

# CLUB PRESIDENT'S MANUAL



ROTARY INTERNATIONAL®

## Addendum to the *Club President's Manual*

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Please note the following changes to the *Club President's Manual*. These changes result from decisions taken by the 2007 Council on Legislation or the RI Board of Directors since its publication.

### Page 6

Under Club President Responsibilities, the seventh bullet has added a sub-bullet:

- Ensuring that a comprehensive training program is implemented by the club and may appoint a club trainer(s) to carry out the training, if needed.

### Page 9

Add the following bullet to the ninth best practice of the Club Leadership Plan:

- A leadership skills development program is available for all members.

### Page 29

Under Sergeant-at-Arms, add the following:

#### **Club Trainer (optional)**

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

The comprehensive training plan should ensure that:

- Club leaders attend district training meetings as appropriate
- 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

### Page 50

Add the following program to appendix 13:

#### **Leadership Development Program**

The purpose of the leadership development program is to develop personal leadership skills of club members thereby enhancing their professional life and developing future club leaders. The district training committee may consult on the training aspects of the program, but the club trainer or club president are chiefly responsible for this meeting. Some topics could include communication skills, leadership styles, leading and motivating volunteers, mentoring, time management, goal setting and accountability, strategic planning, ethics (The Four-Way Test), building consensus, and team work.

#### **Resource changes**

The *Club Committee Manual* (226-EN) is now five separate committee manuals: *Club Administration* (226A-EN), *Club Membership* (226B-EN), *Club Public Relations* (226C-EN), *Club Service Projects* (226D-EN), and *Club Rotary Foundation* (226E-EN).

*A Menu of Service Opportunities* (605B-EN) and *Communities in Action: A Guide to Effective Projects* (605A-EN) is now one publication as *Communities in Action/Menu of Service Opportunities Kit* (605-EN).

This is the 2007 edition of the *Club President's Manual* (222-EN). It is intended for use by club presidents holding office in 2008-09, 2009-10, and 2010-11. The information contained in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, and the Rotary Code of Policies. Changes to these documents, by the 2007 Council on Legislation or the RI Board of Directors, override policy as stated in this publication. It contains the 2007 club constitution and bylaws.

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This is the 2006 edition of the *Club President's Manual* (222-EN). It is intended for use by club presidents holding office in 2007-08, 2008-09, and 2009-10. The information contained in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, and the Rotary Code of Policies. Changes to these documents, by the 2007 Council on Legislation or the RI Board of Directors, override policy as stated in this publication.



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# Introduction

As club president, your role is to lead an effective Rotary club. As president-elect, you will receive training and prepare for your responsibilities. This training includes this *Club President's Manual*, your presidents-elect training seminar (PETS), and the district assembly. On 1 July, as club president, you should be ready for an enjoyable and productive year.

Before you attend your presidents-elect training seminar, review this manual to understand your role and responsibilities. The chapters include details related to specific aspects of your responsibilities and the relevant resources available to support you and your Rotary club. The first appendix of each chapter is a short list of discussion questions to prepare you for your presidents-elect training seminar. Completing these questions in advance will allow you to participate more fully in the discussions. Each chapter also includes appendixes that will be completed during your seminar. For this reason, you should bring your copy of the *Club President's Manual* to your presidents-elect training seminar.

Each chapter in this manual corresponds to a session you will attend at the seminar. Once you have reviewed this manual, work with your club to set long-range goals before you attend your presidents-elect training seminar. Chapter 9, which covers annual and long-range planning, includes a long-range goal-setting worksheet. Setting long-range goals in advance will ensure a more effective goal-setting session when you meet with your assistant governor at your presidents-elect training seminar. Chapter 10 contains important documents, such as the *Planning Guide for Effective Rotary Clubs*, that you'll work on with your assistant governor at your presidents-elect training seminar.

The district assembly will build on what you learn from this manual and your presidents-elect training seminar and allow you to finalize your plans for the year. Chapter 10 also contains a short list of discussion questions to prepare you for your district assembly. You should also bring your manual with you to the district assembly as a reference. After you've completed your training, this manual will serve as a resource during your year as club president.

The *Club President's Manual* provides an overview of the information in the *Club Committee Manual* and *Club Secretary's Manual*. Together, these three manuals make up the *Club Officer's Kit*. Give the *Club Secretary's Manual* to your incoming club secretary and share the club treasurer section of that manual with your incoming club treasurer to assist these officers with their responsibilities in the coming year.

For your presidents-elect training seminar.

**APPENDIX 2**  
**Summary of Session 1: Role and Responsibilities**

**Resources**

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<p><b>Informational Resources</b></p> <p><i>Manual of Procedure</i> (035-EN)  <i>Official Directory</i> (007-EN)  <i>RI Catalog</i> (019-EN)            Rotary Code of Policies  <i>Rotary World</i> (050-EN)  <i>RVM: The Rotarian Video Magazine</i> (510-DVD)  <i>The Rotarian</i></p>	<p><a href="http://www.rotary.org">www.rotary.org</a>            Keyword search:            Club Leadership Plan            Click on:            Member Access</p>
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**Additional Resources**

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<b>Ideas to Implement</b>	<b>Contact</b>
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- 4.
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**Action Steps**

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

## Comments?

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

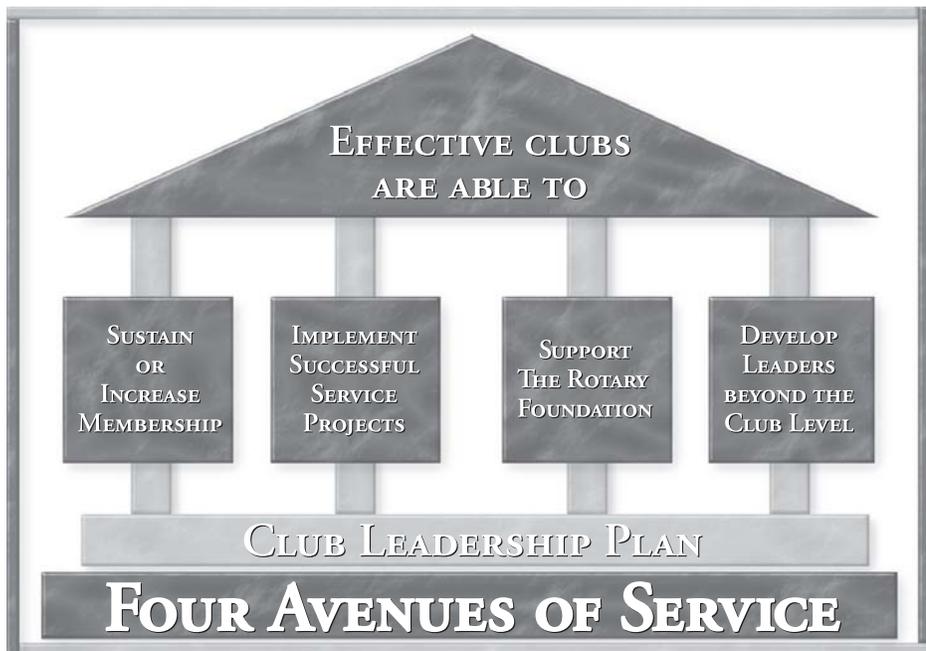
Leadership Education and Training Division  
 Rotary International  
 One Rotary Center  
 1560 Sherman Avenue  
 Evanston, IL 60201-3698 USA  
 E-mail: [leadership.training@rotary.org](mailto:leadership.training@rotary.org)  
 Phone: 847-866-3000  
 Fax: 847-866-0974

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# 1 Role and Responsibilities

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

- Sustain or increase its membership base
- Implement successful projects that address the needs of their 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 present a functional approach to club operations — RI’s operational cornerstone. Rotary’s ideal of service is based on the four Avenues of Service — Club, Vocational, Community, and International — RI’s philosophical cornerstone. The elements of an effective club and the Avenues of Service are related. For example, your club’s ability to implement successful service projects, support The Rotary Foundation, and develop leaders capable of serving Rotary beyond the club level is directly related to the strength and size of your club’s membership base. If one area is weak or absent, your club’s effectiveness in other key areas will also be reduced. Your club should pursue service projects in each avenue in support of the Object of Rotary.

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

## Club President-elect Responsibilities

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

*Note: An asterisk (\*) indicates a responsibility outlined in the Recommended Rotary Club Bylaws or Standard Rotary Club Constitution. Other responsibilities have been assigned by the RI Board of Directors or are best practices.*

- Reviewing this *Club President's Manual* and preparing for the presidents-elect training seminar
- Serving as a director of your club's board, performing responsibilities prescribed by the president or the board\*
- Reviewing your club's long-range goals, using the elements of an effective club as a guide (chapters 2 and 9)
- Setting your club's annual goals, that support long-range goals, using the *Planning Guide for Effective Rotary Clubs* (chapters 2, 9, and 10)
  - Assessing your club's membership situation
  - Discussing and organizing service objectives
  - Identifying ways to improve support of The Rotary Foundation
  - Developing future leaders by promoting attendance at important district events
  - 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 4)
  - Serving as an ex officio member of all club committees\* (chapter 3)
  - Supervising preparation of the club budget\* (chapter 4)
  - Meeting with your assistant governor at PETS and your district assembly (chapter 3)
- Ensuring continuity in leadership and service projects\* (chapter 3)
  - 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 4)
  - Attending your presidents-elect training seminar and district assembly\*
  - Encouraging all club leaders to attend the district assembly
  - Holding a club assembly immediately following the district assembly
  - Attending the district conference

## Club President Responsibilities

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

*Note: An asterisk (\*) indicates a responsibility outlined in the Recommended Rotary Club Bylaws and Standard Rotary Club Constitution. Other responsibilities have been assigned by the RI Board of Directors or are best practices.*

- Registering for Member Access at [www.rotary.org](http://www.rotary.org) to obtain your club's administrative data from RI
- Ensuring your club secretary has registered for Member Access in order to keep membership and club data up-to-date
- Implementing and continually evaluating your club's goals for your year of office, assuring that all club members are involved and informed (chapter 2)
- Ensuring that each committee has defined goals\* (chapter 3)
  - Encouraging communication between club and district committee chairs
  - Conducting periodic reviews of all committee activities, goals, and expenditures\*
- Presiding at all meetings of the club\* (chapter 4)
  - Ensuring that all meetings are carefully planned
  - Communicating important information to club members
  - Providing regular fellowship opportunities for members
- Preparing for and encouraging participation in club and district meetings (chapter 4)
  - Planning for all monthly board meetings\*
  - Attending and ensuring club representation at the district conference and other district meetings
  - Promoting attendance and ensuring representation at the annual RI Convention
- Working with your club and district leaders (chapter 3)
  - Developing, approving, and monitoring the club budget while working closely with the club treasurer\* (chapter 4)
  - Working with district leadership to achieve club and district goals (chapter 3)
  - Using information and resources from the district, RI Secretariat, and the RI Web site (all chapters)
- Ensuring continuity in leadership and service projects\*
  - Submitting a comprehensive annual report to your club on its status in June, before leaving office (chapter 4)
  - Conferring with your successor before leaving office to ensure a smooth transition (chapter 3)
  - Arranging for a joint meeting of the incoming board with the outgoing board of directors (chapter 3)

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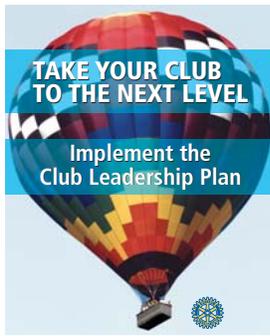
Use the Club President's Monthly Checklist (sent by your RI Club and District Support representative and available at [www.rotary.org](http://www.rotary.org)) when planning your year as president and reviewing your responsibilities as president-elect and president.

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Refer to chapter 4 for a detailed summary of RI online administration tools, including Member Access.

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



## Club Leadership Plan

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The Club Leadership Plan is the recommended administrative structure for Rotary clubs. It is based on the best practices of effective Rotary clubs. Because each Rotary club is unique, the Club Leadership Plan is flexible enough to support the individual needs of clubs around the world. Every Rotary club will benefit from standardizing its administrative procedures based on these best practices:

- Develop long-range goals that address the elements of an effective club.
- Set annual goals that support long-range goals.
- Make sure that all club members feel involved and informed.
- Keep the lines of communication open, both in the club and with the district.
- Ensure continuity in leadership from year to year.
- Customize the club bylaws to reflect club operations.
- Provide regular fellowship opportunities.
- Offer regular, consistent training.

The goal of the Club Leadership Plan is to create an effective club that pursues the Object of Rotary by carrying out activities along each Avenue of Service. The Club Leadership Plan, which provides an opportunity for your club to assess its current operations, has many benefits:

- All members have a chance to voice their opinions on the future of their club.
- Simplified club operations give members more time to focus on service and fellowship.
- Greater involvement of club members develops future club and district leaders.
- Membership retention rates increase as members have greater participation in club activities.
- Club leaders have a larger group of members working to achieve club goals.
- Continuity between appointments and your club's goals eases the leadership transition from one Rotary year to the next.
- Renewed enthusiasm for Rotary comes from taking a fresh look at the practices of your club.

### Implementing the Club Leadership Plan

Your club may already use some of the best practices of the Club Leadership Plan. As president-elect, you should work with club leaders to review your club's current practices. Taking into account your club's current best practices, past, current, and incoming club officers should work together to customize a leadership plan that standardizes processes for the following procedures:

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

Your club's long-range goals should cover the next three to five Rotary years and address the elements of an effective club: membership, service projects,

The Rotary Foundation, and leadership development. They should also include strategies for promoting your club's successes in each element. As your club's leadership plan evolves, these goals should be updated.

**2. Use the *Planning Guide for Effective Rotary Clubs* to set annual goals that are in harmony with your club's long-range goals.**

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

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

Club assemblies help all members of your club stay up-to-date and feel included in club activities. Club assemblies are an opportunity for all members to discuss decisions that affect your club and for committees to report on their activities.

**4. Ensure clear communication between club leaders, club members, and district leaders.**

Regular club assemblies that include all club members and your assistant governor help to ensure that this communication takes place. Outside of club assemblies, you should work with club leaders to develop a plan for communicating with each other, club members, and district leaders. In your communication plan, outline who will communicate with whom, what method will be used, and when.

**5. Provide continuity in leadership of your club and service projects.**

Because Rotary club leaders change annually, every club needs a continual supply of leaders. Three of the most successful ways to achieve continuity are making appointments for multiple years; having a current, incoming, and past chair on all committees; and having the current club president work closely with the president-elect, president-nominee, and immediate past president. Continuity in leadership of service projects is important as service projects can last longer than one year.

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

Work with your fellow club officers to modify the Recommended Rotary Club Bylaws from RI to reflect your club's operations. Check your bylaws annually to make sure they are current.

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

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

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

Club involvement teaches members about Rotary and helps retain them as active members of the club. Active members feel ownership and dedication to club projects. Involve the families of your members to increase your service potential.

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Refer to appendix 3 for RI Board policy for the Club Leadership Plan.

## 9. Develop a comprehensive training plan.

A comprehensive training plan ensures that

- Club leaders attend district training meetings.
- Orientation for new members is provided consistently and regularly.
- Ongoing educational opportunities are available for current members.

Training is crucial for developing future leaders and ensuring that current club officers are well informed about Rotary and capable of leading your club and providing better Rotary service.

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

## Resources

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

### Informational Resources

- Club President's Monthly Checklist — Monthly reminder of activities and deadlines that apply to all Rotary clubs. Revised annually, sent by your RI Club and District Support representative (also available at [www.rotary.org](http://www.rotary.org)).
- *Manual of Procedure* (035-EN) — Policies and procedures established by legislative action, the RI Board of Directors, and the Trustees of The Rotary Foundation, issued every three years following the Council on Legislation. Contains the RI constitutional documents.
- *Official Directory* (007-EN) — Contact information for RI and Foundation officers, committees, task forces, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing within districts of clubs, including contact information for presidents and secretaries and meeting times and places.
- *RI Catalog* (019-EN) — List of RI publications, audiovisual programs, forms, and supplies, updated annually. Available in print and online.
- Rotary Code of Policies and Rotary Foundation Code of Policies — Policies and procedures established by the RI Board of Directors and the Trustees of The Rotary Foundation in support of the RI Constitution and Bylaws, revised following each Board or Trustees meeting (most up-to-date versions posted at [www.rotary.org](http://www.rotary.org)).
- *Rotary World* (050-EN) — Quarterly newspaper for Rotary club and district leaders; can be used for club bulletins and other newsletters.
- *RVM: The Rotarian Video Magazine* (510-DVD) — Video companion to *The Rotarian* magazine; ideal for club meeting presentations, member recruitment, and community public relations efforts.

- *The Rotarian* or Rotary regional magazine — RI's official magazines, published monthly; resource on club and district projects, RI Board decisions, and RI meetings.

### **www.rotary.org**

The RI Web site provides online resources and up-to-date information on all aspects of Rotary, including membership, The Rotary Foundation, RI programs, news, events, club and district support, and training. Many of Rotary's publications are available as downloads. Visitors to the site can shop the online catalog, locate the meeting time and place of any Rotary club, and communicate with other Rotarians through RI discussion rooms.

Click on:

- Member Access ([www.rotary.org](http://www.rotary.org)) — Allows Rotarians to contribute to The Rotary Foundation, manage their e-mail subscriptions from RI, register for meetings, download administrative software, and access member benefits. Club presidents and secretaries have access to additional club reports and records (see chapter 4 for more information).

Keyword search:

- Club Leadership Plan ([www.rotary.org/jump/clubplan](http://www.rotary.org/jump/clubplan)) — A comprehensive, current source of information about the Club Leadership Plan. Download support materials and view the latest Recommended Rotary Club Bylaws and Standard Rotary Club Constitution.

### **Human Resources**

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

For contact information, see the *Official Directory* or go to [www.rotary.org](http://www.rotary.org). Publications can be ordered from the *RI Catalog* or downloaded at [www.rotary.org](http://www.rotary.org).

# APPENDIX 1

## Discussion Questions for Role and Responsibilities

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

What additional responsibilities does your club assign to the president?

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

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

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

## APPENDIX 2

# Summary of Session 1: Role and Responsibilities

### Resources

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#### Informational Resources

*Manual of Procedure* (035-EN)  
*Official Directory* (007-EN)  
*RI Catalog* (019-EN)  
Rotary Code of Policies  
*Rotary World* (050-EN)  
*RVM: The Rotarian Video Magazine* (510-DVD)  
*The Rotarian*

[www.rotary.org](http://www.rotary.org)

Keyword search:  
Club Leadership Plan

Click on:  
Member Access

#### Additional Resources

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### Ideas to Implement

### Contact

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### Action Steps

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# APPENDIX 3

## RI Board Policy for the Club Leadership Plan

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The purpose of the Club Leadership Plan is to strengthen the Rotary club by providing the administrative framework of an effective club. The elements of an effective club are 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 financial contributions and program participation
- Develop leaders capable of serving in Rotary beyond the club level

To implement a Club Leadership Plan, current, incoming, and past club leaders should:

1. Develop a long-range plan that addresses the elements of an effective club.
2. Set annual goals using the *Planning Guide for Effective Rotary Clubs* in harmony with a club's long-range plan.
3. Conduct club assemblies that involve members in the planning process and keep them informed of the activities of Rotary.
4. Ensure clear communication between the club president, board, committee chairs, club members, district governor, assistant governors, and district committees.
5. Provide for continuity in leadership, including the concept of succession planning to ensure development of future leaders.
6. Amend bylaws to reflect the club committee structure and roles and responsibilities of club leaders.
7. Provide opportunities to increase fellowship among members of the club.
8. Ensure that every member is active in a club project or function.
9. Develop a comprehensive training plan that ensures
  - Club leaders attend district training meetings
  - Orientation is consistently and regularly provided for new members
  - Ongoing educational opportunities are available for current members

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

### Club Committees

Club committees are charged with carrying out the annual and long-range goals of the club based on the four Avenues of Service. The president-elect, president, and immediate past president should work together to ensure continuity of leadership and succession planning. When feasible, committee members should be appointed to the same committee for three years to ensure consistency. The president-elect is responsible for appointing committee members to fill vacancies, appointing committee chairs, and conducting planning meetings before the start of the year in office. It is recommended that the chair have previous experience as a member of the committee. Standing committees should be appointed as follows:

- **Membership**  
This committee should develop and implement a comprehensive plan for the recruitment and retention of members.
- **Club Public Relations**  
This committee should develop and implement plans to provide the public with information about Rotary and to promote the club's service projects and activities.
- **Club Administration**  
This committee should conduct activities associated with the effective operation of the club.
- **Service Projects**  
This committee should develop and implement educational, humanitarian, and vocational projects that address the needs of its community and communities in other countries.
- **The Rotary Foundation**  
This committee should develop and implement plans to support The Rotary Foundation through both financial contributions and program participation.

Additional committees may be appointed as needed.

#### **Training Requirements**

Club committee chairs should attend the district assembly before serving as chair.

#### **Relation to the District Leadership Team**

Club committees should work with assistant governors and relevant district committees.

#### **Reporting Requirements**

Club committees should report to the club board on the status of their activities on a regular basis and at club assemblies, as appropriate.

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## 2 Goal Setting

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

To achieve goals, you will need the hard work of your fellow club members. As club president, you must lead volunteers. Recognize club members who set an example for other members through their outstanding participation in club projects and activities.

### **Responsibilities**

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

- Understanding the characteristics of an effective goal
- Developing or assessing your club's long-range goals
- Establishing annual goals, that are in harmony with your club's long-range goals
- Ensuring an action plan has been developed for each goal
- Implementing and continually evaluating your club's goals
- Motivating club members to accomplish the goals
- Seeking opportunities for recognition through RI, The Rotary Foundation, and your district

### **Goal Setting**

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The *Planning Guide for Effective Rotary Clubs* (appendix 39) is a practical goal-setting tool that will help you work with your club leadership team to establish goals. The guide helps you to assess your club's current state and also provides strategies that you may choose to achieve club goals.

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

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

### Effective Goals

Your club's long-range goals should cover the next three to five Rotary years and address the elements of an effective club. Long-range goals should also include strategies for promoting your club's successes in each element. Work with club leaders to develop or review your club's long-range goals before you attend your presidents-elect training seminar (see chapter 9 for more information).

As president-elect, assess the current state of your club, using the *Planning Guide for Effective Rotary Clubs*, and then begin to draft annual goals for the future. Effective goals are

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

Consider these club activities when setting goals:

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

### Developing an Action Plan

Establishing goals is the first step toward ensuring your club is effective and successful during your year in office. As president, you will delegate much of the implementation of club goals to your committee chairs and members. Your role is to ensure that an action plan has been developed for each goal and that steady progress is being made toward achieving the goals. To develop an action plan for each goal:

- Outline the specific steps needed to achieve the goal.
- Establish a time frame for each step.

- Determine who is responsible for implementing each step.
- Establish criteria for measuring progress and success for each step.
- Consider the resources and tools available to support the goal.
- Evaluate the success of previous goals and your current plan, modifying as necessary.

### **Evaluation**

Once goals have been achieved, work with those who implemented them to evaluate their success. This evaluation should assess which strategies worked and which did not. Insights gained from the evaluation should be applied to other goals and shared with the president-elect and president-nominee, as applicable, as they begin to develop goals.

### **Motivating Volunteers**

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

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

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

### **Awards**

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Awards often motivate volunteers. Rotary International and The Rotary Foundation offer awards and recognize outstanding service for Rotarians and Rotary clubs. For an overview of awards available through RI and The Rotary Foundation, see appendix 5.

Districts often develop their own awards to acknowledge outstanding achievement. Contact your governor or assistant governor to learn about awards available for individuals or clubs.

Individual clubs are also encouraged to develop their own awards to recognize excellence within the club and community.

## Responsibilities

As president-elect, you have the following award responsibilities:

- Developing club annual and long-range goals that will meet award program requirements, such as for the RI Presidential Citation
- Promoting award programs for which members or the club might be eligible

As president, you should communicate with district leadership about possible nominees in your club as soon as possible. It is your role to present awards to club or community members.

To maximize the motivational potential of awards and contribution recognition:

- Make the presentation memorable.
  - Invite the governor or other appropriate Rotary leader to present the award
  - Invite family members to attend
- 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
- Photograph the presentation and give a photograph to the recipient.

Nomination forms for awards are revised regularly. For more information about eligibility requirements, exact deadline dates, and a wide variety of other awards, go to [www.rotary.org](http://www.rotary.org) or contact RI Programs or Foundation staff.

## Resources

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The following resources are available to help you set goals and motivate club members for a successful year:

### Informational Resources

- *Planning Guide for Effective Rotary Clubs* (appendix 39) — A club assessment and goal-setting tool that club leaders use to record goals in the areas of membership, service projects, The Rotary Foundation, public relations, leadership development, and club administration.
- *Presidential Citation Brochure* (900A-EN) — Leaflet that outlines the Presidential Citation Program for the current Rotary year.

### [www.rotary.org](http://www.rotary.org)

Keyword search:

- Recognition programs — RI and Rotary Foundation awards and recognition programs.

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Work with the club public relations committee to help publicize awards given to your club or club members. Many communities offer awards for outstanding volunteers or service organizations; find out whether your club or individual members are eligible. Recognition of the club and individual Rotarians can improve the club's public image and membership recruitment efforts.

### **Human Resources**

- RI Programs staff — Staff members at RI World Headquarters who can answer questions about RI service awards.
- Rotary Foundation staff — Staff members at RI World Headquarters who can answer questions about Foundation service awards.

For contact information, see the *Official Directory* or go to [www.rotary.org](http://www.rotary.org). Publications can be ordered from the *RI Catalog* or downloaded at [www.rotary.org](http://www.rotary.org).

# APPENDIX 4

## Discussion Questions for Goal Setting

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

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

How will you ensure that your club's goals are achieved?

What motivates Rotarians in your club?

What service and contribution recognition does your club award?

# APPENDIX 5

## RI and Rotary Foundation Awards

AWARD	HONOREE(S)	NOMINATED BY	AWARDED BY
<b>Best Cooperative Projects Award</b> This RI recognition honors outstanding Rotary club service projects done in cooperation with other organizations.	Up to 5 clubs per district	District governor	RI president
<b>The Rotary Foundation Citation for Meritorious Service</b> This annual award recognizes one Rotarian per district who has given outstanding service to The Rotary Foundation over a period of more than one year.	One Rotarian per district per year	District governor	The Rotary Foundation Trustees
<b>Four Avenues of Service Citation</b> This annual award provides a way for Rotary clubs to personally recognize one club member for his or her outstanding efforts in the four Avenues of Service. Candidates for nomination should be Rotarians in good standing in their clubs who have consistently demonstrated their support of the Object of Rotary through participation in service activities in each of the avenues of club, vocational, community, and international service. Current club presidents and immediate past and current district governors are not eligible.	One Rotarian per club per year	Club president	RI president
<b>Presidential Citation</b> The purpose of this recognition is to increase Rotary club involvement in a variety of service activities, while also encouraging Rotarians' personal involvement in serving others and promoting a high standard of Rotary service in the community and abroad. Rotary clubs in good standing are eligible. The award is revised annually by the RI president and, traditionally, explains the RI theme for the year.	Rotary clubs	District governor	RI president
<b>RI Public Relations Award</b> This honor recognizes Rotary clubs that have generated increased awareness and understanding of Rotary through outstanding media coverage or public relations efforts.	One club from each Rotary district	District governor	RI president
<b>RI Recognition of Membership Development Initiatives</b> This honor recognizes clubs that develop innovative programs focused on one of the elements of membership growth and development (retention, recruitment, or organization of new Rotary clubs).	Three clubs from each Rotary district	District governor	RI president

AWARD	HONOREE(S)	NOMINATED BY	AWARDED BY
<p><b>RI Membership Development and Extension Award</b> This award recognizes clubs for three fundamental aspects of membership: membership growth in existing clubs, retention of current club members, and the organization of new clubs. Districts that meet or exceed their membership goal also receive recognition.</p>	At least three clubs from each Rotary district	District governor	RI president
<p><b>Service Award for a Polio-Free World (regional and international)</b> This Rotary Foundation honor recognizes outstanding contributions to the polio eradication effort at the regional and international levels and encourages participation in the final eradication efforts. Current and incoming district governors are not eligible.</p>	Eligible Rotarians	Any Rotarian	The Rotary Foundation Trustees
<p><b>Significant Achievement Award</b> This RI honor recognizes significant community service projects conducted by clubs.</p>	One club from each Rotary district	District governor	RI president
<p><b>The Rotary Foundation District Service Award</b> This honor can be bestowed upon any Rotarian whose service to humanity through Rotary Foundation programs deserves special recognition.</p>	Up to 20 Rotarians per district	District governor	District governor
<p><b>The Rotary Foundation Distinguished Service Award</b> The Rotary Foundation's highest service award recognizes exemplary service beyond the district for an extended period of time. Candidates must have received the Citation for Meritorious Service at least four years before being nominated.</p>	Up to 50 Rotarians worldwide per year	Any Rotarian with an endorsement from another Rotarian (both from outside the nominee's district)	The Rotary Foundation Trustees

Application forms and award details, including deadlines, are available at [www.rotary.org](http://www.rotary.org) or from your RI Club and District Support representative.

# APPENDIX 6

## Summary of Session 2: Goal Setting

### Resources

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#### Informational Resources

*Planning Guide for Effective Rotary Clubs*  
(appendix 39)

*Presidential Citation Brochure (900A-EN)*

#### Additional Resources

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### Ideas to Implement

### Contact

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- 3.
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- 5.

### Action Steps

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# APPENDIX 7

## Goals Worksheet

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Use the following worksheet to draft goals to support effective club operations. Ensure that your goals are

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

You will continue working on these preliminary goals with your assistant governor in the *Planning Guide for Effective Rotary Clubs* (appendix 39) in PETS Session 9: Annual and Long-Range Planning.

Club name \_\_\_\_\_ Goals for Rotary year 20\_\_\_\_ - \_\_\_\_\_

<b>Membership Goal</b>	<b>Service Projects Goal</b>
<b>Rotary Foundation Goal</b>	<b>Leadership Development Goal</b>
<b>Additional Goals</b>	

# APPENDIX 8

## Action Plan Worksheet

<b>Goal:</b>
<b>Result:</b>

Action Step	Criteria for Measuring Progress	Person Responsible	Time Frame for Completion
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

<b>Resources needed:</b>
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## 3 Working with Your Club and District Leaders

An important part of your leadership role is developing relationships with club leaders, club members, and district leaders. Effective leadership depends on management skills, team building, enthusiasm, and integrity. Effective management skills involve leading problem-solving initiatives and being accessible to members by promoting direct and honest communication.

### Responsibilities

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

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

As president, your role is to ensure clear communication because club and district leaders change annually and service projects often last more than one year. Your club will be more effective if there is continuity in leadership of your club and committees.

### Working with Your Club

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

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### Your Club Leadership Team

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

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For more on the role of your club board of directors, see chapter 4, “Club Administration.”

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 and ensure a smooth transition into the new Rotary year.

### Club Board of Directors

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

The board is elected to manage the interests of the club as a whole. Board members will work closely with you to carry out plans and achieve club goals. Based on the Recommended Rotary Club Bylaws (appendix 38), your club’s board of directors should have the following responsibilities:

- Overseeing all club officers and committee members
- Electing a member of the club to act as sergeant-at-arms
- Overseeing the club’s budget
  - Developing a budget that provides a realistic amount of money for club operations and service projects
  - Approving all expenditures not accounted for in the club budget
- Informing proposers of membership decisions, through the club secretary, within 30 days
- Reviewing the program and policies of the club to ensure they’re being implemented effectively
- Considering new and creative ways to fulfill the Object of Rotary
- Examining the needs of the community and the world and establishing club goals that address them

### Club Secretary

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

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

- Planning weekly meeting agendas for the year
- Keeping membership records
- Recording attendance at meetings
- Sending out notices of meetings of the club, board, and committees
- Recording and preserving minutes of the meetings
- Receiving, completing, and returning the semiannual report of membership and paying dues to Rotary International on 1 July and 1 January
- Regularly reporting new members, terminations, and other changes in membership to the RI general secretary
- Reporting membership and attendance data monthly to the district governor within 15 days of the last meeting of the month

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To ensure access to club administrative data, you and your club's secretary should register for Member Access at [www.rotary.org](http://www.rotary.org).

- Collecting and remitting subscriptions to *The Rotarian* or Rotary regional magazine
- Working with the successor to ensure a smooth transition between Rotary years
- Performing other responsibilities related to the office

While the responsibilities of the club secretary are administrative, in many ways they capture the current status of the club. For example, as the club leader who maintains attendance records, the club secretary may be the first to notice a worrisome trend. To guide members toward achieving club goals, you should stay up-to-date on data and trends that your club's secretary is tracking.

### **Club Treasurer**

Financial stewardship is the responsible management of your club's finances. Your role is to ensure competent oversight of club project funds, transactions, and reports. You should be aware of the financial condition of your club at all times. By meeting regularly with your club's treasurer, you can take early corrective measures to ensure that your club remains financially viable.

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 list the following responsibilities for the treasurer:

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

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

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

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

### **Club Committees**

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Your club's committees should plan, promote, and implement activities and projects to carry out your club's annual and long-range goals. If your club's committees are ineffective, your club won't be able to reach many of its goals. You need to closely monitor the activities and progress of each committee and provide motivation and leadership to committees where necessary.

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

## Responsibilities

As president-elect, you have the following responsibilities:

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

It's your responsibility as club president to oversee each committee so that they reach the goals set for the year.

## Club Committee Structure

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

- Club administration (chapter 4)
- Membership (chapter 5)
- Service projects (chapter 6)
- The Rotary Foundation (chapter 7)
- Public relations (chapter 8)

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

## Effective Committees

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

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

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Refer to chapter 4 for details on amending club bylaws to alter your club's committee structure.

### **Selecting Committee Chairs**

Appoint committee chairs based on their professional abilities, personal interests, and talents. Because committee activities may carry over from one year to the next, reappoint committee members to support three-year terms, when possible, to ensure continuity. Each committee chair should have previous experience on that committee. When appointing committee chairs, consider the following qualities:

- Good judgment
- Leadership ability
- Interest in the committee's work
- Knowledge of the job
- Knowledge of Rotary
- Enthusiasm
- Imagination

### **Preparing Committee Chairs**

It's in your own interest as club president to ensure that committees are well prepared for their responsibilities. Strongly encourage all committee chairs to attend the district assembly, where they can acquire the necessary skills and knowledge for leading an effective committee.

You can also prepare committee chairs in these ways:

- Give each chair a copy of the introduction and chapter 1 from the *Club Committee Manual*, as well as the appropriate committee chapter.
- Ensure that records from past years have been shared with new chairs.
- Encourage new committee chairs to discuss projects and evaluation results with their predecessors.
- Conduct planning meetings with incoming committees before the next Rotary year begins.

### **Working with Your Committees**

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

- Review the status of each committee's action plan.
- Coordinate collaboration between committees, as needed.
- Motivate committees to take on new challenges.
- Respect the direction of a committee when it's different from what you might choose.
- Congratulate, recognize, and thank committee chairs and members when they complete tasks.

## Working with Your District

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

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

### 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 in a given geographical area. The following responsibilities are recommended for an assistant governor:

- Assisting presidents-elect in implementing and reviewing the Club Leadership Plan
- Helping presidents-elect identify club goals, using the *Planning Guide for Effective Rotary Clubs*
- Attending each club assembly associated with the governor's official visit
- Visiting each club regularly (preferably monthly with a minimum of one visit each quarter of the Rotary year) and meeting with club presidents and other leadership to discuss club business, resources, and handling of club funds
- Periodically reviewing the progress made toward club goals (as established in the *Planning Guide for Effective Rotary Clubs*) and providing counsel and guidance when necessary
- Assisting club leaders in scheduling and planning for the governor's official visit
- Acting as a liaison between the governor and clubs
- Encouraging clubs to follow through with suggestions from the governor

- Assisting clubs with service projects and monitoring progress
- Identifying and encouraging the development of future district leaders

### District Committees

The following chart shows how district committees support club committees.

CLUB COMMITTEE	DISTRICT SUPPORT
Membership	Membership development committee
Club public relations	Public relations committee
Club administration	Assistant governor
Service projects	Programs committees
The Rotary Foundation	Rotary Foundation committee

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

## Resources

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

### Informational Resources

- *Club Officers' Kit* (225-EN) — A set of manuals detailing the responsibilities of the club president, secretary, treasurer, and club committees and explaining the operational areas of a Rotary club, including club administration, membership, service projects, The Rotary Foundation, and public relations. The kit includes:
  - *Club President's Manual* (222-EN)
  - *Club Secretary's Manual* (229-EN)
  - *Club Committee Manual* (226-EN)
  - *The Rotary Foundation Quick Reference Guide* (219-EN)
- District directory — Listing of district leaders and activities (if your district produces a directory)
- *Manual of Procedure* (035-EN)
- *Official Directory* (007-EN)
- Rotary Code of Policies and Rotary Foundation Code of Policies

### [www.rotary.org](http://www.rotary.org)

Click on:

- Club-District Support ([www.rotary.org/support](http://www.rotary.org/support)) — Resources for club and district officers, including the most up-to-date versions of the Recommended Rotary Club Bylaws and Standard Rotary Club Constitution.
- Training ([www.rotary.org/training](http://www.rotary.org/training)) — A comprehensive, current source of Rotary training information and publications, many available for free download.

Keyword search:

- Rotary E-Learning Center ([www.rotary.org/jump/elearning](http://www.rotary.org/jump/elearning)) — Online, supplemental training for club-level Rotarians. Brief modules for new members and club officers can be viewed online or downloaded.

Publications can be ordered from the *RI Catalog* or downloaded at [www.rotary.org](http://www.rotary.org).

# APPENDIX 9

## Discussion Questions for Working with Your Club and District Leaders

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

How will you prepare your club leadership team?

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

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

How can your district support your club?

# APPENDIX 10

## Summary of Session 3: Working with Your Club and District Leaders

### Resources

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#### Informational Resources

*Manual of Procedure* (035-EN)

*Official Directory* (007-EN)

[www.rotary.org](http://www.rotary.org)

Click on:

Club-District Support

#### Additional Resources

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### Ideas to Implement

### Contact

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### Action Steps

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## 4 Club Administration

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

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

### **Responsibilities**

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

- Appointing and meeting with your club administration committee to develop an action plan to carry out your club's administrative responsibilities
- Knowing your club's administrative policies and procedures by reviewing its current constitution and bylaws
- Reviewing the most recent versions of the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws (appendixes 37 and 38)
- Understanding the process for amending club bylaws
- Working with club leaders to update your club's constitution and bylaws
- Determining which aspects of the Club Leadership Plan can strengthen your club

As president, you have the following club administration responsibilities:

- Fulfilling district and RI administrative requirements
  - Overseeing the club's reporting requirements
  - Understanding how the information in reports can be used to assess club trends
  - Working closely with the club secretary to ensure that required reports and forms are sent to RI and the district in a timely manner
  - Understanding how to use Member Access and the optional RI club administration software (RI-CAS) to update club records
  - Overseeing the responsible management of club finances, working closely with your club's treasurer
- Encouraging attendance at the district assembly and additional training meetings, as appropriate
- Developing weekly club programs and club assemblies that will interest club members
- Preparing for the district governor's official visit and the quarterly (or more) visits of your assistant governor
- Ensuring the Rotary Marks are used properly

### **Minimum Standards**

The RI Board has adopted standards to ensure that clubs function effectively. Work with your district and assistant governors to comply with the following minimum standards for clubs:

- Pay per capita dues to Rotary International.
- Meet regularly.
- Subscribe to *The Rotarian* or a Rotary regional magazine.
- Implement service projects that address needs in the local community or in communities in other countries.
- Receive the visit of the governor, assistant governor, or any other officer of Rotary International.
- Maintain appropriate general liability insurance.

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Plan weekly meetings and activities in observance of Magazine Month (April).

### **Club Administration Committee**

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

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

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You'll find more information about the club administration committee in the *Club Committee Manual* and the *Club Secretary's Manual*.

### **Club Administration Committee Responsibilities**

Your club administration committee has the following responsibilities:

- Fulfilling all district and RI administrative requirements
- Tracking and reporting attendance
- Making all members aware of current Rotary information by promoting
  - Club bulletin or Web site
  - *The Rotarian* or Rotary regional magazine
  - RI Web site ([www.rotary.org](http://www.rotary.org))
  - District governor's monthly letter
  - District Web site
- Promoting fellowship among club members
- Organizing programs for regular weekly and special meetings, including club assemblies

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

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The Standard Rotary Club Constitution must be adopted by all clubs admitted to membership in Rotary International. It provides a model framework for Rotary club operations. Following the Council on Legislation, the Standard Rotary Club Constitution is updated to include council decisions. Be sure that your club is using the correct version of the Standard Rotary Club Constitution (appendix 37).

Your club's bylaws provide additional guidelines, not included in the club constitution, for managing your club. The Recommended Rotary Club Bylaws (appendix 38) are developed in harmony with the Standard Rotary Club Constitution and reflect current Rotary policy. You can adapt them to meet your club's needs, goals, and activities and reflect its unique identity. To prepare for your year as club president, you should review your club's bylaws and work with your club leadership team to amend them to reflect any new practices and procedures as well as the club committee structure and the roles and responsibilities of your club's leaders.

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

Your club may amend its bylaws at any regular meeting, provided the following requirements are met

- A quorum must be present (one-third of the membership constitutes a quorum).
- Two-thirds of all members present must approve.
- All members must be notified of the proposed amendment 10 days before the meeting.
- All amendments must be in harmony with the club constitution and RI Constitution and Bylaws.

## RI and Rotary Foundation Reporting Requirements

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Every Rotary club is required to submit reports and information to Rotary International on 1 July and 1 January. These reports include:

- Semiannual reports
- Per capita dues
- Other fees and payments, such as:
  - Individual and club subscriptions to *The Rotarian* or Rotary regional magazine
  - Council on Legislation dues (July only)
  - Insurance (USA and its territories only; July only)

Semiannual reports certify the number of club members to RI's Board of Directors. Payment of your per capita dues should be clearly identified with your club number and invoice number. Failure to pay RI dues will result in termination of your club's charter.

To ensure that RI mailings and communications, including semiannual reports, reach the appropriate members of your club, the club secretary must submit *Official Directory* information (names and contact details for incoming club officers) to RI by 31 January. In addition, any changes in current officer information should be sent to RI immediately, and changes in membership or meeting information should be reported regularly.

Reports to The Rotary Foundation include:

- The Rotary Foundation Fund Development Club Goal Report Form
- Project reports for any participation in the Humanitarian Grants Program

Other reporting requirements include:

- Monthly attendance figures to the district governor, no later than 15 days following the last meeting of the month
- Notices to clubs in other localities of any Rotarians relocating to their area

## Online Administration Tools

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Two tools from RI — Member Access and RI-CAS — can help your club perform administrative tasks more quickly and easily, provide more continuity between years of leadership, and ensure that RI has accurate records.

### Member Access

Member Access at [www.rotary.org](http://www.rotary.org) allows Rotarians to perform Rotary business at any time, day or night, from the convenience of their homes, offices, or anywhere they access the Internet. You and your club's secretary have access privileges to the following club administration functions:

- Viewing and changing club membership data
- Paying RI per capita dues and other fees (by credit card only)
- Updating club data (meeting time and place, officer information)

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

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

- Searching club and district data worldwide
- Viewing reports for club contributions to The Rotary Foundation

You'll also have access to functions available to all Rotarians, including:

- Registering for RI meetings
- Contributing to The Rotary Foundation
- Viewing your personal Rotary Foundation contribution history
- Managing your personal e-mail subscriptions from RI
- Viewing member benefits

### **RI-CAS**

RI club administration software, or RI-CAS, can be downloaded in Member Access. Your club secretary can use it for many administrative tasks, including:

- Managing contacts (club members, non-Rotarians)
- Managing club information (attendance, regular club meetings, membership statistics)
- Making assignments for club committees and other leadership positions in the club
- Tracking club events (committee meetings, fellowship events)
- Sending e-mails to contacts in the database

## **Finances**

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Rotary clubs are expected to handle their finances in a businesslike manner. Maintaining and reviewing records and financial statements, developing a balanced club budget, and conducting an annual financial review will help ensure your club's financial well-being.

### **Responsibilities**

As president-elect, you should work with your club leadership team to develop a club budget.

As president, you must work closely with the club's board of directors, secretary, and treasurer to carry out the following responsibilities:

- Monitoring expenditures against the club budget
- Practicing proper accounting for club expenditures throughout the year
- Ensuring that your club's dues structure and policies on fines don't work against your club's financial stability or its membership goals
- Ensuring club per capita dues are sent to RI
- Ensuring that your club's bylaws outline the process for disbursing funds
- Having a thorough annual club financial review prepared by a certified public accountant or other qualified individual
- Submitting a comprehensive financial statement of the club's financial status to the club before the end of the Rotary year

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You'll find more information about the club treasurer's responsibilities and role within the club in the treasurer's section of the *Club Secretary's Manual*.

## Insurance

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Your club must maintain liability insurance for its activities, as appropriate for your geographic region. Contact a local insurance agent or broker for assistance in evaluating and obtaining insurance to protect your club in the event of an accident or claim.

Clubs in the United States and its territories and possessions are provided general liability insurance through a program arranged by RI and paid for by the participating clubs. This mandatory program must be paid annually through the July semiannual dues report. More information on this coverage is available at [www.rotary.org](http://www.rotary.org).

## Rotary Marks

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RI owns numerous trademarks and service marks, including the Rotary emblem and the names Rotary, Rotary International, and The Rotary Foundation; collectively, they're known as the Rotary Marks (for a partial list, see appendix 12). Using them properly preserves their identity as symbols of Rotary throughout the world. Clubs and districts are welcome to use these marks to name and promote their projects, programs, and activities so long as the club or district responsible is clearly identified and the marks are correctly reproduced.

### Naming Guidelines

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

Incorrect:	Correct:
Rotary Cleanup Project	Rotary Club of the Valley Cleanup Project
Rotary Centennial Park	Rotary Club of Mountain City Centennial Park

When the Rotary emblem appears with the name of a club project or program, make sure that the name is placed near the emblem and given equal prominence. By including your club name, you ensure that your club is recognized in the community for its projects and activities. For assistance with naming guidelines, contact your RI Club and District Support representative.

### Reproducing the Rotary Emblem

The Rotary emblem is the organization's most recognizable and reproduced trademark. Make sure that any materials that your club produces with the emblem meet these guidelines:

- The emblem must be reproduced in its complete form.
- When the emblem is printed in more than one color, the gearwheel must appear in its official colors of royal blue and gold (or metallic gold), and "Rotary International" must appear in gold (or metallic gold).

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#### Rotary Emblem PANTONE® Colors

Royal blue  
PANTONE® 286

Metallic gold  
PANTONE® 871

Gold  
PANTONE® 129

PANTONE® is a registered trademark of Pantone Inc.

Be sure to avoid these common mistakes:

- The keyway is missing from the center.

#### Rotary Club of Port City



- The center of the wheel is filled in.

#### Rotary Club of Port City



- The emblem is partially covered or modified.

#### Rotary Club of Port City



#### Rotary Club of Port City



- The club name is missing.



If you discover an improper reproduction of the Rotary emblem on an item that's already been produced, make a note of it to be sure the problem is corrected the next time the item is reproduced.

The official Rotary emblem and many other Rotary logos are available for download at [www.rotary.org](http://www.rotary.org).

### Merchandise and Licensing

If your club wants to raise funds for a project by selling merchandise that bears the Rotary name, emblem, or other marks, you may do so without a license from Rotary International. However, make sure that your club buys the merchandise from an RI-licensed vendor and that the merchandise bears the club name, project name, and project date(s). For a list of licensed vendors, go to [www.rotary.org](http://www.rotary.org).

If your club wants to sell merchandise for a long-term fundraising project, you'll need to apply for a license from Rotary International.

### Meetings

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Club, district, and international meetings allow Rotarians to learn more about Rotary, develop future leaders, and provide an opportunity for fellowship. Throughout your year as club president, you'll need to prepare for many meetings, including:

- Weekly meetings
- Club assemblies

- Board meetings
- Assistant governor visits
- District governor's official visit

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

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

These meetings offer a unique opportunity for Rotarians at the club level to learn about the broader scope of Rotary activities and enhance fellowship. District meetings provide a forum to discuss club and district projects and to develop project partnerships with other clubs in the district and in the Rotary world. For a detailed summary of these district and international meetings, see appendix 13.

## Weekly Club Programs

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Weekly meetings are the core of most Rotary club activities. As club president, you're responsible for developing weekly club programs that provide club members with the information and motivation necessary to increase their participation in and enthusiasm for activities that serve the club, the community, and the world. See appendix 14 for a sample weekly meeting agenda. To ensure that weekly meetings are effective and well planned:

- Develop an agenda for each regular weekly meeting with time for an address or program as well as fellowship.
- Schedule programs in advance (ideally, before the year begins).
- Relate programs to current club projects, activities, and concerns, when possible.
- Rotate the responsibility of arranging programs with an appropriate committee chair or club member.
- Arrange special observance dates, weeks, and months (listed in appendix 15), such as a program by a former Ambassadorial Scholar during Rotary Foundation Month in November.
- Prepare contingency plans in case scheduled programs are canceled.

Remember that club members are busy individuals whose time is valuable. You should begin and end the meetings punctually. Meetings that are organized and feature interesting, relevant programs will enhance members' personal Rotary knowledge, reinforce the value of continued membership, and make them more aware of and connected to their local and world community.

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

## Club Assemblies

A club assembly is a meeting of all club members, including officers, directors, and committee chairs. The purpose of club assemblies can be to either discuss your club's program and activities or educate members. New members should particularly be encouraged to attend club assemblies to learn more about the workings of your club. Club assemblies help all members stay up-to-date and feel included in club activities. Regular club assemblies that include all members and your assistant governor help to ensure that clear communication takes place between club leaders, club members, and district leaders.

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

A club assembly allows for

- Goal setting and developing an action plan
- Coordination of committee activities
- Greater awareness of how your club's action plans are actually implemented
- Informal discussions that stimulate creative solutions and activities
- Ongoing education about Rotary and its programs
- Review of your club's strengths and weaknesses

Relevant topics for discussion include:

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

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

### Scheduling

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

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

## The Official Visit

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

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

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

### Preparing for the Official Visit

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

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

Club leaders should work together to prepare for a thoughtful discussion on important club topics and issues that would benefit from the governor's knowledge and experience. To prepare for the visit:

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

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

## Resources

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

### Informational Resources

- *Club Committee Manual* (226-EN) — Component of the *Club Officers' Kit* (225-EN) that explains the responsibilities and general guidelines for club committees.
- *Club Secretary's Manual* (229-EN) — Component of the *Club Officers' Kit* (225-EN) that explains the responsibilities of the club secretary, as well as information about the role of the club treasurer.
- Governor's monthly letter — Letter sent by the district governor to inform and motivate club leaders and recognize excellence at the club level.
- *Manual of Procedure* (035-EN)
- *Official Directory* (007-EN)
- *Planning Guide for Effective Rotary Clubs* (appendix 39)
- *RI Catalog* (019-EN)
- *Rotary World* (050-EN)
- *The Rotarian* or Rotary regional magazine
- *Visual Identity Style Manual* (547-EN) — Reference for the design of publications at all levels of Rotary. Includes information on the proper use of the Rotary emblem, the Rotary colors, elements of good publications, grids and page layouts, typography, and graphics.

### [www.rotary.org](http://www.rotary.org)

Click on:

- Member Access ([www.rotary.org](http://www.rotary.org))
- Club-District Support ([www.rotary.org/support](http://www.rotary.org/support))
- Downloads ([www.rotary.org/jump/downloads](http://www.rotary.org/jump/downloads))

Keyword searches:

- Insurance
- Licensed suppliers of RI merchandise

### Human Resources

- Assistant governor
- RI Club and District Support representative

For contact information, see the *Official Directory* or go to [www.rotary.org](http://www.rotary.org). Publications can be ordered from the *RI Catalog* or downloaded at [www.rotary.org](http://www.rotary.org).

# APPENDIX 11

## Discussion Questions for Club Administration

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

How does your club use its constitution and bylaws?

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

What will you consider when planning your weekly meetings?

What topics will you discuss at club assemblies?

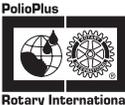
# APPENDIX 12

## Rotary Marks

The following logos and terms are examples of Rotary Marks.

*Note:* All presidential themes and the Rotary Centennial logo are also part of the Rotary Marks.

### Rotary Marks

			
Annual Programs Fund	Club Service	Community Service	Global Networking Groups
			
Health, Hunger and Humanity (3-H) Grants	Interact	International Service	The Permanent Fund
			
PolioPlus	Polio Eradication	Rotaract	Rotary Community Corps
			
Rotary Friendship Exchange	The Rotary Foundation	Rotary International	Rotary Volunteers
			
Rotary Youth Exchange	Rotary Youth Leadership Awards	Vocational Service	World Community Service

# APPENDIX 13

## District and International Meetings

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### Presidents-elect Training Seminar

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

### District Assembly

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

### District Membership Seminar

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

### District Conference

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

### District Leadership Seminar

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

### District Rotary Foundation Seminar

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

### RI Convention

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

# APPENDIX 14

## Sample Weekly Meeting Agenda (90 minutes)

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Adapt the following weekly meeting agenda to the needs of your club.

Start	Finish	Suggested Duration	Activity
		5 min.	<b>Meeting Call to Order</b> According to local custom
		30 min.	<b>Meal and Fellowship Period</b>
		20 min.	<b>President's Time</b> Introduction of visiting Rotarians and guests Correspondence and announcements: Present relevant Rotary information, and share any other pertinent announcements and reminders. Committee reports: Allow committee chairs to make any relevant reports of their activities. Club business: Vote on matters before the club, and report progress made on clubwide projects. (Avoid discussing details more properly discussed at committee meetings, club assemblies, or club board meetings.) Finish pending club business before addressing new business.
		30 min.	<b>Program</b> Introduction of speaker (by chair of committee responsible for program) Speaker's presentation Closing remarks by president
		5 min.	<b>Adjournment</b>

# APPENDIX 15

## Rotary Calendar

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The Rotary calendar provides a natural framework for planning weekly meetings. At the beginning of the year, the new RI theme can be introduced. At other important times, events such as the district assembly, district conference, and RI Convention can be summarized. Programs can also be planned to occur at the same time as special observances held during the Rotary year.

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

# APPENDIX 16

## Summary of Session 4: Club Administration

### Resources

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#### Informational Resources

*Manual of Procedure* (035-EN)  
*Official Directory* (007-EN)  
Recommended Rotary Club Bylaws (appendix 38)  
Rotary Code of Policies  
Standard Rotary Club Constitution (appendix 37)

#### [www.rotary.org](http://www.rotary.org)

Keyword searches:  
Club Leadership Plan  
Insurance  
Licensed Suppliers of RI Merchandise  
Click on:  
Member Access

#### Human Resources

RI Club and District Support representative

#### Additional Resources

- 
- 

### Ideas to Implement

### Contact

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- 1.
- 2.
- 3.
- 4.
- 5.

### Action Steps

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## 5 Membership

To be effective, a Rotary club needs members. Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving beyond the club level is directly related to the strength and size of your club's membership base. Your club leadership team and club members, particularly the club membership committee, should assist you with your membership development responsibilities. Your club's membership development action plan must incorporate strategies for recruitment, retention, and organizing new clubs.

### Responsibilities

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

- Appointing and meeting with your club membership committee to develop an action plan to carry out your club's membership development initiatives
- Assessing the current state of your club's membership, using the *Planning Guide for Effective Rotary Clubs* (appendix 39) as a guide, and reviewing your club's long-range membership goals
- Setting your club's annual membership goals, which support long-range goals, using the *Planning Guide for Effective Rotary Clubs*
- Identifying and implementing strategies to recruit and retain club members
- Promoting club and district membership education and training for all stages of membership, including:
  - Prospective member education
  - New member orientation and education
  - Continuing member education
- Using available RI and district resources to support membership development efforts
- Seeking opportunities to organize a new club in your area

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

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

## Membership Committee

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

Appoint Rotarians to the membership committee who have strong connections to a cross-section of the community. Members of this committee should have an outgoing and sociable personality as well as a thorough knowledge of Rotary.

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

### Membership Committee Responsibilities

Your membership committee has the following responsibilities:

- Establishing club goals for increasing membership with the president-elect
- Assisting the president-elect in developing a membership action plan for the club
- Encouraging all members to propose prospective members
- Coordinating and implementing a new member orientation and education program
- Promoting membership retention
- Implementing club membership education and training
- Identifying classifications within the professional community
- Assessing whether the club's membership reflects the diversity of the community
- Educating the club about the purpose of the classification principle
- Assisting the board in investigating the eligibility of all people proposed for membership

### Other Committees That Support Membership

The membership committee should work with the following committees to meet your club's membership goals:

- Club public relations committee (to develop and maintain a positive image of your club within the community and improve retention of existing members through positive club public relations)
- Club service projects committee (to plan interesting and relevant projects and activities that engage members, meet the needs of the community, and attract new members)
- Club administration committee (to assess club trends, member needs and satisfaction, and plan weekly meetings and programs)

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

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

- District membership development committee (for support, resources, and strategies to recruit and retain members)
- District extension committee (for guidance on organizing or sponsoring new clubs in your area)

### **Assessing Your Club**

As president-elect, you'll work closely with your club's membership committee to assess the current state of your club and plan membership goals using the *Planning Guide for Effective Rotary Clubs* (appendix 39) and other membership assessment tools available at [www.rotary.org/membership](http://www.rotary.org/membership). To understand your club's membership trends:

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

Once you've drafted membership goals, you should develop a membership action plan (see appendix 18).

## **Recruitment**

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

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

### **Responsibilities**

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

- Ensuring that the club board of directors understands the importance of membership growth
- Leading by example, personally recruiting a new member during the first month of the Rotary year and encouraging each member of the club membership committee 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 new members and successful recruiting strategies
- Encouraging full representation of the diversity of the community
- Promoting participation in the district membership seminar

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The *Membership Development Resource Guide* outlines the action steps necessary for developing an effective membership recruitment action plan and includes assessment tools, such as the Member Satisfaction Questionnaire and the Resigning Member Questionnaire.

- 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

### **Diversity**

Your club's membership should accurately reflect the community. Profession, age, gender, and ethnicity can characterize the diversity of your community. One way to ensure professional diversity in your club is to conduct regular classification surveys so that your classification list accurately represents the community. The broad range of professions represented in your club means a wide range of experience and knowledge for your service efforts.

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

### **Recruitment Strategies**

Recruitment involves effective and relevant projects, public relations, interesting meetings, and overall club effectiveness. It also anticipates the challenges that come along with recruiting new members, including:

- Competing priorities
- Lack of diversity among club members
- High cost of membership
- Misconceptions about benefits and responsibilities of membership
- Poor public image
- Lack of awareness of what Rotary does in the community and internationally

Determine which recruitment challenges your club faces and then work with the membership committee to implement strategies for addressing them. See appendix 20 for club membership recruitment strategies.

### **Retention**

Retention is crucial to increasing your club's membership. A high turnover rate in existing clubs is one of the most pressing membership issues facing Rotary today. Work closely with your club administration committee to monitor trends in attendance, length of membership, service projects participation, and contributions to The Rotary Foundation. Such trends can point out concerns that may need to be addressed.

### **Responsibilities**

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

- Making continuing education and training for members a regular club activity
- Involving the club membership and public relations committees in membership retention efforts

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

- Appointing a club leader to update club members on the latest Rotary developments
- Conducting a club assembly for member education
- Including local and international Rotary information in weekly club meetings
- Recognizing existing members for their contributions to club projects and activities

### **Retention Strategies**

Successful club retention strategies include educating and training members and keeping club members involved and informed. Of course, retaining current members comes with some challenges, including:

- Competing commitments with family and work
- Expenses associated with Rotary membership
- Lack of fellowship
- Poorly structured meetings
- Lack of service projects and programs that interest members
- Moves or relocations

You should work with the membership committee to implement retention strategies for addressing these challenges. See appendix 21 for club membership retention strategies.

## **Education**

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Education is important at all stages of membership. Work closely with your club's membership committee to ensure that your club has a membership education and training action plan.

### **Prospective Member Education**

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

### **New Member Orientation and Education**

The process of new member orientation and education should begin immediately after induction, ensuring that new members become part of the club.

Every member of your club should play an active role in educating new members. Informed members can help new members develop the knowledge base necessary to function effectively as a club member, get involved, and help the entire club succeed.

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Refer to the *Membership Development Resource Guide* for more information on educating and involving new club members.

### **Continuing Member Education**

Work with your membership committee to provide the following continuing education components:

- Communicating RI and club news and information
- Holding four or more club programs a year on continuing education
- Promoting district seminars on continuing education, such as the district Rotary Foundation seminar

Continuing member education ensures that members remain challenged, motivated, and enthusiastic.

### **Organizing New Clubs**

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Your district governor is responsible for organizing new clubs. As club president, you should be aware of the possibilities for organizing a new club in your area, such as if a group of committed Rotarians would like to meet at a different time or day. Contact your district governor, district membership committee, or district extension committee if you think your community could support a new club.

If your club sponsors a new club, you have 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

### **Resources**

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

#### **Informational Resources**

- Classification survey — A tool to help clubs identify potential new members.
- Club bulletin — A club's main communication tool, which should include membership development information such as recruitment strategies and continuing education opportunities.
- Club member interest assessment — A tool to help clubs identify the needs and interests of their members.
- Club profile — Club information for new and prospective members.
- Governor's monthly letter — A membership development resource for clubs that includes retention and recruitment strategies as well as continuing education opportunities.

- *How to Propose a New Member* (254-EN) — Brochure outlining the procedure for selecting and electing members.
- *Membership Development Resource Guide* (417-EN) — Publication that outlines basic procedures for building club membership and lists suggestions for retaining members.
- *New Member Orientation* (414-EN) — Resource for Rotarians responsible for creating or updating their club's new member education program.
- *Planning Guide for Effective Rotary Clubs* (appendix 39)
- Retention Model — A tool that clubs can use to identify current membership retention strengths and weaknesses.
- *Rotary Basics* (595-EN) — Member education publication containing the information that every Rotarian should know.
- *Rotary: The Possibility* (688-MU) — A three-minute video without narration showing Rotarians in action.
- *The ABCs of Rotary* (363-EN) — Compilation of short articles about Rotary history and programs.
- *This Is Rotary* (001-EN) — Brochure providing brief overview of Rotary for prospective Rotarians and the public.
- *What's Rotary?* (419-EN) — Wallet-size card answering frequently asked questions about the organization and scope of Rotary. Popular as a handout to non-Rotarians.

### **www.rotary.org**

Click on:

- Membership ([www.rotary.org/membership](http://www.rotary.org/membership)) — A comprehensive, current source of Rotary membership information. Many membership publications are available for free download.

Keyword searches:

- Demographic survey — A tool to help clubs review their membership data and identify trends.
- Membership Development Best Practices Exchange — Contains successful membership ideas submitted by Rotary clubs and districts around the world.
- Rotary E-Learning Center ([www.rotary.org/jump/elearning](http://www.rotary.org/jump/elearning)) — Brief modules designed for independent study by new members and club officers.
- Termination Profile — An online tool that clubs can use to identify why a membership was terminated.

### **Human Resources**

- Assistant governors
- District governor
- District membership development committee — Responsible for overseeing all membership activity in your district.

- District public relations committee — Provides resources to develop a positive image of your club within the community.
- Regional Rotary International membership coordinators (RRIMCs) and Rotary International membership zone coordinators (RIMZCs) — Rotarians appointed by the RI president to serve as a primary membership development resource within a specific region.
- RI Club and District Support representative
- RI Membership Development staff — Staff members at World Headquarters dedicated to assisting clubs and districts in their membership development efforts.

For contact information, see the *Official Directory* or go to [www.rotary.org](http://www.rotary.org). Publications can be ordered from the *RI Catalog* or downloaded at [www.rotary.org](http://www.rotary.org).

# APPENDIX 17

## Discussion Questions for Membership

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

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

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

How is your club actively working to achieve diverse membership?

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

# APPENDIX 18

## Membership Development Action Plan

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

1. Identify
2. Introduce
3. Invite
4. Induct
5. Inform and orient
6. Involve
7. Educate

### 1. Identify

Identify well-qualified members of your community to be members of your Rotary club. These individuals should be of strong character and have a commitment to service. This focus on quality will improve your club's membership retention.

### 2. Introduce

Introduce prospective members to Rotary by informing them about Rotary International's programs and your club's service efforts. Compile this information in a club profile that can be presented to visitors or inserted into copies of the *This Is Rotary* brochure and given to all visitors. A recent issue of *The Rotarian* or a Rotary regional magazine is also a good introduction to Rotary. A prospective member who has been introduced to Rotary by enthusiastic Rotarians and is informed about the club's projects before joining is more likely to become involved and remain active.

### 3. Invite

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

### 4. Induct

Induct new members in a dignified and meaningful manner. Use the induction ceremony as an opportunity to explain the benefits and responsibilities of being a Rotarian. Your Rotary club should provide a new member with the following items:

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

If possible, invite family members to attend. During the ceremony, offer new members the opportunity to give a five-minute talk about themselves, their businesses, and their families. The induction ceremony should leave new members feeling enthused about membership.

## 5. Inform and Orient

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

- Benefits of membership
- Responsibilities of membership
- Opportunities for service

Consider scheduling a formal orientation program in several sessions to enhance retention of information.

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

- Attending new member orientation meetings
- Reading two or more (preferably all) of the following RI publications:
  - *Rotary Basics* (595-EN)
  - *The ABCs of Rotary* (363-EN)
  - *This Is Rotary* (001-EN)
  - *What's Rotary?* (419-EN)
  - *The Rotary Foundation Quick Reference Guide* (219-EN)
- Visiting the Rotary E-Learning Center at [www.rotary.org](http://www.rotary.org)
- Attending one or more of the following club functions:
  - Club assembly
  - Board meeting
  - Committee meeting
- Completing one or more of the following tasks:
  - Give a classification talk at a club meeting.
  - Make up a meeting at another club.
  - Invite a guest to a club meeting or propose a new member.
- Attending one or more district meetings (listed in order of priority):
  - District conference
  - District assembly
  - District Rotary Foundation seminar
- Choosing a club committee on which to serve

See *New Member Orientation* (414-EN) for more ideas.

## 6. Involve

Involve new members in club committees, activities, fundraisers, board meetings, weekly club meetings, and social activities. An involved member will feel a part of the club and make Rotary a personal priority. Consider the following methods of getting members involved in club activities:

- Assign new members to a committee, or give them a weekly meeting assignment.
- Create special name badges for new members to wear for one year. Encourage other members to look for the badges and make an extra effort to talk with the new members.
- Assign a new member to be a greeter, take attendance, or introduce a new speaker.
- Have a new member serve as a delegate to the district conference to learn about the world of Rotary and the projects being done outside of your club. Some clubs assist the new member by paying part or all of the registration fee and costs of the conference. After the conference, ask the new member to give a report to the club.

- Introduce a “commencement” program, where all club members who join in the same Rotary year work together on a project.
- Encourage new members to experience the internationality of Rotary by attending the RI Convention, hosting a Group Study Exchange team member for a meal or other activity, hosting a Rotarian from another country in their home, or inviting a business or professional non-Rotarian to apply for Group Study Exchange.
- Ask new members to find two or three other new members from among their peer group. When new members promote Rotary to their friends, they become stronger and more enthused about Rotary.

Many clubs find it wise to involve the new member’s sponsor during this process. The sponsor keeps close contact with the new Rotarian for the first six months or until the new member is truly involved in the club.

## 7. Educate

Educate all club members so they have enough knowledge to take the initiative and become more active. Some members resign from their clubs because they feel uninformed.

Clubs should have a continuing Rotary education policy in place to keep existing members up-to-date on Rotary and the club. Such a program would include:

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

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

# APPENDIX 19

## Summary of Session 5: Membership

### Resources

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#### Informational Resources

*Membership Development Resource Guide* (417-EN)  
*New Member Orientation* (414-EN)  
*Planning Guide for Effective Rotary Clubs* (appendix 39)  
*Rotary Basics* (595-EN)  
*This Is Rotary* (001-EN)

#### [www.rotary.org](http://www.rotary.org)

Keyword searches:  
Membership  
Membership Development  
Best Practices Exchange

#### Human Resources

Assistant governors  
District governor  
District membership development committee  
District public relations committee  
Regional Rotary International membership coordinators (RRIMCs)  
Rotary International membership zone coordinators (RIMZCs)  
RI Membership Development Staff

#### Additional Resources

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### Ideas to Implement

### Contact

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- 1.
- 2.
- 3.
- 4.
- 5.

### Action Steps

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# APPENDIX 20

## Strategies for Membership Recruitment Worksheet

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- Have a clear club membership goal and a plan for achieving it that can be communicated to each club member.
- Hold a club assembly to discuss sources of new members.
- Conduct information sessions in which club members explain the benefits and responsibilities of membership to potential members.
- Bring in Rotarians who represent the diversity of your community (e.g., different professions, ages, gender, ethnicities). Establish a peer group for these new members by inviting them to join the club in groups of three.
- Click on Membership at [www.rotary.org](http://www.rotary.org) to find successful strategies that other clubs have used.
- Use your community service projects to identify and involve potential members. (Such projects are also essential in developing effective public relations and enhancing the image of Rotary in your community.)
- Become acquainted with new business and community leaders.
- Make it a point of honor to present a new member. Recognize the presenter in your club's bulletin or at the weekly meeting.
- Lead by example. Encourage club leaders, particularly those responsible for membership, to bring in one new member during the first month of the Rotary year.
- Waive some or all membership fees for new members under the age of 40 for the first two years of membership.
- Change club meeting time to accommodate professionals who commute to work.
- Invite spouses, partners, and family members of Rotarians in your club to be members.

### Additional Recruitment Strategies

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# APPENDIX 21

## Strategies for Membership Retention Worksheet

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- Invite every Rotarian to become personally involved in club projects and activities.
- Encourage clubwide participation in community service and Rotary Foundation programs.
- Conduct weekly programs that are relevant and meaningful to members.
- Explain to members how projects are relevant and effective.
- Use surveys such as the Membership Satisfaction Questionnaire to identify what is important to your membership and give a voice to every Rotarian in your club.
- Conduct a minimum of four club programs per year that address issues related to continuing education.
- Take part in multiclub meetings for the purpose of addressing continuing education.
- Participate in district meetings and events.
- Encourage Rotarians to read items related to continuing education, such as the governor's monthly letter and Rotary magazines.
- Offer to temporarily waive fees of members who have encountered financial difficulties.
- Include membership items in your club bulletin.

### Additional Retention Strategies

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## 6 Service Projects

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

A successful service project is one that

- Has specific goals with measurable results
- Has realistic and achievable goals
- Responds to identified needs
- Incorporates the abilities of those who are served
- Recognizes all participants' contributions as important
- Uses available resources effectively
- Builds working networks for future service projects

### Responsibilities

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

- Appointing and meeting with your service projects committee to develop an action plan to achieve your club's service goals
- Assessing the current state of your club's service projects, using the *Planning Guide for Effective Rotary Clubs* (appendix 39) as a guide
- Setting service goals, using the *Planning Guide for Effective Rotary Clubs*
- Ensuring that the service projects committee is following the basic steps of conducting successful service projects:
  - Needs assessment
  - Planning and implementation
  - Evaluation

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

## **Service Projects Committee**

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

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

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

### **Service Projects Committee Responsibilities**

Your service projects committee has the following responsibilities:

- Reporting the current state of the club's service projects to the president-elect
- Conducting a needs assessment of the local or international community where the service project will take place
- Assisting the president-elect in developing service project goals and action plans
- Planning projects that address one or more of the Avenues of Service
- Implementing action steps
- Encouraging club and community involvement in projects
- Promoting the project in both the club and the community
- Managing resources such as funds, materials, and club member time
- Monitoring progress toward project completion
- Conducting project evaluation

### **Other Support for Service Projects**

The service projects committee should work with the following committees to help make your club's service projects successful:

- Club public relations committee (to create recognition of community service efforts)
- Club membership committee (to promote service project participation among all club members and identify community volunteers as potential new Rotarians)
- Club Rotary Foundation committee (to help identify service projects that may qualify for the Humanitarian Grants Program)
- District programs committee (for support, resources, and strategies to implement successful projects)
- Other district-level committees (to support your projects, particularly the World Community Service and Rotary Foundation committees)

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

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

- Rotarians and their families
- Community organizations and other interested citizens
- Rotary Foundation alumni
- Youth Exchange students
- Partners in service (Rotaractors, Interactors, Rotary Community Corps)
- Other Rotary clubs (by working together, clubs can combine their resources)

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

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## Needs Assessment

Successful service projects must be relevant and address real and current community concerns. A project doesn't need to be expensive or elaborate, just necessary. As club president, you'll need to ensure that the service projects undertaken by your club reflect community needs as well as club capabilities and interests. You should encourage your club's service projects committee to conduct a needs assessment to determine the resources and interests within the club and the most pressing needs and concerns of the community.

### Internal Assessment

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

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

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

### External Assessment

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

- Economic situation
- Geographical setting
- Educational strengths and weaknesses

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To learn more about working with your club and community to develop a service project, consult *Communities in Action: A Guide to Effective Projects*.

- Demographic profile
- Political conditions

To properly conduct an external assessment, your club's service projects committee should consult with a wide range of community members. These groups can provide your club with a resource base of experts to consult about 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.

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## A Balanced Program of Service

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Having service projects that address each Avenue of Service will ensure your club is pursuing the Object of Rotary. Rotary International and The Rotary Foundation provide resources to help your club select service projects and achieve service goals. Once your club has assessed the needs of the target community, encourage your service projects committee to identify which social, community, or international developmental issues your Rotary club can address. Consider developing a project that addresses one of the items on Rotary's Menu of Service Opportunities, which lists issues and concerns that RI has identified as recommended service project priorities:

- **Children at risk** includes mentoring, street children, abuse and neglect, bullying, child labor, orphans.
- **Disabled persons** includes accessibility, prosthetics, wheelchairs, job training.
- **Health care** includes disease prevention, avoidable blindness, medical equipment donation, help for drug abusers, mental health.
- **International understanding and goodwill** includes peace, conflict resolution, refugees, mine removal.
- **Literacy and numeracy** includes adult literacy, education of girls, book donation and distribution, computer literacy.
- **Population issues** includes reproductive health, child spacing, population education, prenatal health.
- **Poverty and hunger** includes low-cost housing, food distribution, animal husbandry, microcredit, vocational training.
- **Preserve Planet Earth** includes water sustainability, sanitation, irrigation systems, tree and garden planting, solar cooking.
- **Urban concerns** includes crime reduction, violence prevention, immigrant assistance, prisons, traffic safety, gangs.

### RI and Rotary Foundation Programs

To ensure the effectiveness of a service project, your club needs financial, human, and informational resources. Rotary International offers a broad range of humanitarian, intercultural, and educational programs and activities designed to improve the human condition and advance the organization's ultimate goal of world understanding and peace. The RI Structured Programs, Menu of Service Opportunities, and Global Networking Groups help clubs

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Create a detailed public relations strategy to gain support for the project, attract potential members to the club, and enhance Rotary's image in the community. For more details, see chapter 8, "Public Relations."

and districts achieve their service goals in their own communities and those abroad, fostering fellowship and goodwill in the process.

The Rotary Foundation also offers local, national, and international humanitarian, educational, and cultural programs. These programs provide access to resources that can significantly improve your club's service projects.

Global Networking Groups are groups of individual Rotarians organized internationally to focus on shared topics of interest. Rotary Fellowships and Rotarian Action Groups comprise Global Networking Groups. A directory and other resources are available at [www.rotary.org](http://www.rotary.org).

Consider RI and Foundation programs when planning your club's service projects. For detailed program descriptions, see appendix 27.

Many clubs hold fundraisers to support service projects. Other financial resources include funds raised from individual donors and local businesses, grants from other foundations, and Rotary Foundation grants.

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## International Service Projects

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For more information on using the Humanitarian Grants Program to help finance your international service projects, see chapter 7, "The Rotary Foundation," and go to [www.rotary.org/foundation](http://www.rotary.org/foundation).

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

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

World Community Service (WCS) is an excellent way for clubs to participate in projects internationally. WCS occurs whenever a Rotary club in one country assists a club in another country with a service project. The WCS Projects Exchange at [www.rotary.org](http://www.rotary.org) is available for both Rotary clubs with local community service projects seeking an international partner and clubs interested in supporting an international project.

As you develop your WCS project, remember that many qualify for funding from The Rotary Foundation. Consider the Foundation's Humanitarian Grants Program when planning to enhance and increase the impact of WCS projects.

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

- Explore the WCS Projects Exchange database at [www.rotary.org](http://www.rotary.org).
- Speak with your district's World Community Service chair.
- Contact your district Rotary Foundation committee chair, and explore the Foundation's Humanitarian Grants Program.
- Network with fellow Rotarians at district and international meetings.
- Observe what other organizations are doing around the world.
- Reach out to fellow Rotarians on the Internet.

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

## Project Planning and Implementation

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

During the project's implementation, keep all club members involved, and continuously monitor activities to ensure that the action plan is being carried out. For an overview of planning a service project for your club and community, see appendix 23.

## Evaluation

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

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

- Did the project meet the community needs revealed in the needs assessment? If not, why?
- Did all club and community members have an opportunity to participate?
- Was there a balance between financial assistance and hands-on assistance?
- Was there adequate media coverage of the project?
- Was your club able to meet the financial demands of the project?

Ask all club members who participated in the project to write a brief evaluation report. A copy of this report can then be sent to RI Programs staff for possible inclusion in RI publications. A reporting form is included in *Communities in Action: A Guide to Effective Projects*. Also consider listing your project on the RI Community Projects Database at [www.rotary.org](http://www.rotary.org), where clubs around the world can access examples of successful projects.

## Resources

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

### Informational Resources

- *A Menu of Service Opportunities* (605B-EN) — A companion piece to *Communities in Action: A Guide to Effective Projects*, this guide provides an overview of the RI Board-recommended service areas for clubs and districts and examples of successful club projects.
- *Communities in Action: A Guide to Effective Projects* (605A-EN) — Guide for planning, conducting, and evaluating a service project.
- *Official Directory* (007-EN)
- *Planning Guide for Effective Rotary Clubs* (appendix 39)
- *RI Catalog* (019-EN)

- *Rotary Community Corps Handbook* (770-EN) — Basic steps for organizing a corps, including how to identify potential leaders; also includes case studies and project ideas.
- *The Rotary Foundation Quick Reference Guide* (219-EN) — A compilation of the programs and services of The Rotary Foundation in a quick reference format.
- *World Community Service Handbook: A Guide to Action* (742-EN) — Information on the WCS program, including overviews of donations-in-kind projects and the Rotary Volunteers program, as well as Rotary Foundation grant programs that can assist WCS projects.

### **www.rotary.org**

Click on:

- RI Programs ([www.rotary.org/programs](http://www.rotary.org/programs)) — Up-to-date RI programs information. Many RI programs publications are available for free download.
- The Rotary Foundation ([www.rotary.org/foundation](http://www.rotary.org/foundation)) — Up-to-date information on Rotary Foundation programs. Many Foundation programs publications are available for free download.

Keyword searches:

- Global Networking Groups Directory — A regularly updated listing of all Global Networking Groups, their purpose, and contact information.
- PolioPlus Partners Open Projects List — Primary source of information for PolioPlus Partners projects. Rotarians can choose to support a specific project or ask that donations be applied to the highest priority.
- RI Programs newsletters — Newsletters sent via e-mail on individual RI Structured Programs. Sign up for newsletters on the specific program page at [www.rotary.org](http://www.rotary.org).
- Rotary Volunteers International Site Database — Information on Rotary and Rotaract service projects that are requesting volunteers.
- Rotary Volunteers Database — A listing of Rotarians, Rotaractors, Rotary Foundation alumni, and non-Rotarians who are willing to serve abroad.
- WCS Projects Exchange — A listing of club projects that are seeking assistance. View examples of successful projects.

### **Financial Resources**

- Funds from individual donors or local businesses
- Grants from other foundations
- Rotary Foundation grants for club and district humanitarian projects

### **Human Resources**

- District committees (particularly World Community Service and Rotary Foundation committees)
- District programs committees — Responsible for overseeing all program activity in your district.

- Presidential resource groups/task forces — Groups of Rotarians appointed by the RI president to assist Rotary clubs and districts with the presidential emphases.
- RI Programs staff
- Rotary Foundation staff

For contact information, see the *Official Directory* or go to [www.rotary.org](http://www.rotary.org). Publications can be ordered from the *RI Catalog* or downloaded at [www.rotary.org](http://www.rotary.org).

# APPENDIX 22

## Discussion Questions for Service Projects

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

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

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

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

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

# APPENDIX 23

## Planning a Service Project Worksheet

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

Which projects are club members currently involved in?

What will be the goal of the project?

Who in the club and community will be involved?

How will your club work with members of the community benefiting from the project?

When will the project occur?

Where will the project occur, and how will volunteers get there?

Why is your club undertaking the project?

What resources are needed to complete the project?

How will the club ensure proper use of resources?

How will your club promote the project?

# APPENDIX 24

## Summary of Session 6: Service Projects

### Resources

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#### Informational Resources

*A Menu of Service Opportunities* (605B-EN)  
*Communities in Action: A Guide to Effective Projects*  
(605A-EN)  
*Official Directory* (007-EN)  
*RI Catalog* (019-EN)  
*Rotary Community Corps Handbook* (770-EN)  
*The Rotary Foundation Quick Reference Guide*  
(219-EN)  
*World Community Service Handbook: A Guide to  
Action* (742-EN)

#### Human Resources

Community members  
District committees (particularly World  
Community Service and Rotary Foundation  
committees)  
Foundation alumni  
Interactors  
Other Rotary clubs  
Presidential Resource Groups/Task Forces  
Rotaractors  
Rotarians and their families  
Rotary Community Corps  
Rotary Volunteers  
Rotary Youth Exchange students

#### Additional Resources

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#### www.rotary.org

Keyword searches:  
PolioPlus Open Projects List  
Rotary Volunteers Database  
WCS Projects Exchange

Click on:  
RI Programs  
The Rotary Foundation

#### Financial Resources

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

## Ideas to Implement

## Contact

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- 2.
- 3.
- 4.
- 5.

## Action Steps

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# APPENDIX 25

## Characteristics of Successful Service Projects

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- Clearly defined and measurable goals
- Realistic and manageable scope (determine what can be achieved, and divide project into smaller segments, if necessary)
- Reasonable time frame to plan and complete the project (projects may extend beyond a single Rotary year)
- Response to identified needs
- Planned budget
- Responsive, organized project coordinator
- Effective use of available resources to help plan and implement the project
- Step-by-step strategy
- Solid working relationship between your club and the community being served
- Positive promotion
- Shared information (passing along relevant information, contacts, and material to your club and the community you are helping)
- Postproject analysis to determine successes and failures

### Additional Successful Service Ideas

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# APPENDIX 26

## A Balanced Program of Service Worksheet

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

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

## APPENDIX 27

### RI and Rotary Foundation Programs Worksheet

PROGRAM	CLUB CURRENTLY PARTICIPATES	CLUB INTERESTED IN PARTICIPATING
<b>Interact</b> – service club for young people ages 14-18		
<b>Rotaract</b> – service club for young men and women ages 18-30 sponsored by their local Rotary club		
<b>Rotary Community Corps (RCC)</b> – service group of non-Rotarian adults sponsored by their local Rotary club		
<b>Global Networking Groups</b> – support groups of individual Rotarians focusing on shared topics of interest on an international basis, including Rotarian Action Groups and Rotary Fellowships		
<b>Rotary Friendship Exchange</b> – program that promotes building international relationships that can evolve into international partnerships for service projects		
<b>Rotary Volunteers</b> – program that provides opportunities for Rotarians and other skilled professionals to offer their services and expertise to projects in need of assistance		
<b>Rotary Youth Exchange</b> – program that promotes international understanding and peace among students ages 15-19		
<b>Rotary Youth Leadership Awards (RYLA)</b> – training program for young people, emphasizing leadership, citizenship, and personal growth		
<b>World Community Service (WCS)</b> – joint community service project of Rotary clubs from two or more countries		
<b>Humanitarian Grants Program</b> – support clubs and districts as they undertake humanitarian and service projects		
<b>Educational Programs</b> – foster peace by building understanding through person-to-person contact, friendship, study, and cross-cultural exchange		
<b>PolioPlus and PolioPlus Partners</b> – support global polio eradication efforts		

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## 7 The Rotary Foundation

The mission of The Rotary Foundation is to support the efforts of Rotary International in the fulfillment of the Object of Rotary, Rotary's mission, and the achievement of world understanding and peace through local, national, and international humanitarian, educational, and cultural programs.

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

### Responsibilities

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

- Reviewing your club's current involvement with Foundation programs, using the *Planning Guide for Effective Rotary Clubs* (appendix 39)
- Reviewing your club's financial contributions to The Rotary Foundation, using Member Access at [www.rotary.org](http://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)
- Appointing and meeting with your club's Rotary Foundation committee to develop an action plan to carry out your club's Foundation goals
- Understanding the connection between program participation and financial support of The Rotary Foundation
- Knowing the resources available to help your club support The Rotary Foundation

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

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

- Conduct inspirational Rotary Foundation-focused weekly club programs four times a year, or at least twice a year.
- Contact your district Rotary Foundation committee chair to find alumni or volunteers to relate their experiences with The Rotary Foundation.
- Encourage club members to get involved in Rotary Foundation programs through the Humanitarian Grants Program and Educational Programs.
- Ask club members to contribute to the Foundation, giving extra attention to members who have never given.
- Acknowledge contributions and involvement in Foundation programs.
- Work with your Foundation committee to ensure proper stewardship of Foundation grant funds.

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## Rotary Foundation Committee

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

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

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

### Rotary Foundation Committee Responsibilities

Your Rotary Foundation committee has the following responsibilities:

- Assessing the current state of the club's Foundation efforts with the president-elect
- Setting club goals that support district goals for Foundation fundraising and program participation
- Assisting the president in developing a Foundation action plan
- Identifying Rotary Foundation resources available to support club goals
- Educating Rotarians about The Rotary Foundation
- Ensuring proper stewardship of Foundation grant funds

### District Support for The Rotary Foundation

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

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

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

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

### **District Rotary Foundation Seminar**

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

## **Rotary Foundation Programs**

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The Rotary Foundation has three main program areas:

- Educational Programs
- Humanitarian Grants Program
- PolioPlus

### **Educational Programs**

Through its Educational Programs, The Rotary Foundation furthers international understanding by providing opportunities for students, educators, and business and professional people to experience another culture and develop long-lasting friendships. Through Educational Programs, participants learn about the needs of their local and world communities and the opportunities available through Rotary to help address them. The following educational programs are offered:

- Ambassadorial Scholarships
- Rotary Grants for University Teachers
- Group Study Exchange (GSE)
- Rotary Centers for International Studies in peace and conflict resolution
- Rotary Peace and Conflict Studies (Chulalongkorn University)

For a description of these programs, see appendix 29.

Rotarians are involved in the selection, orientation, and hosting of Educational Programs participants. Your club can get involved with Educational Programs in a variety of ways, including:

- Inviting scholars, Rotary World Peace Fellows, and GSE team members to share their experiences with your club
- Nominating Ambassadorial Scholars, Rotary World Peace Fellows, Peace and Conflict Studies Fellows, Rotary Grants for University Teachers recipients, or GSE team members
- Publicizing the exchange opportunity

### **Humanitarian Grants Program**

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

- Matching Grants
- District Simplified Grants

- Health, Hunger and Humanity (3-H) Grants
- Volunteer Service Grants

For a description of the Humanitarian Grants Program, see appendix 29.

The Trustees of The Rotary Foundation have established the following standards to guide the Humanitarian Grants Program:

- Grants should address humanitarian needs that Rotarians have identified in their communities with the aim of providing sustainable development.
- All Rotary Foundation grants require the active participation of Rotarians.
- Grants should assist in the development of stronger Rotary networks.
- All grants must display a commitment to stewardship of funds, which reflects The Four-Way Test and responsible fiscal oversight. Stewardship includes detailed and committed project planning, submission of complete and accurate applications with documentation, direct Rotarian involvement in the implementation of the project, transparency in all financial transactions, and efficient and effective reporting. Improper stewardship of funds will be promptly investigated by the Trustees and may result in your club and district not receiving future Foundation funding.

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

### PolioPlus



Rotary's most recognized program is the effort to eradicate polio. PolioPlus is the corporate program of Rotary International; activities related to it, such as fundraising and immunization projects, are carried out through The Rotary Foundation. More than one million Rotarians worldwide have contributed over US\$600 million to PolioPlus. In addition, Rotary members around the world serve as a powerful volunteer network at the local level, providing support at clinics and mobilizing their communities for immunization or other polio-eradication activities. The PolioPlus Partners program allows Rotary clubs, districts, and individual Rotarians to voluntarily assist in reaching Rotary's goal of a polio-free world.

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

- Working with local health officials to decrease the risk of polio in your community by maintaining high rates of immunization
- Contributing to PolioPlus to support critical global eradication needs in polio-endemic countries
- Participating in PolioPlus Partners to help provide supplemental support to Rotarians who are working to eradicate polio in their countries
- Devoting a weekly club program to the topic of polio eradication
- Ensuring club members remain informed and involved until the world is certified polio-free
- Contacting national PolioPlus committee chairs to assist with surveillance activities

## Foundation Alumni

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Rotary Foundation alumni are the more than 90,000 people who have received program awards from the Foundation since 1947. Your club should maintain contact with former Foundation program participants in your area, who are advocates for The Rotary Foundation. Your club should use Foundation alumni to show the value of Foundation programs. Encourage alumni to become Rotarians and potential donors to The Rotary Foundation. Contact the Rotary Foundation alumni coordinator for your region to find out how you can integrate Foundation alumni into club activities.

## Contributions

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Financial contributions to The Rotary Foundation fund its educational and humanitarian programs. When Rotarians can see extraordinary results and play active roles in making the world a better place through educational and cultural exchanges and humanitarian projects, they understand how financial support of The Rotary Foundation makes those opportunities possible. Contributions sent to the Foundation can be directed to the Annual Programs Fund or the Permanent Fund.

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

### Annual Programs Fund — For Support Today



The Annual Programs Fund is the primary source of support for Rotary Foundation programs. The money in the Annual Programs Fund is spent every year on Foundation programs, such as Group Study Exchange, Ambassadorial Scholars, District Simplified Grants, and Matching Grants. As club president-elect, you will lead your club in establishing a goal for the Annual Programs Fund, encouraging every Rotarian to give US\$100 or more every year.

It's essential that you explain to club members the fundamental connection between program participation and financial support. To support the Every Rotarian, Every Year effort:

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

### Permanent Fund — To Secure Tomorrow



The Permanent Fund secures Rotary Foundation programs for the future through endowments. The spending portion of the fund's earnings is allocated to benefit Foundation programs every year, providing additional funds to meet the demand for Foundation annual programs such as Matching Grants and Group Study Exchange teams. The recent growth of the Permanent Fund has increased the Foundation's ability to support its annual programs. Donations to the Permanent Fund often take the form of outright gifts, usually Major Gifts or endowed funds, bequests,

or life-income agreements. Because donations to the Permanent Fund can be complex, contact your district Rotary Foundation committee for additional information.

## ***SHARE* and the District Designated Fund**

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The *SHARE* system distributes Rotary Foundation funds worldwide and allows Rotary districts to participate in the process of deciding how funds are spent. Through the *SHARE* system, contributions to The Rotary Foundation are transformed into Ambassadorial Scholarships, Matching Grants, Group Study Exchanges, and other Foundation programs.

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

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

The World Fund portion is used by the Foundation to pay for the worldwide programs available to all Rotary districts. The DDF portion is used by your district to fund the Foundation programs of its choice.

The Rotary Foundation has a unique funding cycle that uses contributions for programs three years after they are received. The three-year cycle gives districts time for program planning and participant selection and allows the Foundation to invest the contributions. The earnings from those investments pay for general administration and fund development.

Your district Rotary Foundation committee is responsible for deciding how to use the available District Designated Fund, often in consultation with the clubs in your district.

## **Contribution Recognition**

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

The Rotary Foundation provides the following types of contribution recognition to individuals and clubs:

### Individuals

- Rotary Foundation Sustaining Member
- Paul Harris Fellow Recognition
- Multiple Paul Harris Fellow
- Memorial Paul Harris Fellow
- Memorial Paul Harris Certificate

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

- Major Donor
- Benefactor
- Annual Programs Fund Recognition banner
- The Rotary Foundation Bequest Society
- Certificate of Appreciation (also available to corporations)

#### Clubs

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

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## Resources

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

### Informational Resources

- *Donor Recognition Booklet* (189-MU) — Multilanguage booklet detailing all available forms of Foundation donor recognition.
- *Every Rotarian, Every Year Club Success Kit* (958-EN) — Brochures, stickers, and instructions to help Rotary clubs promote contributions to the Annual Programs Fund.
- *Official Directory* (007-EN)
- *Planning Guide for Effective Rotary Clubs* (appendix 39)
- *PolioPlus Brochure* (323-EN) — Update on the global polio eradication effort, including recent developments and statistics, and a description of the contributions of Rotary and its major partners and the challenges remaining to achieve a polio-free world.
- *RI Catalog* (019-EN)
- *Rotary Foundation Facts* (159-EN) — Brochure of the most recent Foundation statistics.
- *The Rotary Foundation Quick Reference Guide* (219-EN)

### [www.rotary.org](http://www.rotary.org)

Click on:

- Member Access ([www.rotary.org](http://www.rotary.org))
- The Rotary Foundation ([www.rotary.org/foundation](http://www.rotary.org/foundation)) — A comprehensive, current source of detailed information on all aspects of Rotary Foundation programs; Every Rotarian, Every Year fundraising strategies; recognition opportunities; and many free downloads.

Keyword searches:

- Gift Acceptance Policy Manual — Overview of the types of gifts accepted by The Rotary Foundation, including gifts to the Permanent Fund.
- PolioPlus Partners Open Projects List — A list of projects in polio-endemic and high-risk countries in need of support.
- WCS Projects Exchange Database

#### **Financial Resources**

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

#### **Human Resources**

- Annual Programs Fund strategic adviser — Rotarian appointed to work with the regional Rotary Foundation coordinator to serve as the primary Annual Programs Fund resource for your specific region.
- District Rotary Foundation committee — Responsible for overseeing all Rotary Foundation activity in your district.
- Major Gift adviser — Rotarian appointed to work with the regional Rotary Foundation coordinator to serve as the primary Permanent Fund and major gift resource for your specific region.
- National PolioPlus committees — Responsible for supporting PolioPlus at the national level and submitting project requests to the PolioPlus Partners program.
- Regional Rotary Foundation coordinator (RRFC) — Rotarian appointed to serve as the primary Rotary Foundation resource for your specific region.
- Rotary Foundation alumni coordinator (RFAC) — Rotarian appointed to work with the regional Rotary Foundation coordinator to encourage Rotary clubs and districts to involve Foundation alumni in Rotary activities.
- Rotary Foundation Development Services staff — Staff members at RI World Headquarters who can answer questions about recognition contributions to The Rotary Foundation.
- Rotary Foundation staff

For contact information, see the *Official Directory* or go to [www.rotary.org](http://www.rotary.org). Publications can be ordered from the *RI Catalog* or downloaded at [www.rotary.org](http://www.rotary.org).

# APPENDIX 28

## Discussion Questions for The Rotary Foundation

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

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

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

How does your district support The Rotary Foundation?

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

# APPENDIX 29

## Programs of The Rotary Foundation

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### EDUCATIONAL PROGRAMS

<b>Ambassadorial Scholarships</b>	Provide scholarships to students who serve abroad as ambassadors of goodwill to improve international understanding.
<b>Rotary Grants for University Teachers</b>	Provide grants to higher education faculty to teach at colleges/universities in low-income countries. The program builds understanding and development while strengthening higher education in low-income countries.
<b>Group Study Exchange (GSE)</b>	Enables an exchange of teams of outstanding, young non-Rotarian business and professional people between districts in different countries. GSE teams may have special focuses, such as a single vocation, humanitarian concerns, or neighboring country issues.
<b>Rotary Centers for International Studies in peace and conflict resolution</b>	Provide Rotary World Peace Fellowships to individuals pursuing a one-to-two-year master's degree in international relations, peace, conflict resolution, and related subjects at one of the six Rotary Centers for International Studies in peace and conflict resolution.
<b>Rotary Peace and Conflict Studies (Chulalongkorn University)</b>	Provide professionals in various industries and fields with the conflict resolution tools to foster peace and peaceful conflict resolution. Curriculum includes both coursework and practical fieldwork application.

### HUMANITARIAN GRANTS PROGRAM

<b>Matching Grants</b>	Provide matched funds to support international humanitarian service projects in cooperation with Rotarians in another country.
<b>District Simplified Grants</b>	Support the service activities or humanitarian endeavors of districts.
<b>Health, Hunger and Humanity (3-H) Grants</b>	Support long-term, sustainable, and integrated grassroots development projects that are too large for one club or district to implement on its own.
<b>Volunteer Service Grants</b>	Support the travel of individual Rotarians and spouses of Rotarians planning or implementing international service projects (limit of two awards per year per individual).

### POLIOPLUS

<b>PolioPlus Grants</b>	Support global eradication efforts in polio-endemic, recently endemic, or high-risk countries, including conducting National Immunization Days and monitoring poliovirus transmission, and other activities.
<b>PolioPlus Partners</b>	Support global eradication efforts of fellow Rotarians in polio-endemic, recently endemic, or high-risk countries, including conducting National Immunization Days and monitoring poliovirus transmission, and other activities.

# APPENDIX 30

## Summary of Session 7: The Rotary Foundation

### Resources

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#### Informational Resources

District Rotary Foundation seminar  
*Official Directory* (007-EN)  
*RI Catalog* (019-EN)  
*The Rotary Foundation Quick Reference Guide* (219-EN)

#### Human Resources

Assistant governor  
District Rotary Foundation committee members  
Foundation alumni  
Rotarians and their families

#### Additional Resources

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#### [www.rotary.org](http://www.rotary.org)

Keyword searches:  
PolioPlus Partners Open Projects List  
WCS Projects Exchange Database  
Click on:  
Member Access  
The Rotary Foundation

#### Financial Resources

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

### Ideas to Implement

### Contact

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- 1.
- 2.
- 3.
- 4.
- 5.

### Action Steps

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## 8 Public Relations

Public relations is essential to Rotary's future. It informs communities around the world that Rotary is a credible organization that meets real needs. It also motivates Rotarians to be active members of their club and district. Every Rotary club should develop and implement a successful public relations plan to be effective in the community. The plan can take many forms, from promotion of a Youth Exchange student in the club bulletin to newspaper coverage of an interesting club project. Regardless of the cultural differences from one country to another, all Rotary clubs have audiences that they should communicate with.

Your club leadership team and club members, particularly the club public relations committee, should develop and implement the public relations plan.

### Responsibilities

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

- Appointing and meeting with your club public relations committee to develop an action plan to carry out your club public relations initiatives
- Reviewing your club's current public relations initiatives, using the *Planning Guide for Effective Rotary Clubs* (appendix 39)
- Setting public relations goals, using the *Planning Guide for Effective Rotary Clubs*
- Ensuring that your club conducts projects and activities that will attract positive media attention

As president, you have the following public relations responsibilities:

- Serving as the club spokesperson when working with the media, or identifying a fellow club member who has an understanding of key Rotary messages 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
- Ensuring that every club member is fully informed about Rotary's history, the Object of Rotary, and Rotary programs and activities

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

- Inspiring club members to understand and carry out their club public relations responsibilities
- Cultivating relationships with local media representatives
- Encouraging club members to seek opportunities to further the aims and accomplishments of Rotary through personal, business, and professional contacts
- Seeking publicity for successful service projects or other activities that illustrate Rotary's mission and accomplishments

Through effective public relations, your club will be able to

- Gain support and resources for projects
- Build links with other community organizations
- Attract qualified members
- Recognize Rotary members for their contributions to their community

The public can learn about Rotary if Rotarians make a conscious effort to share their knowledge with non-Rotarians. Creating a positive public image for your club must take place in both the club and the community.

## **Club Public Relations Committee**

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

When appointing your club public relations committee, select Rotarians who will be effective spokespeople, those who are articulate and knowledgeable about Rotary International and your club. For committee chair, choose a club member who has professional public relations experience and is familiar with the local media.

### **Club Public Relations Committee Responsibilities**

Your club public relations committee has the following responsibilities:

- Assessing the club's current public relations plan with the president-elect
- Assisting the president-elect in developing a public relations plan, including action steps
- Creating a list of media contacts, updating the list regularly
- Responding quickly and accurately to media inquiries about club activities
- Advising the club president on public relations matters
- Presenting information to the public about the club and Rotary — its history, goals, and accomplishments
- Working with the media to secure proper publicity for the club's activities

- Communicating with key organizations and leaders within the community
- Working with the district public relations chair to keep the committee informed of larger stories that may generate interest beyond the local community

### **Other Support for Public Relations**

All club members and club committees should work together to inform the public relations committee of newsworthy activities. The following committees should support your club public relations plan:

- Club membership committee (to assist in recruiting qualified media representatives as members)
- Club administration committee (to develop a club brochure or Web page and organize a Rotary fact sheet for the public; to provide *The Rotarian* or Rotary regional magazine to local media and community venues, such as libraries, hospitals, and schools)
- Club service projects committee (to keep the public relations committee informed of activities worthy of media coverage)
- District public relations committee (for public relations strategies that have been successful for other clubs in your district)
- Rotary International (for materials and tools your club can use to raise awareness of Rotary in the community)

## **Components of Public Relations**

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An effective public relations campaign requires time, effort, and planning. The action plan that your club public relations committee develops before the beginning of the Rotary year should address the audience, strategies and tools, and projects and activities to be promoted.

### **Audience**

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

- Media (newspaper, radio, television)
- Local government officials
- Business community
- Civic leaders
- Community organizations
- People directly affected by Rotary service projects
- Students and educators
- Specialized journalists who cover a particular topic, such as education or health

## **Media**

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

- Online publications
- Trade publications
- Public access cable stations
- Radio public affairs shows and radio talk shows
- Corporate newsletters
- Newsletters of other community organizations
- Nontraditional media, such as billboards

Encourage your public relations committee to match the newsworthy story with the appropriate medium. For example, stories with a strong visual element may appeal to a local television station.

There's tremendous competition for media time and space, so encourage your club to be creative and consider all types of media.

## **News Releases**

A news release is the most widely used means of sending information to the media. It can alert media to an event and serve as the basis of a news story.

A good news release answers the basic questions of who, what, when, where, why, and how. Work with your club public relations committee to ensure that the release is objective, expresses opinions in quotation marks, and is concise (no more than one page).

## **Fact Sheets**

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

## **Newsworthy Club Activities and Events**

The following club activities and events may interest the media:

- Service projects that meet a community need or illustrate a larger news trend
- International service projects supported by your club or a local club volunteer
- Projects involving local youth or a prominent community member
- A notable or prominent speaker at a club meeting
- Presentation by an RI or Rotary Foundation program participant about their experiences in another culture
- Interact and Rotaract activities

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

- Anniversaries of local clubs or programs
- Stories with a strong visual element

Additional ways to make the community more aware of Rotary include:

- Sponsoring special events, such as marathons, recycling efforts, or fundraisers for a Rotary project or program
- Creating exhibits and displays that can be posted throughout the community, particularly during special events
- Advertising in newspapers or magazines, on billboards or buses, or in air or rail transportation centers
- Building a rapport with the public relations staff of other organizations your club is involved with
- Encouraging Rotarians to wear their Rotary lapel pins and talk about the organization when appropriate
- Posting Rotary information on an online forum, community calendar, or another organization's Web site

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## Answering Questions about Rotary

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

As a spokesperson, you must be prepared to answer each of the following questions in no more than 25 words:

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

Effective answers to these questions should be positive, factual, specific, and brief. For a list of important points to convey when answering Rotary questions, see appendix 32.

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## Resources

The following public relations publications, materials, and resources are just some of those available from Rotary International:

### Informational Resources

- *Effective Public Relations: A Guide for Rotary Clubs* (257-EN) — Tools and tips for promoting club activities to attract positive attention from the community and potential members.
- *Planning Guide for Effective Rotary Clubs* (appendix 39)
- *Public Relations: Make It Work for You* (269-EN) — Videotape showing the importance of communication in the information age.

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The RI Public Relations Award recognizes clubs and districts that demonstrate outstanding media coverage of Rotary activities and have carried out programs that have improved the image of Rotary in their communities.

- *RI Catalog* (019-EN)
- *This Is Rotary* (001-EN)
- *Visual Identity Style Manual* (547-EN)
- *What's Rotary?* (419-EN)

### **www.rotary.org**

Keyword searches:

- Fact Pack — RI and Foundation fact sheets available for free download.
- Public Relations — Public relations information, including examples of successful public relations efforts undertaken around the world, sample press releases, and other tips and suggestions.
- *PR Tips* — Biweekly newsletter sent via email on club and district public relations ideas.
- RI public service announcements (PSAs) — Announcements produced by RI for print, radio, and television.

### **Human Resources**

- Assistant governor
- District public relations committee — Responsible for overseeing all public relations activity in your district.
- RI Club and District Support representative
- RI Public Relations staff — Staff members at RI World Headquarters dedicated to assisting clubs, districts, and RI in their public relations efforts.

For contact information, see the *Official Directory* or go to [www.rotary.org](http://www.rotary.org). Publications can be ordered from the *RI Catalog* or downloaded at [www.rotary.org](http://www.rotary.org).

# APPENDIX 31

## Discussion Questions for Public Relations

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

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

What types of media are in your area?

What activities can attract positive media attention for your club?

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

# APPENDIX 32

## Key Rotary Messages

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These key Rotary messages can be incorporated into your public relations materials or used when speaking to the public.

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

1. Rotary club members are business and professional leaders who are committed volunteers working together to improve communities.
2. There are 1.2 million Rotary members worldwide who belong to 32,000 Rotary clubs in nearly 170 countries.
3. Rotary's motto is Service Above Self. The organization serves the needs of communities worldwide.
4. Rotary was founded in 1905.

### Rotary and Peace

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

1. Rotary sponsors the largest privately funded international scholarships program in the world. Since the program's inception, about 34,000 students from 100 countries have become Rotary's cultural ambassadors, using the skills acquired from their studies abroad to help their communities.
2. Rotary has teamed with seven universities around the world to offer a master's degree program in peace and conflict resolution. The program aims to train the next generation of ambassadors and social leaders in methods for preventing future conflicts.
3. Rotary clubs around the world initiate thousands of international humanitarian projects every year. Each child we teach to read, every adult we help learn a trade, and every community playground we build is a step toward bringing the world together.

4. By addressing the underlying problems that create instability and trigger conflicts — hunger, poverty, poor health, and illiteracy — Rotary helps promote peace.
5. Membership in Rotary allows people from all cultures and nationalities to establish lifelong friendships that transcend political boundaries and tensions.

### PolioPlus

**Rotary's top philanthropic goal is to end polio worldwide.**

1. Polio, a crippling and sometimes deadly disease, still threatens children in parts of Africa and Asia.
2. For as little as 60 cents worth of oral polio vaccine, a child can be protected against this crippling disease for life.

**Tremendous progress has been made toward ending polio worldwide.**

3. In the 1980s, 1,000 children were infected by this crippling disease every day. In the two decades since Rotary and its global partners launched the Global Polio Eradication Initiative, polio cases have been slashed by 99 percent. Fewer than 1,900 cases were reported in 2005.

**Rotary clubs around the world have contributed to the goal of eradicating polio.**

4. Rotary members have donated their time and money to help immunize more than two billion children in 122 countries.
5. Rotary is the largest private supporter of the Global Polio Eradication Initiative, providing more than US\$500 million and thousands of volunteers to the effort.

**Rotary will continue the fight until the world is certified polio-free and every child is safe from this devastating disease.**

# APPENDIX 33

## Summary of Session 8: Public Relations

### Resources

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#### Informational Resources

*Effective Public Relations: A Guide for Rotary Clubs* (257-EN)

*Public Relations: Make It Work for You* (269-EN), videotape

*RI Catalog* (019-EN)

*This Is Rotary* (001-EN)

*What's Rotary?* (419-EN)

#### Human Resources

Assistant governor

District public relations committee

RI Public Relations staff

#### Additional Resources

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#### [www.rotary.org](http://www.rotary.org)

Keyword searches:

Public Relations

*PR Tips*, a twice-monthly e-mail newsletter

RI public service announcements (PSAs)

### Ideas to Implement

### Contact

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- 1.
- 2.
- 3.
- 4.
- 5.

### Action Steps

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## APPENDIX 34

### Club Public Relations: Case Study

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Read the following case study and create a step-by-step public relations plan for the Rotary Club of Royal Gardens. Focus on three or four ways the club can reach out to the media and to the community directly to share the story of their Rotary projects.

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

The club also worked with local schools to identify a candidate who was selected by the district to receive an Ambassadorial Scholarship. The scholar, who is studying the effects of global warming on ocean water levels, has been corresponding regularly with the club to inform them of her experiences. The club's weekly program often attracts prominent local speakers who talk about important issues facing the community. Attendance is high and members are enthusiastic.

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

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

The town has two radio stations. One station features popular music, the other news and several talk shows. The daily newspaper has a circulation of 15,000, and the weekly newspaper has a circulation of 9,000; both can create supplements for their issues. Royal Gardens also has a local cable television station that routinely runs public service announcements. The new movie theater in town also runs ads from local businesses and organizations before the movie previews begin.

**Consider the following questions as you develop your plan:**

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

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

How might club programs interest local media?

What steps should the club take to keep the media informed of its activities?

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## 9 Annual and Long-Range Planning

In order to complete projects, Rotary clubs must set goals. Long-range goals reflect your club's vision for its future and give your club something to work toward for the next three to five years. Long-range goals should support the pursuit of the Object of Rotary and the elements of an effective club.

Review your club's long-range goals with your fellow club leaders as soon as possible after you become president-elect. As your club evolves, these goals should be updated. Seek input from all members on changes to the club's long-range goals. If your club doesn't have long-range goals in place, take the time to develop some.

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

Before your presidents-elect training seminar, use the Long-Range Goals Worksheet (appendix 35) to draft long-range goals for your club. Of course, this worksheet only begins the goal-setting process; you should ensure that your team supports your goals. This consensus approach will guarantee a year of service that has clear, known goals and supportive club members to achieve them.

Annual goals are a yearly breakdown of long-range goals. You will work on your annual goals at your presidents-elect training seminar and with your club leadership team at your district assembly. The *Planning Guide for Effective Rotary Clubs* has areas for annual goals based on the following topics:

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

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An overview of effective goal setting is outlined in chapter 2, "Goal Setting."

# APPENDIX 35

## Long-Range Goals Worksheet

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Work with current and incoming club officers on the following worksheet to identify, review, and update the long-range goals of your Rotary club, and to develop action steps for meeting them. These action steps will determine your annual goals.

Current Rotary year 20\_\_\_\_-\_\_\_\_

In 3-5 years, by 1 July 20\_\_\_\_ the Rotary Club of \_\_\_\_\_ will look like:

**MEMBERSHIP**

Long-range goal:

Action Steps	Time Frame

**SERVICE PROJECTS**

Long-range goal:

Action Steps	Time Frame

**THE ROTARY FOUNDATION**

Long-range goal:

Action Steps	Time Frame

Complete this worksheet BEFORE your presidents-elect training seminar.

**LEADERSHIP DEVELOPMENT**  
Long-range goal:

Action Steps	Time Frame

**PUBLIC RELATIONS**  
Long-range goal:

Action Steps	Time Frame

**CLUB ADMINISTRATION**  
Long-range goal:

Action Steps	Time Frame

**OTHER**  
Long-range goal:

Action Steps	Time Frame

# APPENDIX 36

## Summary of Session 9: Annual and Long-Range Planning

### Resources

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#### Informational Resources

*Club President's Manual* (222-EN)

*Planning Guide for Effective Rotary Clubs*  
(appendix 39)

*RI Catalog* (019-EN)

#### Human Resources

Assistant governor

#### Additional Resources

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### Ideas to Implement

### Contact

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- 1.
- 2.
- 3.
- 4.
- 5.

### Action Steps

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# 10 Important Documents





## \* Constitution of the Rotary Club of

### Article 1 Definitions

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

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

### Article 2 Name

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

(Member of Rotary International)

### Article 3 Locality of the Club

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

### Article 4 Object

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

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

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

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

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

### Article 5 Four Avenues of Service

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

1. Club Service, the first Avenue of Service, involves action a member should take within this club to help it function successfully.
2. Vocational Service, the second Avenue of Service, has the purpose of promoting high ethical standards in businesses and professions, recognizing the worthiness of all dignified occupations, and fostering the ideal of service in the pursuit of all vocations. The role of members includes conducting themselves and their businesses in accordance with Rotary's principles.
3. Community Service, the third Avenue of Service, comprises varied efforts that members make, sometimes in conjunction with others, to improve the quality of life of those who live within this club's locality or municipality.
4. International Service, the fourth Avenue of Service, comprises those activities that members do to advance international understanding, goodwill, and peace by fostering acquaintance

with people of other countries, their cultures, customs, accomplishments, aspirations, and problems, through reading and correspondence and through cooperation in all club activities and projects designed to help people in other lands.

### Article 6 Meetings

#### Section 1 — Regular Meetings.

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

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

### Article 7 Membership

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

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

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

**Section 4 — Transferring or Former Rotarian.** A member may propose to active membership a transferring member or former member of a club, if the proposed member is terminating or has terminated such membership in the former club due to no longer being engaged in the formerly assigned classification of business or profession within the locality of the former club or the surrounding area. The transferring or former member of a club being proposed to active membership under this section may also be proposed by the former club. The classification of a transferring or former member of a club shall not preclude election to active membership even if the election results in club membership temporarily exceeding the classification limits.

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

**Section 6 — Honorary Membership.**

- (a) *Eligibility for Honorary Membership.* Persons who have distinguished themselves by meritorious service in the furtherance of Rotary ideals and those persons considered friends of Rotary for their permanent support of Rotary's cause may

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

be elected to honorary membership in this club. The term of such membership shall be as determined by the board. Persons may hold honorary membership in more than one club.

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

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

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

## Article 8 Classifications

### Section 1 — General Provisions.

- (a) *Principal Activity.* Each member shall be classified in accordance with the member's business, profession, or type of community service. The classification shall be that which describes the principal and recognized activity of the firm, company, or institution with which the member is connected or that which describes the member's principal and recognized business or professional activity or that which describes the nature of the member's community service activity.
- (b) *Correction or Adjustment.* If the circumstances warrant, the board may correct or adjust the classification of any member. Notice of a proposed correction or adjustment shall be provided to the member and the member shall be allowed a hearing thereon.

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

## Article 9 Attendance

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

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

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

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

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

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

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

- (a) the absence complies with the conditions and under circumstances approved by the board. The board may excuse a member's absence for reasons which it considers to be good and sufficient.
- (b) the aggregate of the member's years of age and years of membership in one or more clubs is 85 years or more and the member has notified the club secretary in writing of the member's desire to be excused from attendance and the board has approved.

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

**Section 5 — Attendance Records.** Any member whose absences are excused under the provisions of subsection 3(b) or section 4 of this article shall not be included in the membership figure used to compute this club's attendance.

## Article 10 Directors and Officers

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

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

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

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

**Section 5 — Election of Officers.**

(a) *Terms of Officers other than President.* Each officer shall be elected as provided in the bylaws. Except for the president, each officer shall take office on 1 July immediately following election and shall serve for the term of office or until a successor has been duly elected and qualified.

(b) *Term of President.* The president shall be elected as provided in the bylaws, not more than two (2) years but not less than eighteen (18) months prior to the day of taking office and shall serve as president-nominee upon election. The nominee shall take the title of president-elect on 1 July in the year prior to taking office as president. The president shall take office on 1 July and shall serve a period of one (1) year or until a successor has been duly elected and qualified.

(c) *Qualifications.* Each officer and director shall be a member in good standing of this club. The president-elect shall attend the district presidents-elect training seminar and the district assembly unless excused by the governor-elect. If so excused, the president-elect shall send a designated club representative who shall report back to the president-elect. If the president-elect does not attend the presidents-elect training seminar and the district assembly and has not been excused by the governor-elect or, if so excused, does not send a designated club representative to such meetings, the president-elect shall not be able to serve as club president. In such event, the current president shall continue to serve until a successor who has attended a presidents-elect training seminar and district assembly or training deemed sufficient by the governor-elect has been duly elected.

## Article 11 Admission Fees and Dues

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

## Article 12 Duration of Membership

**Section 1 — Period.** Membership shall continue during the existence of this club unless terminated as hereinafter provided.

**Section 2 — Automatic Termination.**

(a) *Membership Qualifications.* Membership shall automatically terminate when a member no longer meets the membership qualifications, except that

- (1) the board may grant a member moving from the locality of this club or the surrounding area a special leave of absence not to exceed one (1) year to enable the member to visit and become known to a Rotary club in the new community if the member continues to meet all conditions of club membership;
- (2) the board may allow a member moving from the locality of this club or the surrounding area to retain membership if the member continues to meet all conditions of club membership.

(b) *How to Rejoin.* When the membership of a member has terminated as provided in subsection (a) of this section, such person, provided such person's membership was in good standing at the time of termination, may make new application for membership, under the same or another classification. A second admission fee shall not be required.

(c) *Termination of Honorary Membership.* Honorary membership shall automatically terminate at the end of the term for such membership as determined by the board. However, the board may extend an honorary membership for an additional period. The board may revoke an honorary membership at any time.

**Section 3 — Termination — Non-payment of Dues.**

(a) *Process.* Any member failing to pay dues within thirty (30) days after the prescribed time shall be notified in writing by the secretary at the member's last known address. If the dues are not paid on or before ten (10) days of the date of notification, membership may terminate, subject to the discretion of the board.

(b) *Reinstatement.* The board may reinstate the former member to membership upon the former member's petition and payment of all indebtedness to this club. However, no former member may be reinstated to active membership if the former member's classification is in conflict with article 8, section 2.

**Section 4 — Termination — Non-attendance.**

(a) *Attendance Percentages.* A member must

- (1) attend or make up at least 50 percent of club regular meetings in each half of the year;
- (2) attend at least 30 percent of this club's regular meetings in each half of the year (assistant governors, as defined by the board of directors of RI, shall be excused from this requirement).

If a member fails to attend as required, the member's membership shall be subject to termination unless the board consents to such non-attendance for good cause.

(b) *Consecutive Absences.* Unless otherwise excused by the board for good and sufficient reason or pursuant to article 9, sections 3 or 4, each member who fails to attend or make up four consecutive regular meetings shall be informed by the board that the member's non-attendance may be considered a request to terminate membership in this club. Thereafter, the board, by a majority vote, may terminate the member's membership.

**Section 5 — Termination — Other Causes.**

(a) *Good Cause.* The board may terminate the membership of any member who ceases to have the qualifications for membership in this club or for any good cause by a vote of not less than two-thirds of the board members, at a meeting called for that purpose. The guiding principles for this meeting shall be article 7, section 1, and The Four-Way Test.

(b) *Notice.* Prior to taking any action under subsection (a) of this section, the member shall be given at least ten (10) days' written notice of such pending action and an opportunity

to submit a written answer to the board. The member shall have the right to appear before the board to state the member's case. Notice shall be by personal delivery or by registered letter to the member's last known address.

- (c) *Filling Classification.* When the board has terminated the membership of a member as provided for in this section, this club shall not elect a new member under the former member's classification until the time for hearing any appeal has expired and the decision of this club or of the arbitrators has been announced. However, this provision shall not apply if, by election of a new member, the number of members under the said classification would remain within provided limitations even if the board's decision regarding termination is reversed.

**Section 6 — Right to Appeal, Mediate or Arbitrate Termination.**

- (a) *Notice.* Within seven (7) days after the date of the board's decision to terminate membership, the secretary shall give written notice of the decision to the member. Within fourteen (14) days after the date of the notice, the member may give written notice to the secretary of the intention to appeal to the club, request mediation, or to arbitrate as provided in article 16.
- (b) *Date for Hearing of Appeal.* In the event of an appeal, the board shall set a date for the hearing of the appeal at a regular club meeting to be held within twenty-one (21) days after receipt of the notice of appeal. At least five (5) days' written notice of the meeting and its special business shall be given to every member. Only members shall be present when the appeal is heard.
- (c) *Mediation or Arbitration.* The procedure utilized for mediation or arbitration shall be as provided in article 16.
- (d) *Appeal.* If an appeal is taken, the action of the club shall be final and binding on all parties and shall not be subject to arbitration.
- (e) *Decision of Arbitrators or Umpire.* If arbitration is requested, the decision reached by the arbitrators or, if they disagree, by the umpire shall be final and binding on all parties and shall not be subject to appeal.
- (f) *Unsuccessful Mediation.* If mediation is requested but is unsuccessful, the member may appeal to the club or arbitrate as provided in subsection (a) of this section.

**Section 7 — Board Action Final.** Board action shall be final if no appeal to this club is taken and no arbitration is requested.

**Section 8 — Resignation.** The resignation of any member from this club shall be in writing, addressed to the president or secretary. The resignation shall be accepted by the board if the member has no indebtedness to this club.

**Section 9 — Forfeiture of Property Interest.** Any person whose club membership has been terminated in any manner shall forfeit all interest in any funds or other property belonging to this club.

**Section 10 — Temporary Suspension.**

Notwithstanding any provision of this constitution, if in the opinion of the board

- (a) credible accusations have been made that a member has refused or neglected to comply with this constitution, or has been guilty of conduct unbecoming a member or prejudicial to the interests of the club; and
- (b) those accusations, if proved, constitute good cause for terminating the membership of the member; and
- (c) it is desirable that no action should be taken in respect of the membership of the member pending the outcome of a matter or an event that the board considers should properly occur before such action is taken by the board; and
- (d) that in the best interests of the club and without any vote being taken as to his or her membership, the member's membership should be temporarily suspended and the member should be excluded from attendance at meetings and other activities of this club and from any office or position the member holds within the club. For the purposes of this clause, the member shall be excused from fulfilling attendance responsibilities;

the board may, by a vote of not less than two-thirds of the board, temporarily suspend the member as aforesaid for such period and on such further conditions as the board determines, albeit for a period no longer than is reasonably necessary in all the circumstances.

## Article 13 Community, National, and International Affairs

**Section 1 — Proper Subjects.** The merits of any public question involving the general welfare of the community, the nation, and the world are of concern to the members of this club and shall be proper subjects of fair and informed study and discussion at a club meeting for the enlightenment of its members in forming their individual opinions. However, this club shall not express an opinion on any pending controversial public measure.

**Section 2 — No Endorsements.** This club shall not endorse or recommend any candidate for public office and shall not discuss at any club meeting the merits or demerits of any such candidate.

**Section 3 — Non-Political.**

(a) *Resolutions and Opinions.* This club shall neither adopt nor circulate resolutions or opinions, and shall not take action dealing with world affairs or international policies of a political nature.

(b) *Appeals.* This club shall not direct appeals to clubs, peoples, or governments, or circulate letters, speeches, or proposed plans for the solution of specific international problems of a political nature.

**Section 4 — Recognizing Rotary's Beginning.** The week of the anniversary of Rotary's founding (23 February) shall be known as World Understanding and Peace Week. During this week, this club will celebrate Rotary service, reflect upon past achievements, and focus on programs of peace, understanding, and goodwill in the community and throughout the world.

## Article 14 Rotary Magazines

**Section 1 — Mandatory Subscription.** Unless, in accordance with the bylaws of RI, this club is excused by the board of directors of RI from complying with the provisions of this article, each member shall, for the duration of membership, subscribe to the official magazine or to the magazine approved and prescribed for this club by the board of directors of RI. The subscription shall be paid in six (6) month periods for the duration of membership in this club and to the end of any six (6) month period during which membership may terminate.

**Section 2 — Subscription Collection.** The subscription shall be collected by this club from each member semiannually in advance and remitted to the Secretariat of RI or to the office of such regional publications as may be determined by the board of directors of RI.

## Article 15 Acceptance of Object and Compliance with Constitution and Bylaws

By payment of an admission fee and dues, a member accepts the principles of Rotary as expressed in its object and submits to and agrees to comply with and be bound by the constitution and bylaws of this club, and on these conditions alone is entitled to the privileges of this club. Each member shall be subject to the terms of the constitution and bylaws regardless of whether such member has received copies of them.

## Article 16 Arbitration and Mediation

**Section 1 — Disputes.** Should any dispute, other than as to a decision of the board, arise between any current or former member(s) and this club, any club officer or the board, on any account whatsoever which cannot be settled under the procedure already provided for such purpose, the dispute shall, upon a request to the secretary by any of the disputants, either be resolved by mediation or settled by arbitration.

**Section 2 — *Date for Mediation or Arbitration.*** In the event of mediation or arbitration, the board shall set a date for the mediation or arbitration, in consultation with disputants, to be held within twenty-one (21) days after receipt of the request for mediation or arbitration.

**Section 3 — *Mediation.*** The procedure for such mediation shall be that recognized by an appropriate authority with national or state jurisdiction or be that recommended by a competent professional body whose recognized expertise covers alternative dispute resolution or be that recommended by way of documented guidelines determined by the board of RI or the trustees of The Rotary Foundation. Only a member of a Rotary club may be appointed as mediator(s). The club may request the district governor or the governor's representative to appoint a mediator who is a member of a Rotary club and who has appropriate mediation skills and experience.

(a) *Mediation Outcomes.* The outcomes or decisions agreed between the parties as a result of mediation shall be recorded and copies held by each party, the mediator(s) and one copy given to the board and to be held by the secretary. A summary statement of outcomes acceptable to the parties involved shall be prepared for the information of the club. Either party through the president or secretary may call for further mediation if either party has retracted significantly from the mediated position.

(b) *Unsuccessful Mediation.* If mediation is requested but is unsuccessful, any disputant may request arbitration as provided in section 1 of this article.

**Section 4 — *Arbitration.*** In the event of a request for arbitration, each party shall appoint an arbitrator and the arbitrators shall appoint an umpire. Only a member of a Rotary club may be appointed as umpire or as arbitrator.

**Section 5 — *Decision of Arbitrators or Umpire.*** If arbitration is requested, the decision reached by the arbitrators or, if they disagree, by the umpire shall be final and binding on all parties and shall not be subject to appeal.

## **Article 17 Bylaws**

This club shall adopt bylaws not inconsistent with the constitution and bylaws of RI, with the rules of procedure for an administrative territorial unit where established by RI, and with this constitution, embodying additional provisions for the government of this club. Such bylaws may be amended from time to time as therein provided.

## **Article 18 Interpretation**

Throughout this constitution, the terminology "mail," "mailing," and "ballot-by-mail" will include utilization of electronic mail (e-mail) and internet technology to reduce costs and increase responsiveness.

## **Article 19 Amendments**

**Section 1 — *Manner of Amending.*** Except as provided in section 2 of this article, this constitution may be amended only by the council on legislation in the same manner as is established in the bylaws of RI for the amendment of its bylaws.

**Section 2 — *Amending Article 2 and Article 3.*** Article 2 (Name) and Article 3 (Locality of the Club) of the constitution shall be amended at any regular meeting of this club, a quorum being present by the affirmative vote of not less than two-thirds of all voting members present and voting, provided that notice of such proposed amendment shall have been mailed to each member at least ten (10) days before such meeting, and provided further, that such amendment shall be submitted to the board of directors of RI for its approval and shall become effective only when so approved. The governor may offer an opinion to the board of directors of RI regarding the proposed amendment.



## Recommended Rotary Club Bylaws

### \*Bylaws of the Rotary Club of \_\_\_\_\_

#### Article 1 Definitions

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

#### Article 2 Board

The governing body of this club shall be the board consisting of \_\_\_\_\_ members of this club, namely, the president, vice-president, president-elect (or president-nominee, if no successor has been elected), secretary, treasurer, and the sergeant-at-arms. At the discretion of the board, also added can be the \_\_\_\_\_ directors elected in accordance with article 3, section 1 of these bylaws, and the immediate past president.

#### Article 3 Election of Directors and Officers

**Section 1** – At a regular meeting one month prior to the meeting for election of officers, the presiding officer shall ask for nominations by members of the club for president, vice-president, secretary, treasurer, and \_\_\_\_\_ directors. The nominations may be presented by a nominating committee or by members from the floor, by either or by both as a club may determine. If it is determined to use a nominating committee, such committee shall be appointed as the club may determine. The nominations duly made shall be placed on a ballot in alphabetical order under each office and shall be voted for at the annual meeting. The candidates for president, vice-president, secretary, and treasurer receiving a majority of the votes shall be declared elected to their respective offices. The \_\_\_\_\_ candidates for director receiving a majority of the votes shall be declared elected as directors. The candidate for president elected in such balloting shall be the president-nominee and serve as a director for the year commencing on the first day of July next following the election, and shall assume office as president on 1 July immediately following that year. The president-nominee shall take the title of president-elect on 1 July in the year prior to taking office as president.

**Section 2** – The officers and directors, so elected, together with the immediate past president shall constitute the board. Within one week after their election, the directors-elect shall meet and elect some member of the club to act as sergeant-at-arms.

**Section 3** – A vacancy in the board or any office shall be filled by action of the remaining directors.

**Section 4** – A vacancy in the position of any officer-elect or director-elect shall be filled by action of the remaining directors-elect.

#### Article 4 Duties of Officers

**Section 1** – *President*. It shall be the duty of the president to preside at meetings of the club and the board and to perform other duties as ordinarily pertain to the office of president.

**Section 2** – *President-elect*. It shall be the duty of the president-elect to serve as a director and to perform such other duties as may be prescribed by the president or the board.

**Section 3** – *Vice-President*. It shall be the duty of the vice-president to preside at meetings of the club and the board in the absence of the president and to perform other duties as ordinarily pertain to the office of vice-president.

**Section 4** – *Secretary*. It shall be the duty of the secretary to keep membership records; record attendance at meetings; send out notices of club, board, and committee meetings; record and preserve the minutes of such meetings; report as required to RI, including the semiannual reports of membership on 1 January and 1 July of each year, which shall include per capita dues for all members and prorated dues for active members who have been elected to membership in the club since the start of the July or January semiannual reporting period; report changes in membership; provide the monthly attendance report, which shall be made to the district governor within 15 days of the last meeting of the month; collect and remit RI official magazine subscriptions; and perform other duties as usually pertain to the office of secretary.

**Section 5** – *Treasurer*. It shall be the duty of the treasurer to have custody of all funds, accounting for it to the club annually and at any other time upon demand by the board, and to perform other duties as pertain to the office of treasurer. Upon retirement from office, the treasurer shall turn over to the incoming treasurer or to the president all funds, books of accounts, or any other club property.

**Section 6** – *Sergeant-at-Arms*. The duties of the sergeant-at-arms shall be such as are usually prescribed for such office and other duties as may be prescribed by the president or the board.

#### Article 5 Meetings

**Section 1** – *Annual Meeting*. An annual meeting of this club shall be held on the \_\_\_\_\_ in each year, at which time the election of officers and directors to serve for the ensuing year shall take place.

(*Note: Article 6, section 2 of the Standard Rotary Club Constitution provides that "An annual meeting for the election of officers shall be held not later than 31 December..."*)

**Section 2** – The regular weekly meetings of this club shall be held on \_\_\_\_\_ (day) at \_\_\_\_\_ (time).

Due notice of any changes in or canceling of the regular meeting shall be given to all members of the club. All members excepting an honorary member (or member excused pursuant to the standard Rotary club constitution) in good standing in this club, on the day of the regular meeting, must be counted as present or absent, and attendance must be evidenced by the member's being present for at least sixty (60) percent of the time devoted to the regular meeting, either at this club or at any other Rotary club, or as otherwise provided in the standard Rotary club constitution, article 9, sections 1 and 2.

**Section 3** – One-third of the membership shall constitute a quorum at the annual and regular meetings of this club.

**Section 4** – Regular meetings of the board shall be held on \_\_\_\_\_ of each month. Special meetings of the board shall be called by the president, whenever deemed necessary, or upon the request of two (2) directors, due notice having been given.

\* NOTE: These bylaws are recommended only and may be changed by any Rotary club to meet its own conditions, provided such changes are not out of harmony with the Standard Rotary Club Constitution and with the RI constitution, RI bylaws, and the Rotary Code of Policies. If any doubt exists, the proposed changes should be submitted to the general secretary for the consideration of the Board of Directors of RI.

**Section 5** – A majority of the directors shall constitute a quorum of the board.

## **Article 6 Fees and Dues**

**Section 1** – The admission fee shall be \$ \_\_\_\_\_ to be paid before the applicant can qualify as a member, except as provided for in the standard Rotary club constitution, article 11.

**Section 2** – The membership dues shall be \$ \_\_\_\_\_ per annum, payable semiannually on the first day of July and of January, with the understanding that a portion of each semiannual payment shall be applied to each member's subscription to the RI official magazine.

## **Article 7 Method of Voting**

The business of this club shall be transacted by *viva voce*\* vote except the election of officers and directors, which shall be by ballot. The board may determine that a specific resolution be considered by ballot rather than by *viva voce* vote.

(\*Note: *Viva voce vote* is defined as when club voting is conducted by vocal assent.)

## **Article 8 Four Avenues of Service**

The four Avenues of Service are the philosophical and practical framework for the work of this Rotary club. They are Club Service, Vocational Service, Community Service, and International Service. This club will be active in each of the four Avenues of Service.

## **Article 9 Committees**

Club committees are charged with carrying out the annual and long-range goals of the club based on the four Avenues of Service. The president-elect, president, and immediate past president should work together to ensure continuity of leadership and succession planning. When feasible, committee members should be appointed to the same committee for three years to ensure consistency. The president-elect is responsible for appointing committee members to fill vacancies, appointing committee chairs, and conducting planning meetings prior to the start of the year in office. It is recommended that the chair have previous experience as a member of the committee. Standing committees should be appointed as follows:

- **Membership**  
This committee should develop and implement a comprehensive plan for the recruitment and retention of members.
- **Club Public Relations**  
This committee should develop and implement plans to provide the public with information about Rotary and to promote the club's service projects and activities.
- **Club Administration**  
This committee should conduct activities associated with the effective operation of the club.
- **Service Projects**  
This committee should develop and implement educational, humanitarian, and vocational projects that address the needs of its community and communities in other countries.
- **The Rotary Foundation**  
This committee should develop and implement plans to support The Rotary Foundation through both financial contributions and program participation.

Additional ad hoc committees may be appointed as needed.

- (a) The president shall be ex officio a member of all committees and, as such, shall have all the privileges of membership thereon.
- (b) Each committee shall transact its business as is delegated to it in these bylaws and such additional business as may be referred to it by the president or the board. Except where

special authority is given by the board, such committees shall not take action until a report has been made and approved by the board.

- (c) Each chair shall be responsible for regular meetings and activities of the committee, shall supervise and coordinate the work of the committee, and shall report to the board on all committee activities.

(Note: The above committee structure is in harmony with both the District Leadership Plan and the Club Leadership Plan. Clubs have the discretion to create any committees that are required to effectively meet its service and fellowship needs. A sample listing of such optional committees is found in the Club Committee Manual. A club may develop a different committee structure as needed.)

## **Article 10 Duties of Committees**

The duties of all committees shall be established and reviewed by the president for his or her year. In declaring the duties of each, the president shall reference to appropriate RI materials. The service projects committee will consider the Avenues of Vocational Service, Community Service, and International Service when developing plans for the year.

Each committee shall have a specific mandate, clearly defined goals, and action plans established by the beginning of each year for implementation during the course of the year. It shall be the primary responsibility of the president-elect to provide the necessary leadership to prepare a recommendation for club committees, mandates, goals, and plans for presentation to the board in advance of the commencement of the year as noted above.

## **Article 11 Leave of Absence**

Upon written application to the board, setting forth good and sufficient cause, leave of absence may be granted excusing a member from attending the meetings of the club for a specified length of time.

(Note: Such leave of absence does operate to prevent a forfeiture of membership; it does not operate to give the club credit for the member's attendance. Unless the member attends a regular meeting of some other club, the excused member must be recorded as absent except that absence authorized under the provisions of the Standard Rotary Club Constitution is not computed in the attendance record of the club.)

## **Article 12 Finances**

**Section 1** – Prior to the beginning of each fiscal year, the board shall prepare a budget of estimated income and expenditures for the year, which shall stand as the limit of expenditures for these purposes, unless otherwise ordered by action of the board. The budget shall be broken into two separate parts: one in respect of club operations and one in respect of charitable/service operations.

**Section 2** – The treasurer shall deposit all club funds in a bank, named by the board. The club funds shall be divided into two separate parts: club operations and service projects.

**Section 3** – All bills shall be paid by the treasurer or other authorized officer only when approved by two other officers or directors.

**Section 4** – A thorough review of all financial transactions by a qualified person shall be made once each year.

**Section 5** – Officers having charge or control of club funds shall give bond as required by the board for the safe custody of the funds of the club, cost of bond to be borne by the club.

**Section 6** – The fiscal year of this club shall extend from 1 July to 30 June, and for the collection of members' dues shall be divided into two (2) semiannual periods extending from 1 July to 31 December, and from 1 January to 30 June. The payment

of per capita dues and RI official magazine subscriptions shall be made on 1 July and 1 January of each year on the basis of the membership of the club on those dates.

### **Article 13 Method of Electing Members**

**Section 1** – The name of a prospective member, proposed by an active member of the club, shall be submitted to the board in writing, through the club secretary. A transferring or former member of another club may be proposed to active membership by the former club. The proposal shall be kept confidential except as otherwise provided in this procedure.

**Section 2** – The board shall ensure that the proposal meets all the classification and membership requirements of the standard Rotary club constitution.

**Section 3** – The board shall approve or disapprove the proposal within 30 days of its submission and shall notify the proposer, through the club secretary, of its decision.

**Section 4** – If the decision of the board is favorable, the prospective member shall be informed of the purposes of Rotary and of the privileges and responsibilities of membership, following which the prospective member shall be requested to sign the membership proposal form and to permit his or her name and proposed classification to be published to the club.

**Section 5** – If no written objection to the proposal, stating reasons, is received by the board from any member (other than honorary) of the club within seven (7) days following publication of information about the prospective member, that person, upon payment of the admission fee (if not honorary membership), as prescribed in these bylaws, shall be considered to be elected to membership.

If any such objection has been filed with the board, it shall vote on this matter at its next meeting. If approved despite the objection, the proposed member, upon payment of the admission fee (if not honorary membership), shall be considered to be elected to membership.

**Section 6** – Following the election, the president shall arrange for the new member's induction, membership card, and new member Rotary literature. In addition, the president or secretary will report the new member information to RI and the president will assign a member to assist with the new member's assimilation to the club as well as assign the new member to a club project or function.

**Section 7** – The club may elect, in accordance with the standard Rotary club constitution, honorary members proposed by the board.

### **Article 14 Resolutions**

The club shall not consider any resolution or motion to commit the club on any matter until the board has considered it. Such resolutions or motions, if offered at a club meeting, shall be referred to the board without discussion.

### **Article 15 Order of Business**

Meeting called to order.

Introduction of visitors.

Correspondence, announcements, and Rotary information.

Committee reports if any.

Any unfinished business.

Any new business.

Address or other program features.

Adjournment.

### **Article 16 Amendments**

These bylaws may be amended at any regular meeting, a quorum being present, by a two-thirds vote of all members present, provided that notice of such proposed amendment shall have been mailed to each member at least ten (10) days before such meeting. No amendment or addition to these bylaws can be made which is not in harmony with the standard Rotary club constitution and with the constitution and bylaws of RI.

# APPENDIX 39

## PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

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

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

Rotary Club of \_\_\_\_\_ Rotary year of office: \_\_\_\_\_

Name of president: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

### MEMBERSHIP

#### Current State

Current number of members: \_\_\_\_\_

Number of members as of 30 June last year: \_\_\_\_\_ 30 June five years ago: \_\_\_\_\_

Number of male members: \_\_\_\_\_ Number of female members: \_\_\_\_\_

Average age of members: \_\_\_\_\_

Number of Rotarians who have been members for 1-3 years: \_\_\_\_\_ 3-5 years: \_\_\_\_\_ 5-10 years: \_\_\_\_\_

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

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

Profession  Age  Gender  Ethnicity

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

Describe club's current new member orientation program:

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

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

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

What makes this club attractive to new members?

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

### Future State

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

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

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

- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Ensure 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 for every new club member
- Recognize those Rotarians who sponsor new members
- Encourage members to join a Rotary Fellowship or Rotarian Action Group
- Participate in the RI membership development award programs
- Sponsor a new club
- Other (please describe):

### Action steps:

## SERVICE PROJECTS

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### Current State

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

Number of sponsored Interact clubs: \_\_\_\_\_ Rotaract clubs: \_\_\_\_\_ Rotary Community Corps: \_\_\_\_\_

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

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

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

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

Number of other current club service projects:

## Future State

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

For our local community:

For communities in other countries:

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

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

### Action steps:

## THE ROTARY FOUNDATION

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### Current State

Number of grants awarded:

District Simplified Grants: \_\_\_\_\_ Volunteer Service Grants: \_\_\_\_\_

Matching Grants: \_\_\_\_\_ Health Hunger and Humanity (3-H) Grants: \_\_\_\_\_

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

Number of GSE team members: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of Rotary Grants for University Teachers: Nominated \_\_\_\_\_ Selected \_\_\_\_\_

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

Number of Rotary Conflict Studies Fellows: Nominated \_\_\_\_\_ Selected \_\_\_\_\_

Number of PolioPlus or PolioPlus Partners activities: \_\_\_\_\_

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

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

Number of club members who are

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

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

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

### Future State

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

Our club's Annual Programs Fund contribution goal is \_\_\_\_\_.

Our club's Permanent Fund contribution goal is \_\_\_\_\_.

Our club will participate in the following Rotary Foundation programs:

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

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

### Action steps:

## LEADERSHIP DEVELOPMENT

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### Current State

Number of club leaders who attended

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

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

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

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

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

### Future State

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

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

- Have the president-elect attend PETS and the district assembly
- Have all committee chairs attend the district assembly
- Encourage interested past presidents to attend the district leadership seminar
- Use the expertise of the club's assistant governor
- Encourage new members to assume positions of leadership through participation in club committees
- Ask club members to visit other clubs to exchange ideas and share what they learn with the club
- Other (please describe): \_\_\_\_\_

**Action steps:**

## PUBLIC RELATIONS

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### Current State

List club activities covered by the media and the type of media (radio, newspaper, television, etc.):

### Future State

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

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

- Ensure that the public relations committee is trained in how to conduct media campaigns
- Conduct public relations efforts for all service projects
- Conduct a public awareness program targeted at the business and professional community about what Rotary is and what it does
- Arrange for a public service announcement to be broadcast on a local television channel

Other (please describe):

**Action steps:**

**CLUB ADMINISTRATION**

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**Current State**

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

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

How is the club budget prepared? \_\_\_\_\_ Is it independently reviewed by a qualified accountant? \_\_\_\_\_

Does the club have a long-range plan in place? \_\_\_\_\_

Has the club developed a system for continuity of leadership on its board, committees, etc.? \_\_\_\_\_

Has the club developed a system for keeping all members involved in the club? \_\_\_\_\_

Does the club use Member Access on [www.rotary.org](http://www.rotary.org) to update its membership list? \_\_\_\_\_

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

Describe how weekly club programs are organized:

How often is the club's Web site updated? \_\_\_\_\_

Does your club observe the special months of the Rotary calendar, such as Rotary Foundation Month and Magazine Month? \_\_\_\_\_

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

How does the club involve the families of Rotarians? \_\_\_\_\_

**Future State**

**What plans have you made to carry out the administrative tasks of the club? (check all that apply)**

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

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

**Action steps:**

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

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

\_\_\_\_\_  
Club President Signature

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

\_\_\_\_\_  
Assistant Governor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**SUMMARY OF GOALS FOR \_\_\_\_\_ ROTARY YEAR**

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

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

(506)

# APPENDIX 40

## District Assembly Discussion Questions

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Consider the following discussion questions before your district assembly.

### Public Speaking Session

How can you prepare for a presentation?

What tips do you have for public speaking?

### Leadership Session

What skills are needed to lead your club?

How will you use these skills during your year as president?

### 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?







# TAKE YOUR CLUB TO THE NEXT LEVEL

IMPLEMENT THE CLUB LEADERSHIP PLAN

Develop a long-range plan

Simplify the committee structure

Involve all club members

Learn how to strengthen your club with this manual.