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클럽회장 편람 LA PRÉSIDENCE DU
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DEL CLUB 클럽회장 편람 クラブ
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DI CLUB 클럽회장 편람 MANUAL
DO PRESIDENTE DO CLUBE
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CLUB PRESIDENT'S MANUAL

A PART OF THE *CLUB OFFICERS' KIT*

ROTARY INTERNATIONAL®

222-EN—(312)

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This is the 2012 edition of the *Club President's Manual* (222). It is intended for use by club presidents holding office in 2013-14, 2014-15, and 2015-16. The information 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 RI policy. Changes to these documents listed above by the triennial Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.

Photos: Alyce Henson and Monika Lozinska-Lee

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Introduction

Congratulations on your position as club president. Your role is to lead an effective Rotary club. This manual is your main training resource for the presidents-elect training seminar (PETS) and the district assembly, as well as a reference throughout your term. It also provides an overview of the manuals for the five club committees, the club secretary, and the club treasurer.

This manual is formatted to be viewed online or on your mobile device.

Your Rotary club is a member of Rotary International, a network of more than 34,000 Rotary clubs worldwide, and has access to RI services and resources, including publications in nine languages, information at www.rotary.org and club data through Member Access, grants from The Rotary Foundation, and staff support at the Secretariat.*

Rotary.org

Throughout this manual, there are many references to www.rotary.org, where you can find current information on all aspects of Rotary.

* *The Secretariat is Rotary International's general secretary, RI and Foundation staff at RI World Headquarters in Evanston, Illinois, USA, and seven international offices.*

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About Us: Find Rotary and Foundation information.
Member Access: Administration tool to do Rotary business online, access club information, and take online courses.
Shop: Order RI publications by topic, audiovisual programs, and supplies.
Search: Type in the topic you are looking for. Given the amount of resources on the site, you may need to try a few phrases to get the information you need.
Social Networks: Join Rotary's social networks.
News and Announcements: Stay current on what's happening in Rotary.
Contact Us: Locate the contact information for a specific area of RI World Headquarters.
Site Map: See how topics are organized under each tab of the website.
Select a language: Choose the language you'd like to view each page in.

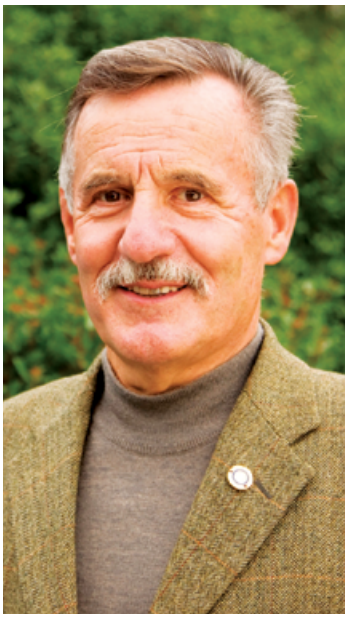
You can shop for resources, do a keyword search, log in to Member Access to access club information, contact staff at RI World Headquarters, and change the language of the site, all from the home page of Rotary.org.

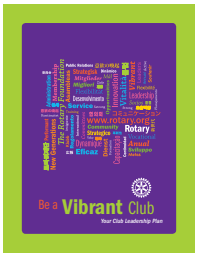
Comments?

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
Email: leadership.training@rotary.org
Phone: 847-866-3000
Fax: 847-866-9446

1 Understanding Your Responsibilities





This manual and *Be a Vibrant Club:Your Club Leadership Plan* (245) are the key references during your year. You can also consult your immediate past president.

Your role as club president is to lead your club, ensuring it functions effectively and is a better club at the end of the year. 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 increase clubs' ability to meet their goals in each Avenue of Service and achieve the Object of Rotary (see appendix 1).

Club President-elect Responsibilities and Best Practices

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 strategic plan, using the elements of an effective club as a guide (chapter 2)
- Setting your club's annual goals, which support long-range goals, using the Planning Guide for Effective Rotary Clubs (appendix 2)
  - 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 3 and 4)
  - Holding one or more meetings with your board of directors; reviewing the provisions of your club's constitution and bylaws (chapter 3)
  - Supervising preparation of the club budget* (chapter 3)
- Ensuring continuity in leadership and service projects* (chapter 4)
  - 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

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

Club President Responsibilities and Best Practices

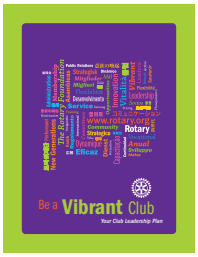
Your responsibilities as club president are summarized below and explained throughout this manual:

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 to obtain your club's administrative data from RI
- Ensuring that your secretary and treasurer have 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 2)
- Ensuring that each committee has defined goals* (chapter 4)
  - Encouraging communication between club and district committee chairs
  - Conducting periodic reviews of all committee activities, goals, and expenditures*
  - Serving as an ex officio member of all club committees*
- Presiding at all meetings of the club* (chapter 3)
  - Ensuring that all meetings are carefully planned
  - Communicating important information to club members
  - Organizing social events for members
- Preparing for and encouraging participation in club and district meetings (chapter 3)
  - Planning for and presiding at 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 4)
  - Developing, approving, and monitoring the club budget while working closely with the club treasurer* (chapter 3)
  - Working with district leadership to achieve club and district goals (chapter 2)

  - Using information and resources from the district, RI Secretariat, and the RI website (all chapters)
  - Preparing for the governor's 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 4)
  - Arranging for a joint meeting of the incoming board of directors with the outgoing board (chapter 4)
  - 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 4)
- Ensuring that RI youth protection policies are followed (chapter 8 and appendix 13)
  - 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

Your Club Leadership Plan



Your club leadership plan is your club's action plan for becoming more vibrant, or fun. *Be a Vibrant Club: Your Club Leadership Plan* offers best practices your club can tailor to your club environment. Rotary clubs are encouraged to use the suggested best practices to develop their own plans.

When developing your club's plan, assess your club's current practices to determine what is working well and what is meaningful to your club. Also consider practices that are not conducive to member engagement and club vitality. The benefits of implementing the suggested best practices include:

- All members are aware of club initiatives and have a chance to voice their opinions on the future of their club.
- More member involvement increases potential for future club and district leaders and retention.
- All members are working to achieve club goals because they are engaged.

- Continuity among leaders and club goals eases the transition from one Rotary year to the next.
- Your club is more fun because it doesn't emphasize rules or outdated traditions and tries new activities and projects to meet member needs.

Use the Club Leadership Plan Worksheet as a starting point for creating your own club leadership plan. Consider presenting the concepts in your plan to your club. Find more information on the RI website.

Strategic Planning Best Practices

Past, current, and incoming club officers should work together to customize a leadership plan that incorporates current club strengths and best practices, such as these:

- Develop long-range goals that address the elements of an effective club.
- Set annual goals that support long-range goals.
- Keep all members informed by holding club assemblies.
- Communicate effectively with club leaders, club members, and district leaders.
- Ensure continuity in leadership and service projects from year to year.
- Customize club bylaws to reflect club operations and practices.
- Provide opportunities to develop stronger relationships among members.
- Ensure that every member is active in a club project or function.
- Offer regular, consistent training.
- Assign committees that support your club's needs.

Review your practices with your fellow club leaders annually to ensure that they continue to meet your club's goals and reflect your club's identity. Ask your assistant governor for assistance. You can also consult your Club and District Support representative, immediate past president, or Rotary coordinator to connect you to resources.

Call to Action

What will you do to better understand your responsibilities as a club president?

Who will you consult with when you have questions about your role?

What do you need to learn more about before your term begins?

Appendix 1: Rotary's Guiding Principles

OBJECT OF ROTARY

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.

AVENUES OF SERVICE

Club Service focuses on strengthening fellowship and ensuring the effective functioning of the club.

Vocational Service encourages Rotarians to serve others through their vocations and practice high ethical standards.

Community Service covers the projects and activities the club undertakes to improve life in its community.

International Service encompasses actions taken to expand Rotary's humanitarian reach around the globe and promote world understanding and peace.

New Generations Service recognizes the positive change implemented by youth and young adults through leadership development activities such as RYLA, Rotaract and Interact club service projects, and creating international understanding with Rotary Youth Exchange.

AREAS OF FOCUS

Projects that receive Global Grant funds from The Rotary Foundation should fall under at least one of the following:

Peace and conflict prevention/resolution

Disease prevention and treatment

Water and sanitation

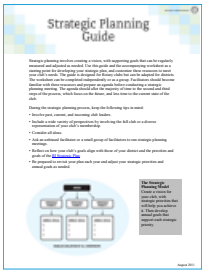
Maternal and child health

Basic education and literacy

Economic and community development

Notes

2 Planning for Your Year



The Planning Guide for Effective Rotary Clubs and the Strategic Planning Guide are key resources for developing your goals and action plan for your year.

As club president-elect, you will lead your club in establishing annual goals that support your strategic plan. The Planning Guide for Effective Rotary Clubs (appendix 2) will help you assess your club's strengths, weaknesses, opportunities, and risks in order to set annual goals.

Responsibilities

As president-elect, you have these goal-setting responsibilities:

- Developing or assessing your club's strategic plan in support of your vision
- Establishing annual goals that coincide with your club's long-range goals
- Ensuring that an action plan has been developed for each goal
- Attending PETS and the district assembly to further develop your goals with your team

As president, you have these goal-setting responsibilities:

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

Strategic Planning

A strategic plan, intended to last three to five years, helps guide the club toward its vision and stay relevant to current and potential members' interests. Your club's strategic plan should be considered a working document that is regularly evaluated to ensure that it continues to represent your club's goals for reaching its vision.

If your club doesn't have a strategic plan, develop one using the Strategic Planning Guide (appendix 3). Rotary International encourages Rotary clubs and districts to align their goals with the RI Strategic Plan (appendix 4).

Long-range and Annual Goals

Your club strategic plan should include long-rage and annual goals. The Planning Guide for Effective Rotary Clubs (appendix 2) will help you develop your annual goals by assessing your club's current state and identifying strategies 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. Submit your completed copy of the guide to your district governor by 1 July.

Evaluation

Once goals have been achieved, work with those who implemented them to determine which strategies were effective. Apply new insights to other goals, and share them with the president-elect and president-nominee, as applicable, as they begin to develop goals for their terms.

Use the planning guide as a working document that can be updated as needed throughout the year. Review the guide with your assistant governor and district governor during club visits.

Call to Action

What will you do to improve your club's strategic plan?

How will you involve your members in the goal-setting process?

What will you delegate and to whom?

What do you need to learn more about?

What will you do to ensure your club's goals are met?

Appendix 2: Planning Guide for Effective Rotary Clubs

April 2012

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 that clubs might choose to pursue goals, but clubs are encouraged to develop alternative strategies when appropriate. Presidents-elect should complete this form in cooperation with their club and submit a copy to their assistant governor by 1 July.

Download a Word version at www.rotary.org.

Rotary Club of _____ Rotary year of office: _____

Name of president: _____

Mailing address: _____

Phone: _____ Fax: _____ Email: _____

MEMBERSHIP

Current State

Current number of members: _____

Number of members as of 30 June last year: _____ As of 30 June five years ago: _____

Number of male members: _____ Number of female members: _____

Average age of members: _____ Number of Rotary alumni members: _____

Number of alumni or program participants tracked by your club: _____

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: _____

Aspects of your community's diversity reflected in your club membership:

☐ Professional ☐ Age ☐ Gender ☐ Ethnicity

Club's classification survey was updated on _____ (date) and contains _____ classifications, of which _____ are unfilled.

Describe the club's new-member orientation program.

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

Has your club 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 your club attractive to new members?

What aspects of your club could be a barrier to attracting new members?

Future State

Membership goal for the coming Rotary year: _____ members by 30 June _____

What sources of potential members has your club identified within the community?

What strategies does the club plan use 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 that 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 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

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 other current club service projects: _____

Future State

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

For our community:

For communities in other countries:

What strategies does the club plan use to achieve its service goals? ***(Check all that apply.)***

- ☐ Ensure that the service projects committee knows 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 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 club to partner with on an international service project.
- ☐ Participate in:
  - ☐ Interact
  - ☐ Rotaract
  - ☐ Rotary Community Corps
  - ☐ Rotary Friendship Exchange
  - ☐ Rotary Youth Exchange
  - ☐ 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 www.rotary.org.
- ☐ Other (please describe):

Action steps:

THE ROTARY FOUNDATION

Current State (for nonpilot clubs in 2012-13)

Number of grants awarded:

District Simplified Grants: _____ Matching Grants: _____

Number of Ambassadorial Scholars: Nominated: _____ Selected: _____ Hosted: _____

Number of Group Study Exchange team members: Nominated: _____ Selected: _____ Hosted: _____

Number of Rotary Peace Fellows: Nominated: _____ Selected: _____ Hosted: _____

Amount contributed this year to PolioPlus activities: _____

Amount contributed this year to Annual Fund: _____

Amount contributed this year to Permanent Fund: _____

Number of club members who are

Paul Harris Fellows: _____ Benefactors: _____ Major Donors: _____

Rotary Foundation Sustaining Members: _____ Bequest Society members: _____

Current State (for pilot clubs in 2012-13)

Club qualified status: ☐ Qualified ☐ Pending ☐ Incomplete

District grant activities your club is currently involved in:

1.

2.

Global grant activities your club is currently involved in:

1.

2.

Educational, promotional, and fundraising projects held by your club for PolioPlus last year:

1.

2.

3.

Number of Rotary Peace Fellows:

Nominated last year: _____

Selected by the Trustees last year: _____

Amount contributed to the Annual Fund last year: _____

Number of Foundation alumni tracked by your club: _____

Number of Rotarians who are:

Rotary Foundation Sustaining Members: _____ Arch C. Klumph Society members: _____

Paul Harris Fellows: _____ Benefactors: _____

Paul Harris Society members: _____ Bequest Society members: _____

Major Donors: _____

Future State (for all clubs in 2013-14)

Date your club will be qualified:

Club's Rotary Foundation goals for the coming Rotary year:

1.

2.

3.

Club's Annual Fund contribution goal:

Club's Permanent Fund contribution goal:

Club's goal to eradicate polio:

District grants:

1.

2.

Club will address the following Rotary Foundation area(s) 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

Global grants:

1.

2.

Educational, promotional, and fundraising projects held by the club for PolioPlus last year:

1.

2.

3.

Number of Rotary Peace Fellowships:

Nominated: _____

Selected by the Trustees: _____

What strategies does the club plan to use to achieve its Rotary Foundation goals? (*Check all that apply.)*

- ☐ Ensure that the club's Rotary Foundation committee understands Foundation grants and programs and is committed to promoting financial support for the Foundation.
- ☐ Help club members understand the relationship between Foundation giving and Foundation programs.
- ☐ Plan a club program about the Foundation every quarter, especially for Rotary Foundation Month in November.
- ☐ Include a brief story about the Foundation in every club program.
- ☐ Schedule presentations that inform club members about the Foundation.
- ☐ Ensure that 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 Foundation and their participation in Foundation programs.

Action steps:

LEADERSHIP DEVELOPMENT

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

Club goals for developing Rotary leaders for the coming Rotary year:

What strategies does the club plan to use to develop Rotary leaders? ***(Check all that apply.)***

- ☐ Have the president-elect attend the presidents-elect training seminar and the district assembly.
- ☐ Have all committee chairs attend the district assembly.
- ☐ Encourage past presidents to attend the district leadership seminar.
- ☐ Appoint a club trainer to develop club members' knowledge and skills.
- ☐ Conduct a leadership development program.
- ☐ Tap the expertise of the 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 fellow members.
- ☐ Other (please describe):

Action steps:

PUBLIC RELATIONS

Current State

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

Future State

Club public relations goals for the coming Rotary year:

What strategies does the club plan to use to achieve its public relations goals? ***(Check all that apply.)***

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

Action steps:

CLUB ADMINISTRATION

Current State

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

How often and when does the club's 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 to update its membership list? ☐ Yes ☐ No

How often is the club's bulletin published? _____

How are weekly club programs organized? _____

Does the club have its own website? ☐ Yes ☐ No If yes, how often is the site updated? _____

Does the club observe the special months designated on the Rotary calendar? ☐ Yes ☐ No

How often does your club conduct fellowship activities? _____

How does the club involve the families of Rotarians? _____

Future State

How will the club carry out administrative tasks? ***(Check all that apply)***

☐ Regular board meetings are 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 are scheduled on the following dates: _____

☐ The club has either adopted the latest version of the Recommended Rotary Club Bylaws or revised its own bylaws.

☐ Club elections will be held on _____.

☐ At least _____ delegates will be sent to the district conference.

☐ A club bulletin will be produced for members.

☐ The club's website will be updated _____ times per year.

☐ A plan has been developed to ensure that weekly club programs are interesting and relevant.

☐ Monthly attendance figures will be reported to the district leadership by the _____ day of the following month.

☐ 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.

☐ Reports to RI, including the semiannual report, will be completed on time.

☐ The following fellowship activities for all club members are planned for the year: _____

☐ Other (please describe): _____

Action steps:

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

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

	Club Service	Vocational Service	Community Service	International Service	New Generations Service
Membership goal _____ members by 30 June _____	☐	☐	☐	☐	☐
Service goals For our community: For communities in other countries:	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐
Rotary Foundation goals PolioPlus contribution goal: _____ Annual Fund contribution goal: _____ Permanent Fund contribution goal: _____ Our club will participate in the following Rotary Foundation programs:	☐ ☐ ☐ ☐	☐ ☐ ☐ ☐	☐ ☐ ☐ ☐	☐ ☐ ☐ ☐	☐ ☐ ☐ ☐
Leadership development goals	☐	☐	☐	☐	☐
Public relations goals	☐	☐	☐	☐	☐
Club administration goals	☐	☐	☐	☐	☐
Other goal	☐	☐	☐	☐	☐
Other goal	☐	☐	☐	☐	☐

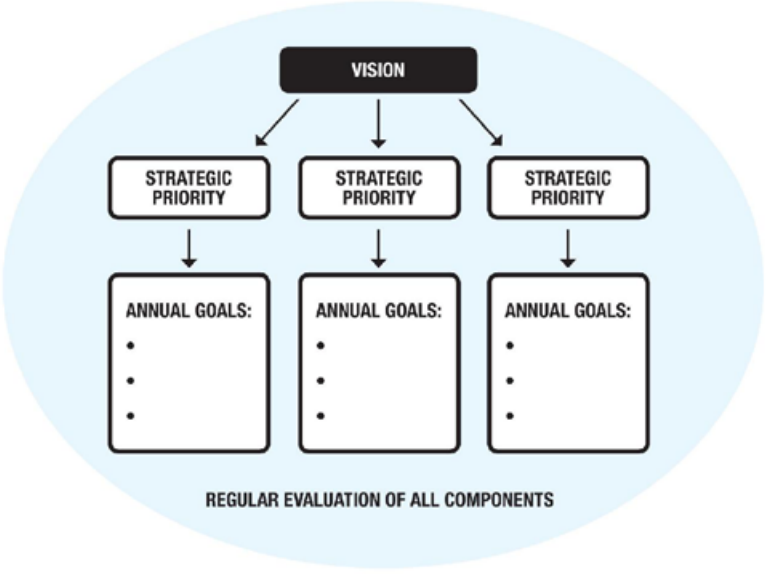
Appendix 3

Strategic Planning Guide

Strategic planning involves creating a vision, with supporting goals that can be regularly measured and adjusted as needed. Use this guide and the accompanying worksheet as a starting point for developing your strategic plan, and customize these resources to meet your club's needs. The guide is designed for Rotary clubs but can be adapted for districts. The worksheet can be completed independently or as a group. Facilitators should become familiar with these resources 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.

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

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



The Strategic Planning Model
Create a vision for your club, with strategic priorities that will help you achieve it. Then develop annual goals that support each strategic priority.

Process

Develop a strategic plan by engaging members in the process below. Use the accompanying worksheet to record your ideas.

1. Where are we now?

- Create a list of your club's strengths and weaknesses as of today.
- Create a list of opportunities and challenges facing your community.

When assessing your club's current state, consult *Be a Vibrant Club: Your Club Leadership Plan* to determine what your club is already doing well and what you could do to rejuvenate it.

2. Where do we want to be?

- Create a list of 5 to 10 characteristics that you would like to see in your club three to five years from now.
- Draft a one-sentence vision statement describing your club and what you want it to be in three to five years. Allow for both individual and group work on this step.
- Finalize the vision statement with the full group, and make sure that all club members support it.

3. How do we get there?

- Develop strategic priorities that will help your club achieve the vision, considering:
  - Strengths and weaknesses of the club
  - Programs and missions of Rotary International and The Rotary Foundation
  - External environment
  - Involvement of all members
  - Achievability in three to five years
- As a group, decide on the most important strategic priorities — those that will have the greatest impact as your club works toward the vision.
- Identify annual goals that support each of the top strategic priorities.
- Determine the timeline, resources, and people necessary to meet the annual goals under each of the strategic priorities.

Use the Planning Guide for Effective Rotary Clubs while identifying your annual goals for ideas and strategies to achieve them.

4. How are we doing?

- Create a strategic planning team to regularly monitor progress and recommend revisions to the plan, if needed.
- Allocate sufficient resources for the plan's implementation.
- Continually evaluate all decisions to make sure they support the plan, providing feedback to the strategic planning team on their implementation.
- Review your strategic plan annually with all club members, including the vision statement, strategic priorities, and annual goals, and revise it as needed.
- Repeat the full strategic planning process every three to five years to create a new plan or uphold the current one.

Strategic Planning Worksheet

Complete this worksheet to create your strategic plan.

1. Where are we now? **Today's date: _____**

Club strengths	Club weaknesses

Opportunities for the community (e.g., new businesses, growing population)	Challenges facing the community (e.g., economic decline, competing services)

2. Where do we want to be? **Target date: _____**

Key characteristics of future state (e.g., number of members, retention percentage, balance between local and international projects, support of The Rotary Foundation)

Vision statement (Include something that will make your club stand out from other service clubs in your community — e.g., *Our vision is to be the most internationally diverse service club in our community*, *Our vision is to be the service club most supportive of youth in our community*.)

3. How do we get there?

To reach our vision, we must achieve the following goals. (On the lines below, write out each of your strategic priorities. Then, in the chart beneath each one, list annual goals that will help you achieve each of them. Though there is no limit to the number of strategic priorities or annual goals in your strategic plan, consider the resources available to you, and focus on goals that you can accomplish.)

Strategic priority 1: _____

Annual goals	Timeline	Resources needed	Member assigned

Strategic priority 2: _____

Annual goals	Timeline	Resources needed	Member assigned

Strategic priority 3: _____

Annual goals	Timeline	Resources needed	Member assigned

4. How are we doing?

To monitor our progress, we will take these steps. (List the actions the club will take to follow up on the plan's implementation, including a timeline for checking in and evaluating your progress — e.g., reports at board meetings each month, strategic plan reviews at club assemblies, annual reviews.)

Appendix 4: RI Strategic Plan

The goals for **Support and Strengthen Clubs** are:

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

The goals for **Focus and Increase Humanitarian Service** are:

- Eradicate polio
- Increase sustainable service focused on
  - New Generations programs
  - Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally

The goals for **Enhance Public Image and Awareness** are:

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

www.rotary.org/strategicplan

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Notes

3 Running Your Club

The RI website and Member Access are key resources for running your club. Assistant governors and your Club and District Support representatives can also help answer your questions throughout the year.

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 make club operations more effective.

Responsibilities

As president-elect, you have these 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
- Working with club leaders to update your club's constitution and bylaws
- Determining which best practices of *Be a Vibrant Club: Your Club Leadership Plan* can strengthen your club

As president, you have these 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
  - Keeping club records current and making sure the semiannual dues payment is made
  - Overseeing the management of club finances
  - Minimizing risk during club activities
- Ensuring the Rotary Marks are used properly
- Running effective club meetings, board meetings, and club assemblies
- Encouraging attendance at the district assembly and additional training meetings, as appropriate
- Preparing for the district governor's visit and the quarterly (or more) visits or meetings with your assistant governor

The *Official Directory* lists contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; districts and governors; and an alphabetical listing of clubs within districts, and their contact information.

Minimum Standards

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

- Pays per capita dues to Rotary International
- Meets regularly
- Subscribes to a Rotary World Magazine Press publication (*The Rotarian* or Rotary regional magazine)
- Implements service projects that address needs in the local community and communities in other countries
- Maintains cooperative relations with the district
- Receives the visit of the governor, assistant governor, or any other officer of Rotary International
- Maintains liability insurance appropriate for the geographic region in which the club is located, or pays mandatory liability insurance with the semiannual report (United States only)
- 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

- Cooperates with RI by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, associate foundations, and the international offices of the Secretariat

These minimum standards are only the beginning of what makes a successful Rotary club. Work with your assistant governor to ensure your club is exceeding the minimum standards.

Club Administration Committee

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. The club administration committee is one of the recommended committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed (see appendix 9 for sample committee structures).

The club secretary and treasurer should be members of this committee. The committee chair, appointed by you, should be part of your club leadership team.

Your club administration committee has these responsibilities:

- Helping the club secretary track club attendance
- Maintaining club membership lists and reporting to Rotary International
- Helping the club treasurer collect dues
- Organizing club meetings
- Organizing social events for club members to get to know each other better
- Producing the club newsletter and website

Meetings

Club, district, and international meetings allow Rotarians to learn more about Rotary, develop future leaders, and provide an opportunity for Rotarians to get to know each other better. Throughout your year, prepare for these meetings:

- Club meetings
- Club assemblies
- Board meetings
- Assistant governor visits
- District governor's visit

You should also promote district and international meetings during club meetings, at club assemblies, on your club's website, and in your club newsletter. Encourage attendance at these meetings:

- RI Convention (to experience Rotary's internationality)

- District assembly, conference, and seminars for The Rotary Foundation, membership, and leadership (to meet other club leaders in your district)

For more details on these district and international meetings, see appendix 5.

Club Meetings

Plan meetings to coincide with special observances on the Rotary calendar.

The club president presides over all club meetings. Club meetings should feature interesting programs that enhance members' Rotary knowledge, reinforce the value of continued membership, and increase awareness of local and global issues. The club administration committee is responsible for developing club meeting agendas under your direction. Recommendations for planning effective meetings are listed in the *Club Administration Committee Manual* (226A).

Depending on your club, your meetings may be an hour or longer. Adapt the sample agendas below to the needs of your club.

90-minute meeting

Activity	Duration
Meeting call to order	5 min
Meal and fellowship period	30 min
President's time	20 min
Introduction of visiting Rotarians/guests	
Correspondence and announcements	
Committee reports	
Club business	
Program	30 min
Introduction of speaker	
Speaker's presentation	
Closing remarks by president	5 min
Adjournment	

60-minute meeting

Activity	Duration
Meeting call to order	5 min
Meal	30 min
President's time	
Introduction of visiting Rotarians/guests	
Correspondence and announcements	
Committee reports	
Club business	
Program	20 min
Introduction of speaker	
Speaker's presentation	
Closing remarks by president	5 min
Adjournment	

During club board meetings, be sure to clearly communicate your expectations, allow time for board members to report on their activities and projects, and include time to discuss any items of concern.

Club Assemblies

Most clubs hold four to six assemblies per year to ensure clear communication between club leaders, club members, and district leaders. Encourage all members to attend, especially new members.

You, or another designated officer, should preside at club assemblies. Before planning assemblies, seek input from members to ensure the meetings address their interests and concerns.

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 goals for the year
Two weeks before the governor's visit	To prepare for the governor's visit
During the governor's 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.)

The Governor's Visit

A core responsibility of your district governor is to visit all clubs in the district, either individually or in groups, to provide support and an update of district goals. Rotary clubs are required to receive these visits. This personal visit is an opportunity for clubs to communicate goals, achievements, and concerns.

If possible, schedule the visit to coincide with an important club event, such as:

- Charter night
- Induction ceremony
- New member orientation program
- Award presentation
- Rotary Foundation event
- Intercity meeting

Strive for maximum participation by publicizing the visit in club communications and asking members for input. To prepare for the visit:

- Review your club's progress toward the goals established in the Planning Guide for Effective Rotary Clubs, so that you can discuss it during the visit.
- Arrange reports of committee plans, activities, and accomplishments.

Elections

During your first six months in office, you will need to oversee the election of officers and directors. The selection process for a club's board of directors and officers should be stated in your club's bylaws and available to all members. 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 (see appendix 6 for a sample club officer installation agenda).

Member Access

See How to Use Member Access at www.rotary.org/elearning for an overview of the features and benefits.

Member Access at www.rotary.org helps Rotarians perform Rotary business more quickly and efficiently, 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. Register for Member Access to view club information, update member information, enter club goals, and take online courses for your role.

Member Access Features by Role*

Feature	President	Secretary	Treasurer	Rotarians
Access Rotary workgroups	x			
Access forms	x			
Update club data	x	x		
Update membership data	x	x		
View contribution and recognition reports	x	x		
View daily club balance report	x	x	x	
View *SHARE* 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 *Official Directory*	x	x	x	x
Manage newsletter subscriptions	x	x	x	x
Update your contact information	x	x	x	x

* *Club Rotary Foundation committee chairs can also view Rotary Foundation reports.*

RI and Rotary Foundation Reporting Requirements

To ensure that RI communications, including semiannual reports, reach the appropriate members of your club, regularly update all club records, preferably through Member Access.

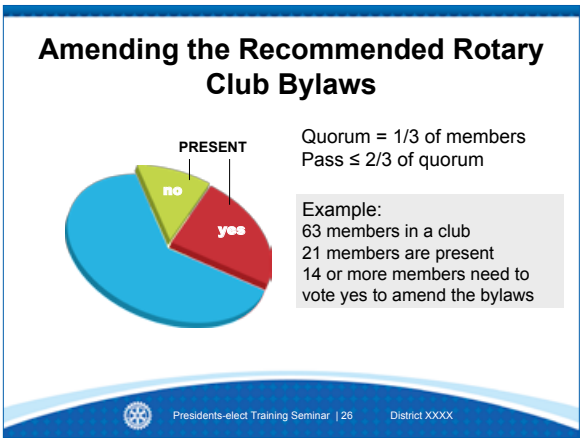
Find more information about club reporting requirements in the *Club Secretary's Manual*.

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 10 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, if your club has been awarded a grant
- 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
  - Membership goals (due 1 June)

Your Club's Constitution and Bylaws

All clubs admitted to membership in Rotary International must adopt the Standard Rotary Club Constitution, which provides a model framework for Rotary club operations. The Standard Rotary Club Constitution will be updated in 2013 and 2016 to include Council on Legislation enactments. Be sure that your club is using the most recent version.



Your club's bylaws provide additional guidelines, not included in the club constitution, for managing your club. The Recommended Rotary Club Bylaws reflect current Rotary policy and are intended to be adapted to reflect your club's identity. RI encourages clubs to look at their bylaws regularly and update them as needed.

Club members must vote on any proposed amendments to the bylaws. 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.

Pass the amendment if it is supported by two-thirds of the members present.

Ensure that the amendment is in line with the Standard Rotary Club Constitution and the RI Constitution and Bylaws.

Financial Management

Your fiscal responsibilities as club president include monitoring your club's funds, practicing good stewardship, and ensuring that the club complies with all local laws, including tax and nonprofit (as applicable). See appendix 7 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. Admission fees for new members should be outlined in the club's bylaws. This fee applies to all members except transferring or former members of other clubs and 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 presidents-elect training seminar, the district assembly, or the district conference.

RI per capita dues. Twice a year, clubs are charged per capita dues. The RI per capita dues per half year are as follows:

2012-13: US$26.00
2013-14: US$26.50†

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-sixth of the semiannual per capita dues listed above.

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

† *Dues will remain constant after 2013-14 unless changed by the Council on Legislation.*

Per capita dues pay for the organization's general operating expenses and grant you access to its services and resources, including producing publications in multiple languages; providing club, district, and project support; offering training, guidance, and resources for incoming club leaders; and maintaining the RI website.

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

Semiannual Report (SAR)

RI sends a semiannual report (SAR) packet to each Rotary club secretary in late June for the July billing and in late December for the January billing. The packet has two parts:

- Club membership list drawn from RI records, which serves as the basis for the estimated billing. The club secretary should update this list.
- Invoice for RI per capita and prorated dues, Council on Legislation fees, and magazine subscriptions (two Rotarians residing at the same address have the option to subscribe jointly to the official magazine). The treasurer is responsible for this portion and should recalculate what is owed using the SAR worksheet provided in the packet.

Keep your club membership list current through Member Access to ensure that your per capita billing is accurate. The club secretary, treasurer, or you can pay your club's balance by credit card in Member Access. Clubs with fewer than 10 members are required to pay for 10 members.

If your club secretary does not receive the SAR package by the end of July or January, you can print a copy from Member Access or request one by contacting data@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. The club's membership can also be suspended or terminated if any member of that club has misused funds from The Rotary Foundation.

Termination

- Six months after the 1 January or 1 July deadline, clubs with unpaid per capita RI dues over US$250 will be terminated.
- Clubs that have not fulfilled their entire financial responsibility within 365 days of termination will lose their original charter and will not be eligible for reinstatement.

Reinstatement

- Within 90 days of termination, the club must pay all financial obligations to RI, including a reinstatement fee of $10 per member. A club with fewer than 10 members must pay for a minimum of 10 members.
- More than 90 days but less than 365 days after termination, the club must pay all financial obligations to RI, pay a 10-member minimum reinstatement fee, complete a reinstatement application, and pay an additional application fee of $15 per member. The application fee is also subject to the minimum 10-member requirement.

Member termination

Any club member who fails to pay dues within 30 days after the deadline should be notified of the amount owed and given an absolute deadline 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 your club must file, if any. Work with the 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 the IRS for more information.

Fundraising

The *Club Treasurer's Manual* has more information about club foundations.

If your club engages in fundraising, follow these guidelines and educate members about them:

- Report money earned through fundraising to your local government.
- When promoting fundraising initiatives, be precise about where the funds will go, whether to a local club, the district's own foundation, The Rotary Foundation, or some other entity.
- 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.

Find more information about planning a fundraiser in the *Club Service Projects Committee Manual*.

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

Risk Management

Risk management best practices are listed in appendix 7.

As club president, you are in a position to minimize risk and safeguard your club's members, program participants, and assets belonging to the club. Consider three basic questions when planning activities and events for your year:

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

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

- Not conducting 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

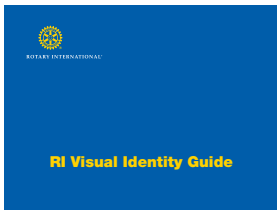
Though conducting business through handshakes or verbal agreements may be common, RI strongly recommends that your club use written and signed contracts. A contract attempts to clearly define the roles and responsibilities of each party and can include provisions to limit risk. Retain legal documents after the event in case a claim is made.

Clubs are urged to obtain the advice of legal and insurance counsel regarding liability protection. Protection may come through the incorporation of the club (or its activities) or the purchase of liability insurance coverage as deemed appropriate. Clubs in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged by RI and paid for by all active U.S. clubs through the semiannual dues report. Clubs outside the United States should consider acquiring insurance if they do not already have it. See the *Manual of Procedure* for additional information.

Using the 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 emblem and ensuring it is available for future Rotary clubs and districts to use.

Rotary International owns trademarks and service marks (referred to as Rotary Marks) for the benefit of Rotarians worldwide. See appendix 8 for a list.



Work with your service projects committee to ensure your club is following RI policy for reproducing these marks and using them in club website and project names. See the *Manual of Procedure* and the Rotary Code of Policies for more information. Your Club and District Support representative can assist you.

Consult the *RI Visual Identity Guide* for more information.

Reproducing the Rotary Emblem

When reproducing the Rotary emblem, follow the guidelines approved by the RI Board of Directors that allow a Rotary club, district, and other Rotary Entity* to use the Rotary Marks:

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

Clubs can download logos for RI, The Rotary Foundation, and other Rotary programs at www.rotary.org/graphics, or order *Rotary Logos on CD* (234-MU).

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

Naming Guidelines

When the "Rotary" name, emblem, or other Rotary Marks appear with the name of a club project, program, website, or publication, make sure that the name is placed near the emblem and given equal prominence. Proper naming examples include:

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

For specific guidelines on using the Rotary name and emblem, see Rotary Code of Policies 33.020.7 or contact your Club and District Support representative.

Using Rotary Marks on Fundraising Merchandise

Nearly 300 vendors are authorized to produce merchandise using the Rotary Marks. A list of official licensees is available at www.rotary.org or in the *Official Directory*.

If your club wants to raise funds for a project by selling merchandise that shows the Rotary name, emblem, or other Rotary Marks, ensure that the merchandise displays your Rotary club name, fundraising event or project name, and project date(s) and that you purchase it 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. Send questions about licensing to rilicensingservices@rotary.org.

Call to Action

What do you still need to learn about running your club?

How will you make your club meetings effective and interesting so that members stay engaged?

What innovative ideas do you have for your year?

What are your personal goals for running your club?

Who will you consult with to answer your questions about running your club?

How will you use Member Access?

Appendix 5: District and International Meetings

Presidents-elect Training Seminar

The presidents-elect training seminar (PETS) is held in February or March and prepares you for your year as president. You are required to attend PETS in order to serve as president of your club.

District Assembly

The district assembly is typically held in March, April, or May 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. The assembly also provides an opportunity to meet the district governor-elect, incoming assistant governors, and district committees.

District Membership Seminar

The district membership seminar, held after the district assembly, prepares 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 district conference allows Rotary clubs to discuss important issues, learn about Rotary programs, and showcase successful district and club activities. It's also an opportunity to socialize and have fun. Encourage all club members to attend.

District Leadership Seminar

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

District Rotary Foundation Seminar

The district Rotary Foundation seminar highlights the benefits of Rotary Foundation participation and outlines Foundation programs and policies. The seminar is for the club Rotary Foundation committee chair and members and other interested Rotarians.

RI Convention

The annual RI Convention, held in May or June, celebrates Rotary achievements, promotes fellowship, and helps Rotarians share service ideas and strategies to strengthen club and district programs.

Appendix 6: 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 suggested outline for the installation of new officers 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

> **Oath for the president:**
>
> I, _____,
>
> as president of the Rotary Club of
>
> _____,
>
> will, to the best of my ability, administer the duties of the office of president in a business-like manner and in accordance with the club's constitution and bylaws.

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

> **Oath for 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

> **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

Appendix 7: Financial and Risk Management Best Practices

Review the items on this checklist to help you ensure transparent and professional financial practices. These best practices are recommended for clubs and districts.

Financial Management

- Register the club/district with the government, if required.
- Submit club/district tax documentation annually, if required by the local or national tax code.
- Set up club/district bank accounts appropriately, and assign two signatories to each account.
- Establish procedures for handling club/district funds.
- Develop a budget and follow it.
- Review the per capita levy, and ensure that it meets district needs.
- Make sure the club/district has a procedure for sending contributions to The Rotary Foundation and that each club has a procedure for sending 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/district funds.
- Ensure that the club/district has an effective way to learn about financial best practices and that these practices are passed on to incoming officers every year.

Risk Management

- Limit 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/district has liability insurance for its activities and operations, as appropriate for the club's/district's geographic area. Contact a local insurance agent or broker for assistance with insurance appropriate for the club/district.*

* *Clubs and districts in the United States and its territories and possessions are provided with general liability and directors and officers/employment practices liability insurance through a program arranged by RI and paid for by all active U.S. clubs through the semiannual dues report.*

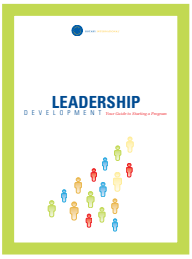
Appendix 8: Rotary Marks

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. See the Rotary Code of Policies for a comprehensive list.

End Polio Now
Every Rotarian, Every Year
A Global Network of Community Volunteers
Humanity in Motion
Interact®, Interact Club®
Interota®
Paul Harris®
Paul Harris Fellow®
The Permanent Fund to Secure Tomorrow®
PolioPlus®
RI®
RITS®
Rotaract®, Rotaract Club®
Rotarian®
The Rotarian®
Rotary®, Rotary Club®
Rotary Community Corps
The Rotary Foundation®
The Rotary Foundation of Rotary International®
Rotary International®
Rotary Leader
Rotary.org
Rotary World Magazine Press
Rotary Youth Exchange
Rotary Youth Leadership Awards
RYLA®
Service Above Self®
One Profits Most Who Serves Best
TRF

Notes

4 Leading Rotarians



Ensure your leadership team has leadership skills and develop future leaders in your club by holding a workshop using the publication *Leadership Development: Your Guide to Starting a Program* (250). The guide can also serve as a reference for your leadership role.

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

Responsibilities

As president-elect, you have these responsibilities for leading Rotarians:

- Appointing club committee chair 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
- Providing continuity in leadership in your club and on committees

As president, you have these responsibilities for leading Rotarians:

- Ensuring clear communication among your club and district leaders
- Recognizing club leaders and members with awards
- Motivating members to reach goals
- Listening to all members and ensuring that their needs are met

Working with Your Club

The Rotarians on the incoming club leadership team will be involved in carrying out 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 for 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, president-elect (or president-nominee, if no successor has been elected), secretary, treasurer, the immediate past president, and any additional directors specified in your club's bylaws.

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

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, your club's board of directors should have these 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
- Approving or disapproving proposed members and informing those who propose members of the decision, through the club secretary, within 30 days
- Reviewing the policies of the club to ensure they're being implemented as intended or revised if no longer current

- Considering innovative ways to make the club more vibrant and fulfilling the Object of Rotary
- Examining the needs of the community and the world and establishing club goals to address them

You are responsible for running your club's board meetings.

Club Secretary

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
- 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 semiannual report of membership, and paying dues to Rotary International on 1 July and 1 January
- Recording attendance at meetings, and reporting monthly attendance figures to the district governor within 15 days of the last meeting of each month
- Working with your club's officers
- Performing any other duties that your club assigns

The club president, secretary, and treasurer should create Member Access accounts to view and update RI club administrative data.

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.

Advise your club secretary and other officers to beware of emails 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 email, confirm the sender's identity and the reason for the request via separate email or phone call.

Club Treasurer

To ensure competent oversight of club funds, transactions, and reports, you should meet with your club's treasurer regularly.

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 these 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

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

- Working with the successor to ensure a smooth transition between Rotary years
- Performing other responsibilities related to the office

Consider adding financial oversight to your board's responsibilities.

Sergeant-at-Arms

The sergeant-at-arms keeps the club meeting running smoothly, with few interruptions. The sergeant-at-arms is responsible for helping to maintain orderly and effective Rotary club meetings.

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.

See appendix 11 to see how your club can use a club trainer.

The club training plan 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

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

Club Committees

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 these 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 for their roles
- 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 oversee the work of each committee to ensure all reach the goals set for the year.

Examples of club committee structures are listed in appendix 9.

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

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 club committees, each of which have a chapter devoted to their areas:

- Club administration (chapter 3)
- Membership (chapter 5)
- Public relations (chapter 6)
- The Rotary Foundation (chapter 7)
- Service projects (chapter 8)

Appoint additional committees and subcommittees as needed.

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 experience as a member of that committee.

Preparing Committee Chairs

Give each chair a copy of the corresponding committee manual. Strongly encourage all committee chairs to attend the district assembly, where they can acquire the necessary skills and knowledge for leading an effective committee.

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.

Motivating Volunteers

Because Rotarians are volunteers, what motivates them in their profession may not motivate them in Rotary.

Common motivators for Rotary volunteers include:

- Belief that the goal will benefit the community and their Rotary club
- Belief that the goal can be achieved
- Social opportunities
- Career networking opportunities
- 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

Awards

Recognizing the efforts of Rotarians in your club is an important part of your role as club president. In addition to honors given by Rotary International and The Rotary Foundation (appendix 10), your district may have several of its own awards. Ask your governor or assistant governor about available awards for individuals or clubs. Individual clubs are also encouraged to develop their own recognition awards.

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

As president, it is your role to present awards to club or community members. To maximize the motivational potential of awards and contribution recognition:

- 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 club communications.
- 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

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 and 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 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 the best practices in *Be a Vibrant Club: Your 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 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 visit
- Acting as a liaison between the governor and clubs
- Assisting clubs with service projects and monitoring progress
- Encouraging clubs to follow through with suggestions from the governor
- Coordinating training at the club level with the appropriate district committee
- Identifying and encouraging the development of future district leaders

District Committees

District committees support club activities related to their area of expertise:

- District conference
- District programs (for example, Rotary Youth Leadership Awards, Rotaract, and Youth Exchange)
- Extension (assists in the creation of new clubs)
- Finance
- Membership development

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* *When personal visits are difficult, consult your assistant governor.*

- Nominating
- Public relations
- RI Convention promotion
- The Rotary Foundation
- District training

Call to Action

What skills do you need to work on to be a good leader?

What is your plan for improving these skills?

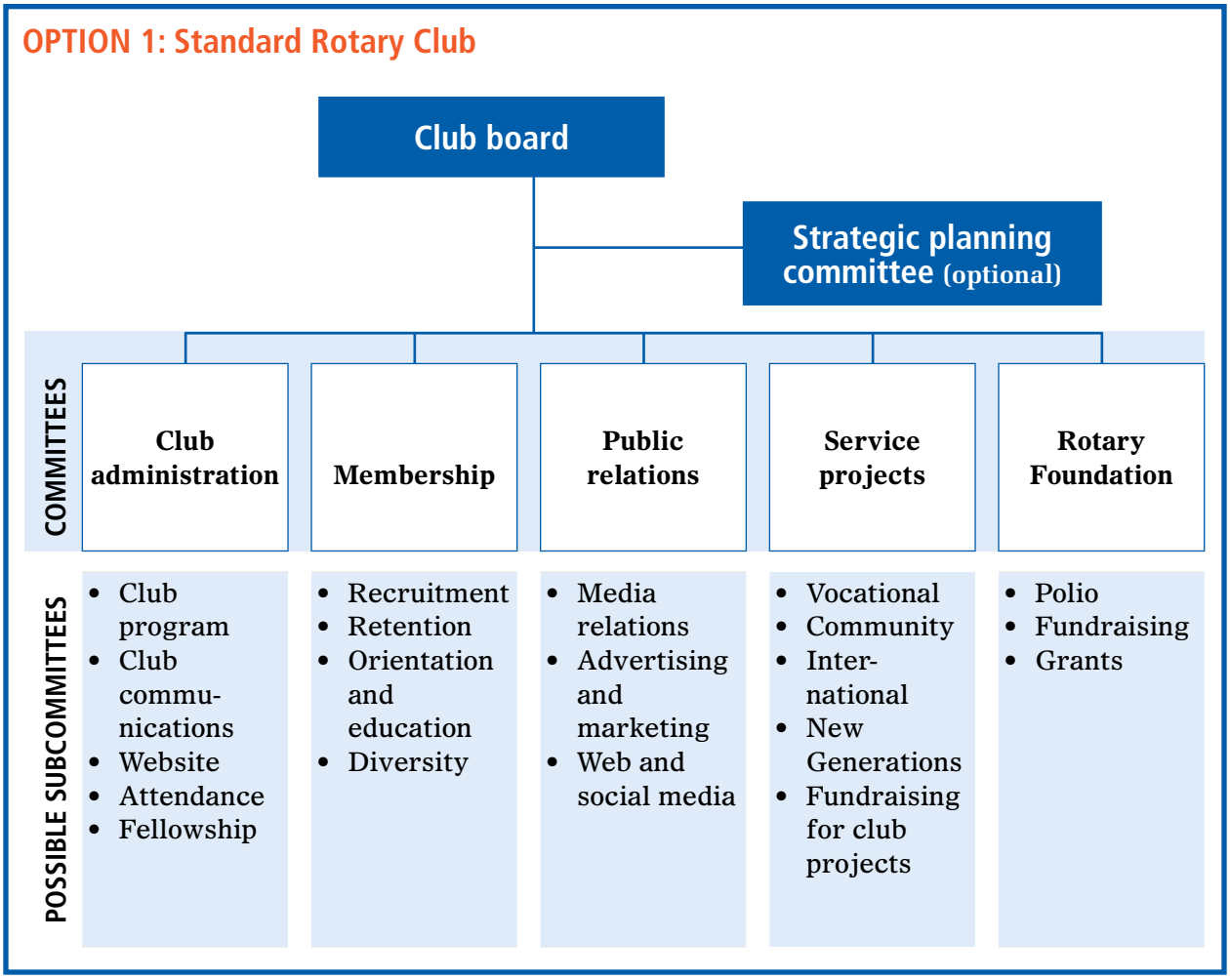
What will you do to strengthen your working relationships with your club leadership team?

Who can you talk to that can advise you on working with your leadership team?

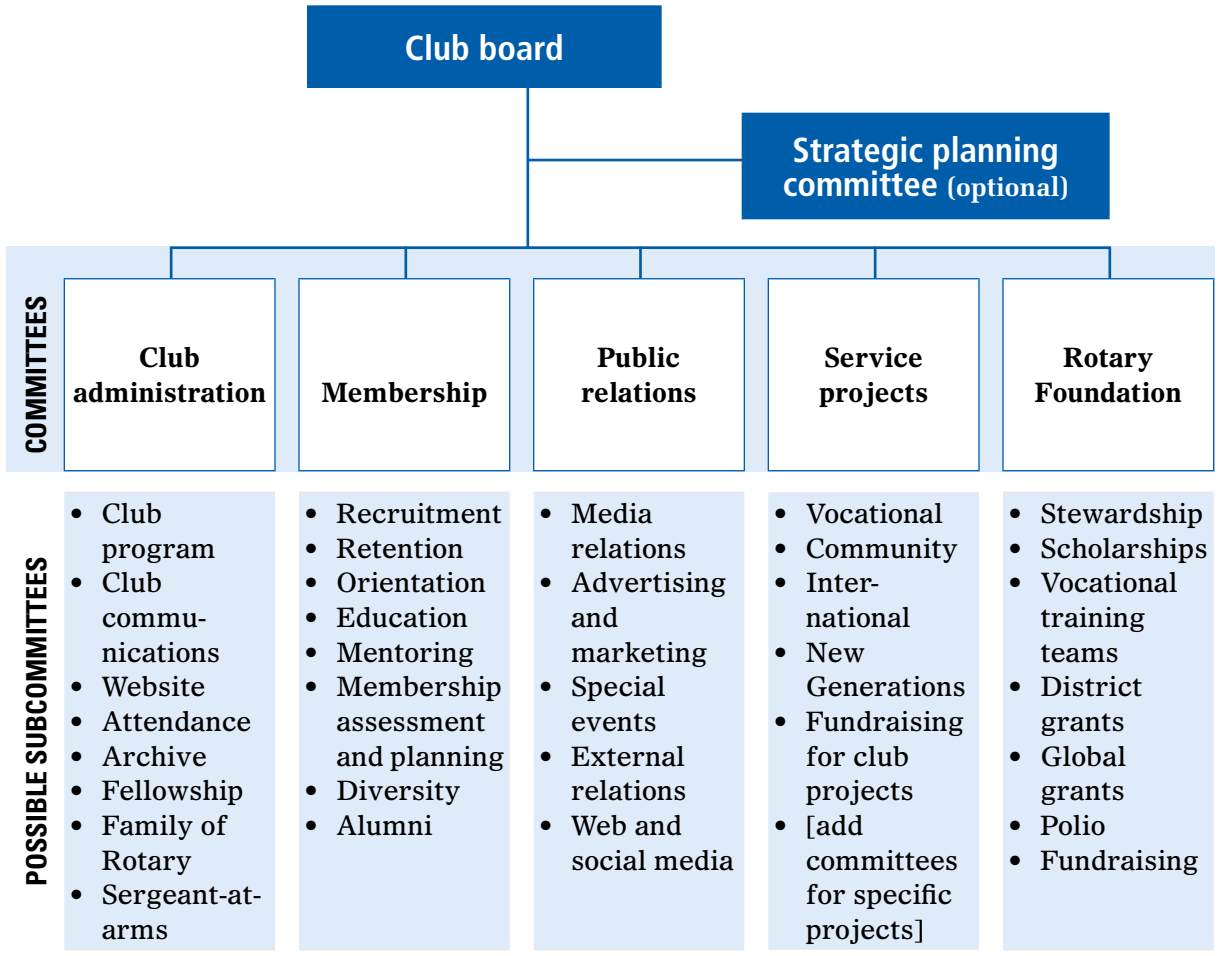
What will your club do to develop leadership skills in your members?

Appendix 9: Sample Club Committee Structure

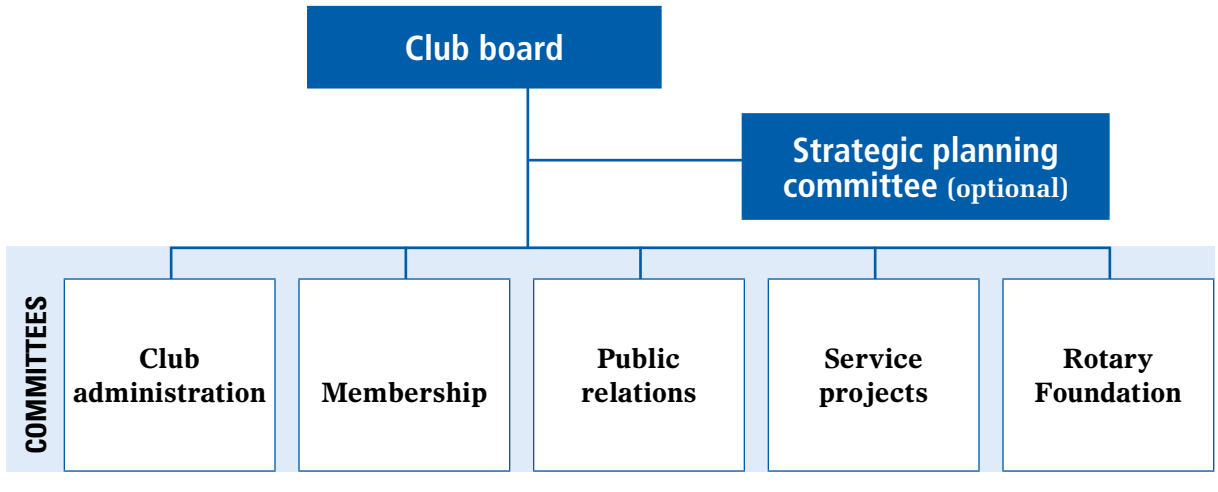
Five committees are recommended for Rotary clubs. Clubs can add or eliminate committees or subcommittees according to their interests and activities. Assistant governors or district governors can assist club leaders with determining the appropriate subcommittees.



OPTION 2: Large Rotary Club



OPTION 3: Small Rotary Club



Appendix 10: RI and Rotary Foundation Awards

Find more information about eligibility requirements and deadlines at www.rotary.org, or request information at riawards@rotary.org.

Award	Honorees	Nominated by	Deadline
Individual Awards			
Avenues of Service Citation	One Rotarian per club per year	Club president	Ongoing
Club Builder Award	One Rotarian per district per year	District governor	1 November
Reach One, Keep One Award	Rotarians who sponsor new members	Club presidents	Ongoing
RI Service Above Self Award	150 Rotarians per year (maximum)	Current and immediate past district governors, current and past RI directors	1 September
Rotarian Spouse/Partner Service Award	One spouse or partner of a Rotarian per district per year	District governor	15 January
Service Award for a Polio-Free World	Eligible Rotarians	Any Rotarian	1 November
The Rotary Foundation Citation for Meritorious Service	One Rotarian per district per year	District governor	Ongoing
The Rotary Foundation Distinguished Service Award	Up to 50 Rotarians worldwide per year (Citation for Meritorious Service is prerequisite)	District governor with two additional Rotarian endorsements (with one from outside the Rotarian's district)	15 November
The Rotary Foundation District Service Award	Up to 20 Rotarians per district	District governor	Ongoing
Vocational Service Leadership Award	One Rotarian per district per year	District governor	Ongoing

Award	Honorees	Nominated by	Deadline
Club Awards			
Presidential Citation	Rotary clubs, Rotaract clubs, and Interact clubs	District governor	Mid-April: Clubs submit completed forms to their district governor for certification
RI Membership Development and Extension Award	Rotary clubs	District governor	15 May
RI Recognition of Membership Development Initiatives	Rotary clubs	District governor	15 April: Club submissions due to district governors
RI Recognition of Smaller Club Membership Growth	Rotary clubs	District governor	16 May-30 June
Significant Achievement Award	One club per district per year	District governor	15 March
Alumni Awards			
Rotary Foundation Alumni Association of the Year Award	One Rotary Foundation alumni association	Any Rotarian or Foundation alumnus, as endorsed by the regional Rotary Foundation coordinator	15 November
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	15 November

Appendix 11: 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?

☐ Identify members' training needs
☐ 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
☐ External trainers or subject matter experts
☐ _____
☐ _____
☐ _____

When will training be done in your club?

☐ During club meetings
☐ At club assemblies
☐ On members' own time
☐ _____
☐ _____
☐ _____

Notes

5 Engaging Club Members

Key resources for membership include the *Membership Development Resource Guide* (417) and Club Assessment Tools, an online supplement for analyzing club membership trends.

Your club's ability to serve the community, support The Rotary Foundation, and develop future leaders is directly related to the level of enthusiasm and engagement of your members.

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, and reviewing your club's long-range membership goals
- Setting your club's annual membership goals, which support your club's long-range goals, using the Planning Guide for Effective Rotary Clubs, and aligning your annual membership growth and retention goals to the district's goals

- Identifying and implementing innovative and creative strategies to recruit and retain club members
- Promoting club and district membership education and training for all stages of membership, including prospective, new and current member education
- Seeking opportunities to sponsor a new club in your area

One of the three priorities of the RI Strategic Plan is to support and strengthen clubs. Rotary clubs are encouraged to

- Foster club innovation and flexibility
- Balance activities in a variety of service
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Have an updated strategic plan

Club Membership Committee

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

The club membership committee is essential to implementing the club's membership development plan. Its main role is to successfully recruit, retain, and educate club members. Your club may amend its bylaws to reflect the specific responsibilities of your membership committee, adding subcommittees as needed. See appendix 9 for sample committee structures. Membership committee members should coordinate efforts with members of the other club committees to maximize membership growth opportunities.

Appoint Rotarians to the membership committee who have strong connections to a cross-section of the community and are interested in improving the membership experience for the club's members. Members of this committee should enjoy working with people and have a thorough knowledge of Rotary.

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

Your membership committee has these 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 recruiting and keeping members
- Conducting classification surveys to ensure that club member occupations and businesses reflect current business and community trends
- Developing a membership action plan for increased member engagement, that includes surveying members and initiating changes in response to member feedback

- Conducting club assessments to ensure membership development and retention efforts are effective and successful
- Developing an action plan for the club to act as a sponsor club for a potential new club in the community

Assessing Your Club

Your club's five-year membership history is available in Member Access.

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 2) and other membership assessment tools available in Club Assessment Tools at www.rotary.org. To understand your club's membership trends:

- Review your club's long-range membership goals.
- Review your club's five-year membership profile and trends (club retention statistics, number of new members, number of new members who continue with the club, whether your club represents the demographic of the community).
- 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, district membership chair, or Rotary coordinator, as appropriate.
- Promote participation in the district membership seminar.

Find contact information for the Rotary coordinator serving your area at www.rotary.org.

Once you've assessed your club's membership history and trends and drafted membership goals, you should develop an action plan for recruiting and keeping members.

Diversity

Your club's membership should accurately reflect your business 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. Having a diverse membership in your club expands the range of experience and knowledge available for your service efforts, and reaches out to all populations in your community.

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.

Recruiting Members

New members bring important benefits to the club, such as fresh ideas and energy, increased capacity to serve your community, and future leaders to ensure the long-term continuity of clubs.

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

- Develop a club brochure and distribute it to prospective members throughout the community.

Visit the Membership Development Best Practices Exchange at www.rotary.org to view membership efforts that have worked in other clubs.

- Promote your club and its events to friends and families using social networking sites.
- Recruit members who reflect the diversity of each club's community.
- Work toward implementing innovative new projects that spark interest in the community.
- Reach out to former participants of New Generations programs.

Responsibilities

As club president, you have these recruitment responsibilities:

- 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
- 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

Keeping Members

Keeping members is as crucial as recruiting new ones. To increase and sustain your club's membership, find out why former members decided to leave the club. Current members who are dedicated, active, and motivated will make your club more fun and are also more likely to attract and keep new members.

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

Responsibilities

As club president, you have these responsibilities for ensuring your club keeps members:

- Regularly assessing your club environment to ensure that it's relevant to club members and the community
- Modernizing your club policies and procedures, making them flexible to address the needs of current working professionals
- Providing diverse opportunities for club members to get involved in club committees and service projects, networking, and leadership development
- Making continuing education and training a regular club activity

- Coordinating efforts among your club's membership, public relations, and service projects committees to enhance membership retention efforts
- Including local and international Rotary information in club meetings
- Recognizing existing members for their contributions to club projects and activities

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

Sponsoring New Clubs

Be aware of the possibilities for sponsoring a new club in your area, such as a group of committed Rotarians who'd like to meet at a different time or day, or a group of active and engaged community members who can't meet at your club's prescribed day and time.

If your club sponsors a new Rotary club, be sure to assign members 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.

Call to Action

What will you do to engage your members?

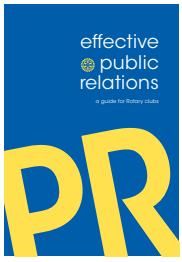
What will you do this year to make your club fun?

How can your club become innovative and flexible?

What are your personal goals for your club's members?

Notes

6 Promoting Your Club and Rotary



Your key resources for public relations efforts include *Effective Public Relations: A Guide for Rotary Clubs* (257) and Rotary's Online Media Center where quality, media-ready materials can be previewed and downloaded for free.

Rotary is the world's premier international humanitarian service organization and should be promoted as such. When people are aware of the outstanding humanitarian accomplishments of Rotary clubs and districts, they respect the organization for its contributions to the community, and become more interested in becoming a part of it.

Every Rotary club should develop and execute a successful public relations plan to make their community aware of their club and the organization. Part of your role as club president is to ensure that your club is providing a positive public image for itself in the community and for Rotary in the world.

Responsibilities

As president-elect, you have these 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 2)
- 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 these public relations responsibilities:

- Serving as the club spokesperson when working with the media, or identifying a fellow club member to serve as spokesperson
- Providing regular updates to business and civic leaders, young people, and other organizations on Rotary's mission and the club's community efforts
- Cultivating relationships with local media and other organization 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
- Using social media to make your community aware of club events and activities

Through effective public relations, your club will be able to

- Enhance your club's public image
- 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

One of the three priorities of the RI Strategic Plan is to enhance public image and awareness. Rotary clubs are encouraged to

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

Club Public Relations Committee

The club public relations committee's role is to 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. Your club may amend its bylaws to reflect the specific responsibilities of your public relations 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 with professional public relations or media experience and who is familiar working with the local media.

For more information, see the *Club Public Relations Committee Manual* (226C).

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 in appendix 2)
- Familiarizing themselves with RI public relations 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

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. For more information about the components of public relations, see the *Club Public Relations Committee Manual.*

You can order promotional materials and publications at shop.rotary.org, including

- *What's Rotary?*
- *This Is Rotary* DVD

Your governor, assistant governor, district public relations chair, and Rotary public image coordinator can advise and assist clubs in public relations matters. The *Media Crisis Handbook* (515) outlines how to handle adverse publicity.

Answering Questions about Rotary

As the president, you are the Rotary spokesperson for your club. Because you will regularly be speaking to the public at project events, dedications, and other occasions, you should 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?

Your answers should be positive, factual, specific, and brief. Avoid using Rotary language that non-Rotarians may not understand. Find important key messages in appendix 12. For circumstances that call for a more formal or longer address, consider the following tips:

- Think about who your message is for and modify your presentation to appeal to them.
- Prepare an outline of topics you want to include.
- Practice your address and time it.
- Prepare a list of questions you would like to ask club members.

Call to Action

What will you do to promote your club?

What will you do to promote Rotary International?

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

What innovative ideas will your club try to make your community more aware of Rotary?

Appendix 12: Rotary Key Messages

Rotary is an international humanitarian service organization.

- Rotary members are business and professional leaders who volunteer their expertise, compassion, and power to improve communities at home and abroad in more than 200 countries and geographical areas.
- Rotary is a worldwide network of 34,000 clubs comprised of inspired individuals who translate their passions into social causes that change lives and improve communities.
- Our track record of success is demonstrated by the millions of people who have achieved and sustained a better quality of life through Rotary.

Rotary's top goal is to eradicate polio worldwide.

- Rotary, in collaboration with the World Health Organization, UNICEF, the Bill & Melinda Gates Foundation, and national governments, is close to eliminating the second human disease in history after smallpox with a 99 percent reduction in polio cases worldwide since 1985.
- Rotary members have contributed more than US$1 billion and countless volunteer hours to help immunize more than 2 billion children in 122 countries.
- Rotary has nearly reached its milestone of raising an additional $200 million to match a $355 million challenge grant from the Bill & Melinda Gates Foundation.

Rotary is on the forefront of tackling major humanitarian issues facing the world today.

- Maternal and child health, clean water and sanitation, literacy, and disease prevention and treatment are among Rotary's top areas of focus.
- Rotary's goal-oriented business model approach has attracted other organizations to partner with us to address these shared humanitarian priorities.

Rotary invests in people to generate sustainable economic growth.

- Rotary supports grassroots entrepreneurs and helps prepare young people and women for meaningful work.
- Rotary helps communities increase their capacity to support sustainable economic development.

Rotary builds peace and international understanding through education.

- Rotary's Peace Centers program offers graduate degrees and professional development certificates in peace studies to more than 110 applicants each year at seven campus-based centers worldwide.
- Today, more than 600 Peace Fellows are in key, decision-making positions in governments and organizations around the world.
- Rotary's Youth Exchange program fosters international goodwill by enabling 8,500 high school students to live and study abroad each year in 115 countries.

Notes

7 Participating in The Rotary Foundation

The Rotary Foundation Quick Reference Guide (219), *Rotary Foundation Facts* (159), and the *Every Rotarian, Every Year Club Success Booklet* (958) are key Foundation reference resources for you during your year.

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.

Through Rotary Foundation participation and support, your club can make a difference in the lives of people around the globe. Participation in Rotary Foundation activities can help attract and keep members. When Rotarians experience Foundation programs directly, 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.

Responsibilities

As president-elect, you have these 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 2)
- Reviewing your club's financial contributions to The Rotary Foundation, using Member Access at www.rotary.org
- 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 available at www.rotary.org)
- Knowing the resources available to help your club support The Rotary Foundation
- Working with your Rotary Foundation committee to ensure that your club is qualified to apply for Rotary Foundation grants, that reports on open grants are submitted on time, and that all completed grants are closed

Club presidents, secretaries, treasurers, and Rotary Foundation committee chairs can review their club's Foundation contributions in Member Access at www.rotary.org.

Your leadership will be particularly important to ensuring your club makes steady progress toward Foundation goals. Strategies for encouraging club members include:

- Asking club members to contribute to the Foundation, giving extra attention to members who have never given
- Acknowledging contributions and involvement in Foundation grants
- Ensuring proper stewardship of Foundation grant funds
- Encouraging club members to get involved in The Rotary Foundation's grant-making model by planning projects and activities that are eligible for district and global grants
- Leading by example and making a personal contribution to The Rotary Foundation

Club Rotary Foundation Committee

The club Rotary Foundation committee structure should be determined by the Foundation goals your club sets. For example, if your plans include applying for a global grant, your club may want to have a grants subcommittee. Your club may amend its bylaws to reflect the specific responsibilities of your Foundation committee, adding subcommittees as needed (appendix 9).

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

The Rotary Foundation committee's main role is to develop and carry out plans to support the Foundation through financial contributions and club participation in Foundation grants and activities.

Your Rotary Foundation committee has these responsibilities:

- Conducting inspirational Rotary Foundation-focused club programs at least four times a year
- Contacting your district Rotary Foundation committee chair to find alumni or volunteers to relate their experiences with The Rotary Foundation
- Achieving club Foundation goals for the coming year
- Educating club members about the Foundation
- Encouraging club members to participate in Foundation grants and activities and support the Foundation financially
- Communicating to club members the Foundation goals set by the district and the Trustees of The Rotary Foundation
- Ensuring proper stewardship of Foundation grant funds

For more information, see the *Club Rotary Foundation Committee Manual* (226E).

District Support

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. Consult your district chair with questions about the Foundation.

Information about the various ways your club can participate in Rotary Foundation programs 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.

Grant Management Seminar

The purpose of the grant management seminar is to help club members understand how to successfully manage a Rotary Foundation grant, to make them aware of Foundation stewardship expectations, and to prepare them to implement the club memorandum of understanding. A club member is required to attend this seminar for club qualification (see pages 83-85). The *Grant Management Manual* has more information.

Rotary Foundation Grants and Programs

The Rotary Foundation Trustees adopted a strategic approach to fulfill the Foundation's mission that will continue its transformation and advancement. Based on input from a wide variety of Rotarians, the new Foundation grants structure is designed to

- Simplify Foundation programs and processes consistent with the mission
- Focus Rotarian service efforts where they will have the greatest impact
- Offer funding options to help achieve both global and local goals
- Transfer more decisions to the districts and their member clubs
- Advance understanding of The Rotary Foundation's work and enhance Rotary's public image

To simplify the grant-making process, this grant model offers three types of grants: district grants, global grants, and packaged grants. Together, these grants allow clubs and districts to carry out a broad spectrum of humanitarian and educational efforts, both locally and abroad.

District grants. With district grant funding, clubs and districts can support their specific service interests that are in line with The Rotary Foundation mission and address immediate needs both locally and abroad. The district administers these grants. Clubs submit project funding requests to the district, and the district then determines the district grant amount to request from the Foundation. The district is eligible to receive one district grant annually. Once the grant is received, the district disburses funds to clubs.

District grant examples include providing a one-year scholarship that allows the recipient to choose the field of study and attend a local or international university, or sponsoring local volunteers to work at a dental clinic in another country for two weeks this Rotary year. These project examples are good candidates for district grants because they are both

- Managed and awarded by the district
- Smaller projects (either local or international)
- Short-term, one-time projects

Global grants. Clubs and districts can receive significant support from the Foundation by participating in larger projects with sustainable, high-impact outcomes in one of Rotary's six area 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

Projects developed by clubs and districts that qualify for a global grant receive a minimum World Fund award of US$15,000 for a minimum project budget of $30,000. The World Fund award is based on a 100 percent match of District Designated Fund (DDF) allocations or a 50 percent match of cash contributions. Global grants must be sponsored by two clubs/districts: a host partner in the country where the activity takes place and an international partner outside the country.

For example, a club sponsors a team of 10 physicians to travel to another country to study the treatment of tropical diseases in children and to conduct a workshop for community members on early detection and treatment of diseases such as tuberculosis. This project is a great candidate for a global grant because it

- Addresses one of the six areas of focus (disease prevention and treatment)
- Requires more time for planning, yet has sustainable outcomes
- Seeks a funding match from The Rotary Foundation

Packaged grants. Packaged 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 carry out the grant project.

One packaged grant, developed by The Rotary Foundation and Aga Khan University, supports nursing scholarships in East Africa. Students can apply for scholarships to study nursing and midwifery at the university's School of Nursing programs in Kenya, Tanzania, and Uganda. The district involved selects the scholarship recipients and mentors them throughout the two-year program.

Aga Khan University is an agency of the Aga Khan Development Network, focused on increasing the number of professionals and their skills sets in the developing world by providing access to opportunities in higher education and research.

Stewardship and qualification. Grant sponsors must display a commitment to the proper stewardship of Rotary Foundation grant funds by getting qualified by their district. Stewardship reflects The Four-Way Test and includes:

- Detailed project planning
- Submitting complete and accurate applications with documentation
- Involving Rotarians directly in carrying out the project
- Transparency in all financial transactions
- Timely reporting

Once the district qualifies a club, the club may apply for a global grant. The Foundation has two minimum requirements for club qualification:

- The club president-elect or a club-designated appointee attends the district Rotary Foundation grant management seminar
- The club agrees to and signs the club memorandum of understanding

If the district has additional requirements, the club must meet those as well. See the *Grant Management Manual* for more information.

PolioPlus. PolioPlus is the corporate program of Rotary International and its Foundation. It is Rotary's most recognized program, and its goal is to eradicate polio. Through Rotarians' fundraising efforts, Rotary has contributed over US$1 billion to polio eradication efforts. 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.

Your club can help ensure that the goal of global polio eradication is reached through activities such as:

- Holding a fundraising event aimed at the general public to help raise funds for PolioPlus and to increase public awareness of Rotary's effort to eradicate polio
- Devoting a club program to the topic of polio eradication
- Ensuring that club members remain informed and involved until the world is certified polio-free

If your club is in a polio-endemic country:

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

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

Clubs can submit Rotary Peace Fellowship applications to the district Rotary Foundation committee; ask your district about the application deadline. Districts must submit their application to The Rotary Foundation by 1 July.

Rotarians are involved in selecting, preparing, and hosting fellowship recipients. Your club can get involved in several ways, including:

- Inviting current and past Rotary Peace Fellows to share their experiences with your club

- Nominating Rotary Peace Fellowship candidates for district consideration
- Serving as hosts and counselors to fellows

Foundation alumni. More than 118,000 people have received program awards from The Rotary Foundation since 1947. These program alumni are powerful advocates for the Foundation and are potential Rotarians and donors as well. 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 their personal experience of how the Foundation changes lives
- Promoting the program opportunity to their peers
- Advising on selection, orientation, and hosting programs
- Becoming a member of your club

Contact your district membership committee chair to find out how you can integrate Foundation alumni into club activities.

***SHARE* and the District Designated Fund.** Through the *SHARE* system, contributions to The Rotary Foundation are transformed into grants that improve our world and change lives. The Foundation Trustees involve Rotarians worldwide in the decision-making process for Foundation grants and programs. No other foundation gives its donors as much freedom to decide how contributions are spent.

At the end of every Rotary year, contributions to the Annual Funds-*SHARE* 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. Your district uses the DDF portion to fund the Foundation grants and programs of its choice.

The Rotary Foundation's unique funding cycle makes all contributions from the same district available three years after they are received. The three-year cycle gives districts time to plan projects 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 decides how to use the district's available DDF, in consultation with the clubs in your district. Contact your district chair to learn more

* *Annual Fund contributions designated to an area of focus are not included in a district's* SHARE *calculation and are not credited to the District Designated Fund.*

Financial Support

Rotary Foundation programs are funded by voluntary contributions from Rotarians worldwide. When Rotarians see the extraordinary results of educational and humanitarian activities, they understand why supporting The Rotary Foundation financially is vital to making the world a better place. Contributions sent to the Foundation can be directed to the Annual 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.

Search www.rotary.org to find the regional Rotary Foundation coordinator serving your area for assistance or advice on Foundation matters.

Contributions to The Rotary Foundation

Contributions should be submitted through Member Access or with the TRF Global Contribution Form or the Multiple Donor Form.

PolioPlus Fund. The greatest challenge in the battle against polio today is financial. Despite the enormous resources already committed, more money is urgently needed to reach the children in the remaining polio-endemic countries. Rotarians are encouraged to make contributions to the PolioPlus Fund, which helps to continue immunization efforts until the world is declared polio-free. Clubs are encouraged to hold special fundraising events in support of PolioPlus. Grants made from this fund help pay for National Immunization Days and surveillance activities.

The *Every Rotarian, Every Year Club Success Booklet* (958) includes brochures, stickers, and instructions to help Rotary clubs promote program participation and contributions to the Annual Fund.

Annual Fund. The Annual Fund is the primary source of support for Rotary Foundation grants and activities. Rotarians are encouraged to contribute to The Rotary Foundation annually. To support this effort:

- 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 Fund support Foundation grants and activities that achieve good in the world.
- Recognize those who support The Rotary Foundation.

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

Rotary Foundation Funding

Funds from the community. While much of the Foundation's contributions come from Rotarians, the community also contributes through fundraisers and independent donations. Consider planning fundraisers to encourage the community to support your club and The Rotary Foundation. For more information, see the fundraising section of the *Club Service Projects Committee Manual* (226D).

Contribution recognition. The sincere acknowledgment of a donor's gift is the first step toward additional financial support. The Rotary Foundation recognizes donors for financial contributions or commitments for future contributions.

RECOGNITION FROM THE ROTARY FOUNDATION

Recognition for Individuals	Recognition for Clubs
Rotary Foundation Sustaining Member	100% Rotary Foundation Sustaining Member Club banner (awarded annually)
Paul Harris Fellow	Every Rotarian, Every Year banner (awarded annually)
Multiple Paul Harris Fellow	Top Three Annual Fund Per Capita Club banner (per district; awarded annually)
Memorial Paul Harris Fellow Certificate	100% Paul Harris Fellow Club banner (upon request)
Certificate of Appreciation (also available to corporations)	
Benefactor	
Bequest Society	
Major Donor	
Arch C. Klumph Society	

For more information on recognition, keyword search "Appreciation and Recognition Opportunities" at www.rotary.org.

For additional support on Foundation matters, contact your regional Rotary Foundation coordinators, assistant RRFCs, and Rotary Foundation alumni coordinators. Support from the Secretariat includes Rotary Foundation staff at RI World Headquarters or your international office, and The Rotary Foundation Contact Center at contact.center@rotary.org or 866-976-8279 (North America only).

Call to Action

What will you do encourage Foundation participation?

What do you need to learn more about to better support The Rotary Foundation?

How will you raise funds for The Rotary Foundation?

How will you ensure stewardship of club funds?

What is your personal goal to support The Rotary Foundation?

Notes

8 Supporting Service

Communities in Action: A Guide to Effective Projects (605A) and *Community Assessment Tools* (605C) are key resources for developing your goals and action plan for your year.

Service is one of Rotary's core values. Effective service projects can translate into effective clubs. By carefully selecting, planning, and evaluating a project, a Rotary club can successfully carry out service projects that address community needs. And by reaching out to the community and promoting your club's signature activity, you can increase your public image and attract new members.

Sustainable projects are able to operate without outside support or intervention after initial project activities and funding end.

Responsibilities

As president-elect, you have these service 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 2)

- Setting service goals, using the Planning Guide for Effective Rotary Clubs

As president, you have these service responsibilities:

- Ensuring that the club and its members adhere to youth protection policies (chapter 1 and appendix 13)
- Ensuring that the service projects committee is following the basic steps of conducting successful service projects:
  - Needs assessment
  - Planning and implementation
  - Evaluation

One of the three priorities of the RI Strategic Plan is to focus and increase humanitarian service. Rotary clubs are encouraged to

- Eradicate polio
- Increase sustainable service focused on youth and young adult programs and The Rotary Foundation's six areas of focus
- Expand strategic partnerships and cooperative relationships
- Create significant projects both locally and internationally

Club Service Projects Committee

The service projects committee's main purpose is to lead the service initiatives of your club, and ensure that they address the needs of your club's community. It also coordinates working with clubs in other countries on international service projects. Your club may amend its bylaws to reflect the specific responsibilities of your service projects committee, adding subcommittees as needed (appendix 9).

Service projects committee appointees should know the community well and have community volunteer experience.

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

The service projects committee has these responsibilities:

- Conducting a needs assessment of the community and the club
- Planning service projects, both local and international, using club, district, and RI resources
- Working with the club public relations committee to ensure that promotion of service projects is planned
- Carrying out service projects and involving all members
- Evaluating all service projects and using the findings to strengthen future service projects

- Reaching out to clubs in other countries to develop partnerships for international fellowship, service, and volunteer activities

For more information, see the *Club Service Projects Committee Manual* (226D).

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 members
- Interact and Rotaract club members
- Members of other Rotary clubs
- Rotarian Action Groups and Rotary Fellowships

Service provides an opportunity for networking and fellowship among club members. Involving all members in service projects will help keep members engaged.

Needs Assessment

Successful service projects address real and current community concerns and engage club members' interests and capabilities.

External Assessment

An external assessment, or community evaluation, will help your club understand the needs of the community your Rotary club can address.

Your club's service projects committee should consult with a wide range of community members. These groups can provide 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.

Club Assessment

An internal assessment of your club can tell you whether a particular project fits your club members' mix of skills, interests, and abilities. For this assessment, 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

A Balanced Program of Service

For more information on using Foundation grants to help finance your international service projects, see chapter 7.

Having service projects that address different Rotary priorities will keep your club's activities balanced. When planning projects, the service projects committee should consider the following:

- Club and community assessments
- RI Strategic Plan
- Areas of focus
- Avenues of Service
- Presidential Citation

Rotary's Areas of Focus (965) provides examples of service projects in each area.

RI Service

Rotary International and its Foundation offer a broad range of humanitarian, intercultural, and educational programs to help clubs and districts achieve their service goals. For detailed descriptions, see appendix 14.

For an overview of vocational service opportunities for your club, see *An Introduction to Vocational Service.*

New Generations programs. New Generations is Rotary's fifth Avenue of Service. Clubs should support New Generations programs such as Rotaract, Interact, RYLA, and Youth Exchange, or develop service projects that target young people up to the age of 30. Clubs can also engage in service projects that involve young people in their communities by getting them involved and interested in Rotary. *An Introduction to New Generations Service* (735) suggests other ways of engaging youth and young adults in your Rotary club.

When conducting a service project where volunteers will be working directly with youth, review the *Youth Protection Training Manual and Leaders' Guide* for screening and training resources.

Local and international service projects. Clubs can partner with local clubs or clubs in other countries on projects that address community needs. For details see *Communities in Action: A Guide to Effective Projects* (605A).

The basic strategies for carrying out local service projects can be applied to international service projects. To participate in an international project, your club will need to find an international partner. You can approach this in various ways:

Explore resources at www.rotary.org to

- Contact your district Rotary Foundation committee chair
- Network with fellow Rotarians at district and international meetings
- Expand your international connections through fellowship visits with other clubs and Rotary Friendship Exchange

- Attend a Rotary-sponsored project fair
- Use your club's Rotaract club to network
- Connect with fellow Rotarians on social networking sites

Planning and Carrying Out Projects

Planning can minimize delays or failures of service projects. Check that your service projects committee is setting project goals, developing a budget and timeline, and beginning implementation.

For ideas for getting started, complete the How to Start a Service Project e-learning module available on www.rotary.org.

Project funding sources may include:

- Funds from individual donors or local businesses
- Grants from other foundations
- Rotary Foundation grants

Before beginning a service project, ensure that your service projects committee develops a project action plan that takes these concerns into consideration:

- 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?
- How can the project have sustainable results?
- 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?

While carrying out the project, keep all club members involved and continuously monitor activities against the action plan.

Evaluation

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?

Call to Action

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

What will you do to ensure that your club's service projects meet community needs and are sustainable?

How will you ensure that your club's projects involve members and draw upon their strengths and talents?

Appendix 13: Risk Management for Youth Programs

Risk management involves 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 for policy details.

- 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 line with the district's policies and with specific RI Board-guidelines 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

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. Clubs and districts are urged to contact a local insurance professional to determine whether their insurance policies provide adequate coverage for their youth programs.

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.

Appendix 14: Rotary Service

Consider the following Rotary service options:

Community Service	Projects that respond to the needs of local communities
Interact	Service clubs for young people ages 12-18
International Service	Projects that involve efforts from Rotarians in more than one country
New Generations Service	Programs and activities that engage young people up to age 30 in their community and in service projects and foster their interest in Rotary
PolioPlus	Rotary International and Rotary Foundation corporate program that supports global polio eradication efforts
Rotaract	Service clubs for young men and women ages 18-30 sponsored by their local Rotary club
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 Community Corps (RCC)	Service groups of non-Rotarian adults sponsored by their local Rotary club
Rotary Fellowships	International groups of Rotarians, Rotarian spouses, and Rotaractors who share a common recreational or vocational interest
Rotary Foundation Grants	Support for clubs and districts as they undertake humanitarian and educational activities both locally and abroad
Rotary Friendship Exchange	International exchange program for Rotarians and their families that promotes building relationships that can evolve into international partnerships for service projects
Rotary Peace Centers	International educational program that offers a fellowship for a master's degree or professional development certificate in peace and conflict resolution. Qualified candidates have the opportunity to study at one of several university-based Rotary Peace Centers around the world.
Rotary Youth Exchange	Program that promotes international understanding and peace among students ages 15-19 and young adults ages 18-25
Rotary Youth Leadership Awards (RYLA)	Training program for young people that emphasizes leadership, citizenship, and personal growth
Vocational Service	Activity that encourages Rotarians to model high ethical standards and apply their business knowledge and skills to benefit others

Notes

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 school, to speak to the students about what Rotary does in the community. Draft your remarks using the space below. Think about the public speaking skills discussed in the session when preparing your presentation.

Next, group members should deliver their remarks and receive feedback from others in the group. Use the following questions as a guide for providing feedback to each other. If time allows, the small groups can report observations to the larger group.

Statement:

Feedback

Did the statement give you the information necessary?

Describe the quality of the presenter's voice. Did the presenter vary his/her tone? Was the statement presented in a clear manner?

Did the presenter seem knowledgeable about the subject?

To what extent were notes used for this statement?

Did the presenter seem relaxed and confident? What were the signs?

Was the presenter's pace appropriate? Did the presenter stay within the allotted time?

What other observations or tips can you provide the presenter?

Worksheet 2: Notes

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.

Characteristic: _____

I will improve this by:

Characteristic: _____

I will improve this by:

Characteristic: _____

I will improve this by:

Characteristic: _____

I will improve this by:

Worksheet 4: Notes

Worksheet 5: President-elect Case Studies

Read the case studies below and answer the questions. Use the case study action plan worksheet on page 111 to create your own plan.

Case Study 1

John is the incoming club president of a small Rotary club. The club hosts an annual barbecue to support a local homeless shelter. He would like to ask Sandy, a club member, to manage the food for the barbecue for the first time. Sandy has been involved in the club for several years and usually is very receptive when asked to help. She owns her own marketing business and has many good contacts within the community. The first time John asked Sandy for her help was through the following email:

> **Hey Sandy,**
>
> **Since your business is slow, can you arrange all the food for our annual barbecue? It will be for about 500 people. Can you also arrange all of the tents, chairs, garbage cans, etc.? Many thanks!**
>
> **Yours in Rotary,**
> **John**

John was surprised when Sandy said she could not help him with the event. What could John have done differently to effectively delegate these tasks to Sandy?

Case Study 2

At the start of your year as club president, you notice that attendance at club meetings is low. You have overheard members say that attending meetings feels like a burden and that the club's projects and activities are not inspiring. You have thought about changing the club's meeting times, but you are not sure how members will react.

Why is attendance low?

How will you find out what the club members want?

What will you do to help inspire your club members to be active members of the club?

Case Study 3

In your club, the new president-elect traditionally gives a short introductory speech. Read the following speech.

> **"Hi, everyone. Um, what? Can you hear me now? I guess I should have prepared. Sorry. I'm nervous. Uh, so you all know me. There really isn't much to say. So, uh, I'm Richard and, uh, I guess, uh, I have been a member of the club for uh, four years — no, wait — five years. I have helped, um, with a lot of stuff with the club, as you know. A lot of different projects. So, we're going to have a good year and, um, I look forward to being your president. Thank you. So, do you have any questions?"**

How could Richard have approached his presentation differently?

Case Study 4

Your predecessor developed the following club goals during his tenure:

Increase club membership by 50 percent
Develop five new club projects
Host three fundraisers for the PolioPlus program
Sponsor a new Interact club

You think that these goals seem unrealistic and unattainable. Now you have to set the club's annual goals, and you want to make sure they are realistic.

List three goals for your year as president.

How will you get input from the members in your club?

What measures will you develop to ensure you are on track with your goals throughout the year?

How will you decide which goals to continue and which goals to phase out?

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?

Worksheet 6: Problem-solving Guide

Use the Planning Guide for Effective Rotary Clubs and the goals worksheet from session 2 to develop your problem-solving guide. Analyze your club's goals, and think about potential challenges to achieving them. Then, offer solutions to these challenges.

	Goal	Potential Challenge	What resources are available?
Administration			
Membership			
Public Relations			
Service Projects			
Rotary Foundation			
Other			

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