while working closely with the club treasurer\* (chapter 4)
  - Working with district leadership to achieve club and district goals (chapter 3)
  - Using information and resources from the district, RI Secretariat, and [www.rotary.org](http://www.rotary.org) (all chapters)
  - Preparing for the governor’s official visit
- Ensuring continuity in leadership and service projects\*
  - Submitting an annual report to your club on the club’s status before leaving office (chapter 3)
  - Conferring with your successor before leaving office (chapter 2)
  - Arranging for a joint meeting of the incoming board of directors with the outgoing board (chapter 2)
  - Ensuring that a comprehensive training program is implemented by the club, and appointing a club trainer(s) to carry out the training, if needed (chapter 2)
- Ensuring that RI youth protection policies are followed (chapter 5) (appendix G)
  - Ensuring that Rotarians in your club are familiar with the Statement of Conduct for Working with Youth
  - Terminating or not admitting to membership any person who admits to, is convicted of, or is otherwise found to have engaged in sexual abuse or harassment
  - Prohibiting non-Rotarians who admit to, are convicted of, or otherwise found to have engaged in sexual abuse or harassment from working with youth in a Rotary context
  - Supporting the volunteer selection, screening, and training requirements outlined for the Youth Exchange program
  - Planning for youth protection in all club service activities that involve young people

Use the Club President’s Monthly Checklist (sent by your Club and District Support representative from Rotary International and available at [www.rotary.org](http://www.rotary.org)) when planning your year as president and reviewing your responsibilities as president-elect and president.

The Secretariat is Rotary International's general secretary, RI and Foundation staff at RI World Headquarters in Evanston, Illinois, USA, and seven international offices (their locations are listed on the inside front cover of the *Official Directory* and at [www.rotary.org](http://www.rotary.org)).



## Club Leadership Plan

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The Club Leadership Plan is based on the best practices of effective clubs, with the goal of creating clubs that pursue the Object of Rotary through activities related to each Avenue of Service. Because each Rotary club is unique, the Club Leadership Plan is flexible and designed for each club to develop its own leadership plan.

The Club Leadership Plan, which provides an opportunity for your club to assess its current operations, has many benefits:

- All members have a chance to voice their opinions on the future of their club.
- Standard club operations give members more time to focus on service and fellowship.
- Greater involvement of club members develops future club and district leaders and increases retention.
- All members are working to achieve club goals.
- Continuity among leaders and club goals eases the transition from one Rotary year to the next.

### Implementing the Club Leadership Plan

Past, current, and incoming club officers should work together to customize a leadership plan that incorporates current club strengths and best practices using the nine implementation steps listed below (refer to worksheet 3 for strategies to implement a customized club leadership plan).

**1. Develop long-range goals that address the elements of an effective club.**

A club's long-range goals should support its strategic plan, cover the next three to five Rotary years, and address the elements of an effective club: membership, service projects, The Rotary Foundation, and leadership development. They should also include strategies for promoting your club's successes in each element.

**2. Set annual goals that are in harmony with the club's long-range goals using the *Planning Guide for Effective Rotary Clubs*.**

Annual goals should address the Avenues of Service and work to help your club pursue the Object of Rotary. The planning guide lists common strategies that your club might use to achieve your annual goals, allowing you to add alternate strategies. Use it as a working document, updating it as needed.

**3. Conduct club assemblies to involve members in the planning process and keep them informed of Rotary activities.**

Club assemblies allow all members of the club to stay current, discuss decisions that affect the club, and hear committee reports on their activities.

**4. Plan for communication between club leaders, club members, and district leaders.**

Work with club leaders to develop a plan for communicating with each other, club members, and district leaders. The plan should specify who will communicate with whom, what method will be used, and when communication will occur.

**5. Support continuity in club leadership and service projects.**

Because Rotary club leadership changes annually, every club needs a continual supply of leaders. Continuity may be achieved by making appointments for multiple years or by having the current club president work closely with the president-elect, president-nominee, and immediate past president. Continuity in project leadership is important because service projects can last longer than one year.

**6. Amend club bylaws to reflect the practices of the club, including committee structure and the roles and responsibilities of club leaders.**

Work with your club officers to modify the Recommended Rotary Club Bylaws from RI to reflect your club's operations. Ensure that any bylaw changes are in accordance with the Recommended Rotary Club Bylaws and Standard Rotary Club Constitution as well as all applicable local laws.

**7. Provide opportunities to increase fellowship among club members.**

Members who enjoy Rotary will feel more involved. Strong club fellowship will also support your club's service efforts. Involve the families of your members to ensure they support your club as well.

**8. Ensure that every member is active in a club project or function.**

Club involvement teaches members about Rotary and helps retain them as active members of the club.

**9. Develop a comprehensive training plan.**

Training is crucial for developing future leaders and ensuring that current club officers are well informed about Rotary, capable of leading the club, and able to provide better Rotary service. A training plan ensures that

- Club leaders attend district training meetings
- Orientation for new members is provided consistently and regularly
- Ongoing educational opportunities are available for current members
- A leadership skills development program is available for all members



The Club Leadership Plan encourages clubs to review their committee structure to ensure that it meets their current needs. The plan recommends the following committees:

- Club administration
- Membership
- Public relations
- Service projects
- The Rotary Foundation

The club should appoint additional committees and subcommittees as needed, such as for special projects or to reflect the traditional activities of the club. Each standing committee should set goals in support of the club's annual and long-range goals.

Club president responsibilities for each area of the Club Leadership Plan are integrated throughout this manual. With your fellow club leaders, you should review the plan annually to ensure that it continues to meet your club's goals and reflect your club's identity. Ask district leaders, particularly your assistant governor, for help as you implement and review your plan.

## Resources

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Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help you fulfill your responsibilities:

### Human Resources

- Past club presidents — Knowledgeable Rotarians who understand your club and its needs. They can serve as advisers when you plan your year and be assigned to lead club activities.
- Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.

### Informational Resources

- *Club Leadership Plan* (245-EN) — Guide to implementing the Club Leadership Plan to strengthen your Rotary club.
- Club President's Monthly Checklist — Month-by-month list of activities and deadlines that apply to all Rotary clubs. Revised annually. (Most current version available at [www.rotary.org](http://www.rotary.org))

- *Manual of Procedure* (035-EN) — RI and Foundation policies and procedures, including the RI constitutional documents, established by legislative action, the RI Board of Directors, and the Trustees of The Rotary Foundation. Issued every three years after each Council on Legislation.
- *Official Directory* (007-EN) — Contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing of clubs within districts, including contact information. Issued annually (available in Member Access at [www.rotary.org](http://www.rotary.org)).
- *RI Catalog* (019-EN) — List of RI publications, audiovisual programs, forms, and supplies. Updated annually.
- Rotary Code of Policies and Rotary Foundation Code of Policies — Policies and procedures established by the RI Board of Directors and the Trustees of The Rotary Foundation in support of the RI Constitution and Bylaws, revised following each Board or Trustees meeting (most current versions available at [www.rotary.org](http://www.rotary.org)).
- *Rotary World* (050-EN) — Quarterly publication for Rotary leaders that can be used for club bulletins and other newsletters.
- *RVM: The Rotarian Video Magazine* (510-DVD) — Documentary-style stories on DVD that chronicle the achievements and projects of Rotarians worldwide; ideal for club meeting presentations, member recruitment, and community public relations efforts.
- *The Rotarian* — RI's official magazine, published monthly. Provides information on club and district projects, RI Board decisions, and RI meetings. In addition to *The Rotarian*, 31 regional magazines in more than 20 languages serve club members around the world.
- [www.rotary.org](http://www.rotary.org) — Comprehensive resource for Rotary information, includes sections for running a club, Club Leadership Plan, constitutional documents, and Member Access, an online administrative tool for reports to RI.

## Discussion Questions

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Consider these questions in preparation for your presidents-elect training seminar.

What additional responsibilities does your club assign to the president?

How will you ensure continuity with the current president and your successor?

How did (could) your club benefit from the Club Leadership Plan?

If you haven't yet implemented the Club Leadership Plan, how will you begin to do so?

# Worksheet 1: Summary

## Notes

[illegible]

## Role and Responsibilities

### I learned . . .

**I will ...**

**I will ...**

## Contacts

[illegible]

## Worksheet 2: Club Leadership Plan Case Study

Develop a plan for advising a Rotary club that is implementing the Club Leadership Plan. Answer the questions below.

A Rotary club has 40 members. It has lost at least three members each of the last five years and has only brought in an average of two new members a year over the same period of time. In its 10 years of existence, the club has held an annual breakfast to raise funds for the fire department, a 5-kilo-meter run to raise funds for the school district, and a holiday meal for a retirement community. The club has never sponsored a Rotary Foundation or World Community Service project. The club does not know the contents of its bylaws and is unsure of when it was last revised. The club has never pursued public relations.

The president-elect heard about the Club Leadership Plan at the presidents-elect training seminar and feels it could improve the club. She has come to you to ask for your assistance in working out a timetable over the 15 weeks until the new Rotary year begins to implement the plan.

What are the problems this Rotary club is facing?

How can each implementation step of the Club Leadership Plan address these problems?

What goals might you advise the club to set for the first year of the plan?

What suggestions would you make to help the club follow the Club Leadership Plan throughout the year?

# Worksheet 3: Implementing the Club Leadership Plan

Review each implementation step below. Check the steps your club currently does and circle what steps your club is having difficulty with.

## Implementation Steps

To implement a club leadership plan, current, incoming, and past club leaders should:

- ☐ Develop a long-range plan that addresses the elements of an effective club for the next three to five years.
- ☐ Set annual goals using the *Planning Guide for Effective Rotary Clubs* in harmony with the club's long-range plan.
- ☐ Conduct \_\_\_\_ (#) club assemblies that involve members in the planning process and keep them informed of the activities of Rotary.
- ☐ Develop a clear communication plan among the club president, board, committee chairs, club members, district governor, assistant governors, and district committees.
- ☐ Provide for continuity in leadership, including the concept of succession planning, to ensure the development of future leaders. Ensure the president-elect and president-nominee are involved in the decision making and work with the committee chairs to appoint a chair-elect to each committee.
- ☐ Amend bylaws to reflect the club committee structure and the roles and responsibilities of club leaders. Consider adopting the Recommended Rotary Club Bylaws, found at [www.rotary.org](http://www.rotary.org).
- ☐ Provide opportunities to increase fellowship among members of the club.
- ☐ Take steps to ensure that every member is active in a club project or function, such as appointing all members to a committee and assigning responsibilities to new members.
- ☐ Develop a comprehensive training plan that ensures
  - ☐ Club leaders attend district training meetings
  - ☐ Orientation is consistently and regularly provided for new members
  - ☐ Ongoing educational opportunities are available for current members
  - ☐ A leadership skills development program is available for all members

Club leaders should implement the Club Leadership Plan in consultation with district leaders as described by the District Leadership Plan. The plan should be reviewed annually.

During my year, I will focus on the following:

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# Working with Your Club and District Leaders



Your success as club president depends on your working relationships with club and district leaders. It is important to be both a leader, providing a vision for your club and motivating others to action, and a manager, assigning responsibilities, ensuring deadlines are met, and ensuring open and direct communication.

## Responsibilities

As president-elect, you have the following responsibilities for working with your club and district leaders:

- Appointing club committee members based on their skills and potential for growth
- Preparing your club's leadership team for the coming year
- Understanding the role of the district in supporting your club

As president, you have the following responsibilities:

- Ensuring clear communication among your club and district leaders
- Having continuity in leadership of your club and committees
- Recognizing club leaders and members with awards



### **Rotary Reminder**

#### **Your Club Leadership Team**

- Club board of directors
  - Vice president
  - President-elect
  - Club secretary
  - Club treasurer
  - Immediate past president
  - Additional directors
- Club trainer
- Sergeant-at-arms
- Committee chairs



### **Rotary Reminder**

For more on the role of your club board of directors, see chapter 3, “Club Administration.”

## **Working with Your Club**

The Rotarians on the incoming club leadership team will achieve your club’s goals, so involve them in the development of club goals. Reach a consensus for what your club wants to achieve, and then make the necessary appointments to achieve these goals. With responsibility delegated to your club leadership team, you’ll have more time to devote to motivating members to participate in club projects or functions.

Ensure that club leaders attend district training meetings so that they’re prepared for their responsibilities, and work with your club leadership team to prepare future club leaders for a smooth transition into the new Rotary year.

### **Club Board of Directors**

Your club’s board of directors is its governing body. Its members are the president, vice president(s), president-elect (or president-nominee, if no successor has been elected), secretary, treasurer, the immediate past president, and the additional number of directors specified in your club’s bylaws.

The board is elected to manage the interests of the club as a whole. Board members will work closely with you to carry out plans and achieve club goals. Based on the Recommended Rotary Club Bylaws (appendix K), your club’s board of directors should have the following responsibilities:

- Overseeing all club officers and committee members
- Electing a member of the club to act as sergeant-at-arms
- Overseeing the club’s budget
  - Ensuring the budget includes realistic amounts for club operations and service projects
  - Approving all expenditures not accounted for in the club budget
- Informing those who propose members of the board’s decision, through the club secretary, within 30 days
- Reviewing the policies of the club to ensure they’re being implemented as intended
- Considering new and creative ways to fulfill the Object of Rotary
- Examining the needs of the community and the world and establishing club goals to address them

### **Club Secretary**

Your focus as president is on leading your club. Your secretary has much of the administrative responsibility for the day-to-day club operations.

Based on the Recommended Rotary Club Bylaws, your club’s secretary should have the following responsibilities:

- Maintaining membership records
- Recording attendance at meetings, and reporting monthly attendance figures to the district governor within 15 days of the last meeting of each month



- Sending out notices of meetings of the club, board, and committees
- Recording and maintaining minutes of club, board, and committee meetings
- Making required reports to RI and your district, including the semi-annual report of membership, and paying dues to Rotary International on 1 July and 1 January
- Working with your club officers
- Performing any other duties that usually pertain to the office of secretary

Work with the club secretary to understand the status and trends of the club during the year. At the end of the year, work with the secretary to update the club archive, including a summary of activities for the year, photographs of officers or special events, names of new members, and a list of outstanding accomplishments.

Beware of e-mails that use Rotary terminology and ask for passport or other personal identifying information. They are often fraudulent and should be disregarded. Before providing any personal information in response to an e-mail, confirm the sender's identity and the reason for the request via separate e-mail or phone call.

### **Club Treasurer**

Your role as president is to ensure competent oversight of club funds, transactions, and reports. You should be aware of the financial condition of your club at all times by meeting regularly with your club's treasurer.

The club treasurer should manage your club's financial transactions, maintain club financial records, and help plan your club's budget. The Recommended Rotary Club Bylaws lists the following responsibilities for the treasurer:

- Maintaining custody of all club funds
- Accounting for all club funds, books of accounts, or any other club property to the board of directors, incoming treasurer, or the president at the end of the year
- Working with the successor to ensure a smooth transition between Rotary years
- Performing other responsibilities related to the office

### **Sergeant-at-Arms**

To conduct effective weekly meetings, the sergeant-at-arms must keep the meeting running smoothly, with few interruptions. The sergeant-at-arms has the following responsibilities:

- Helping to maintain orderly and effective Rotary club meetings
- Working to prevent any occurrence that might detract from the dignity or prestige of the club



#### **Rotary Reminder**

To gain access to the RI club administrative data, you, your club's secretary, and treasurer should register with Member Access at [www.rotary.org/en/selfservice](http://www.rotary.org/en/selfservice).



#### **Rotary Reminder**

If your club has no treasurer, the secretary should perform these functions.

**Rotary Reminder**

Refer to worksheet 9 to see how your club can use a club trainer.

**Club Trainer**

To ensure your club has a training plan, you may wish to appoint a club trainer. The club trainer should work with the club's board and committees, your assistant governor, the district training committee, and the district governor for support and ideas.

The training plan for the club should ensure that

- Club leaders attend district training meetings
- Orientation is consistent and regularly provided to new members
- Ongoing educational opportunities are available for current members
- A leadership skills development program is available for all members

**Your Successor**

To create greater continuity with your club leadership team, remember to work with your successor, especially on activities that last more than a single Rotary year, such as strategic planning, committee appointments, and club service projects.

**Club Committees**

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Your club's committees should plan, promote, and implement activities and projects to carry out your club's annual and long-range goals.

As president-elect, you have the following club committee responsibilities:

- Determining how well the current club committee structure supports the goals for the coming year
- Appointing committees no later than 31 March
- Preparing your club's committee chairs
- Ensuring continuity on club committees and filling any openings
- Amending the club bylaws to accurately reflect the club's organizational needs, if necessary

As club president, you will oversee the work of each committee to ensure all reach the goals set for the year.

**Club Committee Structure**

Your club committee structure should support your club's goals and objectives for the year. The recommended club committee structure includes the following five club committees, which are explained in this manual:

- Club administration (chapter 3)
- Membership (chapter 4)
- Service projects (chapter 5)
- The Rotary Foundation (chapter 6)
- Public relations (chapter 7)

**Rotary Reminder**

For examples of club committee structures, refer to appendix A.

Your club should appoint additional committees as needed, such as for special projects or to reflect the ongoing activities of the club. Your club may also appoint subcommittees as needed. For example, the service projects committee might have subcommittees for community service, international service, or youth programs (such as Rotary Youth Exchange or Interact). If your club is very active in a particular Rotary Foundation program, you may want to have a subcommittee dedicated to that program.

### Effective Committees

Each standing committee should set goals in support of the club's annual and long-range goals. Consider these suggestions for making your club's committees more effective:

- Limit committee size to the number of people required to fulfill the committee's purpose.
- Encourage committees to keep records of meetings, plans, decisions, and results and to give progress reports on their activities to the club's board.
- Encourage committees to communicate regularly with one another, your club's assistant governor, and appropriate district committees.
- Participate in committee meetings when needed.
- Solicit feedback from committees.



#### **Rotary Reminder**

Refer to chapter 3 for details on amending club bylaws to alter your club's committee structure.

### Selecting Committee Chairs

Appoint committee chairs based on their professional abilities, personal interests, and talents. Because committee activities may carry over from one year to the next, reappoint some committee members to ensure continuity. Each committee chair should have previous experience on that committee.

### Preparing Committee Chairs

Strongly encourage all committee chairs to attend the district assembly, where they can acquire the necessary skills and knowledge for leading an effective committee.

You can also prepare committee chairs in these ways:

- Give each chair a copy of the corresponding *Club Committee Manual*.
- Ensure that records from past years have been shared with new chairs.
- Encourage new committee chairs to discuss projects and evaluation results with their predecessors.
- Conduct planning meetings with incoming committees before the next Rotary year begins.

### Working with Your Committees

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

- Review the status of each committee's action plan.
- Coordinate collaboration between committees.
- Motivate committees to take on new challenges.

- Respect the direction of a committee when it's different from what you might choose.
- Congratulate, recognize, and thank committee chairs and members when they complete tasks.

## Motivating Volunteers

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Once you have established your goals and developed a plan to achieve them, you must work to motivate your club leaders and committee chairs to follow the action plan. Because Rotarians are volunteers, what motivates them in their profession may not motivate them in Rotary. You must consider each club leader and member as an individual and address their individual motivational needs.

The following are common motivators for volunteers:

- Belief that the goal will benefit the community and their Rotary club
- Fellowship opportunities
- Networking opportunities
- Belief that the goal can be achieved
- Assignments that apply their expertise
- Due dates with consistent follow-up by the president or other members of the club leadership team
- Recognition of their efforts

Use these and other motivating factors to help encourage member commitment to Rotary and participation in club activities. Club activities that combine these motivating factors are particularly effective.

## Awards

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Awards often motivate volunteers. Rotary International and The Rotary Foundation offer awards that recognize the outstanding service of Rotarians and Rotary clubs. For an overview of awards available through RI and The Rotary Foundation, see appendix B. Nomination forms for awards are revised regularly. For more information about eligibility requirements and deadlines, as well as a wide variety of other awards, go to [www.rotary.org](http://www.rotary.org) or contact RI Programs or Rotary Foundation staff.

Districts often develop their own awards to acknowledge outstanding achievement. Contact your governor or assistant governor to learn about awards available for individuals or clubs. Individual clubs are also encouraged to develop their own awards to recognize excellence within the club and community.

As president, you should communicate with district leadership about possible nominees in your club as soon as possible. It is your role to present awards to club or community members. To maximize the motivational potential of awards and contribution recognition:



### **Rotary Reminder**

Develop club annual and long-range goals that will meet award program requirements, such as RI's Presidential Citation.

- Make the presentation memorable.
  - Invite the governor or other appropriate Rotary leader to present the award.
  - Invite family members to attend.
  - Photograph the presentation and publish the photo in the club newsletter.
- Invite prospective members to attend. This allows them to learn about Rotary and the outstanding contributions of club members. It also demonstrates the club's appreciation of its members.
- Create an appropriate atmosphere for the presentation.
  - Use a stage or podium.
  - Use decorations or flowers, as appropriate.

## Working with Your District

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The primary responsibility of district leaders is to support effective clubs. The district leadership team consists of the district governor, assistant governors, district committees, the district trainer, district secretary, and past district governors. The district supports your Rotary club by

- Providing guidance on issues such as membership or service projects
- Connecting clubs that have similar issues or projects
- Providing an opportunity for Rotarians to develop their leadership skills and increase their service efforts through membership on district committees
- Conveying detailed Rotary information to club committees and members
- Coordinating RI and Rotary Foundation programs

### District Governor

The administration of clubs in a district is under the direct supervision of the district governor, who

- Provides advice, inspiration, and motivation to help clubs become more effective
- Informs clubs and their officers of district activities and opportunities for service

### Assistant Governors

Assistant governors are appointed by the district governor to help clubs operate effectively and achieve their goals. Each assistant governor is responsible for working with four to eight clubs. The following responsibilities are recommended for an assistant governor:

- Assisting in implementing and reviewing the Club Leadership Plan
- Helping identify and review club goals using the *Planning Guide for Effective Rotary Clubs*
- Attending club meetings and assemblies as invited, particularly the club assembly associated with the governor's official visit

- Visiting each club regularly (preferably monthly with a minimum of one visit each quarter of the Rotary year) and meeting with club leaders to discuss club business, resources, and handling of club funds
- Assisting club leaders in scheduling and planning for the governor's official visit
- Acting as a liaison between the governor and clubs
- Encouraging clubs to follow through with suggestions from the governor
- Assisting clubs with service projects and monitoring progress
- Identifying and encouraging the development of future district leaders

### **District Committees**

District committees support club activities related to their area of expertise. The following are the district committees that address ongoing administrative functions:

- District conference
- District programs (for example, Rotary Youth Leadership Awards, World Community Service)
- Extension
- Finance
- Membership development
- Nominating
- Public relations
- RI Convention promotion
- The Rotary Foundation
- Training

Encourage your club committees to contact their district counterparts whenever they need guidance or information.

### **Resources**

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Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help you work with your club and district leaders:



Recommended Rotary Club Bylaws and Standard Rotary Club Constitution — Current versions available at [www.rotary.org](http://www.rotary.org).

### Informational Resources

- *Club Officers' Kit* (225-EN) — Set of manuals outlining responsibilities and general guidelines for club officers. Training discussion questions are provided. The kit includes:
  - *Club President's Manual* (222-EN)
  - *Club Secretary's Manual* (229-EN)
  - *Club Treasurer's Manual* (220-EN)
  - *Club Administration Committee Manual* (226A-EN)
  - *Club Membership Committee Manual* (226B-EN)
  - *Club Public Relations Committee Manual* (226C-EN)
  - *Club Service Projects Committee Manual* (226D-EN)
  - *Club Rotary Foundation Committee Manual* (226E-EN)
- District directory — Listing of district leaders and activities (if your district produces a directory).
- *Leadership Development: Your Guide to Starting a Program* (250-EN) — Program guidelines and session ideas for developing leadership skills.
- *Presidential Citation Brochure* (900A-EN) — Leaflet that outlines the requirements for a club to receive a presidential citation for the current Rotary year.
- Rotary Code of Policies and Rotary Foundation Code of Policies — Policies and procedures established by the RI Board of Directors and the Trustees of The Rotary Foundation in support of the RI Constitution and Bylaws, revised following each Board or Trustees meeting (most current versions posted at [www.rotary.org](http://www.rotary.org)).
- [www.rotary.org](http://www.rotary.org) — Comprehensive resource for Rotary information, includes sections for running a club, Club Leadership Plan, constitutional documents, and Member Access, an online administrative tool for reports to RI.

### Discussion Questions

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Consider these questions in preparation for your presidents-elect training seminar.

How will you prepare your club leadership team?

How will you work with your club's board of directors?

How does your club's current committee structure meet the needs and goals of your club? What changes are needed?

What motivates Rotarians in your club?

What service and contribution recognition does your club award?

How can your district support your club?



# Appendix A: Sample Club Committee Structure



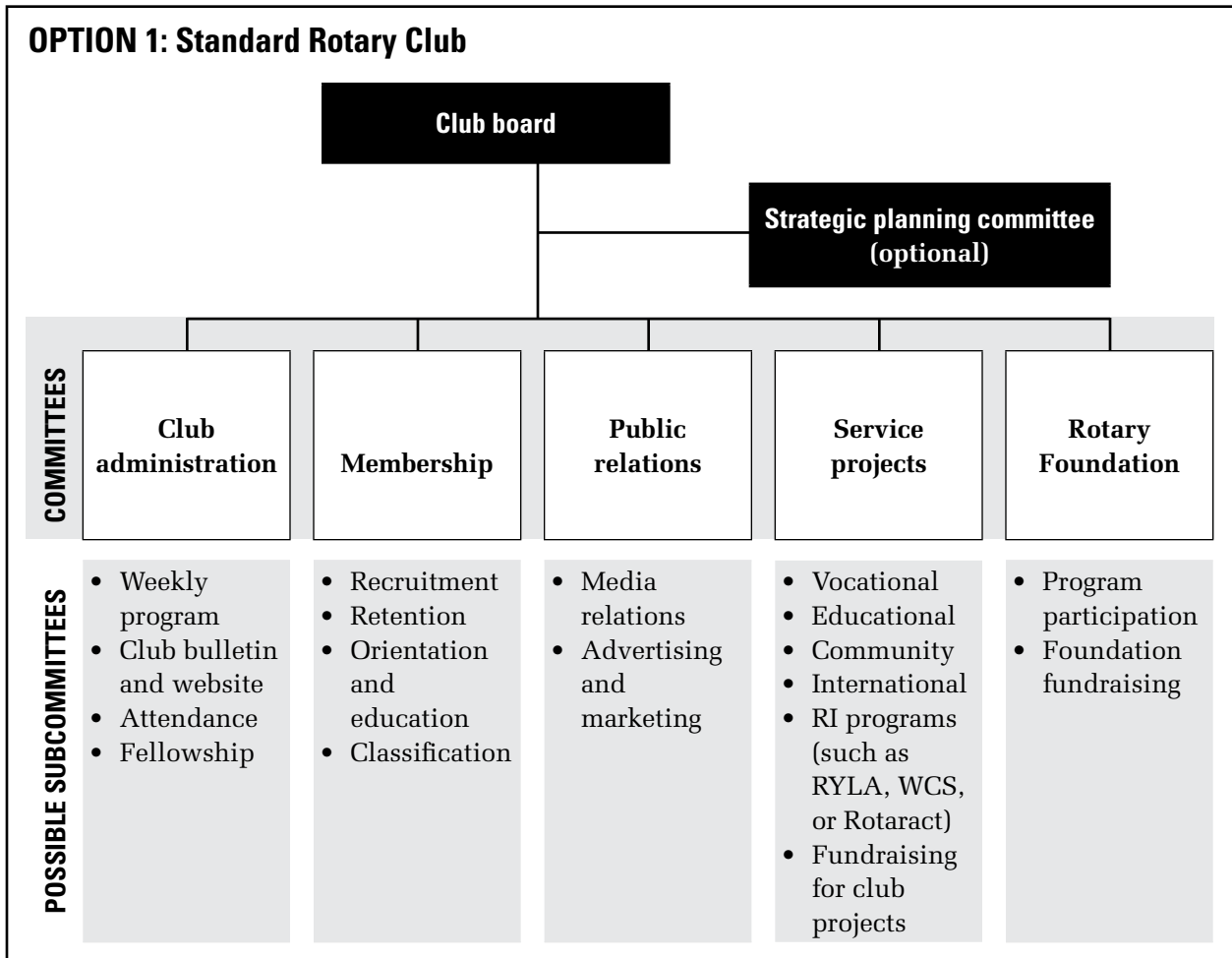
## Rotary Reminder

Each Rotary club's committee structure is unique as it is based on the goals and operational needs of the club itself.

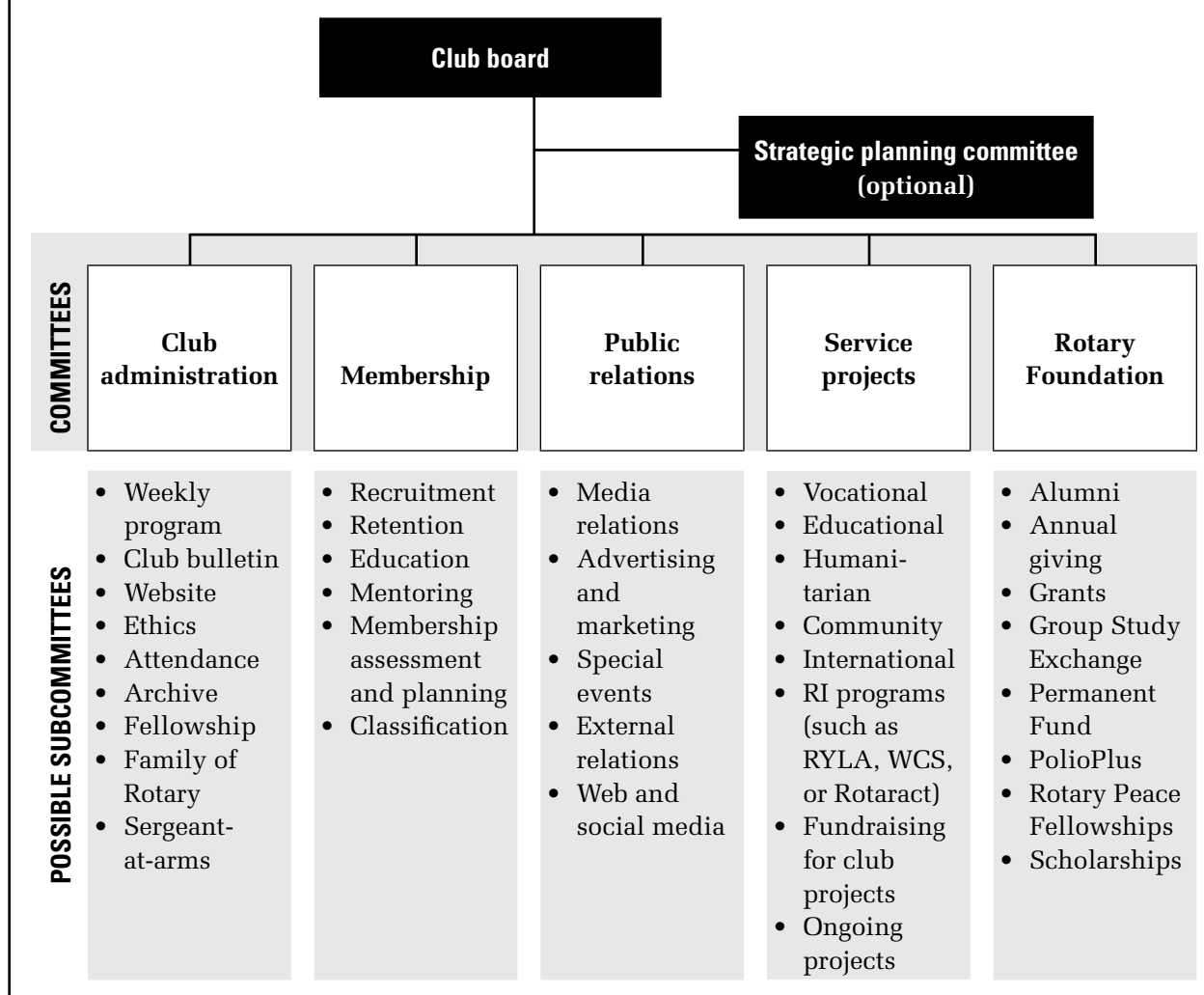
Under the Club Leadership Plan, there are five recommended standing committees. Each club can add additional committees or subcommittees to meet the special interests of their club or ongoing projects. Committees and subcommittees can also be eliminated if the club does not participate in that activity.

Below are sample subcommittees for each of the standing committees depending on your club's membership size. Choose the structure that meets the needs and goals of your clubs and then add, move, and delete subcommittees as needed or develop your own committee and subcommittee structure with your fellow club leaders. If you need assistance with determining the appropriate subcommittees, contact your assistant governor or district governor.

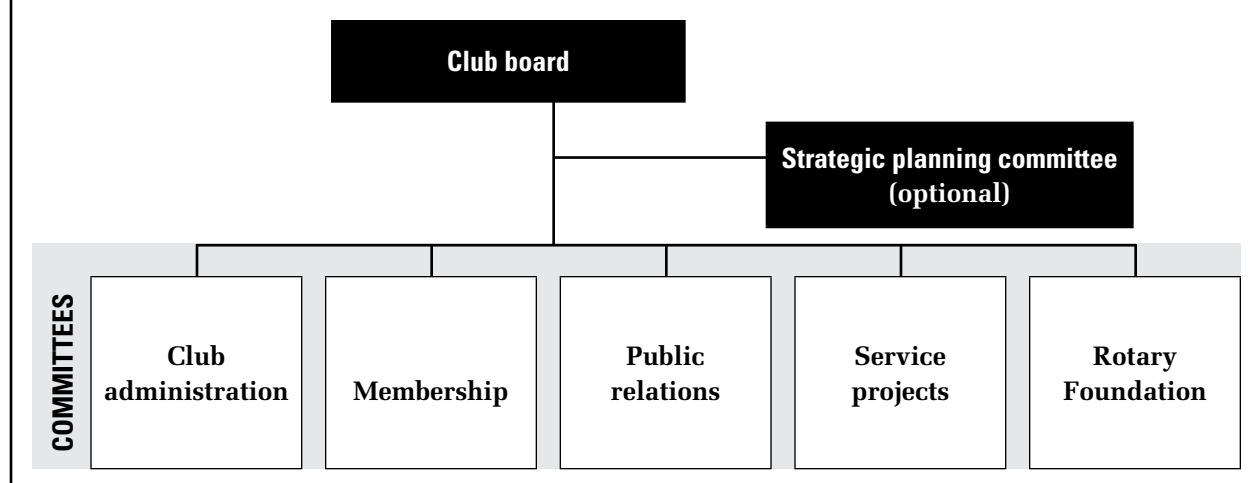
## OPTION 1: Standard Rotary Club



## OPTION 2: Large Rotary Club



## OPTION 3: Small Rotary Club



# Appendix B: RI and Rotary Foundation Awards

Recognizing the significant efforts of Rotarians is an important part of Rotary. Awards can help you motivate Rotarians and thank them for their service. The following RI and Foundation awards are available to Rotarians or clubs.

Award	Honorees	Nominated by	Awarded by
<b>Individual Rotarian Awards</b>			
Four Avenues of Service Citation	One Rotarian per club per year	Club president	RI president
RI Service Above Self Award	Maximum of 150 Rotarians per year	Current and immediate past district governors, current and past RI directors	RI president
Service Award for a Polio-Free World	Eligible Rotarians	Any Rotarian	The Rotary Foundation Trustees
The Rotary Foundation Citation for Meritorious Service	One Rotarian per district per year	RI directors and district governors	The Rotary Foundation Trustees
The Rotary Foundation Distinguished Service Award	Not more than 50 Rotarians worldwide per year	Any Rotarian (additional endorsement from outside the nominee's district required)	The Rotary Foundation Trustees
The Rotary Foundation District Service Award	Up to 20 Rotarians per district	District governor	District governor
The Rotary Foundation Global Alumni Service to Humanity Award	One Foundation alumna or alumnus	Foundation Trustees, regional Rotary Foundation coordinators, district governors, or district alumni subcommittee chairs	The Rotary Foundation Trustees
<b>Club and District Awards</b>			
External Relations Best Cooperative Projects Award	Up to five clubs per district	District governor	RI president
Presidential Citation	Rotary clubs	District governor	RI president
RI Membership Development and Extension Award	Rotary clubs	District governor	RI president
RI Recognition of Membership Development Initiatives	Rotary clubs	District governor	RI president
RI Recognition of Smaller Club Membership Growth	Rotary clubs	District governor	RI president
Significant Achievement Award	One club from each Rotary district	District governor	RI president

# Worksheet 4: Summary

## Notes

## Working with Your Club and District Leaders

## I learned . . .

**I will . . .**

**I will ...**

## Contacts

[illegible]

# Worksheet 5: Club Committee Structure

Think about your club's current committee structure. Outline this structure below. During your year, what committees will you add, eliminate, or consolidate? Which committees will have subcommittees? Outline your ideas for your year below.

Current Committee Structure

Committee Structure during Your Year

# Worksheet 6: Case Studies: Managing Relationships

As club president, you will need to manage Rotarians with different work styles who are motivated by different things. Review each scenario below, and answer the questions that follow.

**Scenario 1: Underperforming Committee Chair**

Daniel is your service projects committee chair, and this is his first year in office. It's halfway through the year, and he isn't performing to your expectations. He doesn't communicate with committee members and hasn't made progress on any of the committee's goals. The committee members are frustrated and are threatening to step down if action isn't taken.

How will you address the situation with this committee chair?

How will you respond to the committee members' concerns?

**Scenario 2: Your Assistant Governor**

Maria has been an assistant governor for one year. The previous club president had some challenges with her, but you are determined to overcome these challenges and have a great year. Halfway through the year, you realize your past club president was right. Maria is not organized, and you have been unable to reach her by phone or e-mail. She also forgot to schedule your governor's monthly visit.

What can you do to improve communication with your assistant governor?

What will you do to make the last half of your year successful?

# Club Administration



The administration of your Rotary club is ultimately under the supervision of your club's board of directors, which you lead. Your club leadership team, particularly the club administration committee, should assist you with your administrative responsibilities in order to increase the effectiveness of club operations.

The Club Leadership Plan is the recommended administrative structure for Rotary clubs. Under this plan, effective club administration is key to carrying out your club's annual and long-range goals. In order to implement the Club Leadership Plan, Rotary clubs develop standard procedures for continuity, communication, and Rotarian involvement. The plan's simple committee structure focuses on the central functions of a club and can be expanded to address club service goals and fellowship.

## Responsibilities

As president-elect, you have the following club administration responsibilities:

- Appointing and meeting with your club administration committee
- Knowing your club's administrative policies and procedures by reviewing the most recent versions of the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws (appendixes J and K)
- Understanding the process for amending club bylaws and working with club leaders to update your club's constitution and bylaws

- Determining which aspects of the Club Leadership Plan can strengthen your club

As president, you have the following club administration responsibilities:

- Fulfilling district and RI administrative requirements
  - Overseeing the club's reporting requirements
  - Working closely with the club secretary to ensure that required reports and forms are sent to RI and the district in a timely manner
  - Understanding how to use Member Access to update club records and make the semiannual dues payment
  - Overseeing the management of club finances
  - Minimizing risk during club activities
- Ensuring the Rotary Marks are used properly
- Developing weekly club meetings and club assemblies that will interest club members
- Encouraging attendance at the district assembly and additional training meetings, as appropriate
- Preparing for the district governor's official visit and the quarterly (or more) visits of your assistant governor



#### **Rotary Reminder**

Consider planning a weekly meeting or activity in observance of Magazine Month (April).

#### **Minimum Standards**

To ensure that clubs function effectively, the RI Board has adopted these minimum standards:

- Paying per capita dues to Rotary International
- Meeting regularly
- Subscribing to a certified Rotary World Magazine Press publication (*The Rotarian* or Rotary regional magazine)
- Implementing service projects that address needs in the local community and communities in other countries
- Receiving the visiting governor, assistant governor, or any other officer of Rotary International
- Maintaining liability insurance appropriate for the geographic region in which the club is located (United States only: Paying mandatory liability insurance with the semiannual report)

Work with your assistant governor to ensure your club is exceeding the minimum standards.





### **Rotary Reminder**

More information about the club administration committee is in the *Club Administration Committee Manual*, the *Club Secretary's Manual*, and the *Club Treasurer's Manual*.

## **Club Administration Committee**

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Ensuring effective club administration is a collaborative effort. As club president, you lead this effort while the club administration committee carries out the specific responsibilities. Include the club administration committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

The club administration committee should help carry out your club's annual goals. The club secretary and treasurer should be members of this committee. The chair of this committee, appointed by you, should be part of your club leadership team.

Your club administration committee has the following responsibilities:

- Helping the club secretary track club attendance
- Maintaining club membership lists and reporting to Rotary International
- Helping the club treasurer collect dues
- Organizing weekly and special programs
- Promoting fellowship among club members
- Producing the club bulletin and Web site

## **Your Club's Constitution and Bylaws**

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The Standard Rotary Club Constitution must be adopted by all clubs admitted to membership in Rotary International. It provides a model framework for Rotary club operations. Following the Council on Legislation, which will occur in 2010 and 2013, the Standard Rotary Club Constitution will be updated to include Council enactments. Be sure that your club is using the correct version of the Standard Rotary Club Constitution (appendix J).

Your club's bylaws provide additional guidelines, not included in the club constitution, for managing your club. The Recommended Rotary Club Bylaws (appendix K) are developed in harmony with the Standard Rotary Club Constitution and reflect current Rotary policy. You can adapt them to meet your club's needs, goals, and activities and reflect its unique identity. To prepare for your year as club president, you should review your club's bylaws and work with your club leadership team to amend them to reflect any new practices and procedures as well as the club committee structure and the roles and responsibilities of your club's leaders.

### **Proposing and Voting on Amendments**

If your club needs to amend its bylaws to reflect its current practices:

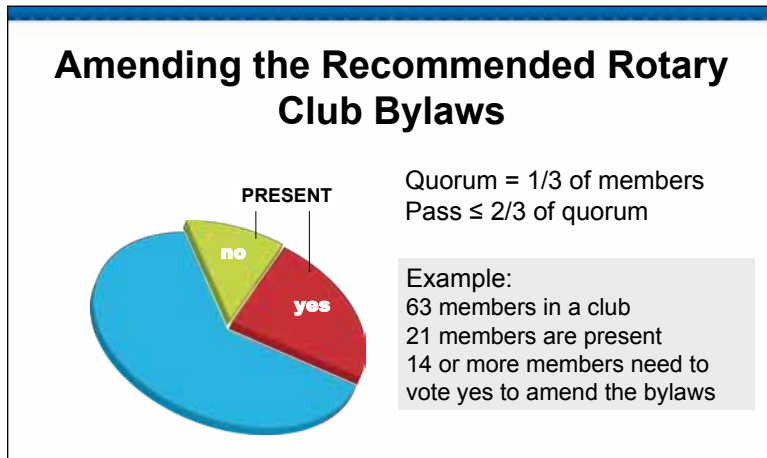
- Notify all members of the proposed amendment at least 10 days before the meeting.
- Ensure you have at least one-third of active members (a quorum) present at the regular meeting to vote.



### **Rotary Reminder**

**2010-11 Club presidents:** Be sure to find out the changes made to the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws following the 2010 Council on Legislation.

- Pass the amendment if it is supported by two-thirds of the members present.
- Ensure that the amendment is in harmony with the Standard Rotary Club Constitution and the RI Constitution and Bylaws.



#### **Rotary Reminder**

Most RI and Foundation reports can be submitted through Member Access.

### **RI and Rotary Foundation Reporting Requirements**

To ensure that RI mailings and communications, including semiannual reports, reach the appropriate members of your club, regularly update all club records. The information below can also be updated through Member Access at [www.rotary.org](http://www.rotary.org).

Every Rotary club is required to submit the following reports and information:

- To RI
  - Semiannual reports (due 1 July and 1 January), which include RI per capita dues
  - Changes in membership
  - Changes in officer or meeting information
  - Information for the *Official Directory* (by 31 December)
  - Individual and club subscriptions to *The Rotarian* or Rotary regional magazine
  - Council on Legislation dues (July only)
  - USA and its territories only: Insurance (July only)
- To The Rotary Foundation
  - Use of Rotary Foundation funds
- To the district
  - Club goals (using the *Planning Guide for Effective Rotary Clubs* and *The Rotary Foundation Fund Development Club Goal Report Form*)
  - Monthly attendance figures



#### **Rotary Reminder**

You'll find more information about club reporting requirements in the *Club Secretary's Manual*.

## Financial Management

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As club president, you have fiscal responsibilities such as monitoring your club's funds, practicing good stewardship, and ensuring that the club complies with all local laws, including tax and nonprofit (as applicable). Refer to worksheet 8 for a list of financial management best practices.

### Dues and Fees

Work with your club treasurer to review or establish a system to collect and pay dues and fees.

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

**Admission fees.** Many clubs charge an admission fee for new members, as determined by the club's bylaws. This fee does not apply to transferring or former members of other clubs or to Rotaractors.\*

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

**RI per capita dues.** Twice a year, clubs are charged per capita dues.\*\* All dues, including prorated dues, are payable on 1 July and 1 January. For each new member admitted within a semiannual period, the club must pay prorated per capita dues to Rotary International; the amount payable for each full month of membership is one-twelfth of the annual per capita dues.

Per capita dues pay for the organization's general operating expenses, including producing publications in multiple languages; providing club, district, and project support; offering training, guidance, and resources for incoming club leaders; and maintaining [www.rotary.org](http://www.rotary.org).

**RI fees.** Besides dues, Rotarians are charged for required magazine subscriptions, Council on Legislation fees, and other expenses. Payments for *The Rotarian* or the *Revista Rotaria* regional magazine should be submitted with semiannual dues. All other regional magazine subscription payments should be sent directly to the appropriate magazine editor.

### Semiannual Dues Invoice (SAR)

RI sends a semiannual dues invoice as part of a SAR package to each Rotary club secretary in late June for the July billing and in late December for the January billing. The package includes a current membership list, which

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

\*\* Dues are determined by the triennial Council on Legislation.

serves as the basis for the estimated billing; a worksheet to calculate any necessary revisions; and instructions for completing the forms and sending the information and payment to RI or its fiscal agents.

The invoice charges clubs RI per capita dues and fees based on their most current membership list. (Clubs with fewer than 10 members are required to pay for 10 members.) Help the club secretary keep this list up-to-date through Member Access on [www.rotary.org](http://www.rotary.org) so that your club's per capita billing is accurate. Make sure your club number is included on all payments. Your club's balance may also be paid by credit card through Member Access by you, the secretary, or the treasurer.

If the secretary does not receive the SAR package by the end of July or January, a copy can either be printed from Member Access or requested by contacting [data.services@rotary.org](mailto:data.services@rotary.org) or your international office.

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

### **Termination and Reinstatement**

Any club that does not pay its dues and fees to RI will be terminated and will not receive services from RI or the district.

Six months after the 1 January or 1 July deadline, clubs with obligations of US\$250 or more will be terminated from Rotary International. When a club seeks reinstatement within 90 days of termination, it must pay all financial obligations due at the time of termination, all semiannual dues payments that have accrued during the period between termination and reinstatement, and a \$10 per member reinstatement fee. If the club has fewer than 10 members, it is subject to a 10-member minimum payment requirement.

A club that seeks reinstatement more than 90 days but less than 365 days after termination must complete an application for reinstatement and pay a \$15 per member application fee in addition to fulfilling the requirements noted above. The application fee is also subject to the 10-member minimum payment requirement. Terminated clubs that have not fulfilled their entire financial responsibility to RI within 365 days of termination will lose their original charter and will not be eligible for reinstatement. Similarly, any club that fails to pay district dues may have its membership in RI suspended or terminated by the RI Board.

Any member failing to pay dues within 30 days of the deadline should be notified in writing by the club secretary. If the dues are not paid within 10 days of the notification date, membership may be terminated, subject to the discretion of the club's board. The board may reinstate membership upon a member's petition and payment of all debts to the club.

## Taxes

Check with local and national tax codes to determine which forms, if any, the district and its clubs must file. If a club is incorporated, for example, it may need to file additional tax forms. Work with your district finance committee and your assistant governor for more information about these requirements.

All clubs in the United States are required by law to submit an informational return to the Internal Revenue Service every year. Contact your RI Club and District Support representative or the IRS for more information.

## Fundraising

Most Rotary clubs and districts engage in fundraising. Be sure to follow these guidelines and educate members about them:

- Report money earned through fundraising to your local government, if required.
- When promoting fundraising initiatives, be precise about where the funds will go — to a local club, the district's own foundation, The Rotary Foundation, or some other entity. Money raised through public fundraising activities should be used for service activities, rather than for supporting the club itself.
- If a fundraiser qualifies as a tax-deductible event, issue receipts to donors as needed.
- Submit all contributions to The Rotary Foundation separately from payments to Rotary International.

For more detailed information about planning a fundraiser, refer to the *Club Service Projects Committee Manual*.



### Rotary Reminder

You'll find more information about club foundations in the *Club Treasurer's Manual*.

**Club foundations.** If your club has or is going to set up a foundation or charitable trust, be sure it follows local laws. Some countries require foundations to register with the government or follow specific rules. For example, clubs that accept contributions to their own foundations are often expected to issue tax receipts from club foundations. Consult with your local tax authority about reporting requirements. For more information about club foundations, contact your Club and District Support representative.

## Risk Management

Risk management is the process of planning, organizing, leading, and controlling an organization's activities to minimize the adverse effects of accidental losses. As club president, you are in a position to minimize risk and safeguard your club's members and assets. Liability issues and potential penalties are geographically specific, and it is your responsibility to learn the laws regarding financial practices and to make sure your club abides by them. Refer to worksheet 8 for a list of risk management best practices.

Limit your personal liability and that of your club by answering three basic questions when planning activities and events for your year as president:

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

If there is a significant possibility that something will go wrong, you can reduce risk by

- Choosing not to conduct the activity or event
- Modifying the activity or event to lessen the risk
- Preparing a plan to address any potential problems
- Finding another organization that will agree to participate and share the risk

Though conducting business through handshakes or verbal agreements may be common, RI strongly recommends that your club use written and signed contracts. A contract attempts to clearly define the roles and responsibilities of each party and can include provisions to limit risk. When negotiating a contract, read it thoroughly to understand what you are agreeing to, and seek legal counsel if necessary. Retain legal documents after the event in case a claim is made.

Clubs are urged to obtain the advice of legal and insurance counsel regarding liability protection, which may come through the incorporation of the club or its activities, or the purchase of liability insurance. General liability insurance for clubs in the United States and its territories is mandatory and administered through RI. Clubs outside the United States should consider acquiring insurance if they do not already have it. See the *Manual of Procedure* for additional information.

## **Member Access**

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The Member Access area of [www.rotary.org](http://www.rotary.org) helps Rotarians perform Rotary business more quickly and easily, provides more continuity between years of leadership, and ensures that RI has accurate records.

Only you and your club secretary can activate other officers' Member Access privileges. Activation requires logging on to Member Access at [www.rotary.org/en/selfservice](http://www.rotary.org/en/selfservice) and indicating the officer's position.

## Rotarian Privileges in Member Access

MAP Feature	President	Secretary	Treasurer	Rotarians
The Rotary Foundation Fund Development Club Goal Report Form	X			
Update Club Data	X	X		
Update Membership Data	X	X		
View Club Recognition Summary (for own club only)	X	X		
Pay Semiannual Dues or Print Semiannual Report (SAR)	X	X	X	
View Daily Club Balance report	X	X	X	
View EREY Eligibility Report	X	X	X	
View Monthly Contribution, <i>SHARE</i> , and Polio Reports	X	X	X	
Contribute to The Rotary Foundation	X	X	X	X
View your Contribution history	X	X	X	X
Search the online <i>Official Directory</i>	X	X	X	X
Manage E-mail Preferences	X	X	X	X
Register for meetings	X	X	X	X
View Member Benefits	X	X	X	X

Currently, club Rotary Foundation committee chairs can also view Rotary Foundation reports. Rotary International continues to enhance its services to Rotarians in its efforts to provide more online support.

## Rotary Marks

The Rotary emblem identifies Rotary clubs and their members in every part of the world. All Rotarians should be concerned with protecting the integrity of the Rotary emblem and ensuring it is available for Rotary clubs and districts to use in the future.

Rotary International is the owner of trademarks and service marks (referred to as the Rotary Marks) for the benefit of Rotarians worldwide. RI has registered the Rotary Marks in over 50 countries to ensure their exclusive use by the association and to strengthen RI's ability to prevent misuse by others. The Rotary Marks include the Rotary emblem, the Rotary name, the Rotary International name, and The Rotary Foundation name. See appendix C for a more comprehensive list.

As club president, RI depends on you to understand how to use the Rotary Marks and to help correct improper uses of the Rotary Marks with the help of your RI Club and District Support representative if needed. Report any misuse of the Rotary Marks by a Rotary Entity\* or by non-Rotarians to your RI Club and District Support representative.

RI policy on the use of the Rotary Marks is included in the *Manual of Procedure* and the Rotary Code of Policies.

### Reproducing the Rotary Emblem

When reproducing the Rotary emblem, follow the guidelines approved by the RI Board of Directors:

- The Rotary emblem may not be altered, modified, or obstructed in any way. It must be reproduced in its complete form.



- The most common problem when reproducing the Rotary emblem is not using it in its entirety. Avoid the following improper uses of the Rotary emblem:

The keyway is missing from the center.



The center of the emblem is filled in.



The emblem is partially covered or modified.



- The Rotary emblem may be printed in any single color or in two colors. When it is printed in two colors, it must be reproduced in its official colors of royal blue (PANTONE® 286 Blue) and either metallic gold (PANTONE® 871 Metallic Gold) or gold (PANTONE® 123 C or 115 U Gold [yellow]).\*\* The Rotary emblem should never be printed in more than two colors.

The Rotary Marks should never be used to further any commercial purpose or political campaign. Also, the Rotary name and emblem may appear on

\* 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, RI Convention host committee, and administrative territorial units of Rotary International. Individual RI programs are not Rotary Entities.

\*\* Gold colors are specified because they reproduce differently depending on the paper choice. See the RI Visual Identity Guide.




club and district stationery and personal cards but never on business stationery or business cards. All incorrect or incomplete reproductions of the Rotary emblem by a club or district should be corrected as soon as possible for electronic publications and in the next reprinting for printed materials.

### **Naming Guidelines: Use of the Rotary Name and Emblem**

When the Rotary name, emblem, or other Rotary Marks appear with the name of a club project, program, Web site, or publication, make sure that the name is placed near the emblem and given equal prominence and used immediately following or preceding the Rotary name. By including your club name, you ensure that your club is recognized in the community for its projects and activities. These guidelines also help protect RI from liability.

As president, review the names of existing and planned club projects and programs to ensure that they're clearly identified by your club's name. For example:

-  **Valley Rotary Club Cleanup Project**
- Centennial Park of the Rotary Club of Mountain City
- [www.anycityrotaryclub.org](http://www.anycityrotaryclub.org)

For assistance with naming guidelines, contact your RI Club and District Support representative.

### **Merchandise and Licensing**

The RI Board of Directors has developed a licensing system to provide high-quality products to Rotarians, and RI asks Rotarians to buy merchandise containing the Rotary Marks only from RI's official licensees. For a list of official licensees, go to [www.rotary.org](http://www.rotary.org) or the *Official Directory*.

If your club wants to raise funds for a project by selling merchandise that bears the Rotary name, emblem, or other Rotary Marks, your club may be able to do so without a license from Rotary International provided that the merchandise bears the Rotary club name, fundraising event or project name, and project date(s). Make sure your club buys merchandise from an RI official licensee. If your club wants to sell merchandise for a long-term fundraising project, you'll need to apply for a license from Rotary International.

## **Meetings**

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Club, district, and international meetings allow Rotarians to learn more about Rotary, develop future leaders, and provide an opportunity for fellowship. Throughout your year as club president, you and your club trainer, if appointed, will prepare for the following meetings:

- Weekly club meetings
- Club assemblies

- Board meetings
- Assistant governor visits
- District governor's official visit
- Leadership development program

You should also promote district and international meetings during weekly meetings, at club assemblies, and in your club's bulletin. Encourage attendance at the following meetings:

- RI Convention
- District-level meetings
  - District assembly
  - District conference
  - District Rotary Foundation seminar
  - District membership seminar
  - District leadership seminar

These meetings offer a unique opportunity for Rotarians at the club level to learn about the broader scope of Rotary activities and enhance fellowship. District meetings provide a forum to discuss club and district projects and to develop project partnerships with other clubs in the district and in the Rotary world. For a detailed summary of these district and international meetings, see appendix D.

## **Weekly Club Meeting**

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Develop a weekly club meeting that provides club members with the information and motivation necessary to increase their participation in activities that serve the club, the community, and the world. To ensure that weekly meetings are effective and well planned:

- Determine programs and create an agenda in advance of the meeting.
- Relate programs to current club projects, activities, using the Rotary calendar.
- Delegate the responsibilities of arranging programs to the club administration committee.
- Include programs that update members on Rotary information.
- Begin and end the meeting on time.
- Have a contingency plan in case a scheduled program is canceled.

Organized meetings that feature interesting, relevant programs will enhance members' personal Rotary knowledge, reinforce the value of continued membership, and make members aware of their local and world community.

## Weekly Meeting Sample Agenda

Adapt this sample agenda to the needs of your club.

Start	Finish	Suggested duration	Activity
		5 min.	<b>Meeting Call to Order</b> According to local custom
		30 min.	<b>Meal and Fellowship Period</b>
		20 min.	<b>President's Time</b> Introduction of visiting Rotarians and guests Correspondence and announcements Committee reports Club business
		30 min.	<b>Program</b> Introduction of speaker Speaker's presentation Closing remarks by president
		5 min.	<b>Adjournment</b>

## Rotary Calendar

The Rotary calendar provides a natural framework for planning weekly meetings. At the beginning of the year, introduce the new RI theme. Discuss events such as the district assembly, district conference, and the RI Convention as they occur. You can also plan programs to occur at the same time as these special Rotary year observances:

<b>July</b>	No Rotary designation
<b>August</b>	Membership and Extension Month
<b>September</b>	New Generations Month
<b>October</b>	Vocational Service Month
<b>November</b>	Rotary Foundation Month World Interact Week (week including 5 November)
<b>December</b>	Family Month
<b>January</b>	Rotary Awareness Month
<b>February</b>	World Understanding Month 23 February: World Understanding and Peace Day/ Rotary's anniversary
<b>March</b>	Literacy Month World Rotaract Week (week including 13 March)
<b>April</b>	Magazine Month
<b>May</b>	No Rotary designation
<b>June</b>	Rotary Fellowships Month



### Rotary Reminder

Special observances on the Rotary calendar are incorporated into the Club President's Monthly Checklist, available from your Club and District Support representative.

## Club Assemblies

A club assembly is a meeting of all club members, including officers, directors, and committee chairs. Club assemblies are an opportunity to discuss your club's programs and activities and educate members. New members particularly should be encouraged to attend club assemblies to learn more about the workings of your club. Regular club assemblies that include all members and your assistant governor ensure clear communication between club leaders, club members, and district leaders.

As president, you are responsible for planning and conducting club assemblies. You, or another designated officer, preside at club assemblies.

Club assemblies allow club members to

- Set goals and develop action plans
- Coordinate committee activities
- Understand how the club's action plans are implemented
- Participate in informal discussions that stimulate creative solutions
- Learn about Rotary and its programs
- Review your club's strengths and weaknesses

Relevant topics for discussion include:

- Annual and long-range goals
- Service projects and club activities
- Membership growth and retention strategies
- District conference or other district and RI meetings
- Rotary programs
- Any topic raised in an open forum

### Scheduling

Four to six club assemblies during the year may be the most effective number. Many clubs hold monthly assemblies. The following schedule is suggested.

Time Frame	Purpose
Immediately following the district assembly (before 1 July)	To describe, review, and discuss plans developed and suggested at the district assembly and to discuss how the club will incorporate the RI theme and emphases (president-elect presides)
After 1 July	To discuss and adopt a plan for the year
Two weeks before the official visit	To prepare for the official visit
During the official visit	To discuss the club's status with the district governor
Midpoint of Rotary year (January/February)	To review the club's progress toward goals and determine the club's plan for the rest of the year
April or May	To provide an opportunity for open discussion (Ideas and suggestions may be implemented to help bring club plans toward completion.)



#### Rotary Reminder

Assistant governors should visit clubs a minimum of four times a year. Some clubs use these visits as opportunities for club assemblies.

## The Official Visit

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The district governor is required by RI to visit each club in the district. The visit can be done with individual or multiple clubs. The purpose of this personal visit is to focus attention on important Rotary issues and motivate the Rotarians in your club to participate in service activities. The official visit is also an opportunity for your club leadership team to ask the governor for guidance with challenges facing your club.

Maximize the impact of the governor's presence by scheduling the official visit to coincide with an important clubwide event (if possible), such as:

- Charter night
- Induction ceremony
- New member orientation program
- Citation or award program
- Rotary Foundation event
- Intercity meeting

### Preparing for the Official Visit

The official visit can be an exciting time for your club, providing opportunities to learn about important issues facing Rotary and to discuss possible solutions to pressing club issues. To best ensure that club members participate:

- Announce the visit at weekly club meetings.
- Publish announcements about the visit in the club bulletin.
- Ask club members to make a special effort to attend the official visit.
- Arrange for recognition or awards (for example, Paul Harris Fellow Recognition) to be presented by the governor.

Club leaders should work together to prepare for a thoughtful discussion on important club topics and issues that would benefit from the governor's knowledge and experience. Arrange your schedule to allow for as much time with the governor as needed. To prepare for the visit:

- Review your club's progress toward the goals established in the *Planning Guide for Effective Rotary Clubs*, and be prepared to discuss it during the visit.
- Make a list of questions, problems, and concerns that can be addressed during the visit.
- Arrange reports of committee plans, activities, and accomplishments.
- Make appropriate arrangements for the governor's spouse, if necessary.

The purpose of a visit by the district governor or assistant governor is to provide support for your club. Rotary clubs are required to allow these visits.

## Elections

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During your first six months in office, you will need to oversee the election of officers.

When electing new officers and directors, it is important to conduct elections that are fair to all members involved. The selection process for a club's board of directors and officers should be stated in your club's bylaws. Each officer and director should be a member in good standing of the club.

The club should hold an officer installation meeting at the beginning of each Rotary year, to give club officers and members an opportunity to renew and reaffirm their commitment to the objectives of RI. Refer to appendix E for a sample club officer installation agenda.

## Resources

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Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help support effective club administration:



**[www.rotary.org](http://www.rotary.org)** — Comprehensive resource for Rotary information, includes sections for running a club, constitutional documents, and Member Access, an online administrative tool.

### Human Resources

- Assistant governor — Appointed by the district governor to help clubs operate effectively and achieve their goals.
- RI Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.

### Informational Resources

- *Club Administration Committee Manual* (226A-EN) — Provides an overview of the club administration committee and its responsibilities as well as available resources and specific committee duties.
- *Club Secretary's Manual* (229-EN) — Component of the *Club Officers' Kit* (225-EN) that explains the responsibilities of the club secretary.
- *Club Treasurer's Manual* (220-EN) — Component of the *Club Officer's Kit* (225-EN) that explains the responsibilities of the club treasurer.
- Governor's monthly letter — Letter sent by the district governor to inform and motivate club leaders and recognize excellence at the club level.

- *Manual of Procedure* (035-EN) — RI and Foundation policies and procedures, including the RI constitutional documents, established by legislative action, the RI Board of Directors, and the Trustees of The Rotary Foundation. Issued every three years after each Council on Legislation.
- *Official Directory* (007-EN) — Contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing of clubs within districts, including contact information. Issued annually.
- Club Administration section of the *Planning Guide for Effective Rotary Clubs* (appendix I) — Club assessment and goal-setting tool used to plan the club administration committee goals.
- Recommended Rotary Club Bylaws and Standard Rotary Club Constitution — Current versions available at [www.rotary.org](http://www.rotary.org).
- *RI Catalog* (019-EN) — List of RI publications, audiovisual programs, forms, and supplies. Available in print and online. Updated annually.
- *Rotary World* (050-EN) — Newspaper published quarterly for Rotary club and district leaders.
- *The Rotarian* or Rotary regional magazine — RI's official magazine, published monthly; provides information on club and district projects, RI Board decisions, and RI meetings. In addition to *The Rotarian*, 31 regional magazines in more than 20 languages serve club members around the world.
- *RI Visual Identity Guide* (547-EN) — Provides information for publications at all levels of Rotary, included proper use of the Rotary emblem, the Rotary colors, elements of good publications, typography, graphics, and photographs.
- *Rotary Logos on CD* (234-MU) — Includes the logos of RI, The Rotary Foundation, and numerous Rotary programs on CD-ROM for use with specific color setting and either coated and uncoated paper.
- [www.rotary.org](http://www.rotary.org) — The administration section of running a club that includes information about club committees, dues, and constitutional documents.

## Discussion Questions

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Consider these questions in preparation for your presidents-elect training seminar.

How does your club use its constitution and bylaws?

How will you ensure that your club's finances are managed responsibly?

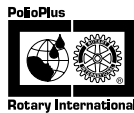
What will you consider when planning your weekly meetings?

What topics will you discuss at club assemblies?



# Appendix C: Rotary Marks

The Rotary Marks include the word Rotary, the Rotary emblem, the names and logos of RI and Rotary Foundation programs, RI themes, RI Convention logos, and many other terms and images, some of which are shown below.



# Appendix D: District and International Meetings

## **Presidents-elect Training Seminar**

The purpose of the presidents-elect training seminar (PETS) is to prepare you for your year as president. You are required to attend PETS in order to serve as president of your club. The seminar focuses on improving club effectiveness in these key areas: working with your club and district leaders, club administration, membership, service projects, The Rotary Foundation, public relations, and goal setting. PETS also provides you with an opportunity to meet your assistant governor and draft goals for your year in office.

## **District Assembly**

The purpose of the district assembly is to provide incoming club committee chairs, secretaries, treasurers, and presidents-elect with the necessary skills and knowledge to help their clubs pursue club goals for their year in office. This meeting focuses on the same areas as the presidents-elect training seminar but on a wider club level. The district assembly also provides club leaders with an opportunity to build their team through goal-setting and problem-solving exercises and meet the district governor-elect, incoming assistant governors, and district committees.

## **District Membership Seminar**

The purpose of the district membership seminar, held after the district assembly, is to prepare club leaders to support membership activities in their club. You and all members of your membership committee should attend to learn new strategies to recruit and retain members. Other interested Rotarians may also attend.

## **District Conference**

The purpose of the district conference is to advance the Object of Rotary through fellowship and the discussion of matters of importance to Rotary clubs and Rotary International. The conference features Rotary programs and successful district and club activities. Your club should strive for broad representation at the conference.

## **District Leadership Seminar**

The purpose of the district leadership seminar, held in conjunction with the district conference, is to learn more about serving Rotary at the district level. Past club presidents and club leaders are encouraged to attend.

## **District Rotary Foundation Seminar**

The purpose of the district Rotary Foundation seminar is to provide key information about The Rotary Foundation and encourage increased club-level participation. The seminar supports the fourth object of Rotary, reaching every Rotarian with The Rotary Foundation's message of achieving world understanding and peace. The seminar is for the club Rotary Foundation committee chair and members and other interested Rotarians.

## **RI Convention**

The purpose of the annual RI Convention is to celebrate the achievements of Rotary International, promote fellowship among Rotarians from around the world, and share service ideas and strategies to strengthen club and district programs. The convention is held in May or June.

# Appendix E: Installation of Club Officers

While there is no required ceremony for installing officers, your club may wish to establish one that honors the new officers and acknowledges the efforts and accomplishments of the outgoing officers. The following is a suggested outline for the installation of new officers that can be adapted as needed:

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

## Sample:

### 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

## Sample:

### Oath for the 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

## Sample:

### Outgoing president:

I hereby declare the new officers and directors installed and give President \_\_\_\_\_  
the gavel as symbolic of the transfer of the club's administration.

9. New president's address

# Worksheet 7: Summary

## Notes

[illegible]

## Club Administration

### I learned . . .

**I will ...**

**I will ...**

## Contacts

[illegible]

# Worksheet 8: Financial and Risk Management

## Best Practices Checklist

Review the items on this checklist. Check the items your club already does, and circle the items you would like your club to implement. Add any additional best practices related to your club.

### Financial Management

- ☐ Register the club with the government, if required.
- ☐ Submit club tax documentation, if required by the local or national tax code.
- ☐ Set up separate club bank accounts for operating and charitable expenses, and assign two signatories to each account.
- ☐ Develop a budget and follow it. (Be sure to monitor expenditures against the budget.)
- ☐ Make sure the club has a procedure for sending contributions to The Rotary Foundation and dues to Rotary International.
- ☐ Be aware of local laws regarding donated funds, and make sure those laws are being followed.
- ☐ Have the yearly financial report reviewed by a qualified accountant who is not involved with the regular management of club funds, and give a financial report to all club members.
- ☐ Make sure the club has an effective way to learn about financial best practices and that these practices are passed on to incoming officers.
- ☐ Ensure that if the club has a foundation, it is managed in accordance with local laws.
- ☐ Meet regularly with the club's treasurer to ensure the club's financial affairs operate smoothly.
- ☐ Ensure club bylaws outline the process for disbursing funds.
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### Risk Management

- ☐ Limit the club president's personal liability by anticipating what can go wrong and thinking about how the president or the club will respond and how any losses will be paid for.
- ☐ Use written and signed contracts and keep the documentation for several years after the event. Involve local legal counsel when negotiating contracts.
- ☐ Ensure the club has liability insurance for its activities and operations, as appropriate for the club's geographic area. Contact a local insurance agent or broker for assistance with insurance appropriate for the club.\*
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

*\* Clubs in the United States and its territories and possessions are provided general liability insurance through a program arranged by RI and paid for by participating clubs through the July semiannual dues report. For more information, go to [www.rotary.org](http://www.rotary.org) and search "insurance."*

# Worksheet 9: Club Trainer Responsibilities

To ensure your club has a comprehensive training plan, your club may wish to appoint a club trainer. The club trainer should work with the club's board and committees, your assistant governor, the district training committee, and the district governor for support and ideas.

Fill out the following club assessment to help you and your club trainer plan for the year.

## What will the club trainer do?

- ☐ Plan one program per month for all members
- ☐ Meet with new and prospective members one-on-one or in small groups
- ☐ Manage a mentoring program
- ☐ Conduct a leadership development program
- ☐ Help with strategic planning

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

## Who will do the training?

- ☐ Club trainer
- ☐ Committee members
- ☐ Club members

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

## When will training be done in your club?

- ☐ During weekly meetings
- ☐ At club assemblies
- ☐ On members' own time

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

**Suggested club trainer responsibilities**

- ☐ Conduct a needs assessment of members.
- ☐ Analyze club goals to determine what club members need to do.
- ☐ Design training to support the first two above responsibilities.
- ☐ Work with the membership committee to conduct new member orientation.
- ☐ Work with the membership committee to educate prospective members.
- ☐ Work with the club administration committee to plan a weekly program to provide continued education for all members.
- ☐ Collaborate with the club Rotary Foundation committee to educate members on fundraising and contributing to the Foundation.
- ☐ Work with the club public relations committee to ensure that club members are comfortable describing what Rotary is.
- ☐ Work with incoming leaders to prepare them for district training.
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_





# Membership



Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving beyond the club level is directly related to the strength and size of your club's membership base.

## Responsibilities

As president-elect, you have the following membership development responsibilities:

- Appointing and meeting with your club membership committee
- Assessing the current state of your club's membership, using the *Planning Guide for Effective Rotary Clubs* (appendix I) as a guide, and reviewing your club's long-range membership goals
- Setting your club's annual membership goals, which support long-range goals, using the *Planning Guide for Effective Rotary Clubs*, and submitting annual membership growth and retention goals to district leadership
- Identifying and implementing strategies to recruit and retain club members
- Promoting club and district membership education and training for all stages of membership, including:
  - Prospective member education
  - New member orientation and education
  - Continuing member education
- Using available RI and district resources to support membership development efforts



### Rotary Reminder

Plan weekly meetings and activities in observance of Membership and Extension Month (August) and New Generations Month (September).



#### **Rotary Reminder**

You'll find more information on the membership committee in the *Club Membership Committee Manual*.



#### **Rotary Reminder**

Your club's five-year membership history is available from your district governor or district governor-elect.



#### **Rotary Reminder**

The *Membership Development Resource Guide* outlines the steps for developing a membership development action plan.

- Seeking opportunities to organize a new club in your area

As club president, it is important to make membership a priority so that your club has an active and involved membership base to pursue the Object of Rotary.

## **Membership Committee**

Many different club committees must interact and work closely with club leaders to successfully recruit, retain, and educate club members. Include the membership committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

Appoint Rotarians to the membership committee who have strong connections to a cross-section of the community. Members of this committee should enjoy working with people and have a thorough knowledge of Rotary.

The club membership committee develops and implements an action plan for recruiting, retaining, and educating club members. Check in with the membership committee regularly to determine whether new strategies are needed to achieve your membership goals.

Your membership committee has the following responsibilities:

- Achieving club membership goals for the coming year using the *Planning Guide for Effective Rotary Clubs*
- Educating and training club members about the importance of recruitment and retention of qualified, diverse members
- Conducting classification surveys to ensure the club's classifications are relevant to current business trends
- Conducting club assessments to ensure membership development efforts are effective
- Developing an action plan for the club to act as a sponsor club for a new club organized in the district, if applicable

### **Assessing Your Club**

As president-elect, you'll work closely with your club's membership committee to assess the current state of your club and plan membership goals using the *Planning Guide for Effective Rotary Clubs* (appendix I) and other membership assessment tools available in *Club Assessment Tools* at [www.rotary.org](http://www.rotary.org). To understand your club's membership trends:

- Review your club's long-range goals.
- Review your club's five-year membership profile.
- Complete a classification survey as early in the year as possible to identify unfilled professions represented in the community.
- Consult with your district governor, assistant governor, or regional Rotary International membership coordinator, as appropriate.

Once you've drafted membership goals, you should develop a membership development action plan (see appendix F).

## Recruitment

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All Rotarians are responsible for proposing new members. New members bring important benefits to the club, including:

- Increased capacity to serve your community
- Future leaders
- Diversity
- Fresh ideas, interests, and energy
- Long-term continuity of clubs and the organization

Determine which recruitment challenges your club faces by completing the assessments in *Club Assessment Tools* to identify your club's recruitment strengths and weaknesses, and then work with the membership committee to implement strategies for addressing them. See worksheet 11 for club membership recruitment strategies.



### Rotary Reminder

Search [www.rotary.org](http://www.rotary.org) to find the regional Rotary International membership coordinator serving your area.

## Responsibilities

As club president, you have the following responsibilities for raising awareness of the importance of recruiting new members:

- Leading by example, personally recruiting a new member and encouraging each member of the club to do the same
- Appointing active, knowledgeable membership committee members
- Setting ambitious but attainable membership recruitment goals
- Conducting a club assembly on the importance of successful recruiting strategies
- Encouraging full representation of the diversity of the community
- Promoting participation in the district membership seminar
- Encouraging club members to discuss Rotary and its goals with friends, family, and colleagues and to invite qualified candidates to join Rotary
- Promoting community awareness of your club and its activities
- Recognizing club members for sponsoring new members



### Rotary Reminder

Visit the Membership Development Best Practices Exchange at [www.rotary.org](http://www.rotary.org) to view membership initiatives that have worked in other clubs.

## Diversity

Your club's membership should accurately reflect the community in terms of profession, age, gender, and ethnicity. One way to ensure diversity in your club is to conduct regular classification surveys and membership diversity assessments to ensure your club accurately represents the community. Having a diverse membership in your club will result in a wider range of experience and knowledge available for your service efforts.

RI policy prohibits limitations on membership in Rotary clubs based on gender, race, color, creed, or national origin. Refer to RI Bylaws Article 4.070. for more information.

## Retention

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Retention is crucial to increasing and sustaining your club's membership. A high turnover rate in existing clubs is one of the most pressing membership issues facing Rotary today. Current members who are dedicated, active, and motivated support the effective functioning of the club and are also more likely to attract new members.

Determine what retention challenges your club faces by completing the assessments in *Club Assessment Tools* to identify your club's retention strengths and weaknesses, and then implement strategies for addressing them. Successful club retention strategies include member education and keeping club members involved and informed. Work with the membership committee to implement retention strategies for addressing these issues. See worksheet 12 for club membership retention strategies.

### Responsibilities

As club president, you have these responsibilities for raising awareness of the importance of retaining club members:

- Making continuing education and training for members a regular club activity
- Involving the club's membership and public relations committees in membership retention efforts
- Including local and international Rotary information in weekly club meetings
- Recognizing existing members for their contributions to club projects and activities

## Sponsoring New Clubs

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As club president, you should be aware of the possibilities for sponsoring a new club in your area, such as if a group of committed Rotarians would like to meet at a different time or day.

If your club sponsors a new Rotary club, develop an action plan to assign the following responsibilities:

- Assisting the special representative 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 during the club's first year
- Serving as a mentor to the new club for at least two years after its admission to membership in RI

For more information, contact your district governor, district membership committee, or district extension committee.

## Education

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Knowledgeable members are more likely to take initiative and become more active in your Rotary club and your district. Share information about Rotary with prospective and new members, as well as experienced Rotarians.



### **Rotary Reminder**

Refer to *New Member Orientation: A How-to Guide for Clubs* for more information on educating and involving new club members.

### **Prospective and New Member Education**

The club membership committee should provide prospective members with information about Rotary, including its history and ideals, and information about the club and its activities.

The process of new member orientation should build on the information provided to prospective members and should begin immediately after induction. Every member of your club should play an active role in introducing new members to the club. Assign a mentor to each new member to ease their transition into the club.

### **Continuing Member Education**

Continuing member education ensures that members remain challenged, motivated, and enthusiastic. Work with your membership committee to provide the following continuing education components:

- Regular club assemblies to discuss which activities members want to continue and which they want to change
- Four or more weekly club programs a year focused on Rotary, its history, object, scope, and activities
- Participation of club members in district meetings that address continued education

Use your club and district Web sites, weekly meetings, e-mails, and club bulletins to share information from your district governor or Rotary International.

## Resources

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Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org](http://www.rotary.org), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help you fulfill your membership development responsibilities:



**Membership Development Resource Guide** (417-EN) — Outlines basic procedures for clubs to develop a membership action plan and provides suggestions for recruiting and retaining members.

## Human Resources

- Assistant governors — Appointed by the district governor to help clubs operate effectively and achieve their goals.
- Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.
- District governor — Provides advice, inspiration, and motivation to help clubs become more effective.
- District extension committee — Rotarians appointed to support club organizing or sponsoring new clubs in the area.
- District membership development committee — Rotarians appointed to support clubs in their membership development efforts.
- District public relations committee — Rotarians appointed to provide resources to clubs for developing a positive image within the community.
- Regional Rotary International membership coordinators (RRIMCs) — Rotarians serving as the primary membership development resource for clubs and districts in a specific region or zone.
- Membership Development Division at RI World Headquarters — Staff members dedicated to assisting clubs and districts in their membership development efforts.

## Informational Resources

### Club Resources

- *Club Assessment Tools* — Online supplement to the *Membership Development Resource Guide* that helps clubs plan their retention and recruitment strategies. The following assessment activities are included:
  - Membership section of the *Planning Guide for Effective Rotary Clubs* Helps clubs assess their current membership and establish goals for the coming year.
  - Classification Survey — Encourages clubs to strive toward a balanced and diverse membership across all classifications by comparing the local community's professional make-up to the club's.
  - Membership Diversity Assessment — Promotes developing a club membership that reflects the local community's age, gender, religious, and ethnic composition.
  - 25-Minute Membership Survey — Helps clubs create a list of qualified candidates for membership.
  - Retention Model — Allows clubs to calculate their net membership gain (or loss) over a specified time and to determine its cause.
  - Termination Profile — Illustrates when the majority of a club's terminations occur so it can focus its retention strategies accordingly.
  - Membership Satisfaction Questionnaire — Asks current club members to anonymously comment on what they most appreciate about their club and what needs improvement.

- Resigning Member Questionnaire — Helps clubs determine how to improve retention efforts.
- *Club Membership Committee Manual* (226B-EN) — Overview of the club membership committee and its responsibilities as well as available resources and specific committee duties.
- *How to Propose a New Member* (254-EN) — Brochure outlining the procedure for selecting and electing members.
- *The Membership Minute* — E-newsletter filled with tips, tools, and the latest membership development research; archives and free subscriptions available at [www.rotary.org/newsletters](http://www.rotary.org/newsletters).
- *New Member Orientation: A How-to Guide for Clubs* (414-EN) — Resource for Rotarians responsible for prospective and new member orientation programs.

### **New and Prospective Member Handouts**

- *The ABCs of Rotary* (363-EN) — Compilation of short articles about Rotary history and programs.
- *Introducing Rotary* (982-EN) — Three-minute video that provides an overview of Rotary club membership for new members.
- *Rotary Basics* (595-EN) — Educational publication containing the information every Rotarian should know.
- Rotary E-Learning Center — Brief modules designed for independent study by new members and club officers.
- *This Is Rotary* (001-EN) — Colorful brochure providing a brief overview of Rotary for prospective Rotarians and the public.
- *What's Rotary?* (419-EN) — Wallet-size card answering frequently asked questions about the organization and scope of Rotary; popular as a hand-out to non-Rotarians.
- Preassembled kits for prospective and new members — Collection of publications of interest to prospective and new members, including some of those listed above; specific contents listed in the *RI Catalog* (019-EN).
  - *Prospective Member Information Kit* (423-EN)
  - *New Member Information Kit* (426-EN)
  - *Membership Video Set* (427-MU) — Videos to showcase Rotary to prospective and new members alike.
- [www.rotary.org](http://www.rotary.org) — The membership development section of running a club includes information about how to find and keep members as well as the Membership Development Best Practices Exchange.

## Discussion Questions

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Consider these questions in preparation for your presidents-elect training seminar.

How will you assess your club's current membership situation?

What are some of your club's membership development successes and challenges?

How is your club actively working to achieve diverse membership?

What successful strategies have you used in your club that you would like to share with your fellow incoming presidents (recruitment, retention, education)?



# Appendix F: Membership Development Action Plan

To recruit and retain high quality Rotary club members, your membership development action plan should have the following steps:

## 1. Identify

Identify professional members of your community who are qualified to join your club. These individuals should be of strong character and have a commitment to service.

## 2. Introduce

Introduce prospective members to Rotary by informing them about Rotary International's programs and your club's service projects. Develop a formal prospective member information program that provides the prospective member with an overview of:

- Rotary International and The Rotary Foundation
- The benefits and responsibilities of membership in your club
- A description of your club's primary projects and activities

A prospective member who has been introduced to Rotary by enthusiastic Rotarians, and who is well-educated in these areas before joining, is more likely to become an involved and active member.

## 3. Invite

Invite prospective members to become Rotarians with a personal visit from both the proposer and a member of the club's membership committee. This personal visit provides the prospective member with a second contact in the club, one who brings additional Rotary knowledge and experience. Rotarians extending the invitation should know the interests and expertise of the prospective member in order to point out relevant club activities and projects.

## 4. Induct

Induct new members into the club in a dignified and meaningful manner. Invite spouses, partners, and family members to attend. During the ceremony, offer new members the opportunity to introduce themselves in a brief, five-minute speech. Also make sure that all club members personally introduce themselves to each new member. Your Rotary club may wish to provide a new member with the following items:

- Rotary lapel pin
- Membership identification card
- Club bulletin
- District directory
- District governor's monthly letter
- *The Rotarian* or Rotary regional magazine
- List of local clubs for make-up meetings
- Club name badge
- Club banner

Recognize the new member and sponsor in your club's bulletin or at the weekly meeting.

## 5. Inform and Orient

Inform new members about your club and RI by focusing on the following areas:

- Rotary policies and procedures
- Opportunities for service
- Rotary history and achievements

Consider scheduling a formal new member orientation program that extends over several sessions. See *New Member Orientation: A How-to Guide for Clubs* for ideas.

During the first six months, new members can expand their understanding of Rotary in these ways:

- Attending new member orientation meetings
- Reading RI publications for new members
- Visiting the Rotary E-Learning Center at [www.rotary.org](http://www.rotary.org)
- Attending one or more of the following club functions:
  - Club assembly
  - Board meeting
  - Committee meeting
- Completing one or more of the following tasks:
  - Give a classification talk at a club meeting.
  - Make up a meeting at another club.
  - Invite a guest to a club meeting or propose a new member.
- Attending one or more district meetings (listed in order of priority):
  - District conference
  - District assembly
  - District Rotary Foundation seminar
- Choosing a club committee on which to serve

## 6. Involve

Involve new members in club committees, activities, fundraisers, board meetings, weekly club meetings, and social activities. Many clubs find it wise to involve the new member's sponsor during the introductory period of membership and/or appoint each new member a Rotarian mentor. These individuals keep close contact with the new Rotarians for the first six months or until the new member is fully involved in the club. Also consider the following methods of getting new members involved in the activities of the club:

- Assign new members to a committee or give them a weekly meeting assignment.
- Create special name badges for new members to wear for one year. Encourage other members to look for the badges and make special effort to talk with the new members.
- Have a new member serve as a delegate to the district conference to learn about the world of Rotary and the projects being done outside of his or her own club. Some clubs assist the new member by paying part or all of the registration fee and costs of the conference. After the conference, ask the new member to give a report to the club.
- Have all club members who join in the same Rotary year work together on a project.
- Encourage new members to experience the internationality of Rotary by attending the RI Convention or hosting visiting Rotarians for a meal or other activity.
- Ask new members to find two or three other new members from among their peer group. When new members promote Rotary to their friends, they become more enthused about Rotary.

## 7. Educate

Educate all club members so they have enough knowledge to take the initiative and become active members. Clubs should develop a curriculum for continuing education in an effort to keep members current on club programs, projects, and initiatives. Clubs also should communicate news from Rotary International and The Rotary Foundation to their members. Such a program would include:

- Four or more weekly club programs a year focused on continuing education
- Participation of club members in multidistrict meetings that address continuing education
- At least two club assemblies a year focused on education
- District-level seminars on continuing education
- Sharing of ideas and information on Rotary programs, projects, and activities at committee meetings
- Attendance of club members at meetings of other clubs

Refer to the *Membership Development Resource Guide* (417-EN) for more information on developing a membership development action plan.

# Worksheet 10: Summary

## Notes

## Membership

### I learned . . .

**I will ...**

**I will ...**

## Contacts

[illegible]

# Worksheet 11: Strategies for Membership Recruitment

Review the list of recruitment strategies, and check the items you are interested in implementing. Add any additional strategies below.

- ☐ Maintain a club Web site. A Web site promotes your club to the community and makes your club credible to prospective and younger members.
- ☐ Emphasize each club member's responsibility to identify, invite, and propose new members. Recognize club members who sponsor new members.
- ☐ Conduct the 25-Minute Membership Survey with your club membership to develop a list of prospective members. (The survey is included in *Club Assessment Tools* at [www.rotary.org](http://www.rotary.org).)
- ☐ Have a clear club membership goal and a plan for achieving it that can be communicated to each club member.
- ☐ Hold a club assembly to discuss sources of new members.
- ☐ Encourage the club membership committee to hold information sessions in which club members explain the benefits and responsibilities of membership to potential members.
- ☐ Bring in Rotarians who represent the diversity of your community (e.g., different professions, ages, genders, ethnicities). Establish a peer group for these new members by inviting them to join the club in groups of three.
- ☐ Click on Members at [www.rotary.org](http://www.rotary.org) to find successful strategies that other clubs have used.
- ☐ Use your club's community service projects to identify and involve potential members. (These projects are also essential in developing effective public relations and enhancing the image of Rotary in your community.)
- ☐ Become acquainted with new business and community leaders.
- ☐ Hold induction ceremonies for new members. Recognize the new members and their sponsors in your club's bulletin or on its Web site.
- ☐ Lead by example. Encourage club leaders, particularly those responsible for membership, to bring in one new member during the first month of the Rotary year.
- ☐ Waive some or all membership fees for new members under the age of 40 for the first two years of membership.
- ☐ Change the club meeting time to accommodate professionals who commute to work. If there is enough interest, contact the district governor to suggest organizing a new club.
- ☐ Invite spouses, partners, and family members of Rotarians in your club to be members.

## Additional Recruitment Strategies

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

# Worksheet 12: Strategies for Membership Retention

Review the list of retention strategies, and check the items that you are interested in implementing. Add any additional strategies below.

- ☐ Invite every Rotarian to become personally involved in club projects and activities.
- ☐ Encourage clubwide participation in community service and Rotary Foundation programs.
- ☐ Conduct weekly programs that are relevant and meaningful to members.
- ☐ Explain to members how projects are relevant and effective.
- ☐ Use the Membership Satisfaction Questionnaire and the Resigning Member Questionnaire to help clubs identify their strengths and weaknesses. (Questionnaires are included in *Club Assessment Tools* at [www.rotary.org](http://www.rotary.org).)
- ☐ Conduct a minimum of four club programs per year that address issues related to continuing education.
- ☐ Take part in multiclub meetings for the purpose of addressing continuing education.
- ☐ Participate in district meetings and events.
- ☐ Conduct a leadership development program in your club.
- ☐ Encourage Rotarians to read items such as the governor's monthly letter and Rotary magazines.
- ☐ Offer to temporarily waive fees for members who have encountered financial difficulties.
- ☐ Include membership items in your club bulletin.

## Additional Retention Strategies

- ☐ \_\_\_\_\_  
\_\_\_\_\_
- ☐ \_\_\_\_\_  
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- ☐ \_\_\_\_\_  
\_\_\_\_\_
- ☐ \_\_\_\_\_  
\_\_\_\_\_

# Service Projects



Service Above Self is the principal Rotary motto. Every Rotarian is responsible for finding ways to improve the quality of life in his or her community and communities around the world through service projects. By carefully selecting, planning, and evaluating a project, a Rotary club can successfully carry out service projects that address such community needs.

## Responsibilities

As president-elect, you have the following service projects responsibilities:

- Appointing and meeting with your service projects committee
- Assessing the current state of your club's service projects, using the *Planning Guide for Effective Rotary Clubs* (appendix I)
- Setting service goals, using the *Planning Guide for Effective Rotary Clubs*
- Ensuring that the club and its members adhere to youth protection policies (refer to chapter 1 and appendix G)
- Ensuring that the service projects committee is following the basic steps of conducting successful service projects:
  - Needs assessment
  - Planning and implementation
  - Evaluation



### Rotary Reminder

Plan weekly meetings and activities in observance of Vocational Service Month (October), Literacy Month (March), and Rotary Fellowships Month (June).



### **Rotary Reminder**

You'll find more information on the service projects committee in the *Club Service Projects Committee Manual*.



### **Rotary Reminder**

When conducting a service project with Interactors, RYLA participants, Youth Exchange students, or other children, or a project where volunteers will be working directly with child beneficiaries, review the *Abuse and Harassment Prevention Training Manual and Leaders' Guide* for screening and training resources. Your responsibilities are in chapter 1 of this manual.

## **Service Projects Committee**

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The service projects committee should carry out projects that address the needs of your club's community and communities in other countries. Include the service projects committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

Appoint Rotarians to the service projects committee who have a strong knowledge of the community, as well as community volunteer experience.

As president-elect, work with the service projects committee to determine whether current club projects will continue into the coming year. Incorporate any continuing service projects as you set your goals.

Your service projects committee has the following responsibilities:

- Achieving club service project goals for the coming year
- Conducting a needs assessment of the community and the club
- Planning service projects, both local and international, using club, district, and RI resources, and ensuring that promotion is planned
- Implementing service projects and involving all members
- Evaluating all service projects and using the findings to strengthen future service projects

The following people can provide support in implementing club service projects:

- Rotarians and their families and friends
- Community organizations
- Rotary Foundation alumni
- Youth Exchange students and RYLA participants
- Rotary Community Corps
- Interact and Rotaract club members
- Members of other Rotary clubs

Service provides an opportunity for networking and fellowship among club members. Involving all members in service projects will help membership retention efforts.

## **Needs Assessment**

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Successful service projects must be relevant and address real and current community concerns. As club president, you'll need to ensure that the service projects undertaken by your club reflect community needs as well as club capabilities and interests. You should encourage your club's service projects committee to conduct a needs assessment to determine the resources and interests within the club and the most pressing needs and concerns of the community.





### Rotary Reminder

To learn more about working with your club and community to develop a service project, consult *Communities in Action: A Guide to Effective Projects*. Search Community Assessment Tools at [www.rotary.org](http://www.rotary.org) for samples on how to conduct an external assessment.



### Rotary Reminder

Create a detailed public relations strategy to gain support for the service project, attract potential members to the club, and enhance Rotary's image in the community. For more details, see chapter 7, "Public Relations."

## Internal Assessment

It's important to consider whether a particular project fits your club members' mix of skills, interests, and abilities. An internal assessment should focus on the following:

- Past project experiences and the lessons learned from them
- Club composition, including:
  - Number of members willing to participate in service projects
  - Diversity of skills
  - Level of member interest in potential projects
  - Satisfaction level for past projects

Evaluating these factors will help define the types of service projects best suited to your club. To increase the likelihood of success, identify a project that takes advantage of the widest array of member skills and interests.

## External Assessment

An external assessment, or community evaluation, will help your club understand the needs of the community. To determine key areas of concern in a community, examine these aspects:

- Economic situation
- Geographical setting
- Education levels
- Demographic profile
- Political conditions

To properly conduct an external assessment, your club's service projects committee should consult with a wide range of community members. These groups can provide your club with a resource base of experts on community issues, project strategies, and future club service projects. In addition, working with community members to develop and carry out service projects helps identify potential new Rotarians.

## A Balanced Program of Service

Having service projects that address each Avenue of Service will ensure your club is pursuing the Object of Rotary. When planning projects, the service projects committee should consider ideas from the Presidential Citation program and emphases, the four Avenues of Service, the RI Strategic Plan, and any other service priorities identified by the RI Board of Directors, and the mission of The Rotary Foundation and its areas of focus. These areas of focus can be found at [www.rotary.org](http://www.rotary.org).

## RI and Rotary Foundation Programs

To ensure the effectiveness of a service project, your club needs financial, human, and informational resources. Rotary International and its Foundation offers a broad range of humanitarian, intercultural, and educational programs and activities designed to improve the human condition and advance the organization's ultimate goal of world understanding and peace. These programs help clubs and districts achieve their service goals in their own communities and those abroad, fostering fellowship and goodwill in the process. For detailed program descriptions, see worksheet 15.

Rotary Foundation grants or grants from other foundations are available to provide funding for service projects. Other financial resources include funds raised from individual donors and local businesses, through the ProjectLINK database, or through club fundraisers.



### Rotary Reminder

For more information on using Foundation grants to help finance your international service projects, see chapter 6, "The Rotary Foundation."

## International Service Projects

In Rotary, the idea of community extends far beyond the place in which a single Rotary club is located; it encompasses all peoples of the world. This is especially true today, as high-speed communications and transportation are bringing people together from all parts of the globe.

The basic strategies for carrying out local service projects can be applied to international service projects. However, because at least two clubs in different countries must work together, communication is even more critical to a project's success.

World Community Service (WCS) is an excellent way for clubs to participate in projects internationally. WCS occurs whenever a Rotary club in one country assists a club in another country with a service project. The ProjectLINK database at [www.rotary.org](http://www.rotary.org) helps Rotary clubs find international partners to support service projects.

As you develop your WCS project, remember that many qualify for funding from The Rotary Foundation. Consider applying for Foundation grants to enhance and increase the impact of a WCS project.

To participate in an international project, clubs need to find an international partner. You can approach this in various ways:

- Explore the ProjectLINK database at [www.rotary.org](http://www.rotary.org).
- Speak with your district's World Community Service committee chair.
- Contact your district Rotary Foundation committee chair.
- Network with fellow Rotarians at district and international meetings.
- Attend a Rotary-sponsored project fair.
- Use your club's Rotaract club to network.
- Reach out to fellow Rotarians on the Internet.



### Rotary Reminder

More information on WCS can be found in *World Community Service: A Guide to Action*.

## Project Planning and Implementation

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Planning can minimize delays and failures of service projects. Work with the service projects committee to set project goals, develop a budget and timeline, and begin implementation.

Before beginning a service project, check with your service projects committee to ensure they have answered the following questions. Answers to these questions will result in a project action plan:

- Which projects are club members currently involved in?
- What will be the goal of the project?
- Why is your club undertaking the project?
- Who in the club and community will be involved?
- How will your club work with members of the community benefiting from the project?
- When will the project occur?
- Where will the project occur, and how will volunteers get there?
- What resources are needed to complete the project?
- How will the club ensure proper use of resources?
- How will your club promote the project?

During the project's implementation, keep all club members involved, and continuously monitor activities to ensure that the action plan is being carried out.

## Evaluation

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Evaluation on the effectiveness of a project should be a part of all stages, from planning to implementation. As president, ensure that your service projects committee evaluates all service project activities.

When evaluating a completed service project, consider these key questions:

- Did the project meet community needs? If not, why?
- Did all club and community members have an opportunity to participate?
- Was there adequate media coverage of the project?
- Was your club able to meet the financial demands of the project?

Consider sharing a successful project with RI by using the project database submission form, which is included at the end of *Communities in Action: A Guide to Effective Projects*. This way, clubs around the world can access examples of successful projects on the ProjectLINK database.



### **Rotary Reminder**

A complete guide to evaluating projects is included in *Communities in Action: A Guide to Effective Projects*.

## Resources

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Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org](http://www.rotary.org), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help you conduct successful service projects:



***Communities in Action*** (605-EN) — Comprehensive instructions for planning, conducting, and evaluating a service project.

### Human Resources

- Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.
- RI Programs resource groups — Groups of Rotarians appointed by the RI president to assist Rotary clubs and districts with service projects and efforts to address presidential emphases.
- RI Programs staff at RI World Headquarters — Staff members dedicated to assisting clubs and district with programs, service projects, and awards.
- Rotarian Action Groups — International groups of Rotarians, Rotarian spouses, and Rotaractors who join together to conduct international service projects related to a specific topic.
- Rotary Volunteers — Individuals interested in volunteering or advising on Rotary-sponsored projects. Find a complete list of volunteers on the ProjectLINK Database at [www.rotary.org](http://www.rotary.org).

### Informational Resources

- *Club Service Projects Committee Manual* (226D-EN) — Overview of the service projects committee and its responsibilities as well as available resources and specific committee duties.
- *Community Assessment Tools* (605C-EN) (Web only) — Detailed guidelines for conducting effective community assessments.
- RI programs newsletters — E-newsletters on specific RI programs. Sign up at [www.rotary.org](http://www.rotary.org)
- *Rotary Community Corps Handbook* (770-EN) — Basic steps for organizing a corps, including how to identify potential leaders; also includes case studies and project ideas.
- Service Projects section of the *Planning Guide for Effective Rotary Clubs* (appendix I) — Club assessment and goal-setting tool used to plan service projects goals.
- *The Rotary Foundation Quick Reference Guide* (219-EN) — A detailed overview of the programs and services of The Rotary Foundation.

- *World Community Service: A Guide to Action* (742-EN) — Information on the WCS program, including overviews of donations-in-kind projects and the Rotary Volunteers program, as well as Rotary Foundation grants that can assist WCS projects.
- *Abuse and Harassment Prevention Training Manual and Leaders' Guide* (775-EN) — Youth protection guidance that can be modified to comply with local laws and situations to create and maintain the safest possible environment for all participants.
- [www.rotary.org](http://www.rotary.org) — The service projects section of running a club includes information about how to start and fund a service project, and download resources for a service project.

### **Financial Resources**

- Funds from individual donors or local businesses
- Grants from other foundations
- Rotary Foundation grants
- Funds solicited through the ProjectLINK database

### **Discussion Questions**

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Consider these questions in preparation for your presidents-elect training seminar.

Think of a service project that went well in your club. What made it a success?

How will you evaluate your club's current service projects?

How can you plan service projects that support the Object of Rotary?

What steps must be taken to implement a successful service project?

# Appendix G: Risk Management for Youth Programs

Risk management can provide a basis for understanding possible risks involved with youth activities, such as injury, illness, and abuse, so that participants make good choices. Risk management will not eliminate all negative occurrences, but it can reduce their number and effects. Your club should consider the following points when developing a risk management program for working with youth:

- Develop and implement a club youth protection policy that addresses physical, sexual, and emotional abuse or harassment. Contact your district to see their policy.
- Establish a code of conduct for adult and youth participants. These rules should reflect local cultural standards and those of the district or club, as well as best practices for youth protection.
- Review your club's policies to ensure they are in harmony with the district's policies and with specific RI guidelines developed by the Board for each youth program.
- Consider these questions when sponsoring a youth program or event:
  - What happens if someone is injured?
  - What happens if a participant alleges sexual misconduct?
  - What happens if a natural disaster strikes during the program or event?
- Work to minimize potential losses in these ways:
  - Teaching participants about safe behavior during the program
  - Developing a disaster emergency plan and practicing it
  - Purchasing adequate liability insurance coverage for your region

Clubs and districts are urged to contact a local insurance professional to determine whether their insurance policies provide adequate coverage for their youth programs. All participants are urged to verify that their health and life insurance will provide adequate coverage, because many health insurance policies provide only limited coverage when traveling or living away from home. In these cases, participants may want to consider obtaining travel insurance that includes coverage for medical expense reimbursement, repatriation of remains, emergency evacuation, and accidental death and dismemberment.

Also, it is recommended that a club consult local legal counsel before signing any agreement or contract with another 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.

# Worksheet 13: Summary

## Notes

[illegible]

## Service Projects

### I learned . . .

**I will ...**

**I will ...**





## Contacts

[illegible]



# Worksheet 14: A Balanced Program of Service

An effective club pursues the Object of Rotary, carrying out activities along each Avenue of Service. The chart below lists three examples of club activities. Check the boxes below to show which Avenues of Service are represented in each club activity.

OBJECT OF ROTARY	AVENUES OF SERVICE	CLUB ACTIVITIES		
The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:	The Avenues of Service were developed in the 1920s to clarify the Object of Rotary.	Paint the outside of the local library with high school students.	Hold a fundraiser for an overseas disaster relief project.	Participate in career day at the local university.
<b>FIRST.</b> The development of acquaintance as an opportunity for service;	 <b>Club Service</b> focuses on strengthening fellowship and ensuring the effective functioning of the club.			
<b>SECOND.</b> High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;	 <b>Vocational Service</b> encourages Rotarians to serve others through their vocations and practice high ethical standards.			
<b>THIRD.</b> The application of the ideal of service in each Rotarian's personal, business, and community life;	 <b>Community Service</b> covers the projects and activities the club undertakes to improve life in its community.			
<b>FOURTH.</b> The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.	 <b>International Service</b> encompasses actions taken to expand Rotary's humanitarian reach around the globe and promote world understanding and peace.			

What additional service projects would you add to balance this club's program of service?

# Worksheet 15: RI and Rotary Foundation Programs

Review the RI and Rotary Foundation programs listed, and indicate if your club currently participates in each program or if you're interested in participating in the program in the future.

PROGRAM	CLUB CURRENTLY PARTICIPATES	CLUB INTERESTED IN PARTICIPATING
<b>Community Service</b> – Program that responds to the needs of local communities		
<b>Interact</b> – Service club for young people ages 14-18		
<b>Rotaract</b> – Service club for young men and women ages 18-30 sponsored by their local Rotary club		
<b>Rotarian Action Groups</b> – International groups of Rotarians, Rotarian spouses, and Rotaractors who join together to conduct international service projects related to a specific topic		
<b>Rotary Community Corps (RCC)</b> – Service group of non-Rotarian adults sponsored by their local Rotary club		
<b>Rotary Fellowships</b> – International groups of Rotarians, Rotarian spouses, and Rotaractors who join together to pursue a common recreational or vocational interest		
<b>Rotary Friendship Exchange</b> – International exchange program for Rotarians and their families that promotes building relationships that can evolve into international partnerships for service projects		
<b>Rotary Volunteers</b> – Program that provides opportunities for Rotarians and other skilled professionals to offer their services and expertise to projects in need of assistance		
<b>Rotary Youth Exchange</b> – Program that promotes international understanding and peace among students ages 15-19		
<b>Rotary Youth Leadership Awards (RYLA)</b> – Training program for young people that emphasizes leadership, citizenship, and personal growth		
<b>Vocational Service</b> – Program that encourages Rotarians to model high ethical standards and apply their business knowledge and skills to benefit others		
<b>World Community Service (WCS)</b> – Joint community service project of Rotary clubs from two or more countries		
<b>Humanitarian Grants Program</b> – Rotary Foundation program that supports clubs and districts as they undertake humanitarian and service projects		
<b>Educational Programs</b> – Rotary Foundation programs that foster peace by building understanding through person-to-person contact, friendship, study, and cross-cultural exchange		
<b>PolioPlus</b> – Rotary Foundation program that supports global polio eradication efforts		

# The Rotary Foundation



## Rotary Reminder

For clubs in Future Vision pilot districts, use the 2010-11 Future Vision Addendum to the *Club President's Manual* available at [www.rotary.org](http://www.rotary.org).



The mission of The Rotary Foundation of Rotary International is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

The Rotary Foundation provides your club the opportunity to participate in and contribute to programs that make a difference in the lives of people around the globe. Participation in Rotary Foundation activities can help attract and retain members. When Rotarians directly experience Foundation programs, they can be inspired to contribute to The Rotary Foundation. Foundation programs are supported solely by voluntary contributions from Rotarians and friends of the Foundation who share its vision of a better world.



## Rotary Reminder

Club presidents, secretaries, treasurers, and Rotary Foundation committee chairs can review their club's Foundation contributions in Member Access at [www.rotary.org](http://www.rotary.org).

## Responsibilities

As president-elect, you have the following Rotary Foundation responsibilities:

- Appointing and meeting with your club Rotary Foundation committee
- Reviewing your club's current involvement with Foundation programs, using the *Planning Guide for Effective Rotary Clubs* (appendix I)
- Reviewing your club's financial contributions to The Rotary Foundation, using Member Access at [www.rotary.org](http://www.rotary.org)



### **Rotary Reminder**

Plan weekly meetings and activities in observance of Rotary Foundation Month (November), World Understanding Month (February), and Literacy Month (March).

- Setting your club's financial contribution and program participation goals for your year, using the *Planning Guide for Effective Rotary Clubs* and *The Rotary Foundation Fund Development Club Goal Report Form* (distributed at PETS and at [www.rotary.org](http://www.rotary.org))
- Knowing the resources available to help your club support The Rotary Foundation

As club president, your leadership will be particularly important to ensuring steady progress is made toward Foundation goals. Use the following strategies to encourage club members to support club goals:

- Conduct inspirational Rotary Foundation-focused weekly club programs at least four times a year.
- Contact your district Rotary Foundation committee chair to find alumni or volunteers to relate their experiences with The Rotary Foundation.
- Encourage club members to get involved in The Rotary Foundation's humanitarian grants and educational programs.
- Ask club members to contribute to the Foundation, giving extra attention to members who have never given.
- Acknowledge contributions and involvement in Foundation programs.
- Ensure proper stewardship of Foundation grant funds.

## **Rotary Foundation Committee**

The club-level committee structure for The Rotary Foundation should be determined by the Foundation goals your club sets. For example, if your plans include applying for a humanitarian grant, your club may want to have a grants subcommittee.

When appointing your Rotary Foundation committee, choose Rotarians with excellent communication skills, international experience, and community or international volunteer experience. Former program participants are also good candidates.

The Rotary Foundation committee should develop and carry out plans to support the Foundation through financial contributions and club participation in Foundation programs. Include the Foundation committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

Your Rotary Foundation committee has the following responsibilities:

- Achieving club Foundation goals for the coming year
- Educating club members about the Foundation
- Encouraging club members to participate in Foundation programs and support the Foundation financially
- Communicating the Foundation goals of the district and the Trustees of The Rotary Foundation to club members
- Ensuring proper stewardship of Foundation grant funds



### **Rotary Reminder**

You'll find more information on the club Rotary Foundation committee in the *Club Rotary Foundation Committee Manual*.

## District Support for The Rotary Foundation

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Members of the district Rotary Foundation committee can provide guidance about The Rotary Foundation and put your club in contact with other Rotary clubs working on similar projects. Contact your district Rotary Foundation committee chair with questions about The Rotary Foundation.

Information about the various ways your club can participate in the programs of The Rotary Foundation can be found in *The Rotary Foundation Quick Reference Guide*.

### District Rotary Foundation Seminar

The purpose of the district Rotary Foundation seminar is to reach every Rotarian with The Rotary Foundation's message of achieving world understanding and peace. Club presidents, club Foundation committee members, and other interested Rotarians are encouraged to attend to learn more about the Foundation.

## Programs of The Rotary Foundation

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The Rotary Foundation has three main program areas:

- PolioPlus
- Educational Programs
- Humanitarian Grants

### PolioPlus

The goal of PolioPlus is the global certification of polio eradication. It is important for Rotarians in your club to stay informed and involved until certification is achieved.

More than one million Rotarians worldwide have contributed over US\$800 million to PolioPlus. In addition, Rotarians 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. The PolioPlus program allows Rotary clubs, districts, and individual Rotarians to voluntarily assist in reaching Rotary's goal of a polio-free world.

Recognizing Rotary's resolve to eradicate polio and its extensive volunteer network, the Bill & Melinda Gates Foundation awarded The Rotary Foundation grants totaling US\$355 million. In return, Rotary is committed to raising \$200 million by 30 June 2012. Together, Rotary International and the Gates Foundation will provide over half a billion dollars toward our goal of a polio-free world.

Your club can help ensure that the goal of global polio eradication is achieved by conducting the following activities:

- Working with local health officials to maintain high rates of immunization for polio and other diseases
- Contributing to PolioPlus, which will help fulfill Rotary's US\$200 Million Challenge
- Holding a club fundraiser to support Rotary's US\$200 Million Challenge
- Devoting a weekly club program to the topic of polio eradication
- Ensuring club members remain informed and involved until the world is certified polio-free

### **Educational Programs**

Through its educational programs, The Rotary Foundation furthers international understanding by providing opportunities for students, educators, and business and professional people to experience another culture and develop long-lasting relationships with peers in other countries. Educational programs help participants learn about the needs of their local and world communities and the opportunities available through Rotary to help address them. The educational programs include:

- Ambassadorial Scholarships
- Group Study Exchange (GSE)
- Rotary World Peace Fellowships

For a description of these programs, see worksheet 17.

Rotarians are involved in the selection, orientation, and hosting of educational program participants. Your club can get involved with educational programs in a variety of ways:

- Invite current and past scholars, Rotary World Peace Fellows, and Group Study Exchange team members to share their experiences with your club.
- Nominate Ambassadorial Scholars, Rotary World Peace Fellows, or GSE team members.
- Publicize the exchange opportunity.
- Serve as host and sponsor counselors to program participants.



#### **Rotary Reminder**

Specific eligibility criteria and application forms for each humanitarian grant and educational program are available through the *RI Catalog*, at [www.rotary.org](http://www.rotary.org), or from your district Rotary Foundation committee.

### **Humanitarian Grants**

The Humanitarian Grants Program provides grants to Rotary clubs and districts to implement humanitarian projects. The following grants are available to address different service needs and funding options:

- Matching Grants
- District Simplified Grants

For a description of the Humanitarian Grants Program, see worksheet 17.

The Trustees of The Rotary Foundation have established the following standards to guide the program:

- Grants should address humanitarian needs with the aim of providing sustainable development.
- All Rotary Foundation grants require the active participation of Rotarians.
- Grants should assist in the development of stronger Rotary networks.
- All grants must display a commitment to stewardship of funds.

As club president, you are responsible for club activities funded by the Foundation. Work with your club Rotary Foundation committee, district Rotary Foundation committee, and district grants subcommittee to ensure your club regularly reports how Foundation funds for projects are used.

### **Foundation Alumni**

More than 110,000 people have received program awards from The Rotary Foundation since 1947. It is important to maintain contact with former Foundation program participants in your area because they are powerful advocates for The Rotary Foundation and are potential donors. Alumni can also help your club by

- Connecting Rotary clubs from different countries for service projects and fellowship
- Sharing with club members and the media how their experience in the Rotary Foundation program changed their life
- Promoting program opportunities to their peers
- Advising on selection, orientation, and hosting programs

Contact the Rotary Foundation alumni coordinator for your region to find out how you can integrate Foundation alumni into club activities.

### **Financial Support for Foundation Programs**

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Rotary Foundation programs are funded by voluntary contributions from Rotarians worldwide. When Rotarians see the extraordinary results of education, cultural exchanges, and humanitarian projects, they understand why supporting The Rotary Foundation financially is vital to making the world a better place. Contributions sent to the Foundation can be directed to the Annual Programs Fund, the Permanent Fund, or the PolioPlus Fund.

As president-elect, you will submit *The Rotary Foundation Fund Development Club Goal Report Form*, which you'll receive at PETS.

### Annual Programs Fund — For Support Today



The Annual Programs Fund is the primary source of support for Rotary Foundation programs. Money from the Annual Programs Fund is spent every year on Foundation programs, such as Group Study Exchange, Ambassadorial Scholars, District Simplified Grants, and Matching Grants. Rotarians are encouraged to make financial contributions to The Rotary Foundation annually. The Every Rotarian, Every Year initiative, designed to encourage worldwide annual per capita giving of \$100 or more, supports vital Foundation programs. To support the Every Rotarian, Every Year effort, you should:

- Make your gift to the Foundation early in the Rotary year.
- Encourage and ask every club member to make a gift every year.
- Inform members of how their contributions to the Annual Programs Fund support Foundation programs that achieve good in the world.
- Recognize Rotarians who support The Rotary Foundation.



#### Rotary Reminder

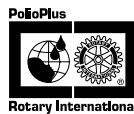
Search [www.rotary.org](http://www.rotary.org) to find the regional Rotary Foundation coordinator serving your area.

### Permanent Fund — To Secure Tomorrow



The Permanent Fund is Rotary's endowment. The principal is never spent, and a portion of the earnings is directed toward Foundation programs. Donations to the Permanent Fund can be outright gifts, securities, bequests, or life-income agreements. Many Rotarians direct substantial gifts to the Permanent Fund. If you know of a club member who has the capacity to make a large gift to The Rotary Foundation, please contact the regional Rotary Foundation coordinator serving your area.

### PolioPlus Fund



The PolioPlus Fund helps pay for Rotary's efforts to eradicate polio, including National Immunization Days and surveillance activities. Donations to the PolioPlus Fund help to fulfill Rotary's US\$200 Million Challenge. Clubs are encouraged to hold special community fundraising events to meet their part of the challenge. Rotary districts may also direct District Designated Fund allocations to Rotary's US\$200 Million Challenge.

### SHARE and the District Designated Fund

Through the *SHARE* system, contributions to The Rotary Foundation are transformed into Ambassadorial Scholarships, Matching Grants, Group Study Exchanges, and other Foundation programs, awards, and activities. Through *SHARE*, the Foundation Trustees involve Rotarians worldwide in the decision-making process for funding Foundation programs. No other foundation gives its donors the freedom to decide how contributions are spent.

At the end of every Rotary year, contributions to the Annual Programs Fund from all of the Rotary clubs in a district are divided into two funds:

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



The Foundation uses the World Fund portion to pay for the worldwide programs available to all Rotary districts, such as Group Study Exchange, Matching Grants, and 3-H Grants. Your district uses the DDF portion to fund the Foundation programs of its choice.

The Rotary Foundation's unique funding cycle uses contributions for programs three years after they are received. The three-year cycle gives districts time to plan programs and select participants and allows the Foundation to invest the contributions. The earnings from those investments pay for general administration and fund development expenses.

Your district Rotary Foundation committee is responsible for deciding how to use the district's available District Designated Fund, in consultation with the clubs in your district. Contact your district Rotary Foundation committee chair to learn how the district plans to use its available District Designated Fund.

### **Stewardship**

All grants must display a commitment to stewardship of funds, which reflects The Four-Way Test and responsible fiscal oversight. Stewardship includes:

- Detailed project planning
- Submitting complete and accurate applications with documentation
- Direct Rotarian involvement in the implementation of the project
- Transparency in all financial transactions
- Reporting in an efficient and effective manner

For more information about financial management best practices, refer to worksheet 8.

### **Contribution Recognition**

The sincere acknowledgement of a donor's gift is the first step toward additional financial support. The Rotary Foundation presents recognition to donors in appreciation of financial contributions or commitments for future contributions.

#### **Recognition for Individuals**

- Rotary Foundation Sustaining Member
- Paul Harris Fellow Recognition
- Multiple Paul Harris Fellow
- Memorial Paul Harris Fellow
- Memorial Paul Harris Certificate
- Major Donor
- Arch C. Klumph Society
- Benefactor
- Annual Programs Fund recognition banner



### **Rotary Reminder**

For details on Rotary Foundation recognition, see the *Donor Recognition Booklet*.

- The Rotary Foundation Bequest Society
- Certificate of Appreciation (also available to corporations)

### **Recognition for Clubs**

- 100% Rotary Foundation Sustaining Member club banner (awarded annually)
- Every Rotarian, Every Year banner (awarded annually)
- Top Three Annual Programs Fund Per Capita Club banner (per district; awarded annually)
- 100% Paul Harris Fellow Club banner (upon request)

## **Future Vision Plan**

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The Rotary Foundation Trustees adopted the Future Vision Plan, a forward-looking, strategic approach to fulfilling the Foundation's mission that will continue its transformation and advancement. Based on input from a wide variety of Rotarians, the Foundation Trustees developed the Future Vision Plan, which is designed to

- Simplify Foundation programs and processes consistent with the mission
- Focus Rotarian service efforts where they will have the greatest impact by addressing major world needs that are relevant to Rotarians
- Offer program options to help achieve both global and local goals
- Increase the sense of ownership at the district and club levels by transferring more decisions to the districts

### **Grants Structure**

Under the new grants structure, the Foundation will provide two types of grants:

- **Rotary Foundation District Grants** — Block grants made to districts to support smaller projects, both locally and internationally. Districts may use up to 50 percent of their available District Designated Fund (DDF) for these grants in a given Rotary year and administer the grant without the Foundation's involvement.
- **Rotary Foundation Global Grants** — Grants that support larger projects with sustainable, high-impact outcomes in one of the six 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

Clubs and districts can either create their own global grant project in the areas of focus or choose to work on packaged grants developed by The Rotary Foundation in conjunction with its strategic partners.

Club- and district-developed global grant projects are funded by the sponsors and a matching World Fund award. Packaged global grants are developed by the Foundation and its strategic partners. The World Fund and the strategic partner provide 100 percent of the funding, and Rotarians implement the grant project.

### Implementation

The Future Vision Plan will be implemented in stages until its full implementation in 2013-14. Selected representative districts will participate in the Future Vision Pilot that will run 2010-13. This pilot will have the following timeline:

- **2010-11:** Begin awarding grants to pilot districts. Approximately 100 districts will participate in the three-year pilot.
- **2011-12:** Continue awarding grants to pilot districts. Begin to phase out current Foundation programs.
- **2012-13:** Continue awarding grants to pilot districts. Begin to adjust the grant model based on pilot district's feedback. Qualify and train all districts.
- **2013-14:** Begin awarding new grants worldwide and phase out remaining Foundation programs.



#### Rotary Reminder

For questions about the Future Vision Plan, e-mail [newgrantspilot@rotary.org](mailto:newgrantspilot@rotary.org) or go to [www.rotary.org/futurevision](http://www.rotary.org/futurevision).

### Resources

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org](http://www.rotary.org), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help your club achieve its Foundation goals:



***The Rotary Foundation Quick Reference Guide*** (219-EN) — Detailed overview of the programs and services of The Rotary Foundation.

### Human Resources

- District Rotary Foundation committee — Responsible for overseeing all Rotary Foundation activity in your district.
- PolioPlus committees — Serve as international, regional, national, and local advisers on Rotary's participation in the polio eradication effort.
- Regional Rotary Foundation coordinators (RRFCs) — Rotarians appointed to help districts and clubs in all aspects of The Rotary Foundation.
  - Assistant regional Rotary Foundation coordinators — Assist the regional Rotary Foundation coordinators, districts, and clubs with their annual giving, major gifts, and program participation.

- Rotary Foundation alumni coordinators (RFACs) — Assist RRFCs, club, and districts in reconnecting with Foundation program alumni and involving alumni in Rotary Foundation activities.
- Zone challenge coordinators — Assist the RRFCs, districts, and club in fundraising in support of the PolioPlus Fund and fulfilling Rotary’s US\$200 Million Challenge
- Rotary Foundation staff at RI World Headquarters or your international office — Staff members dedicated to supporting Rotarians, clubs, and districts involved in Rotary Foundation programs and fund development.
- The Rotary Foundation Contact Center — Foundation staff available to answer questions about The Rotary Foundation at e-mail [contact.center@rotary.org](mailto:contact.center@rotary.org) or, in North America only, at 1-866-976-8279 (toll-free).

### Informational Resources

- *Club Rotary Foundation Committee Manual* (226E-EN) — Overview of the committee’s role and responsibilities as well as available resources.
- *Donor Recognition Booklet* (189-MU) — Multilanguage booklet detailing all available forms of Foundation donor recognition.
- *End Polio Now* — A bimonthly newsletter that provides an update on the global status of polio eradication and Rotary’s US\$200 Million Challenge fundraising efforts.
- *Every Rotarian, Every Year Club Success Kit* (958-EN) — Brochures, stickers, and instructions to help Rotary clubs promote program participation and contributions to the Annual Programs Fund.
- Gift Acceptance Policy Manual (Web only) — Overview of the types of gifts accepted by The Rotary Foundation, including gifts to the Permanent Fund.
- The Rotary Foundation section of the *Planning Guide for Effective Rotary Clubs* (appendix I) — Club assessment and goal-setting tool used to plan the club’s Rotary Foundation goals.
- *PolioPlus Brochure* (323-EN) — Update on the global polio eradication effort, including recent developments and statistics, and a description of the contributions of Rotary and its major partners and the challenges remaining to achieve a polio-free world.
- *Rotary’s US\$200 Million Challenge Brochure* (986-EN) — Informs Rotarians and non-Rotarian supporters about Rotary’s commitment to eradicate polio and encourages support for Rotary’s fundraising challenge.
- *Rotary Foundation Facts* (159-EN) — Pocket-size leaflet with recent Foundation statistics.
- *Rotary International and The Rotary Foundation Annual Report* (187-EN) — Year-end financial figures and notable program achievements.
- [www.rotary.org](http://www.rotary.org) — The Rotary Foundation section of running a club includes information such as The Rotary Foundation’s annual report, Foundation goals, and program information.

**Financial Resources**

- Funds from individual donors or local businesses
- Rotary Foundation grants

**Discussion Questions**

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Consider these questions in preparation for your presidents-elect training seminar.

What programs of The Rotary Foundation is your club currently involved with?

Why should your club financially support the Annual Programs Fund and the Permanent Fund?

How is your district involved with The Rotary Foundation?

How can you get your community to support Rotary's US\$200 Million Challenge?

What strategies for promoting The Rotary Foundation (both in program participation and funding) have worked for your club?

## Worksheet 16: Summary

## Notes

# The Rotary Foundation

### I learned . . .

**I will ...**

**I will ...**

## Contacts

[illegible]

# Worksheet 17: Programs of The Rotary Foundation

Review the information about each Rotary Foundation program. Discuss the questions below each program area with your group.

## POLIOPLUS

### PolioPlus Grants

Supports the immunization activities of Rotary International and other major partners of the Global Polio Eradication Initiative (the World Health Organization, UNICEF, and the U.S. Centers for Disease Control and Prevention) by keeping Rotarians informed of progress, promoting accurate media coverage, supporting volunteers during National Immunization Days, and providing needed resources in polio-endemic or at-risk regions.

1. If your club has never supported PolioPlus, what can you do to learn about the program?
2. In what ways will you raise awareness for polio eradication in your club and your community?
3. What will be your goal for PolioPlus this year?



## EDUCATIONAL PROGRAMS

<b>Ambassadorial Scholarships</b>	Offers scholarships for undergraduate and graduate students as well as qualified professionals pursuing vocational studies so they may serve abroad as ambassadors of goodwill to improve international understanding.
<b>Group Study Exchange (GSE)</b>	Provides cultural and vocational exchange opportunities for young professionals ages 25-40 as they begin their careers. The program provides travel grants for teams to exchange visits in paired areas of different countries.
<b>Rotary World Peace Fellowships</b>	Allows fellows to study at one of the Rotary Centers for International Studies in peace and conflict resolution to pursue graduate degrees in conflict resolution, peace studies, international relations, and related fields. Fellows can elect to earn a professional development certificate through a three-month program at Chulalongkorn University in Bangkok, Thailand.

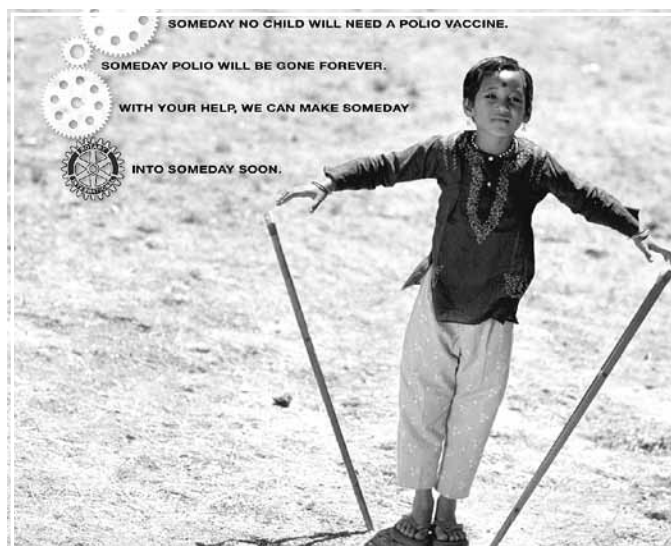
1. How will you recruit qualified applicants in your community?
2. What is the process in your club for reviewing applicants for a program?
3. How will you involve past and current participants once they return? How does your club keep track of educational program alumni?
4. What goal will you have for the coming year for educational programs?

## HUMANITARIAN GRANTS PROGRAM

<b>Matching Grants</b>	Provides a match to contributions raised by Rotary clubs and districts for international humanitarian service projects involving clubs or districts in two or more countries.
<b>District Simplified Grants</b>	Allows Rotary districts to support short-term, humanitarian projects that benefit the community. Districts can request up to 20 percent of their District Designated Fund for one grant per Rotary year to support local or international projects.

1. How will you gain consensus when deciding on a club project?
2. How will you raise funds to participate in a humanitarian grants program?
3. How will you promote your project to the community (internationally and locally)?
4. How will you evaluate the project?

# Public Relations



Public relations is essential to Rotary's future. It informs communities around the world that Rotary is a credible organization that meets real needs. It also motivates Rotarians to be active members in their club and district. Every Rotary club should develop and execute a successful public relations plan to be effective in the community. The plan can take many forms, from promotion of a visiting Youth Exchange student in the club bulletin to newspaper coverage of an interesting club project.

## Responsibilities

As president-elect, you have the following public relations responsibilities:

- Appointing and meeting with your club public relations committee
- Reviewing your club's current public relations initiatives, using the *Planning Guide for Effective Rotary Clubs* (appendix I)
- Setting public relations goals, using the *Planning Guide for Effective Rotary Clubs*
- Ensuring that your club is planning projects and activities that will attract positive media attention

As president, you have the following public relations responsibilities:

- Serving as the club spokesperson when working with the media, or identifying a fellow club member to serve as spokesperson



#### **Rotary Reminder**

Plan weekly meetings and activities in observance of Rotary Awareness Month (January).

- Providing regular updates to business and civic leaders, young people, and other organizations on Rotary's mission and the club's community efforts
- Ensuring that every club member is fully informed about Rotary's history, the Object of Rotary, and Rotary programs and activities
- Cultivating relationships with local media representatives
- Encouraging club members to seek opportunities to further the aims and accomplishments of Rotary through personal, business, and professional contacts
- Seeking publicity for successful service projects or other activities that illustrate Rotary's mission and accomplishments

Through effective public relations, your club will be able to

- Gain support and resources for projects
- Build links with other community organizations
- Attract qualified members
- Recognize Rotary members for their contributions to their community
- Correct misconceptions in the community about your club and Rotary

## **Club Public Relations Committee**

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The club public relations committee should develop and execute a plan to inform the public about Rotary and promote your club's service projects and activities. As the main spokesperson for your club, you will help implement and continuously evaluate your club's public relations plan. Include the public relations committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

When appointing your club public relations committee, select Rotarians who are articulate and knowledgeable about Rotary International and your club. Choose a committee chair who has professional public relations or media experience and is familiar working with the local media.

Your club public relations committee has the following responsibilities:

- Achieving club public relations goals for the coming year (see the Public Relations section of the *Planning Guide for Effective Rotary Clubs*)
- Familiarizing themselves with RI resources
- Creating awareness of club activities among club members, media, and the general public
- Enhancing projects and activities to make them more appealing to the media
- Helping to create a public image conducive to membership development



#### **Rotary Reminder**

You'll find more information on the public relations committee in the *Club Public Relations Committee Manual*.

## Components of Public Relations

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Effective public relations requires time, effort, and planning. Before the beginning of the Rotary year, have the club public relations committee develop an action plan that identifies the audience, strategies, and tools, and the projects and activities that will be promoted.

### Audience

Ensuring a positive image of Rotary in the community requires tailoring public relations for different audiences. These audiences may include:

- Television, radio, print, and Internet journalists or reporters
- Local government officials
- Business leaders
- Civic leaders
- Community organizations
- People directly affected by Rotary service projects
- Students and educators
- Specialized journalists or reporters who cover a specific topic, such as education or health

### Media

Media is a broad term that can include television stations, newspapers, international wire services, the Internet, and the publications of other organizations and institutions. Additional types of media include:

- Local magazines and radio stations
- Billboards and other public space media, including signage at bus and train stations
- Trade publications
- Public access cable stations
- Radio public affairs shows and radio talk shows
- Corporate and community organization newsletters
- Online media, including blogs, video, podcasts, and social networking sites

There is a tremendous competition for media time and space, so it is important for your club to be creative and consider all types of media.

### News Releases

A news release is the most widely used means of sending information to the media. It can alert media to an event and serve as the basis of a news story. A good news release answers the basic questions of who, what, when, where, why, and how. Ensure that the release is objective and concise.

When sending a news release, consider the following tips:

- Send your news release in the body of the e-mail message rather than an attachment. Spam filters often flag e-mails with attachments, so your message might not be delivered.

- Rather than just typing “News Release” in the subject line, share what the news release is about.
- Take the time to find the appropriate contact person and e-mail your release directly to an individual reporter rather than to a general e-mail address.

### Fact Sheets

A fact sheet provides basic information on Rotary, its history, objectives, and project emphases. Among Rotarians, fact sheets are used to educate new and prospective members; outside Rotary, they supply the media with background information, raise public awareness, and inform the general public of Rotary’s activities. Search PR fact sheet at [www.rotary.org](http://www.rotary.org).

### Newsworthy Club Activities and Events

The following club activities and events may interest the media:

- Service projects that meet a community need or illustrate a larger news trend
- International service projects supported by your club or a local club volunteer
- Projects involving local youth or a prominent community member
- A notable or prominent speaker at a club meeting
- Presentation by RI or Rotary Foundation program participants about their experiences in another culture
- Interact and Rotaract activities
- Anniversaries of local clubs or programs
- Stories with a strong visual element

Additional ways to make the community more aware of your club include:

- Sponsoring special events, such as marathons, recycling efforts, or fundraisers
- Creating exhibits and displays that can be posted throughout the community
- Advertising in newspapers or magazines, on billboards or buses, or in air or train transportation centers
- Building a rapport with the public relations staff of other organizations
- Encouraging Rotarians to wear their Rotary lapel pins
- Posting Rotary information on an online forum, community calendar, or another organization’s Web site



#### **Rotary Reminder**

More information on starting a club public relations program can be found in *Effective Public Relations: A Guide for Rotary Clubs* or at [www.rotary.org](http://www.rotary.org).



### Rotary Reminder

Your governor, assistant governor, or district public relations chair are available to advise and assist clubs in preventing or solving local public relations problems. Refer to the *Media Crisis Handbook* for counsel on how to handle adverse publicity.

## Answering Questions about Rotary

As the spokesperson for your Rotary club, you will be addressing and speaking with non-Rotary audiences, including the media, at project events and dedications, club visits, and other occasions. Work closely with your public relations committee to develop concise statements to explain Rotary and your club to the media.

Be prepared to answer each of the following questions in no more than 25 words:

- What is Rotary?
- Who are Rotarians?
- What does Rotary do?

Effective answers to these questions should be positive, factual, specific, and brief. For a list of key Rotary messages, see appendix H.

## Resources

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org](http://www.rotary.org), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to support your club's public relations efforts:



***Effective Public Relations: A Guide for Rotary Clubs*** (257-EN) — Tools and tips for promoting club activities to attract positive attention from the community and potential members.

### Human Resources

- Assistant governor — Appointed by the district governor to help clubs operate effectively and achieve their goals.
- District public relations committee — Responsible for overseeing all public relations activity in your district.
- Public Relations Division at RI World Headquarters — Staff members dedicated to assisting clubs, districts, and RI in their public relations efforts.
- Club and District Support representative — Staff member at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.

### Informational Resources

- *Club Public Relations Committee Manual* — Provides an overview of the public relations committee and its responsibilities as well as available resources, specific committee duties, and other relevant information.

- Humanity in Motion campaign materials — Public relations tools including television, radio, print, Internet, and billboard public service announcements that focus on Rotarians' efforts to address critical community issues, including polio eradication, peace, and membership.
- *Media Crisis Handbook* (515-EN) — Helps Rotary clubs and districts deal effectively with the news media when unexpected events prompt inquiries from the press.
- *Planning Guide for Effective Rotary Clubs* (appendix I) — Club assessment and goal-setting tool used to plan club public relations goals.
- *RI Visual Identity Guide* (547-EN) — Reference for publication design at all levels of Rotary; includes information on the proper use of the Rotary emblem and colors, elements of good publications, typography, graphics, and photographs.
- *Rotary Fact Pack* (Web only) — Rotary fact sheets to assist with club public relations efforts.
- Rotary Images (Web only) — Database of Rotary project and event photos taken by RI photographers.
- *Rotary PR Tips* (Web only) — Twice-monthly English-only e-newsletter that offers innovative ideas for clubs and district to promote Rotary in their communities. Free subscriptions available at [www.rotary.org/newsletters](http://www.rotary.org/newsletters).
- *RVM: The Rotarian Video Magazine* — Features a collection of stories that chronicle Rotarian achievements and projects worldwide.
- *This Is Rotary* (001-EN) — Colorful illustrated brochure providing a brief overview of Rotary for prospective Rotarians and the public.
- *What's Rotary?* (419-EN) — Wallet-size card answering frequently asked questions about Rotary.
- [www.rotary.org](http://www.rotary.org) — The public relations section of running a club includes information about working with the media, promoting Rotary, and the Humanity in Motion campaign materials.

## Discussion Questions

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Consider these questions in preparation for your presidents-elect training seminar.

What is your role in your club's public relations?



What types of media are in your area?

What activities can attract positive media attention for your club?

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

# Appendix H: Key Rotary Messages

These key Rotary messages can be incorporated into your public relations materials or public speeches.

**Rotary is one of the largest and most influential international humanitarian service organizations in the world.**

- Rotary's 1.2 million members worldwide belong to more than 33,000 Rotary clubs in more than 200 countries and geographical areas.
- As volunteers, Rotary members have been serving the needs of communities worldwide since 1905.

**Rotary is a global network of business, professional, and community leaders.**

- Through volunteer service, the women and men of Rotary build friendships and enlarge their circle of business, professional, and community acquaintances.
- Participating in international service projects allows Rotary members to connect with people from around the world and promote cross-cultural understanding.

**Rotary promotes peace and international understanding through its educational and humanitarian programs.**

- Rotary sponsors the largest privately funded international scholarship program in the world. Since 1947, Rotary has contributed roughly US\$500 million to fund 38,000 students from 100 countries. These cultural ambassadors use the skills they acquire through their studies abroad to help their communities.
- Rotary clubs promote peace by initiating thousands of humanitarian projects every year that address the underlying causes of social instability and conflict — such as hunger, poverty, disease, and illiteracy.
- Rotary's top philanthropic goal is to eradicate polio worldwide.
- Since 1985, Rotary members have donated their time and money to help immunize more than two billion children in 122 countries.
- To date, Rotary has contributed \$800 million and countless volunteer hours to fighting the disease.
- In 2007 and 2009, the Bill & Melinda Gates Foundation awarded The Rotary Foundation grants totaling US\$355 million. In return, Rotary is committed to raising \$200 million by 30 June 2012.

**This is an exciting yet challenging time. Rotary and its partners have reduced polio cases by 99 percent worldwide.**

- In 2007, 1,315 cases of polio were reported, compared with 350,000 cases in 1988.
- Polio still threatens children in parts of Africa and South Asia.
- Polio remains endemic in just four countries: Afghanistan, India, Nigeria, and Pakistan.

## Worksheet 18: Summary

## Notes

## Public Relations

### I learned . . .

**I will ...**

**I will ...**

## Contacts

[illegible]

# Worksheet 19: Public Relations Case Study

Read the following case study, and create a public relations plan for the Rotary Club of Royal Gardens. Focus on three or four ways the club can reach out to the media and to the community directly to share its projects. Consider the questions below as you develop your plan.

The Rotary Club of Royal Gardens is located in a prosperous town of 35,000. The club's 40 members are a cross-section of the Royal Gardens professional community. The club's longest-running and most successful service project provides support for the community's growing elderly population. Through this ongoing project, club members prepare and deliver meals, arrange for home repairs, and visit hospitals.

The club also works with local schools to identify a candidate who is selected by the district to receive a Rotary Foundation Ambassadorial Scholarship. One scholar is studying the effects of global warming on ocean water levels and corresponds regularly with the club to inform members of her experiences.

The club's weekly program attracts prominent local speakers who talk about important issues facing the community. Attendance is high, and members are enthusiastic.

An informal survey was conducted by the club, and it revealed that few people in the community are aware of the club's efforts. Some respondents reported they perceive Rotary as a social club for older men.

Several members have complained about the difficulty of attracting new members as well as the lack of recognition the club receives for its service to the community. The club's activities have received no media coverage for the past five years.

How can the club provide basic information about Rotary International and the club to the media?

What aspects of the club's current activities might interest the media? Which type of media is most appropriate for each aspect? Why?

How might club programs be of interest to local media?

How can the club reach prospective members directly to inform them of its projects and membership opportunities?

# Goal Setting



As club president-elect, you will lead the club in establishing annual goals to achieve your club's strategic plan. To begin setting goals, you must assess the strengths and weaknesses of your club and determine how your club can improve what it does well and address areas of concern. Encourage broad club participation in the goal-setting process.

## Responsibilities

As president-elect, you have the following goal-setting responsibilities:

- Understanding the characteristics of an effective goal
- Developing or assessing your club's long-range goals in support of your vision or strategic plan
- Establishing annual goals that are in harmony with your club's long-range goals
- Ensuring an action plan has been developed for each goal

As president, you have the following responsibilities:

- Implementing and continually evaluating your club's goals
- Motivating club members to accomplish the goals



### Rotary Reminder

Learn about the RI Strategic Plan and the Foundation's Future Vision Plan at [www.rotary.org](http://www.rotary.org).

## Strategic Planning

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To ensure an effective year as club president, you must set goals that reflect your club's vision and strategic plan. A strategic plan, intended to last three to five years, helps guide the club toward its vision and achieving the Object of Rotary. Once you have evaluated the state of your club, you can begin to outline goals that address its weaknesses and enhance its strengths in areas that support your club's strategic plan.

If your club does not have a strategic plan, the club leadership team (including the current president, president-nominee, and immediate past president) should consider developing one (see worksheet 21: *Strategic Planning Guide*). Strategic planning

- Gives all club members the opportunity to be involved in planning the future of the club
- Ensures consistency and continuity among those who carry out the goals
- Focuses on significant issues and challenges facing the club
- Promotes team work and commitment to strategic issues

Once your club decides to begin the strategic planning process, your club should come up with a vision and ensure the annual goals support this vision.

Effective goals are

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available.
- **Time specific.** A goal should have a deadline or timeline.

Consider these club activities when setting goals:

- Membership
- Service projects
- The Rotary Foundation (participation and contributions)
- Public relations
- Club administration

A club retreat or assembly is an opportunity for members to collaborate and develop a vision for the future of your club. Work with your fellow club leaders to draft long-range goals that will achieve the vision and to determine which committee should address each goal. Consider the steps needed to achieve those goals, including annual goals.

## Annual Goals

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The *Planning Guide for Effective Rotary Clubs* (appendix I) is a goal-setting tool that will help you work with your club leadership team to establish goals for the year. The guide helps you to assess your club's current state and also provides strategies that you may choose to achieve club goals.

You'll work on the planning guide during the presidents-elect training seminar and at the district assembly with your fellow club leaders. A completed copy of the *Planning Guide for Effective Rotary Clubs* should be submitted to your district governor by 1 July.

### Developing an Action Plan

Establishing goals is the first step toward ensuring a successful year. The next step is developing an action plan to achieve them. As president, you will delegate much of the responsibility for implementing club goals to your committee chairs and members. Your role is to ensure that an action plan has been created for all goals and to monitor progress toward them. An action plan can be developed by

- Establishing a timeline
- Outlining the specific steps needed to achieve the goal
- Considering the resources and tools available to support the goal
- Determining who is responsible for implementing each step
- Identifying the criteria for measuring your club's progress
- Monitoring the progress toward the goal
- Evaluating the success of previous goals and current action plans, making modifications as necessary

### Evaluation

Once goals have been achieved, work with those who implemented them to determine which strategies worked and which did not. Apply new insights to other goals, and share them with the president-elect and president-nominee, as applicable, as they begin to develop goals.

Use the planning guide throughout your year in office to help measure club progress toward established goals or to try a new strategy. It's a working document, one that can be updated as needed. Review the planning guide with your assistant governor and district governor during club visits throughout the year.

## Resources

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Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help you set goals for a successful year:



***Planning Guide for Effective Rotary Clubs*** (appendix I) — A club assessment and goal-setting tool that club leaders use to record goals in the areas of membership, service projects, The Rotary Foundation, public relations, leadership development, and club administration.

### **Human Resources**

- Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Rotary Foundation staff.

### **Informational Resources**

- *Presidential Citation Brochure* (900A-EN) — Leaflet that outlines the Presidential Citation Program for the current Rotary year.
- *Strategic Planning Guide* (Web only) — A tool to help clubs create a strategic plan; includes worksheets and information to help clubs set goals and develop a plan to implement them.

### **Discussion Questions**

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Consider these questions in preparation for your presidents-elect training seminar.

If your club currently has a strategic plan, how will you build on the one you have?



If your club does not have a strategic plan, how will you gain your club's support in developing one?

What is your vision for your club?

Which goals from the current year will you carry into your year as president?

How will you ensure your club goals are achieved?

# Worksheet 20: Summary

## Notes

A full page of blank graph paper. The grid consists of small squares formed by thin, light gray lines. There are 20 columns and 15 rows of squares, creating a total of 300 square units. The margins are uniform on all sides.

## Goal Setting

### I learned . . .

**I will ...**

**I will ...**

## Contacts

[illegible]

## Strategic Planning Guide

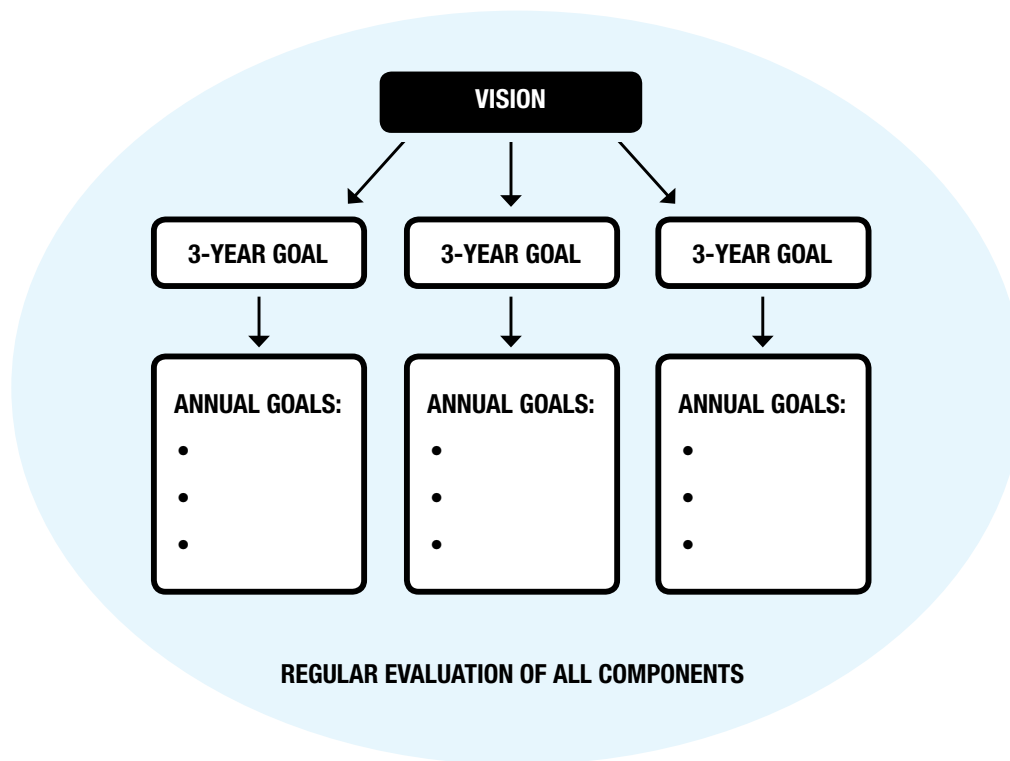
Strategic planning helps individuals, clubs, and districts develop a long-range vision and serves as a framework for establishing goals. This guide and the accompanying worksheet provide clubs with a starting point for strategic planning. These resources can also be easily adapted for individuals or districts, and the worksheet can be completed independently or as a group. Facilitators should become familiar with this resource and prepare an agenda before conducting a strategic planning meeting. The agenda should allot 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.

When conducting the strategic planning process, keep the following tips in mind:

- Include a wide variety of perspectives and consider all ideas.
- Involve past, current, and incoming club leaders.
- Have an unbiased facilitator or a small group of facilitators run strategic planning meetings.
- Reflect on how your club's goals align with those of your district and the RI Strategic Plan.



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### The Strategic Planning Model

Strategic planning involves creating a vision, with supporting goals that can be regularly evaluated and adjusted as needed.

## Process

A strategic plan can be developed by completing the process below. Use the accompanying worksheet to record your ideas.

### 1. Where are we now?

- Describe your club's current state.
- Brainstorm your club's strengths and weaknesses.

### 2. Where do we want to be?

- Create a list of 5-10 characteristics that you would like to see in your club three years from now.
- Draft a one-sentence vision statement describing your club three years from now.
- Finalize the vision statement, making sure that all participants support it.

### 3. How do we get there?

- Brainstorm three-year goals that will help your club achieve the vision, considering:
  - Strengths and weaknesses of the club
  - Programs and missions of RI and its Foundation
  - Involvement of all members
  - Achievability in three years

- Prioritize the three-year goals based on participant consensus. As a group, decide on the top two or three goals that will have the greatest impact as your club works toward the vision.
- Identify annual goals that support each of the top three-year goals.
- Determine the deadlines, resources, and people necessary for meeting the first annual goal for each of the three-year goals.

### 4. How are we doing?

- Create a strategic planning team to regularly monitor progress and recommend revisions to the plan.
- Allocate sufficient resources for the plan's implementation.
- Evaluate all decisions to make sure they support the plan, providing feedback to the strategic planning team on their implementation.
- Review the strategic plan annually, including the vision statement, three-year goals, and annual goals, and revise as needed.
- Repeat the full strategic planning process every three years to create a new plan or affirm the current one.



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# Strategic Planning Worksheet

Use the process outlined on the previous page to complete this worksheet and create your strategic plan.

1. Where are we now? \_\_\_\_\_

Today's date: \_\_\_\_\_

Describe your current state:

Strengths:

Weaknesses:

2. Where do we want to be? \_\_\_\_\_

Target date: \_\_\_\_\_

Key characteristics of future state:

Vision Statement:

### 3. How do we get there? \_\_\_\_\_

In order to reach the vision, the following goals must be achieved:

#### Three-year goals:

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In order to achieve the three-year goals, the following annual goals must be achieved.

*Note: There is no limit to the number of three-year or annual goals for your strategic plan.*

#### Three-year goal 1: \_\_\_\_\_

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

#### Three-year goal 2: \_\_\_\_\_

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

#### Three-year goal 3: \_\_\_\_\_

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

### 4. How are we doing?

List the actions that you will take to follow up on implementation of the plan:

## CHAPTER 9   **Important Documents**

# Appendix I: PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



August 2009

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in each section are common ways clubs might choose to pursue goals. Clubs are encouraged to develop alternative strategies to achieve their goals when appropriate. Presidents-elect should complete this form in cooperation with their club and submit a copy of it to their assistant governor by 1 July.

Download a Microsoft Word version at [www.rotary.org](http://www.rotary.org).

Rotary Club of \_\_\_\_\_ Rotary year of office: \_\_\_\_\_  
Name of president: \_\_\_\_\_  
Mailing address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

## MEMBERSHIP

### Current State

Current number of members: \_\_\_\_\_  
Number of members as of 30 June last year: \_\_\_\_\_ 30 June five years ago: \_\_\_\_\_  
Number of male members: \_\_\_\_\_ Number of female members: \_\_\_\_\_  
Average age of members: \_\_\_\_\_ Number of Rotary alumni members \_\_\_\_\_  
Number of Rotarians who have been members for 1-3 years: \_\_\_\_\_ 3-5 years: \_\_\_\_\_  
5-10 years: \_\_\_\_\_

Number of members who have proposed a new member in the previous two years: \_\_\_\_\_

Check the aspects of your community's diversity that your club membership reflects:

☐ Profession ☐ Age ☐ Gender ☐ Ethnicity

Our classification survey was updated on \_\_\_\_\_ and contains \_\_\_\_\_ classifications, of which \_\_\_\_\_ are unfilled.  
(number) (date) (number)

Describe the club's current new member orientation program.

Describe the club's continuing education programs for both new and established members.

Our club has sponsored a new club within the last 24 months. ☐ Yes ☐ No

Number of Rotary Fellowships and Rotarian Action Groups that club members participate in:

What makes this club attractive to new members?



What aspects of this club could pose a barrier to attracting new members?

### Future State

Membership goal for the upcoming Rotary year: \_\_\_\_\_ members by 30 June \_\_\_\_\_  
(number) (year)

Our club has identified the following sources of potential members within the community:

### How does the club plan to achieve its membership goals? (check all that apply)

- ☐ Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- ☐ Ensure the membership committee is aware of effective recruitment techniques
- ☐ Develop a recruitment plan to have the club reflect the diversity of the community
- ☐ Explain the expectations of membership to potential Rotarians
- ☐ Implement an orientation program for new members
- ☐ Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- ☐ Assign an experienced Rotarian mentor to every new club member
- ☐ Recognize those Rotarians who sponsor new members
- ☐ Encourage members to join a Rotary Fellowship or Rotarian Action Group
- ☐ Participate in the RI membership development award programs
- ☐ Sponsor a new club
- ☐ Other (please describe): \_\_\_\_\_

### Action steps:

## SERVICE PROJECTS

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### Current State

Number of Rotary Youth Exchange students: Hosted \_\_\_\_\_ Sponsored \_\_\_\_\_

Number of sponsored Interact clubs: \_\_\_\_\_ Rotaract clubs: \_\_\_\_\_

Rotary Community Corps: \_\_\_\_\_

Number of Rotary Youth Leadership Awards (RYLA) events: \_\_\_\_\_

Number of Rotary Friendship Exchanges: \_\_\_\_\_

Number of registered Rotary Volunteers: \_\_\_\_\_

Number of World Community Service (WCS) projects: \_\_\_\_\_

Number of other current club service projects: \_\_\_\_\_

## Future State

Our club has established the following service goals for the upcoming Rotary year:

For our community:

For communities in other countries:

### How does the club plan to achieve its service goals? *(check all that apply)*

- ☐ Ensure the service projects committee is aware of how to plan and conduct a service project
- ☐ Conduct a needs assessment of the community to identify possible projects
- ☐ Review current service projects to confirm that they meet a need and are of interest to members
- ☐ Identify the social issues in the community that the club wants to address through its service goals
- ☐ Assess the club's fundraising activities to determine if they meet project funding needs
- ☐ Involve all members in the club's service projects
- ☐ Recognize club members who participate and provide leadership in the club's service projects
- ☐ Identify a partner club with which to carry out an international service project
- ☐ Participate in:
  - ☐ Interact
  - ☐ Rotary Friendship Exchange
  - ☐ World Community Service
  - ☐ Rotaract
  - ☐ Rotary Volunteers
  - ☐ Rotary Youth Exchange
  - ☐ Rotary Community Corps
  - ☐ Rotary Youth Leadership Awards (RYLA)
- ☐ Use a grant from The Rotary Foundation to support a club project
- ☐ Register a project in need of funding, goods, or volunteers on the ProjectLINK database
- ☐ Other (please describe):

### Action steps:

## THE ROTARY FOUNDATION

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### Current State

Number of grants awarded:

District Simplified Grants: \_\_\_\_\_ Matching Grants: \_\_\_\_\_

Number of Ambassadorial Scholars: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of Group Study Exchange (GSE) team members: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of Rotary World Peace Fellows: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Current year's contributions to PolioPlus activities: \_\_\_\_\_

Current year's contributions to Annual Programs Fund: \_\_\_\_\_

Current year's contributions to Permanent Fund: \_\_\_\_\_

Number of club members who are

Paul Harris Fellows: \_\_\_\_\_ Benefactors: \_\_\_\_\_ Major Donors: \_\_\_\_\_

Rotary Foundation Sustaining Members: \_\_\_\_\_ Bequest Society members: \_\_\_\_\_

Number of Foundation alumni tracked by your club: \_\_\_\_\_

#### **Future State**

Our club has established the following Rotary Foundation goals (as reported on the Fund Development Club Goal Report Form) for the upcoming Rotary year:

Polio fundraising: \_\_\_\_\_ Annual Programs Fund contributions: \_\_\_\_\_

Major gifts: \_\_\_\_\_ Benefactors: \_\_\_\_\_

Bequest Society members: \_\_\_\_\_

Our club will participate in the following Rotary Foundation programs:

#### **How does the club plan to achieve its Rotary Foundation goals? (check all that apply)**

- ☐ Ensure the club's Rotary Foundation committee understands the programs of The Rotary Foundation and is committed to promoting financial support of the Foundation
- ☐ Help club members understand the relationship between Foundation giving and Foundation programs
- ☐ Plan a club program about The Rotary Foundation every quarter, especially in November, Rotary Foundation Month
- ☐ Include a brief story about The Rotary Foundation in every club program
- ☐ Schedule presentations that inform club members about The Rotary Foundation
- ☐ Ensure the club's Rotary Foundation committee chair attends the district Rotary Foundation seminar
- ☐ Use Rotary Foundation grants to support the club's international projects
- ☐ Recognize club members' financial contributions to The Rotary Foundation and their participation in Foundation programs
- ☐ Encourage each club member to contribute to the Foundation every year
- ☐ Participate in:
  - ☐ Group Study Exchange
  - ☐ PolioPlus
  - ☐ Matching Grants
  - ☐ Ambassadorial Scholarships
  - ☐ District Simplified Grants
  - ☐ Rotary World Peace Fellowships
- ☐ Invite Foundation program participants and alumni to be part of club programs and activities
- ☐ Other (please describe): \_\_\_\_\_

#### **Action steps:**

### **LEADERSHIP DEVELOPMENT**

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#### **Current State**

Number of club leaders who attended

District assembly: \_\_\_\_\_ District Rotary Foundation seminar: \_\_\_\_\_

District membership seminar: \_\_\_\_\_ District leadership seminar: \_\_\_\_\_

District conference: \_\_\_\_\_

Number of club members involved at the district level: \_\_\_\_\_

Number of visits from the assistant governor this Rotary year: \_\_\_\_\_

### **Future State**

Our club has established the following goals for developing Rotary leaders for the upcoming Rotary year:

#### **How does the club plan to develop Rotary leaders? (check all that apply)**

- ☐ Have the president-elect attend the presidents-elect training seminar (PETS) and the district assembly
- ☐ Have all committee chairs attend the district assembly
- ☐ Encourage interested past presidents to attend the district leadership seminar
- ☐ Appoint a club trainer to develop club members' knowledge and skills
- ☐ Conduct a leadership development program
- ☐ Use the expertise of the club's assistant governor
- ☐ Encourage new members to assume leadership positions through participation in club committees
- ☐ Ask members to visit other clubs to exchange ideas, and then share what they have learned with the club
- ☐ Other (please describe): \_\_\_\_\_

#### **Action steps:**

## **PUBLIC RELATIONS**

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### **Current State**

List club activities covered by the media and the type of media (television, radio, print, Internet, etc.) involved.

### **Future State**

Our club has established the following public relations goals for the upcoming Rotary year:

#### **How does the club plan to achieve its public relations goals? (check all that apply)**

- ☐ Ensure the public relations committee is trained in conducting a multimedia campaign
- ☐ Plan public relations efforts around all service projects
- ☐ Conduct a public awareness program targeted at the business and professional community that explains what Rotary is and what Rotary does
- ☐ Arrange for a public service announcement to be broadcast on a local television channel, aired on a local radio station, or placed in a local newspaper or magazine
- ☐ Other (please describe): \_\_\_\_\_

## Action steps:

### CLUB ADMINISTRATION

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#### Current State

Is your club operating under the Club Leadership Plan? ☐ Yes ☐ No

How often and when does the club board meet? \_\_\_\_\_

When are club assemblies held? \_\_\_\_\_

How is the club budget prepared? \_\_\_\_\_

Is the budget independently reviewed by a qualified accountant? ☐ Yes ☐ No

Does the club have a strategic plan in place? ☐ Yes ☐ No

Has the club developed a system for ensuring continuity of leadership on its board, committees, etc.?  
☐ Yes ☐ No

Has the club developed a system for keeping all members involved? ☐ Yes ☐ No

Does the club use Member Access at [www.rotary.org](http://www.rotary.org) to update its membership list? ☐ Yes ☐ No

How often is the club's bulletin published? \_\_\_\_\_

Describe how weekly club programs are organized. \_\_\_\_\_

Does the club have its own Web site? ☐ Yes ☐ No If yes, how often is the site updated? \_\_\_\_\_

Does the club observe the special months of the Rotary calendar, such as Rotary Foundation Month and Magazine Month? ☐ Yes ☐ No

How often does your club conduct fellowship activities? \_\_\_\_\_

How does the club involve the families of Rotarians?

#### Future State

**How does the club carry out the administrative tasks of the club? (check all that apply)**

- ☐ Regular board meetings have been scheduled.
- ☐ The club will review the Club Leadership Plan on the following dates: \_\_\_\_\_
- ☐ The club's strategic and communication plans will be updated on the following dates: \_\_\_\_\_
- ☐ \_\_\_\_\_ club assemblies have been scheduled on the following dates: \_\_\_\_\_  
(number)
- ☐ The club has either adopted the latest version of the Recommended Rotary Club Bylaws or revised its own bylaws (recommended after each Council on Legislation).
- ☐ Club elections will be held on \_\_\_\_\_.  
(date)
- ☐ At least \_\_\_\_\_ delegates will be sent to the district conference.  
(number)
- ☐ A club bulletin will be produced to provide information to club members.

- ☐ The club's Web site will be updated \_\_\_\_\_ times per year.  
(number)
- ☐ A plan has been developed to ensure interesting and relevant weekly club programs.
- ☐ Monthly attendance figures will be reported to the district leadership by the \_\_\_\_\_ day of the following month.  
(number)
- ☐ Member Access will be used to maintain club records by 1 June and 1 December to ensure accurate semiannual reports.
- ☐ Membership changes will be reported to RI within \_\_\_\_\_ days.  
(number)
- ☐ Reports to RI, including the semiannual report, will be completed on a timely basis.
- ☐ The following fellowship activities for all club members are planned for the year:
- ☐ Other (please describe):

**Action steps:**

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**Our club would like assistance from the governor or assistant governor with the following:**

**Our club would like to discuss the following issues with the governor or assistant governor during a visit to our club:**

\_\_\_\_\_  
Club President's Signature

\_\_\_\_\_  
Rotary Year

\_\_\_\_\_  
Assistant Governor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

# SUMMARY OF GOALS FOR ROTARY CLUB OF \_\_\_\_\_ ROTARY YEAR \_\_\_\_\_

For each goal your club has identified for the upcoming Rotary year, indicate which Avenue of Service it addresses. To ensure a balanced service effort, you should have at least one goal that addresses each Avenue of Service. Most goals will address more than one avenue.

	Club Service	Vocational Service	Community Service	International Service
<b>Membership goal</b> _____ members by 30 June _____ (number) (year)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Service goals</b> For our community:  For communities in other countries:	<input type="checkbox"/>  <input type="checkbox"/>	<input type="checkbox"/>  <input type="checkbox"/>	<input type="checkbox"/>  <input type="checkbox"/>	<input type="checkbox"/>  <input type="checkbox"/>
<b>Rotary Foundation goals</b> Our club's PolioPlus contribution goal is _____. Our club's Annual Programs Fund contribution goal is _____. Our club's Permanent Fund contribution goal is _____. Our club will participate in the following Rotary Foundation programs:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Leadership development goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Public relations goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Club administration goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other goal:</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other goal:</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## \*Constitution of the Rotary Club of

### Article 1 Definitions

As used in this constitution, unless the context otherwise clearly requires, the words in this article shall have the following meanings:

1. Board: The Board of Directors of this club.
2. Bylaws: The bylaws of this club.
3. Director: A member of this club's Board of Directors.
4. Member: A member, other than an honorary member, of this club.
5. RI: Rotary International.
6. Year: The twelve-month period which begins on 1 July.

### Article 2 Name (select one)

☐ The name of this organization shall be Rotary Club of \_\_\_\_\_

(Member of Rotary International)

or

☐ The name of this organization shall be Rotary E-Club of \_\_\_\_\_

(Member of Rotary International)

### Article 3 Locality of the Club (select one)

☐ The locality of this club is as follows: \_\_\_\_\_

or

☐ The locality of this e-club is (worldwide) \_\_\_\_\_ and can be found on the Worldwide Web at: www. \_\_\_\_\_

### Article 4 Object

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

*First.* The development of acquaintance as an opportunity for service;

*Second.* High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

*Third.* The application of the ideal of service in each Rotarian's personal, business, and community life;

*Fourth.* The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

### Article 5 Five Avenues of Service

Rotary's Five Avenues of Service are the philosophical and practical framework for the work of this Rotary club.

1. Club Service, the first Avenue of Service, involves action a member should take within this club to help it function successfully.
2. Vocational Service, the second Avenue of Service, has the purpose of promoting high ethical standards in businesses and

professions, recognizing the worthiness of all dignified occupations, and fostering the ideal of service in the pursuit of all vocations. The role of members includes conducting themselves and their businesses in accordance with Rotary's principles.

3. Community Service, the third Avenue of Service, comprises varied efforts that members make, sometimes in conjunction with others, to improve the quality of life of those who live within this club's locality or municipality.

4. International Service, the fourth Avenue of Service, comprises those activities that members do to advance international understanding, goodwill, and peace by fostering acquaintance with people of other countries, their cultures, customs, accomplishments, aspirations, and problems, through reading and correspondence and through cooperation in all club activities and projects designed to help people in other lands.

5. New Generations Service, the fifth Avenue of Service, recognizes the positive change implemented by youth and young adults through leadership development activities, involvement in community and international service projects, and exchange programs that enrich and foster world peace and cultural understanding.

### (Select one Article 6)

#### ☐ Article 6 Meetings

##### Section 1 — Regular Meetings.

- (a) *Day and Time.* This club shall hold a regular meeting once each week on the day and at the time provided in the bylaws.
- (b) *Change of Meeting.* For good cause, the board may change a regular meeting to any day during the period commencing with the day following the preceding regular meeting and ending with the day preceding the next regular meeting, or to a different hour of the regular day, or to a different place.
- (c) *Cancellation.* The board may cancel a regular meeting if it falls on a legal holiday, including a commonly recognized holiday, or in case of the death of a club member, or of an epidemic or of a disaster affecting the whole community, or of an armed conflict in the community which endangers the lives of the club members. The board may cancel not more than four regular meetings in a year for causes not otherwise specified herein provided that this club does not fail to meet for more than three consecutive meetings.

**Section 2 — Annual Meeting.** An annual meeting for the election of officers shall be held not later than 31 December as provided in the bylaws.

or

#### ☐ Article 6 Meetings (for e-Clubs)

##### Section 1 — Regular Meetings.

- (a) *Day.* This club shall hold a regular meeting once each week by posting an interactive activity on the club's Web site on the day provided in the bylaws. The meeting shall be considered as held on the day that the interactive activity is to be posted on the Web site.
- (b) *Change of Meeting.* For good cause, the board may change a regular meeting to any day during the period commencing with the day following the preceding regular meeting and ending with the day preceding the next regular meeting.
- (c) *Cancellation.* The board may cancel a regular meeting if it falls on a legal holiday, including a commonly recognized

\* The bylaws of Rotary International provide that each club admitted to membership in RI shall adopt this prescribed standard club constitution.



holiday, or in case of the death of a club member, or of an epidemic or of a disaster affecting the whole community, or of an armed conflict in the community which endangers the lives of the club members. The board may cancel not more than four regular meetings in a year for causes not otherwise specified herein provided that this club does not fail to meet for more than three consecutive meetings.

**Section 2 — Annual Meeting.** An annual meeting for the election of officers shall be held not later than 31 December as provided in the bylaws.

## Article 7 Membership

**Section 1 — General Qualifications.** This club shall be composed of adult persons of good character and good business, professional and/or community reputation.

**Section 2 — Kinds.** This club shall have two kinds of membership, namely: active and honorary.

**Section 3 — Active Membership.** A person possessing the qualifications set forth in article 5, section 2 of the RI constitution may be elected to active membership in this club.

**Section 4 — Transferring or Former Rotarian.**

(a) *Potential Members.* A member may propose to active membership a transferring member or former member of a club, if the proposed member is terminating or has terminated such membership in the former club due to no longer being engaged in the formerly assigned classification of business or profession within the locality of the former club or the surrounding area. The transferring or former member of a club being proposed to active membership under this section may also be proposed by the former club. The classification of a transferring or former member of a club shall not preclude election to active membership even if the election results in club membership temporarily exceeding the classification limits. Potential members of this club who are current or former members of another club who have debts to the other club are ineligible for membership in this club. This club may demand that a potential member present written proof that no money is owed to the other club. The admission of a transferring or former Rotarian as an active member pursuant to this section shall be contingent upon receiving a certificate from the board of the previous club confirming the prospective member's prior membership in that club.

(b) *Current or Former Members.* This club shall provide a statement whether money is owed to this club when requested by another club with respect to a current or former member of this club being considered for membership in the other club.

**Section 5 — Dual Membership.** No person shall simultaneously hold active membership in this and another club. No person shall simultaneously be a member and an honorary member in this club. No person shall simultaneously hold active membership in this club and membership in a Rotaract club.

**Section 6 — Honorary Membership.**

(a) *Eligibility for Honorary Membership.* Persons who have distinguished themselves by meritorious service in the furtherance of Rotary ideals and those persons considered friends of Rotary for their permanent support of Rotary's cause may be elected to honorary membership in this club. The term of such membership shall be as determined by the board. Persons may hold honorary membership in more than one club.

(b) *Rights and Privileges.* Honorary members shall be exempt from the payment of admission fees and dues, shall have no vote, and shall not be eligible to hold any office in this club. Such members shall not hold classifications, but shall be entitled to attend all meetings and enjoy all the other privileges of this club. No honorary member of this club is entitled to any rights and privileges in any other club, except for the right to visit other clubs without being the guest of a Rotarian.

**Section 7 — Holders of Public Office.** Persons elected or appointed to public office for a specified time shall not be eligible to active membership in this club under the classification of such office. This restriction shall not apply to persons holding positions or offices in schools, colleges, or other institutions of learning or to persons who are elected or appointed to the judiciary. Members who are elected or appointed to public office for a specified period may continue as such members in their existing classifications during the period in which they hold such office.

**Section 8 — Rotary International Employment.** This club may retain in its membership any member employed by RI.

## Article 8 Classifications

**Section 1 — General Provisions.**

(a) *Principal Activity.* Each member shall be classified in accordance with the member's business, profession, or type of community service. The classification shall be that which describes the principal and recognized activity of the firm, company, or institution with which the member is connected or that which describes the member's principal and recognized business or professional activity or that which describes the nature of the member's community service activity.

(b) *Correction or Adjustment.* If the circumstances warrant, the board may correct or adjust the classification of any member. Notice of a proposed correction or adjustment shall be provided to the member and the member shall be allowed a hearing thereon.

**Section 2 — Limitations.** This club shall not elect a person to active membership from a classification if the club already has five or more members from that classification, unless the club has more than 50 members, in which case, the club may elect a person to active membership in a classification so long as it will not result in the classification making up more than 10 percent of the club's active membership. Members who are retired shall not be included in the total number of members in a classification. The classification of a transferring or former member of a club, or a Rotary Foundation alumnus as defined by the board of directors of RI, shall not preclude election to active membership even if the election results in club membership temporarily exceeding the above limitations. If a member changes classification, the club may continue the member's membership under the new classification notwithstanding these limitations.

## Article 9 Attendance

### (Select one introductory paragraph to Section 1)

☐ **Section 1 — General Provisions.** Each member should attend this club's regular meetings. A member shall be counted as attending a regular meeting if the member is present for at least 60 percent of the meeting, or is present and is called away unexpectedly and subsequently produces evidence to the satisfaction of the board that such action was reasonable, or makes up for an absence in any of the following ways:

or

☐ **Section 1 (for e-Clubs) — General Provisions.** Each member should attend this club's regular meetings. A member shall be counted as attending a regular meeting if the member participates in the regular meeting posted on the club's Web site within one week following its posting, or makes up a missed meeting in any of the following ways:

(a) *14 Days Before or After the Meeting.* If, within fourteen (14) days before or after the regular time for that meeting, the member

- (1) attends at least 60 percent of the regular meeting of another club or of a provisional club; or
- (2) attends a regular meeting of a Rotaract or Interact club, Rotary Community Corps, or Rotary Fellowship or of a provisional Rotaract or Interact club, Rotary Community Corps, or Rotary Fellowship; or
- (3) attends a convention of RI, a council on legislation, an international assembly, a Rotary institute for past and present officers of RI, a Rotary institute for past, present, and incoming officers of RI, or any other meeting convened with the approval of the board of directors of RI or the president of RI acting on behalf of the board of directors of RI, a Rotary multizone conference, a meeting of a committee of RI, a Rotary district conference, a Rotary district assembly, any district meeting held by direction of the board of directors of RI, any district committee meeting held by direction of the district governor, or a regularly announced intercity meeting of Rotary clubs; or
- (4) is present at the usual time and place of a regular meeting of another club for the purpose of attending such meeting, but that club is not meeting at that time or place; or
- (5) attends and participates in a club service project or a club-sponsored community event or meeting authorized by the board; or
- (6) attends a board meeting or, if authorized by the board, a meeting of a service committee to which the member is assigned; or
- (7) participates through a club web site in an interactive activity requiring an average of 30 minutes of participation.

When a member is outside the member's country of residence for more than fourteen (14) days, the time restriction shall not be imposed so that the member may attend meetings in another country at any time during the travel period, and each such attendance shall count as a valid make-up for any regular meeting missed during the member's time abroad.

- (b) *At the Time of the Meeting.* If, at the time of the meeting, the member is
  - (1) traveling with reasonable directness to or from one of the meetings specified in sub-subsection (a) (3) of this section; or
  - (2) serving as an officer or member of a committee of RI, or a trustee of The Rotary Foundation; or
  - (3) serving as the special representative of the district governor in the formation of a new club; or
  - (4) on Rotary business in the employ of RI; or
  - (5) directly and actively engaged in a district-sponsored or RI- or Rotary Foundation-sponsored service project in a remote area where making up attendance is impossible; or
  - (6) engaged in Rotary business duly authorized by the board which precludes attendance at the meeting.

**Section 2 — Extended Absence on Outposted Assignment.** If a member will be working on an outposted assignment for an extended period of time, attendance at the meetings of a designated club at the site of the assignment will replace attendance at the regular meetings of the member's club, provided there is a mutual agreement between the two clubs.

**Section 3 — Excused Absences.** A member's absence shall be excused if

- (a) the absence complies with the conditions and under circumstances approved by the board. The board may excuse a member's absence for reasons which it considers to be good and sufficient. Such excused absences shall not extend for longer than twelve months.
- (b) the age of the member is 65 and above and the aggregate of the member's years of age and years of membership in one or more clubs is 85 years or more and the member has notified

the club secretary in writing of the member's desire to be excused from attendance and the board has approved.

**Section 4 — RI Officers' Absences.** A member's absence shall be excused if the member is a current officer of RI.

**Section 5 — Attendance Records.** In the event that a member whose absences are excused under the provisions of subsection 3(b) or section 4 of this article attends a club meeting, the member and the member's attendance shall be included in the membership and attendance figures used to compute this club's attendance.

## Article 10 Directors and Officers

**Section 1 — Governing Body.** The governing body of this club shall be the board constituted as the bylaws may provide.

**Section 2 — Authority.** The board shall have general control over all officers and committees and, for good cause, may declare any office vacant.

**Section 3 — Board Action Final.** The decision of the board in all club matters is final, subject only to an appeal to the club. However, as to a decision to terminate membership, a member, pursuant to article 12, section 6, may appeal to the club, request mediation, or request arbitration. If appealed, a decision of the board shall be reversed only by a two-thirds vote of the members present, at a regular meeting specified by the board, provided a quorum is present and notice of the appeal has been given by the secretary to each member at least five (5) days prior to the meeting. If an appeal is taken, the action taken by the club shall be final.

**Section 4 — Officers.** The club officers shall be a president, the immediate past president, a president-elect, and one or more vice-presidents, all of whom shall be members of the board, and a secretary, a treasurer, and a sergeant-at-arms, who may or may not be members of the board as the bylaws shall provide.

**Section 5 — Election of Officers.**

- (a) *Terms of Officers other than President.* Each officer shall be elected as provided in the bylaws. Except for the president, each officer shall take office on 1 July immediately following election and shall serve for the term of office or until a successor has been duly elected and qualified.
- (b) *Term of President.* The president shall be elected as provided in the bylaws, not more than two (2) years but not less than eighteen (18) months prior to the day of taking office and shall serve as president-nominee upon election. The nominee shall take the title of president-elect on 1 July in the year prior to taking office as president. The president shall take office on 1 July and shall serve a period of one (1) year or until a successor has been duly elected and qualified.
- (c) *Qualifications.* Each officer and director shall be a member in good standing of this club. The president-elect shall attend the district presidents-elect training seminar and the district assembly unless excused by the governor-elect. If so excused, the president-elect shall send a designated club representative who shall report back to the president-elect. If the president-elect does not attend the presidents-elect training seminar and the district assembly and has not been excused by the governor-elect or, if so excused, does not send a designated club representative to such meetings, the president-elect shall not be able to serve as club president. In such event, the current president shall continue to serve until a successor who has attended a presidents-elect training seminar and district assembly or training deemed sufficient by the governor-elect has been duly elected.

## Article 11 Admission Fees and Dues

Every member shall pay an admission fee and annual dues as prescribed in the bylaws, except that any transferring or former member of another club who is accepted into membership of this club pursuant to article 7, section 4(a) shall not be required to pay a second admission fee. A Rotaractor who ceased to be a member of Rotaract

within the preceding two years, who is accepted into membership of this club, shall not be required to pay an admission fee.

## Article 12 Duration of Membership

**Section 1 — Period.** Membership shall continue during the existence of this club unless terminated as hereinafter provided.

**Section 2 — Automatic Termination.**

- (a) *Membership Qualifications.* Membership shall automatically terminate when a member no longer meets the membership qualifications, except that
  - (1) the board may grant a member moving from the locality of this club or the surrounding area a special leave of absence not to exceed one (1) year to enable the member to visit and become known to a Rotary club in the new community if the member continues to meet all conditions of club membership;
  - (2) the board may allow a member moving from the locality of this club or the surrounding area to retain membership if the member continues to meet all conditions of club membership.
- (b) *How to Rejoin.* When the membership of a member has terminated as provided in subsection (a) of this section, such person, provided such person's membership was in good standing at the time of termination, may make new application for membership, under the same or another classification. A second admission fee shall not be required.
- (c) *Termination of Honorary Membership.* Honorary membership shall automatically terminate at the end of the term for such membership as determined by the board. However, the board may extend an honorary membership for an additional period. The board may revoke an honorary membership at any time.

**Section 3 — Termination — Non-payment of Dues.**

- (a) *Process.* Any member failing to pay dues within thirty (30) days after the prescribed time shall be notified in writing by the secretary at the member's last known address. If the dues are not paid on or before ten (10) days of the date of notification, membership may terminate, subject to the discretion of the board.
- (b) *Reinstatement.* The board may reinstate the former member to membership upon the former member's petition and payment of all indebtedness to this club. However, no former member may be reinstated to active membership if the former member's classification is in conflict with article 8, section 2.

**Section 4 — Termination — Non-attendance.**

- (a) *Attendance Percentages.* A member must
  - (1) attend or make up at least 50 percent of club regular meetings in each half of the year;
  - (2) attend at least 30 percent of this club's regular meetings in each half of the year (assistant governors, as defined by the board of directors of RI, shall be excused from this requirement).

If a member fails to attend as required, the member's membership shall be subject to termination unless the board consents to such non-attendance for good cause.

- (b) *Consecutive Absences.* Unless otherwise excused by the board for good and sufficient reason or pursuant to article 9, sections 3 or 4, each member who fails to attend or make up four consecutive regular meetings shall be informed by the board that the member's non-attendance may be considered a request to terminate membership in this club. Thereafter, the board, by a majority vote, may terminate the member's membership.

**Section 5 — Termination — Other Causes.**

- (a) *Good Cause.* The board may terminate the membership of any member who ceases to have the qualifications for membership in this club or for any good cause by a vote of not less than two-thirds of the board members, at a meeting called for that purpose. The guiding principles for this meeting shall

be article 7, section 1; The Four-Way Test; and the high ethical standards that one should hold as a Rotary club member.

- (b) *Notice.* Prior to taking any action under subsection (a) of this section, the member shall be given at least ten (10) days' written notice of such pending action and an opportunity to submit a written answer to the board. The member shall have the right to appear before the board to state the member's case. Notice shall be by personal delivery or by registered letter to the member's last known address.
- (c) *Filling Classification.* When the board has terminated the membership of a member as provided for in this section, this club shall not elect a new member under the former member's classification until the time for hearing any appeal has expired and the decision of this club or of the arbitrators has been announced. However, this provision shall not apply if, by election of a new member, the number of members under the said classification would remain within provided limitations even if the board's decision regarding termination is reversed.

**Section 6 — Right to Appeal, Mediate or Arbitrate Termination.**

- (a) *Notice.* Within seven (7) days after the date of the board's decision to terminate membership, the secretary shall give written notice of the decision to the member. Within fourteen (14) days after the date of the notice, the member may give written notice to the secretary of the intention to appeal to the club, request mediation, or to arbitrate as provided in article 16.
- (b) *Date for Hearing of Appeal.* In the event of an appeal, the board shall set a date for the hearing of the appeal at a regular club meeting to be held within twenty-one (21) days after receipt of the notice of appeal. At least five (5) days' written notice of the meeting and its special business shall be given to every member. Only members shall be present when the appeal is heard.
- (c) *Mediation or Arbitration.* The procedure utilized for mediation or arbitration shall be as provided in article 16.
- (d) *Appeal.* If an appeal is taken, the action of the club shall be final and binding on all parties and shall not be subject to arbitration.
- (e) *Decision of Arbitrators or Umpire.* If arbitration is requested, the decision reached by the arbitrators or, if they disagree, by the umpire shall be final and binding on all parties and shall not be subject to appeal.
- (f) *Unsuccessful Mediation.* If mediation is requested but is unsuccessful, the member may appeal to the club or arbitrate as provided in subsection (a) of this section.

**Section 7 — Board Action Final.** Board action shall be final if no appeal to this club is taken and no arbitration is requested.

**Section 8 — Resignation.** The resignation of any member from this club shall be in writing, addressed to the president or secretary. The resignation shall be accepted by the board if the member has no indebtedness to this club.

**Section 9 — Forfeiture of Property Interest.** Any person whose club membership has been terminated in any manner shall forfeit all interest in any funds or other property belonging to this club if, under local laws, the member may have acquired any right to them upon joining the club.

**Section 10 — Temporary Suspension.** Notwithstanding any provision of this constitution, if in the opinion of the board

- (a) credible accusations have been made that a member has refused or neglected to comply with this constitution, or has been guilty of conduct unbecoming a member or prejudicial to the interests of the club; and
- (b) those accusations, if proved, constitute good cause for terminating the membership of the member; and
- (c) it is desirable that no action should be taken in respect of the membership of the member pending the outcome of a matter or an event that the board considers should properly occur before such action is taken by the board; and
- (d) that in the best interests of the club and without any vote being taken as to his or her membership, the member's

membership should be temporarily suspended and the member should be excluded from attendance at meetings and other activities of this club and from any office or position the member holds within the club. For the purposes of this clause, the member shall be excused from fulfilling attendance responsibilities;

the board may, by a vote of not less than two-thirds of the board, temporarily suspend the member as aforesaid for such period and on such further conditions as the board determines, albeit for a period no longer than is reasonably necessary in all the circumstances.

## **Article 13 Community, National, and International Affairs**

**Section 1 — Proper Subjects.** The merits of any public question involving the general welfare of the community, the nation, and the world are of concern to the members of this club and shall be proper subjects of fair and informed study and discussion at a club meeting for the enlightenment of its members in forming their individual opinions. However, this club shall not express an opinion on any pending controversial public measure.

**Section 2 — No Endorsements.** This club shall not endorse or recommend any candidate for public office and shall not discuss at any club meeting the merits or demerits of any such candidate.

**Section 3 — Non-Political.**

(a) *Resolutions and Opinions.* This club shall neither adopt nor circulate resolutions or opinions, and shall not take action dealing with world affairs or international policies of a political nature.

(b) *Appeals.* This club shall not direct appeals to clubs, peoples, or governments, or circulate letters, speeches, or proposed plans for the solution of specific international problems of a political nature.

**Section 4 — Recognizing Rotary's Beginning.** The week of the anniversary of Rotary's founding (23 February) shall be known as World Understanding and Peace Week. During this week, this club will celebrate Rotary service, reflect upon past achievements, and focus on programs of peace, understanding, and goodwill in the community and throughout the world.

## **Article 14 Rotary Magazines**

**Section 1 — Mandatory Subscription.** Unless, in accordance with the bylaws of RI, this club is excused by the board of directors of RI from complying with the provisions of this article, each member shall, for the duration of membership, subscribe to the official magazine or to the magazine approved and prescribed for this club by the board of directors of RI. Two Rotarians residing at the same address have the option to subscribe jointly to the official magazine. The subscription shall be paid in six (6) month periods for the duration of membership in this club and to the end of any six (6) month period during which membership may terminate.

**Section 2 — Subscription Collection.** The subscription shall be collected by this club from each member semiannually in advance and remitted to the Secretariat of RI or to the office of such regional publications as may be determined by the board of directors of RI.

## **Article 15 Acceptance of Object and Compliance with Constitution and Bylaws**

By payment of an admission fee and dues, a member accepts the principles of Rotary as expressed in its object and submits to and agrees to comply with and be bound by the constitution and bylaws of this club, and on these conditions alone is entitled to the privileges of this club. Each member shall be subject to the terms of the constitution and bylaws regardless of whether such member has received copies of them.

## **Article 16 Arbitration and Mediation**

**Section 1 — Disputes.** Should any dispute, other than as to a decision of the board, arise between any current or former member(s) and this club, any club officer or the board, on any account whatsoever which cannot be settled under the procedure already provided for such purpose, the dispute shall, upon a request to the secretary by any of the disputants, either be resolved by mediation or settled by arbitration.

**Section 2 — Date for Mediation or Arbitration.** In the event of mediation or arbitration, the board shall set a date for the mediation or arbitration, in consultation with disputants, to be held within twenty-one (21) days after receipt of the request for mediation or arbitration.

**Section 3 — Mediation.** The procedure for such mediation shall be that recognized by an appropriate authority with national or state jurisdiction or be that recommended by a competent professional body whose recognized expertise covers alternative dispute resolution or be that recommended by way of documented guidelines determined by the board of RI or the trustees of The Rotary Foundation. Only a member of a Rotary club may be appointed as mediator(s). The club may request the district governor or the governor's representative to appoint a mediator who is a member of a Rotary club and who has appropriate mediation skills and experience.

(a) *Mediation Outcomes.* The outcomes or decisions agreed between the parties as a result of mediation shall be recorded and copies held by each party, the mediator(s) and one copy given to the board and to be held by the secretary. A summary statement of outcomes acceptable to the parties involved shall be prepared for the information of the club. Either party, through the president or secretary, may call for further mediation if either party has retracted significantly from the mediated position.

(b) *Unsuccessful Mediation.* If mediation is requested but is unsuccessful, any disputant may request arbitration as provided in section 1 of this article.

**Section 4 — Arbitration.** In the event of a request for arbitration, each party shall appoint an arbitrator and the arbitrators shall appoint an umpire. Only a member of a Rotary club may be appointed as umpire or as arbitrator.

**Section 5 — Decision of Arbitrators or Umpire.** If arbitration is requested, the decision reached by the arbitrators or, if they disagree, by the umpire shall be final and binding on all parties and shall not be subject to appeal.

## **Article 17 Bylaws**

This club shall adopt bylaws not inconsistent with the constitution and bylaws of RI, with the rules of procedure for an administrative territorial unit where established by RI, and with this constitution, embodying additional provisions for the government of this club. Such bylaws may be amended from time to time as therein provided.

## **Article 18 Interpretation**

Throughout this constitution, the terminology "mail," "mailing," and "ballot-by-mail" will include utilization of electronic mail (e-mail) and internet technology to reduce costs and increase responsiveness.

## **Article 19 Amendments**

**Section 1 — Manner of Amending.** Except as provided in section 2 of this article, this constitution may be amended only by the council on legislation in the same manner as is established in the bylaws of RI for the amendment of its bylaws.

**Section 2 — Amending Article 2 and Article 3.** Article 2 (Name) and Article 3 (Locality of the Club) of the constitution shall be amended at any regular meeting of this club, a quorum being

present, by the affirmative vote of not less than two-thirds of all voting members present and voting, provided that notice of such proposed amendment shall have been mailed to each member and to the governor at least ten (10) days before such meeting, and provided further, that such amendment shall be submitted to the board of directors of RI for its approval and shall become effective only when so approved. The governor may offer an opinion to the board of directors of RI regarding the proposed amendment.

## Recommended Rotary Club Bylaws

### \*Bylaws of the Rotary Club of \_\_\_\_\_

#### Article 1 Definitions

1. Board: The Board of Directors of this club.
2. Director: A member of this club's Board of Directors.
3. Member: A member, other than an honorary member, of this club.
4. RI: Rotary International.
5. Year: The twelve-month period that begins on 1 July.

#### Article 2 Board

The governing body of this club shall be the board consisting of \_\_\_\_\_ members of this club, namely, the president, immediate past president, president-elect (or president-nominee, if no successor has been elected), vice-president, secretary, treasurer, and the sergeant-at-arms. At the discretion of the board, also added can be the \_\_\_\_\_ directors elected in accordance with article 3, section 1 of these bylaws.

#### Article 3 Election of Directors and Officers

**Section 1** — At a regular meeting one month prior to the meeting for election of officers, the presiding officer shall ask for nominations by members of the club for president, vice-president, secretary, treasurer, and \_\_\_\_\_ directors. The nominations may be presented by a nominating committee or by members from the floor, by either or by both as a club may determine. If it is determined to use a nominating committee, such committee shall be appointed as the club may determine. The nominations duly made shall be placed on a ballot in alphabetical order under each office and shall be voted for at the annual meeting. The candidates for president, vice-president, secretary, and treasurer receiving a majority of the votes shall be declared elected to their respective offices. The \_\_\_\_\_ candidates for director receiving a majority of the votes shall be declared elected as directors. The candidate for president elected in such balloting shall be the president-nominee. The president-nominee shall take the title of president-elect on the first day of July next following the election, and shall serve as an officer during that year. On 1 July immediately following that year, the president-elect shall assume office as president.

**Section 2** — The officers and directors shall constitute the board. Within one week after their election, the directors-elect shall meet and elect some member of the club to act as sergeant-at-arms.

**Section 3** — A vacancy in the board or any office shall be filled by action of the remaining directors.

**Section 4** — A vacancy in the position of any officer-elect or director-elect shall be filled by action of the remaining directors-elect.

#### Article 4 Duties of Officers

**Section 1** — *President*. It shall be the duty of the president to preside at meetings of the club and the board and to perform other duties as ordinarily pertain to the office of president.

**Section 2** — *Immediate Past President*. It shall be the duty of the immediate past president to serve as a director and to perform

such other duties as may be prescribed by the president or the board.

**Section 3** — *President-elect*. It shall be the duty of the president-elect to serve as a director and to perform such other duties as may be prescribed by the president or the board.

**Section 4** — *Vice-President*. It shall be the duty of the vice-president to preside at meetings of the club and the board in the absence of the president and to perform other duties as ordinarily pertain to the office of vice-president.

**Section 5** — *Secretary*. It shall be the duty of the secretary to keep membership records; record attendance at meetings; send out notices of club, board, and committee meetings; record and preserve the minutes of such meetings; report as required to RI, including the semiannual reports of membership on 1 January and 1 July of each year, which shall include per capita dues for all members and prorated dues for active members who have been elected to membership in the club since the start of the July or January semiannual reporting period; report changes in membership; provide the monthly attendance report, which shall be made to the district governor within 15 days of the last meeting of the month; collect and remit RI official magazine subscriptions; and perform other duties as usually pertain to the office of secretary.

**Section 6** — *Treasurer*. It shall be the duty of the treasurer to have custody of all funds, accounting for it to the club annually and at any other time upon demand by the board, and to perform other duties as pertain to the office of treasurer. Upon retirement from office, the treasurer shall turn over to the incoming treasurer or to the president all funds, books of accounts, or any other club property.

**Section 7** — *Sergeant-at-Arms*. The duties of the sergeant-at-arms shall be such as are usually prescribed for such office and other duties as may be prescribed by the president or the board.

#### Article 5 Meetings

**Section 1** — *Annual Meeting*. An annual meeting of this club shall be held on the \_\_\_\_\_ in each year, at which time the election of officers and directors to serve for the ensuing year shall take place.

(Note: Article 6, section 2 of the Standard Rotary Club Constitution provides that "An annual meeting for the election of officers shall be held not later than 31 December...")

**Section 2** — The regular weekly meetings of this club shall be held on \_\_\_\_\_ (day) at \_\_\_\_\_ (time). Due notice of any changes in or canceling of the regular meeting shall be given to all members of the club. All members excepting an honorary member (or member excused pursuant to the standard Rotary club constitution) in good standing in this club, on the day of the regular meeting, must be counted as present or absent, and attendance must be evidenced by the member's being present for at least sixty (60) percent of the time devoted to the regular meeting, either at this club or at any other Rotary club, or as otherwise provided in the standard Rotary club constitution, article 9, sections 1 and 2.

\*NOTE: These bylaws are recommended only and may be changed by any Rotary club to meet its own conditions, provided such changes are not out of harmony with the Standard Rotary Club Constitution and with the RI Constitution, RI Bylaws, and the Rotary Code of Policies. If any doubt exists, the proposed changes should be submitted to the general secretary for the consideration of the Board of Directors of RI.

For Rotary e-clubs, governors should contact their Club and District Support representative ([www.rotary.org/cds](http://www.rotary.org/cds)) for more information about Recommended Rotary E-Club Bylaws and other e-club issues.

**Section 3** — One-third of the membership shall constitute a quorum at the annual and regular meetings of this club.

**Section 4** — Regular meetings of the board shall be held on \_\_\_\_\_ of each month. Special meetings of the board shall be called by the president, whenever deemed necessary, or upon the request of two (2) directors, due notice having been given.

**Section 5** — A majority of the directors shall constitute a quorum of the board.

## Article 6 Fees and Dues

**Section 1** — The admission fee shall be \$ \_\_\_\_\_ to be paid before the applicant can qualify as a member, except as provided for in the standard Rotary club constitution, article 11.

**Section 2** — The membership dues shall be \$ \_\_\_\_\_ per annum, payable semiannually on the first day of July and of January, with the understanding that a portion of each semiannual payment shall be applied to each member's subscription to the RI official magazine.

## Article 7 Method of Voting

The business of this club shall be transacted by *viva voce*\* vote except the election of officers and directors, which shall be by ballot. The board may determine that a specific resolution be considered by ballot rather than by *viva voce* vote.

(\*Note: Viva voce vote is defined as when club voting is conducted by vocal assent.)

## Article 8 Avenues of Service

The Avenues of Service are the philosophical and practical framework for the work of this Rotary club. They are Club Service, Vocational Service, Community Service, International Service, and New Generations Service. This club will be active in each of the Avenues of Service.

## Article 9 Committees

Club committees are charged with carrying out the annual and long-range strategic goals of the club. The president-elect, president, and immediate past president should work together to ensure continuity of leadership and succession planning. When feasible, committee members should be appointed to the same committee for three years to ensure consistency. The president-elect is responsible for appointing committee members to fill vacancies, appointing committee chairs, and conducting planning meetings prior to the start of the year in office. It is recommended that the chair have previous experience as a member of the committee. Standing committees should be appointed as follows:

- **Membership**  
This committee should develop and implement a comprehensive plan for the recruitment and retention of members.
- **Public Image**  
This committee should develop and implement plans to provide the public with information about Rotary and to promote the club's service projects and activities.
- **Administration**  
This committee should conduct activities associated with the effective operation of the club.
- **Service Projects**  
This committee should develop and implement educational, humanitarian, and vocational projects that address the needs of its community and communities in other countries.
- **The Rotary Foundation**  
This committee should develop and implement plans to support The Rotary Foundation through both financial contributions and program participation.

Additional ad hoc committees may be appointed as needed.

- (a) The president shall be *ex officio* a member of all committees and, as such, shall have all the privileges of membership thereon.
- (b) Each committee shall transact its business as is delegated to it in these bylaws and such additional business as may be referred to it by the president or the board. Except where special authority is given by the board, such committees shall not take action until a report has been made and approved by the board.
- (c) Each chair shall be responsible for regular meetings and activities of the committee, shall supervise and coordinate the work of the committee, and shall report to the board on all committee activities.

(Note: The above committee structure is in harmony with both the District Leadership Plan and the Club Leadership Plan. Clubs have the discretion to create any committees that are required to effectively meet its service and fellowship needs. Sample listings of such optional committees are found in the club committee manuals. A club may develop a different committee structure as needed.)

## Article 10 Duties of Committees

The duties of all committees shall be established and reviewed by the president for his or her year. In declaring the duties of each, the president shall reference appropriate RI materials and the Avenues of Service when developing plans for the year.

Each committee shall have a specific mandate, clearly defined goals, and action plans established by the beginning of each year for implementation during the course of the year. It shall be the primary responsibility of the president-elect to provide the necessary leadership to prepare a recommendation for club committees, mandates, goals, and plans for presentation to the board in advance of the commencement of the year as noted above.

## Article 11 Leave of Absence

Upon written application to the board, setting forth good and sufficient cause, leave of absence may be granted excusing a member from attending the meetings of the club for no longer than twelve (12) months.

(Note: Such leave of absence does operate to prevent a forfeiture of membership; it does not operate to give the club credit for the member's attendance. Unless the member attends a regular meeting of some other club, the excused member must be recorded as absent except that absence authorized under the provisions of the Standard Rotary Club Constitution is not computed in the attendance record of the club.)

## Article 12 Finances

**Section 1** — Prior to the beginning of each fiscal year, the board shall prepare a budget of estimated income and expenditures for the year, which shall stand as the limit of expenditures for these purposes, unless otherwise ordered by action of the board. The budget shall be broken into two separate parts: one in respect of club operations and one in respect of charitable/service operations.

**Section 2** — The treasurer shall deposit all club funds in a bank, named by the board. The club funds shall be divided into two separate parts: club operations and service projects.

**Section 3** — All bills shall be paid by the treasurer or other authorized officer only when approved by two other officers or directors.

**Section 4** — A thorough review of all financial transactions by a qualified person shall be made once each year.

**Section 5** — Officers having charge or control of club funds shall give bond as required by the board for the safe custody of the funds of the club, cost of bond to be borne by the club.

**Section 6** — The fiscal year of this club shall extend from 1 July to 30 June, and for the collection of members' dues shall be divided into two (2) semiannual periods extending from 1 July to 31 December, and from 1 January to 30 June. The payment of per capita dues and RI official magazine subscriptions shall be made on 1 July and 1 January of each year on the basis of the membership of the club on those dates.

### **Article 13 Method of Electing Members**

**Section 1** — The name of a prospective member, proposed by an active member of the club, shall be submitted to the board in writing, through the club secretary. A transferring or former member of another club may be proposed to active membership by the former club. The proposal shall be kept confidential except as otherwise provided in this procedure.

**Section 2** — The board shall ensure that the proposal meets all the classification and membership requirements of the standard Rotary club constitution.

**Section 3** — The board shall approve or disapprove the proposal within 30 days of its submission and shall notify the proposer, through the club secretary, of its decision.

**Section 4** — If the decision of the board is favorable, the prospective member shall be informed of the purposes of Rotary and of the privileges and responsibilities of membership, following which the prospective member shall be requested to sign the membership proposal form and to permit his or her name and proposed classification to be published to the club.

**Section 5** — If no written objection to the proposal, stating reasons, is received by the board from any member (other than honorary) of the club within seven (7) days following publication of information about the prospective member, that person, upon payment of the admission fee (if not honorary membership), as prescribed in these bylaws, shall be considered to be elected to membership.

If any such objection has been filed with the board, it shall vote on this matter at its next meeting. If approved despite the objection, the proposed member, upon payment of the admission fee (if not honorary membership), shall be considered to be elected to membership.

**Section 6** — Following the election, the president shall arrange for the new member's induction, membership card, and new member Rotary literature. In addition, the president or secretary will report the new member information to RI and the president will assign a member to assist with the new member's assimilation to the club as well as assign the new member to a club project or function.

**Section 7** — The club may elect, in accordance with the standard Rotary club constitution, honorary members proposed by the board.

### **Article 14 Resolutions**

The club shall not consider any resolution or motion to commit the club on any matter until the board has considered it. Such resolutions or motions, if offered at a club meeting, shall be referred to the board without discussion.

### **Article 15 Order of Business**

Meeting called to order.

Introduction of visitors.

Correspondence, announcements, and Rotary information.

Committee reports if any.

Any unfinished business.

Any new business.

Address or other program features.

Adjournment.

### **Article 16 Amendments**

These bylaws may be amended at any regular meeting, a quorum being present, by a two-thirds vote of all members present, provided that notice of such proposed amendment shall have been mailed to each member at least ten (10) days before such meeting. No amendment or addition to these bylaws can be made which is not in harmony with the standard Rotary club constitution and with the constitution and bylaws of RI.



# District Assembly Discussion Questions

Consider the following discussion questions before your district assembly.

## **Public Speaking Session**

How do you prepare for a presentation?

What tips do you have for public speaking?

## **Leadership Session**

What skills are needed to lead your club?

What leadership skills do you need to improve?

How will you work to improve these skills?

**Case Study Exercise Session**

What procedures should a club have in place to strengthen its administration, membership, service projects, public relations, and Rotary Foundation efforts?

**Finalizing Club Goals and Problem-Solving Session**

What are your clubs goals for the coming year?

What challenges will your club face for achieving these goals?

What strategies will you use to address those challenges?

# Worksheet 1: Public Speaking

You have been asked by a local television station to deliver a short statement (no more than three minutes) about one of the following topics: a) your club's service project, b) why you joined Rotary, or c) your club's upcoming fundraiser. Draft your statement using the space below. Be prepared to deliver the statement to your group. Think about the public speaking skills discussed in the session when preparing your presentation.

Next, group members should deliver their statements and receive feedback from others in the group. Use the questions below as a guide for providing feedback to each other. If time allows, the small groups can report observations to the larger group.

**Statement:**

[illegible]

## **Feedback**

1. Did the statement give you the information necessary?
  
  
  
  
  
  
  
  
  
  
2. Describe the quality of the presenter's voice. Did the presenter vary his/her tone? Was the statement presented in a clear manner?
  
  
  
  
  
  
  
  
  
  
3. Did the presenter seem knowledgeable about the subject?
  
  
  
  
  
  
  
  
  
  
4. To what extent were notes used for this statement?
  
  
  
  
  
  
  
  
  
  
5. Did the presenter seem relaxed and confident? What were the signs?
  
  
  
  
  
  
  
  
  
  
6. Was the presenter's pace appropriate? Did the presenter stay within the allotted time?
  
  
  
  
  
  
  
  
  
  
7. What other observations or tips can you provide the presenter?

## Worksheet 2: Summary

## Notes

[illegible]

# Public Speaking

### I learned . . .

**I learned ...**

**I will ...**

**I will ...**

## Contacts

[illegible]

# Worksheet 3: Leadership

List characteristics of effective leaders below.

In the boxes below, list four leadership characteristics you need to improve, then describe how you will improve each characteristic.

<p><b>Characteristic:</b> _____</p> <p><b>I will improve this by:</b></p>	<p><b>Characteristic:</b> _____</p> <p><b>I will improve this by:</b></p>
<p><b>Characteristic:</b> _____</p> <p><b>I will improve this by:</b></p>	<p><b>Characteristic:</b> _____</p> <p><b>I will improve this by:</b></p>

## Worksheet 4: Summary

## Notes

# Leadership

### I learned . . .

**I learned ...**

**I will ...**

**I will ...**

## Contacts

[illegible]

# Worksheet 5: Presidents-elect case study

Read the case study below, then create a step-by-step plan for the president of the Rotary Club of Park City South using the case study action plan on the next page. Consider the questions listed as you develop your plan.

The Rotary Club of Park City South has 50 members. Over the last three years, five members have been inducted, and 12 members have left within a year of joining. New member orientation consists of presenting each new member with a Rotary lapel pin and a copy of *The ABCs of Rotary* during the induction ceremony.

The last three presidents have been members of the club for less than five years. The club has 18 committees, many of which only have one member and produce very little.

Most members attend every meeting, but one-third leave immediately after the meal, before the guest speaker. The weekly programs usually involve local government officials providing community updates, business professionals attempting to promote their companies, or local charities seeking financial support from the club.

Most members sit at the same table every week for the meal. Club members often comment on how much they enjoy seeing their fellow Rotarians once a week.

The 75-year-old club has an annual golf outing that attracts about half of its members, plus 20 family members. Every year, the club also awards a scholarship to a local high school student, organizes a New Year's meal at a local retirement community, and donates books to the library. Less than half of the members participate in these projects. The club has only received coverage in the local paper for the New Year's meal.

The club is a 100% Paul Harris Fellow Club and supports the Every Rotarian, Every Year initiative. The club has never applied for a grant from The Rotary Foundation or nominated anyone to participate in a Foundation program.

In the last three years, the club has had one member serve the district as an assistant governor and another as a district conference committee member. The club always has at least 10 members attend the district conference, and the president-elect attends the presidents-elect training seminar. Usually only people new to their committee or office attend the district assembly.

The club has sent students to the district Rotary Youth Leadership Awards (RYLA) seminar for the last two years. It has never participated in the district's Rotary Youth Exchange program nor sponsored an Interact or Rotaract club or Rotary Community Corp.

The club has not earned a Presidential Citation for the last five years.

What are the strengths of this club?



What are the weaknesses of this club?

How would you motivate club members to get more involved?

What procedures should be put into place to increase member involvement?

What is the single most important issue facing this club?

How would you increase membership retention?

## Case Study Action Plan

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

What did you learn that you can apply to your club?





# Plan your club's future using these guides

**Club Leadership Plan  
Strategic Planning Guide  
Planning Guide for Effective Rotary Clubs**

**Guides are designed to work together. Download at [www.rotary.org](http://www.rotary.org).**



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