



Rotary International

Club President's Manual

Addendum to the *Club President's Manual*

Please note the following changes to the *Club President's Manual*. These changes result from decisions taken by the 2004 Council on Legislation or the RI Board of Directors since its publication. Additions are underlined.

General change

Delete all references to the *Rotary News Basket* and the *Membership Development Package* (916-EN); they are no longer produced by RI.

Page 4

Under Club President's Responsibilities, the third responsibility should now read:

3. Attend the presidents-elect training seminar and the district assembly. (Mandatory, see the Standard Rotary Club Constitution, article 9, section 5, (c) Qualifications.)

Page 9

Under Working with the Club Secretary, the fifth bullet should now read:

- Receive, complete, and return the semiannual report of membership and pay dues to Rotary International on 1 July and 1 January. Per capita dues for each member will be US\$21.50 per half year in 2005-06 and \$23.50 per half year in 2006-07 provided that each club shall pay for a minimum of 10 members per half year.

The eighth bullet point should be replaced with the following text:

- Collect and remit subscriptions to *The Rotarian** or Rotary regional magazine. In Bolivia, Canada, Costa Rica, the Dominican Republic, Guatemala, Honduras, El Salvador, Ecuador, Paraguay, the United States, Uruguay, and Venezuela this is included with dues payment to RI. All other countries should submit their subscriptions directly to their regional magazine editor.

Page 47

Add the following award to the Club Service Awards section:

- Best Cooperative Projects Award
This award recognizes outstanding club service projects carried out in cooperation with other organizations, such as Boy Scouts, UN agencies, or local groups, especially those that require hands-on participation of club members. Projects that involve only fundraising are not eligible. Each district may submit up to five nominations.

Page 49

Add the following to the Awards and Recognition Resources section:

Best Cooperative Projects Award Nomination Form

This is the 2003 edition of the *Club President's Manual* (222-EN). It is intended for use by club presidents holding office in 2004-05, 2005-06, and 2006-07. 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 2004 Council on Legislation or the RI Board of Directors, override policy as stated in this publication. It contains the 2004 club constitution and bylaws.

Contents

| | |
|--|-----------|
| Introduction | 1 |
| 1 Role and Responsibilities | 3 |
| Club President's Role | 3 |
| Club President's Responsibilities | 4 |
| 2 Goal Setting and Selecting Your Team | 7 |
| Goal Setting | 7 |
| Working with Club Leaders | 8 |
| Club Committees | 11 |
| Club Committee and Subcommittee Structure | 12 |
| Selecting and Preparing Committee Chairs | 13 |
| 3 Club Administration | 15 |
| Preparing for Important Events | 16 |
| Developing Weekly Club Programs | 17 |
| Guidelines for Developing Weekly Meetings | 18 |
| Club Assemblies | 19 |
| The Official Visit | 20 |
| Working with the District | 21 |
| Managing Club Finances | 23 |
| Club Committees Related to Club Administration | 23 |
| Club Administration Resources | 25 |
| 4 Membership | 27 |
| Membership Recruitment and Induction | 28 |
| New Member Orientation | 29 |
| Membership Retention | 30 |
| Club Committees Related to Membership | 31 |
| Membership Resources | 33 |
| Strategies for Member Education | 35 |
| 5 What Motivates Rotarians | 43 |
| Motivating Rotarians | 43 |
| Recognizing Excellence | 44 |
| Individual and Club Service Awards | 45 |
| Contribution Recognition | 48 |
| Awards and Recognition Resources | 49 |
| 6 Service Projects | 51 |
| Needs Assessment | 52 |
| Project Planning and Implementation | 53 |
| Reviewing Current Projects | 54 |
| Evaluation | 55 |
| International Service Projects | 56 |
| Club Committees Related to Service Projects | 57 |
| Service Projects Resources | 58 |
| Selecting a Service Project | 60 |

| | |
|--|-----------|
| 7 The Rotary Foundation | 63 |
| Program Participation: | |
| Educational Programs and Humanitarian Grants Program | 64 |
| Program Participation: PolioPlus | 65 |
| Financial Support | 66 |
| Rotary Foundation Goals | 68 |
| Club Committees Related to The Rotary Foundation | 69 |
| Rotary Foundation District Resources | 72 |
| <hr/> | |
| 8 Public Relations | 73 |
| Starting a Public Relations Campaign | 74 |
| Media Tools | 75 |
| Key Rotary Messages | 76 |
| Club Committees Related to Public Relations | 77 |
| Public Relations Resources | 77 |
| <hr/> | |
| 9 Important Documents | 79 |
| General Resources | 79 |
| Planning Guide for Effective Rotary Clubs | 83 |
| Standard Rotary Club Constitution | 89 |
| Recommended Rotary Club Bylaws | 94 |
| Club President's Monthly Checklist | 99 |
| Inventory for the Rotary Club of _____ | 105 |
| Discussion Questions for PETS | 109 |

Introduction

Rotary International is the association of Rotary clubs. Rotary International is effective if its member clubs are effective. As club president, your primary responsibility will be to make your club as effective as possible. You have received this edition of the *Club President's Manual* (222-EN) as part of an orientation kit developed to help make your year as president successful and rewarding, both for you and your club. The *Club President's Manual* provides essential information to help you establish goals and understand your responsibilities related to increasing club effectiveness. Before attending your district's presidents-elect training seminar (PETS), review the entire manual in order to understand and prepare for your leadership responsibilities in key areas of club operations. Selected discussion questions that will be covered at PETS have been included at the end of this manual on pages 109-110 to enhance your preparation. Preparing will help you get the most out of the facilitated discussions you'll participate in at PETS.

The *Club President's Manual* serves as the preparatory material for the training you will receive at PETS. Because of the complementary role these materials play in the training, it is recommended that you bring the *Club President's Manual* with you when you attend PETS.

At the district assembly, you'll use chapters 2 and 8 of the *Club President's Manual* as you work with other club leaders to establish goals during team-building exercises, so be sure to bring the manual with you.

After you have completed your training and preparation for your year in office, this manual will remain a functional resource to support you in fulfilling your responsibilities.

Structure of the Manual

The organization of the *Club President's Manual* reflects the recommended curriculum for club presidents at the presidents-elect training seminar and the district assembly. Each chapter relates to a key aspect of club operation and effectiveness. Individual sections in each chapter are devoted to specific topics. For example, one section in chapter 6, "Service Projects," is devoted to conducting a needs assessment.

These topic-specific sections highlight your responsibilities as club president while providing the essential information you need to know to guide club members.

Topic-specific sections are generally one to three pages in length, making them easy to reproduce and distribute to club members, if applicable.

Comments?

If you have questions or comments about this manual, please submit them to:

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1

Role and Responsibilities

Club President's Role

Your primary role as club president is that of club leader, one who ensures that the club is functioning effectively. An effective Rotary club is able to

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



Supporting the Elements of an Effective Club

As club president, you will guide your club in developing and supporting goals that increase effectiveness in each of these four key areas.

These elements of effectiveness are interrelated and interdependent. For example, a club with a growing membership base can increase the size and scope of its service activities. Conversely, if one element is weak or absent, the club's effectiveness in other key areas will also be reduced.

In addition to addressing each of these elements, the *Club President's Manual* also contains information and strategies for conducting public relations campaigns and for motivating Rotarians (including awards and recognition).

Club president responsibilities for each area of club effectiveness are outlined in the following chapters.

Using these strategies, in coordination with other club efforts, can provide needed support to attain club goals. For example, a public relations campaign that highlights a club's community service efforts may attract new members, who, in turn, are highly motivated to serve the community. Likewise, successful fundraising can enhance community service efforts and contributions to The Rotary Foundation.

Club President's Responsibilities

As President-elect — Before 1 July

On 1 July you will become president of your Rotary club. Most of what you will accomplish must be set in motion weeks and months before, working with your fellow club officers, board of directors, and committee chairs. Your months as president-elect are extremely important. Your preparations during this time will influence what you are able to accomplish once you take office. Using the elements of an effective Rotary club as a guide, you should follow these steps:

- Assess the club's membership situation.
- Discuss service objectives.
- Identify ways to improve support of The Rotary Foundation.
- Develop future leaders by promoting attendance at important district events, including the district assembly, district conference, district leadership seminar, district membership seminar, and district Rotary Foundation seminar.

This basic review of club effectiveness will lay the groundwork for setting goals and selecting the club committee chairs you'll work with during your year. You should take the following actions as soon as possible after your election:

1. Begin to set club goals for the coming year using the *Planning Guide for Effective Rotary Clubs*, incorporating the upcoming RI theme and Presidential Citation (see pages 83-88).
2. Appoint committee chairs.
3. Attend the presidents-elect training seminar and the district assembly.
4. Strongly encourage all club leaders to attend the district assembly to acquire the skills and knowledge required for success in the coming year.

Use the Club President's Monthly Checklist (pages 99-104) when planning your year as president and reviewing your responsibilities as president-elect and president.

The Secretariat is Rotary International's general secretary and administrative staff. The World Headquarters of the Secretariat is located in Evanston, Illinois, USA, with international offices authorized by the RI Board of Directors. The international offices and their locations are listed on the inside front cover of the *Official Directory* (007-EN) and on the RI Web site, www.rotary.org.

5. Hold one or more meetings with your board of directors, as early as possible. Review together the provisions of the constitution and bylaws of your club to ensure that the club committee structure reflects club needs and goals for the coming year.
6. Hold a club assembly immediately after the district assembly 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 the president's emphases.
7. Supervise the preparation of the club budget and consider how it will affect your plans for the coming year. Also review your fundraising plans and develop goals for increasing contributions to The Rotary Foundation.
8. Review the status of current club projects and consider how they will affect your plan for the coming year. Evaluate club activities and determine which areas need more emphasis in the year ahead.
9. Attend the district conference.
10. Confer with your predecessor before taking office to ensure as smooth a transition as possible.
11. Arrange for a joint meeting of the incoming board of directors with the retiring board to assure continuity.

As President — After 1 July

1. Ensure that each committee has definite objectives. Review committee progress throughout the year to ensure that committees are functioning effectively. Make certain committee chairs give written reports to the district governor during the official visit.
2. Register your name and e-mail address on Member Access (riweb.rotaryintl.org) to ensure access to club administrative data after taking office. Ensure that the club secretary is also registered.*
3. Hold the first club assembly early in the year to discuss the agenda and schedule regular assemblies throughout the year (see pages 19-20).
4. Cooperate with the district governor in various matters, including careful preparation for the official visit and any visits made by the assistant governor (see pages 20-22).
5. Ensure that all correspondence is answered promptly, especially from clubs in other countries. You may delegate this responsibility as appropriate.
6. Preside at all meetings of the club and ensure that all club meetings are carefully planned.
7. Plan carefully for all board meetings, which are to be held at least once a month.
8. Review information and suggestions from the Secretariat and use as appropriate.
9. Forward important information from *Rotary World*, the governor's monthly letter, and other sources from the Secretariat to the appropriate individuals and committees.
10. Attend and ensure club representation at the district conference.

* Please note that the Member Access feature on the RI Web site was previously called the Rotary Business Portal.

11. Conduct a periodic review on all committee activities and goals, as well as the club budget.
12. Promote attendance and ensure representation at the annual RI Convention.
13. Submit a comprehensive annual report to the club on its status in June, before leaving office.
14. Confer with your successor before leaving office to ensure as smooth a transition as possible.
15. Arrange for a joint meeting of the incoming board with the retiring board of directors to assure continuity.

2 Goal Setting and Selecting Your Team

Goal Setting

An effective club sets goals and identifies the strategies necessary to achieve them. As club president, you will lead the club in establishing goals related to each element of club effectiveness prior to your year of service. Encourage broad club participation in the goal-setting process.

Your Responsibilities

- Understand the characteristics of an effective goal.
- Lead club members in establishing goals using the *Planning Guide for Effective Rotary Clubs*.
- Ensure that goals are meaningful to the club and community.

Characteristics of an Effective Goal

It is important that the goals that the club sets are

- **Shared.** Club members should work together to set a goal, develop strategies to meet it, and to achieve it.
- **Measurable.** A goal should provide a tangible and unambiguous point for club members to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Setting overly ambitious goals can lead to frustration.
- **Time specific.** A goal should have a deadline or timeline.

Establishing Achievable Goals

Your club will establish a variety of goals related to membership, service, The Rotary Foundation, and developing future leaders. How can you ensure that the goals established accurately reflect club capabilities and interests?

- Compare goals to previous goals that have been achieved by the club.
- Consult with other experienced club members.
- Seek the insights of appropriate district leaders.

Using the *Planning Guide for Effective Rotary Clubs*

The *Planning Guide for Effective Rotary Clubs* is a practical goal-setting tool that will help you work with club leaders to establish goals related to the key areas of club effectiveness. The planning guide also suggests common ways that clubs can choose to pursue their goals. You will have opportunities to work on the planning guide during the presidents-elect training seminar and, with other club officers, at the district assembly. A completed copy of the *Planning Guide for Effective Rotary Clubs* should be submitted to the district governor by 1 July.

The *Planning Guide for Effective Rotary Clubs* is included on pages 83-88 of this manual.

The Inventory for the Rotary Club of _____ form on pages 105-108 will help you evaluate your club in terms of the elements of an effective club. A review of these items will provide insight into your club's strengths and weaknesses and help you determine where you should focus your efforts during your year as president.

You will continue to use the planning guide throughout your year in office to help measure club progress toward established goals. You will also review it with the assistant governor and district governor throughout the year, during club visits.

Developing a Plan of Action

Establishing goals is the first step toward ensuring your club is effective and successful during your year in office. As president, you must also work with other club leaders to ensure steady progress is being made toward achievement of goals as envisioned. The following steps can help you to motivate club members to work together to achieve a goal:

- Outline **specific actions** needed to achieve this goal.
- Establish a **time frame** for each strategy.
- Determine **who is responsible** for implementing each step.
- Establish the **criteria for measuring your progress** and success.
- Consider the **resources and tools** that can help you to achieve your goal.
- **Evaluate** the success of your strategy to learn how to better achieve subsequent club goals.

Working with Club Leaders

An important resource available to a Rotary club is its members. During your term, you will work with elected club officers and the committee chairs you've appointed to successfully achieve club goals and objectives for the year.

Your Responsibilities

- Build a club organization that reflects the needs and goals of the club.
- Identify the skill sets needed by Rotarians to serve as effective club leaders.
- Prepare the club's leadership team for the coming year.

Working with the Club's Board of Directors

The club's board of directors is its governing body and is comprised of the president, vice president(s), president-elect, secretary, treasurer, the immediate past president, and in some cases a number of other club members specified in club bylaws. While you do not choose the board of directors, they will work closely with you to carry out plans and achieve club goals.

The club's board of directors has the following responsibilities:

- Act as a club budget or finance committee to
 - Develop a budget that provides a realistic amount of money for each committee and club activity
 - Approve all expenditures not accounted for in the club budget
- Ensure that potential club members meet qualifications and can hold a classification.
- Inform the proposer of a decision regarding membership, through the club secretary, within 30 days.
- Review the program and policies of the club to ensure that they are being implemented effectively.
- Consider new and creative ways to promote the Object of Rotary.
- Assess current trends in the community and the world and evaluate how the club can pursue its goals in regard to these trends.

While much of the business of the board can be administered at regular club meetings, the board's planning and budgeting functions are best handled at special meetings.

Working with the Club Secretary

The club president works with the club secretary to plan the club's weekly meeting agenda as well as the long-term agenda for the club. To guide members toward achieving the club's goals, the club president needs to keep up-to-date with data and trends that the club secretary is tracking on a regular basis. Toward this end, you should be familiar with the duties of the club secretary, which the Recommended Rotary Club Bylaws prescribes as follows:

- Keep membership records.
- Record attendance at meetings.
- Send out notices of meetings of the club, board, and committees.
- Record and preserve minutes of the meetings.
- Receive, complete, and return the semiannual report of membership and pay dues to Rotary International on 1 July and 1 January.
- Report new members, terminations, and other changes in membership to the RI general secretary on a regular basis.
- Report membership and attendance data monthly to the district governor.
- Collect and remit to RI the subscriptions to *THE ROTARIAN* or official regional magazine (except in Canada, Central America, the Dominican Republic, Ecuador, Paraguay, the United States, Uruguay, and Venezuela, where this is included with dues payment).
- Work with successor to ensure a smooth transition between Rotary years.
- Perform other duties that pertain to the office.

While the duties of the club secretary are administrative, in many ways they capture the current status of the club. For example, because the club secretary maintains attendance records, he or she may be the first to notice a trend that is cause for concern. As the club secretary collects and distributes a variety of information, this officer is therefore able to facilitate the coordination of club activities.

The *Club Secretary's Manual* (229-EN), which is part of the *Club Officers' Kit* (225-EN), should be given to incoming club secretaries to assist them with their responsibilities in the coming year. Tear sheets in the *Club Secretary's Manual* containing guidelines and assistance for the club treasurer should be shared with this officer.

If the club has no treasurer, the secretary performs these functions.

Each chapter of this manual contains brief descriptions of the responsibilities of related committees. For example, there is a description of the role and responsibilities of the club public relations committee in the public relations chapter.

Working with the Club Treasurer

Healthy club finances play an important role in the success of every club, and the club president needs to be aware of the financial condition of the club at all times. By meeting regularly with the club treasurer, you can take early corrective measures to ensure that the club remains financially viable.

The treasurer manages the club's financial transactions, maintains club financial records, and helps to plan the club's budget. According to the club's by-laws, the treasurer has the following duties:

- Maintain custody of all club funds.
- Account for all club funds to the board of directors, upon request, and at the end of the year.
- Work with successor to ensure a smooth transition between Rotary years.
- Perform other duties related to the office.

Working with the Sergeant-at-Arms

To conduct effective weekly meetings, you often must rely on the sergeant-at-arms to keep the meeting running smoothly, with few interruptions. The sergeant-at-arms has the following duties:

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

Working with Club Committees

Club committees plan, promote, and implement activities and projects that sustain the club and provide service to communities around the world. If the club's committees do not function effectively, the club will not be able to reach many of its goals. As the club's principal leader, the club president is expected to counsel and guide each committee so that they reach the goals set for the year. You need to closely monitor the activities and progress of each committee and provide motivation and leadership to the committee where necessary.

Club Committees

Selection and preparation of the club committee chairs who will serve during your year is an important responsibility. The club committee structure should support the club's goals and objectives for the year. Committees should be consolidated or disbanded if they do not serve a purpose.

The following page contains the suggested committee structure for a Rotary club and an alternate structure based on the functional needs of a club. Club leaders are urged to adapt these models to individual club needs. In a small club it may be necessary to combine committees. For example, the club bulletin committee might be combined with the magazine committee.

In order to alter your club's committee structure you must amend your club's bylaws. They may be amended *at any regular club meeting*. The club must meet the following requirements:

- A quorum must be present.
- 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 the RI Constitution and Bylaws.

Your Responsibilities

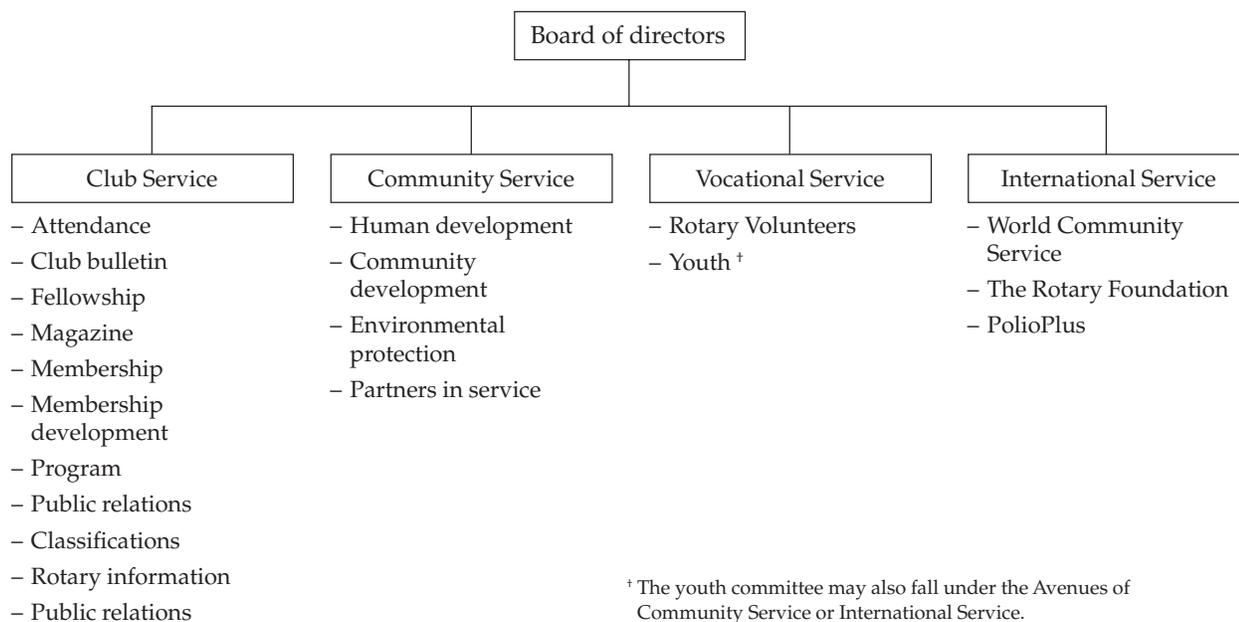
- Review goals using the *Planning Guide for Effective Rotary Clubs* and the club committee structure as outlined in your club's bylaws.
- Determine whether the current club committee structure effectively supports the goals for the coming year.
- With the approval of the club, work to amend the club bylaws to accurately reflect the club's organizational needs if necessary.

You can make club committees more effective by doing the following:

- Define the purpose of each committee.
- Consolidate, eliminate, expand, or add committees as needed.
- Appoint committee members based on their professional abilities, personal interests, and talents.
- Limit committee size to the actual number of persons required to fulfill the committee's purpose.
- Establish a concrete assignment for each committee.
- Encourage committees to keep records of meetings, plans, decisions, and results.
- Participate in committee meetings when requested or when the situation requires.
- Solicit feedback from committees.

Club Committee and Subcommittee Structure

Based on the Recommended Rotary Club Bylaws and the Rotary Code of Policies



Optional Club Committee and Subcommittee Structure

Based on functional grouping ††



Selecting and Preparing Committee Chairs

When appointing committee chairs, consider the following qualities:

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

Preparing Committee Chairs

As club president, you have the responsibility of ensuring that committees are well prepared at the beginning of the year. Strongly encourage all club leaders to attend the district assembly, which is designed to prepare them with the skills and knowledge required to lead effectively. District assembly sessions focus on improving club effectiveness in the key areas of membership, service, The Rotary Foundation, public relations, club administration, and fundraising for club service projects. The district assembly also provides club leaders with an opportunity to build their team through goal-setting and problem-solving exercises.

In addition to promoting attendance at the district assembly, you can prepare committee chairs by taking the following steps:

- Distribute the *Club Committee Manual* (226-EN), which contains information regarding the roles and responsibilities for each club committee. Give copies of the appropriate sheets to each of the chairs as soon as they have accepted their assignments.
- Ensure that files from past years have been shared with new chairs.
- Encourage new committee chairs to contact their predecessors to benefit from their experience.

Monitoring Progress

To sustain club committees, maximize their potential, and encourage their continuing effectiveness, it is important to follow these steps:

- Review the status of each committee regularly.
- Motivate committees to take on new challenges.
- Coordinate committees' action.
- Respect the direction of a committee when it is different from what you might choose, so long as it is sound.
- Congratulate and thank chairs and members when they complete tasks.

3 Club Administration

Your Responsibilities

- Be familiar with the administrative policies and procedures that serve as a framework for operation of a Rotary club. This includes knowing
 - How the Standard Rotary Club Constitution provides a model framework for the functioning of a Rotary club
 - How to apply the Standard Rotary Club Constitution to key aspects of club administration including meetings, attendance, and admission fees and dues
 - How the club bylaws provide additional provisions for the governing of the club
 - The additional provisions in the club bylaws related to the duties of club officers responsible for club administration
 - The process for amending club bylaws
- Fulfill the administrative requirements to the district and RI.
 - Know the reports for which the club is responsible.
 - Understand how the information contained in reports can be used to assess important club trends.
 - Work closely with the club secretary to ensure that required reports and forms are filed with RI and the district in a timely manner.
 - Understand how to access and update club records using Member Access.
- Understand the role of the governor and assistant governor in supporting the club.
- Develop new ideas for weekly club programs that will interest club members.
- Oversee the responsible management of club finances.

RI Reporting Requirements

Every Rotary club is required to submit reports and information to Rotary International. These include:

- Semiannual reports — Due on 1 July and 1 January, semiannual reports certify the number of club members to the RI Board of Directors. A check or draft* covering per capita dues, payments for individual and club subscriptions to *THE ROTARIAN*, Council on Legislation fees, and insurance (if applicable) should accompany the form. Payments can also be made via Member Access or by wire transfer.
- Changes in membership can be reported on a regular basis using Member Access.
- Changes in club officer or meeting information can be reported on a regular basis using Member Access.
- Information for the *Official Directory* (007-EN) must be submitted to RI by 31 January.

More information about club reporting requirements can be found in the *Club Secretary's Manual* (229-EN).

Additional Reporting Requirements

- Submit monthly attendance percentages to the district governor no later than 15 days following the last meeting of the month.
- Notify another club of a Rotarian who is moving to its locality.

Preparing for Important Events

Throughout your year as club president, you'll need to prepare for many events, including:

- Weekly meetings
- Club assemblies
- Meetings with the assistant governor
- The official visit of the district governor

You also should promote district and international events during weekly meetings, at club assemblies, and in the club bulletin. These important meetings

- Provide a unique opportunity for Rotarians at the club level to learn about the broader scope of Rotary activities at the district level and beyond
- Serve as forums to discuss club and district projects and to develop project partnerships with other clubs in the district and in the Rotary world
- Offer the potential for fellowship beyond the club level

Be sure to promote participation in the following district and international Rotary events.

District Assembly

The district assembly provides incoming club committee chairs, secretaries, treasurers, and presidents-elect with the necessary skills and knowledge to help their clubs more effectively pursue club goals.

* To ensure proper credit, make certain that all payments to RI include your club number and the invoice number.

District Conference

The district conference is held in each district to further the program of Rotary through fellowship, inspirational addresses, and the discussion of matters related to the affairs of clubs in the district and Rotary International. Clubs are strongly encouraged to strive for broad representation of their club at the conference.

District Leadership Seminar

Held in conjunction with the district conference, the purpose of the district leadership seminar is to develop Rotarian leaders within the district who have the necessary skills, knowledge, and motivation to serve in Rotary beyond the club level. Past club presidents and club leaders of three or more years are encouraged to attend.

District Rotary Foundation Seminar

The purpose of this meeting is to provide key information about The Rotary Foundation and encourage increased program participation and financial contributions at the club level. The seminar targets club Rotary Foundation committee members and other interested Rotarians.

District Membership Seminar

The district membership seminar provides district and club leaders with the necessary skills, knowledge, and background to support the clubs in the district in sustaining and increasing their membership base.

Rotary International Convention

This annual meeting is held to inspire and inform all Rotarians to develop Rotary at the club and district level. This convention also constitutes the annual meeting of Rotary International.

Developing Weekly Club Programs

Weekly meetings form the core of Rotary club activity. These meetings provide an ideal opportunity to

- Update members on important Rotary information
- Promote club projects, activities, district meetings, and events
- Increase fellowship

Remember that club members are busy individuals whose time is valuable. Meetings that are organized and feature interesting, relevant programs will

- Demonstrate to members that the time and resources that they have allocated to attend meetings were well invested
- Enhance personal Rotary knowledge
- Reinforce the value of continued membership
- Make them more aware of and connected to their local and world community

More information about these meetings can be found in the *Manual of Procedure* (035-EN).

Ensure that weekly meetings are well planned by doing the following:

- Develop an agenda for each regular weekly meeting, ensuring that each meeting includes time for an address or program as well as fellowship.
- Prepare contingency plans in case scheduled programs are cancelled.
- Begin and end the meeting punctually.

The program should 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. In order to enhance weekly programs:

- Ensure that all programs are applicable to Rotary.
- Determine programs well in advance (ideally before the year begins).
- Relate programs to current club projects, activities, and concerns, when possible.
- Consider rotating the responsibility of arranging programs.
- Use the Rotary calendar as a guide to arrange special observance programs (for example, a program by a former Rotary Foundation Ambassadorial Scholar* might be presented during Rotary Foundation Month in November). Rotary special observance dates, weeks, and months are listed on the inside back cover of the *Official Directory* (007-EN) and are incorporated in the Club President's Monthly Checklist included as part of this manual.
- Devote one meeting per month to communicating Rotary information, Rotary education, and leadership training to members.

Guidelines for Developing Weekly Meetings

The following is a suggested weekly meeting guide. You should adapt it to the needs of the individual club.

1. Opening
 - According to local custom
2. Meal and Fellowship Period
3. President's Time
 - 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 club-wide projects. Take care not to discuss details that are more properly discussed at committee meetings, club assemblies, or meetings of the club's board. Finish pending club business before addressing new business.
4. Program
 - Introduction of speaker (by chair of the committee responsible for the program)

* A list of Rotary Foundation alumni is available from the district Rotary Foundation chair.

- Speaker’s presentation
 - Closing remarks by president
5. Adjournment

Using the Rotary Calendar

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 the RI Convention can be summarized. Programs can also be planned to occur at the same time as these special observances held during the Rotary year:

Special observances on the Rotary calendar are incorporated in the Club President’s Monthly Checklist (pages 99-104).

- Literacy Month (July)
- Membership and Extension Month (August)
- New Generations Month (September)
- Vocational Service Month (October)
- The Rotary Foundation Month (November)
- World Interact Week (week of 5 November)
- Family Month (December)
- Rotary Awareness Month (January)
- World Understanding Month (February)
- Rotary anniversary and World Understanding and Peace Day (23 February)
- World Rotaract Week (week of 13 March)
- Magazine Month (April)
- Rotary Fellowships Month (June)

Club Assemblies

A club assembly is a meeting of all club members, including the club’s officers, directors, and committee chairs. As president, you are responsible for planning and conducting club assemblies. Frequent club assemblies can be important factors in a club’s effectiveness. A club assembly allows for

- Strategic planning
- Coordination of committee activities
- Greater awareness of how club plans are actually implemented
- Informal discussions that stimulate creative solutions and activities
- Ongoing education about Rotary and its programs
- Periodic review of the club’s strengths and weaknesses

Club Assembly Defined

- The club assembly is the club’s primary planning and consultative body.
- It is held to discuss the club’s program and activities or for member education.
- Reports by key leaders form its core.
- Selected items from different committees and subcommittees can also be presented.

- It should focus on the issues facing the club as a whole. Challenges that face specific committees should be related to the club’s overall welfare.
- The club president, or other designated officer, presides at club assemblies.

Relevant Topics for Discussion

- Service projects and activities
- Membership growth and retention strategies
- Attendance at the district conference or other district and RI meetings
- Rotary programs
- Open forum

Scheduling Club Assemblies

Many clubs hold monthly assemblies, but experience has shown that four to six club assemblies during the year may be the most effective number. The following schedule is suggested.

| Immediately following the district assembly (before 1 July) | After 1 July | Two weeks before the official visit | During the official visit* | Mid point of Rotary year (January/February) | After the district conference |
|--|--------------------------------------|-------------------------------------|---|---|---|
| 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. The president-elect presides over this club assembly. | Discuss and adopt plan for the year. | Prepare for the official visit. | Discuss club status with the district governor. | Review the club’s progress toward goals and determine the club plan for the rest of the year. | Ideas and suggestions received at this meeting can be implemented to help bring club plans toward completion. |

The Official Visit

The governor is required to visit each club in the district. This personal visit has several purposes:

- Focuses attention on important Rotary issues
- Provides special attention to weak or struggling clubs
- Motivates Rotarians to participate in service activities
- Recognizes personally the outstanding contributions of Rotarians

Scheduling the Official Visit

If possible, a visit should be scheduled to coincide with an important club-wide event to maximize the impact of the governor’s presence. Such events might include:

- Charter nights
- Induction ceremonies
- New member orientation programs
- Citation or award programs

* It is suggested that the assistant governor visit clubs a minimum of four times a year. Some clubs use these visits as opportunities for club assemblies.

- Rotary Foundation events
- Intercity meetings

Preparing for the Official Visit

The official visit can be an exciting time for the club, providing opportunities to learn about important issues facing Rotary and to discuss possible solutions to pressing club issues. To ensure the widest possible participation by club members:

- Announce the forthcoming 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 to be presented by the governor (for example, Paul Harris Fellows).

The purpose of a visit by the district governor or assistant governor is to provide support for club effectiveness. The Rotary Code of Policies states that not allowing a visit by these Rotary leaders is considered one of the “failure to function” factors.

Club leaders must work together to create the basis for a thoughtful discussion on important club topics and issues that would benefit from the governor’s knowledge and experience. To establish this foundation, it is important to implement these steps:

- Review the 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.

Working with the District

The District

According to the *Manual of Procedure* (035-EN) the district exists “to help the individual Rotary club advance the Object of Rotary . . .” The primary responsibility of leaders in the district is to support effective clubs. Rotary districts do this by

- Providing guidance to clubs on various issues such as membership or service projects
- Introducing clubs that have similar issues or projects
- Serving as a resource on a wide variety of topics
- Providing an opportunity for Rotarians to serve on district-level committees
- Sharing detailed information with club committees and members
- Coordinating Rotary Foundation programs, such as Ambassadorial Scholars or Group Study Exchange

The District Governor

The administration of clubs in a district is under the direct supervision of the district governor. In relation to clubs, the district governor

- Provides advice, inspiration, and motivation to help clubs become more effective
- Keeps clubs and their officers apprised of district activities and opportunities

District Leadership Team

Additional resources for clubs at the district level include assistant governors and district committees.

Each district governor appoints a group of assistant governors to help clubs operate effectively and achieve their objectives. Each assistant governor is responsible for working with four to eight clubs in a given geographical area. The following duties are recommended for an assistant governor:

- Assist presidents-elect in identifying club goals using the *Planning Guide for Effective Rotary Clubs*.
- Review periodically the progress made toward goals that club presidents established in the *Planning Guide for Effective Rotary Clubs* and provide counsel and guidance when necessary.
- Visit each club at least once every quarter and hold regularly scheduled meetings with club presidents and secretaries to discuss club business and related issues.
- Schedule and plan for the governor's official visit to a club.
- Represent the governor at club assemblies related to the official visit.
- Encourage clubs to follow through with suggestions from the governor.
- Act as a liaison between the governor and clubs.
- Assist clubs with service projects.
- Identify and encourage the development of future district leaders.

While the structure of each district varies, district committees have been created to help clubs achieve their various goals by providing them with specialized information and expertise. These district-level committees include:

- Membership development
- Extension
- Finance
- Programs
- Public relations
- District conference
- The Rotary Foundation
- RI Convention promotion

Managing Club Finances

Rotary clubs are expected to handle their finances competently. Maintaining records and financial statements, developing a balanced club budget, and conducting an annual audit will help ensure your club's financial affairs operate smoothly.

Your Responsibilities

As club president, you must work closely with the club's board of directors, the club secretary, and the club treasurer (if the club has one) to:

- Develop a club budget before your term begins and then monitor expenditures against it.
- Ensure that all disbursement checks are signed by two people. Make sure your club's bylaws outline the process for disbursing funds.
- Provide a proper accounting for club expenditures throughout the year.
- Have a thorough annual club audit of all the club's financial transactions prepared by a certified public accountant or other qualified individual.
- Submit a comprehensive financial statement to the club regarding its financial status in June, before the beginning of the next Rotary year.

As club president, you must also ensure that your club's dues structure and policies on fining do not work against your club's financial health or its membership goals. If this is the case, it may be necessary to amend the club's bylaws.

Working with the Treasurer

A club treasurer (or club secretary if your club does not have a treasurer) is an important resource in helping to maintain a club's financial health. The treasurer is charged with these tasks:

- Maintaining club financial records
- Managing the club's financial transactions (receiving and disbursing funds)
- Maintaining custody of all club funds
- Preparing financial reports
- Assisting in the development of the club budget
- Working with successors to ensure a smooth transition between Rotary years

Club Committees Related to Club Administration

Ensuring effective club administration is a collaborative effort. As club president, you lead this effort while the club secretary and various club committees carry out many of the administrative duties. The following committees and their responsibilities are outlined in the Recommended Rotary Club Bylaws. If your club has amended its bylaws, its committee structure may differ.

More information about the club treasurer's duties and role within the club can be found in the treasurer's section of the *Club Secretary's Manual* (229-EN).

Attendance Committee

- Encourages attendance at regular club meetings or regular meetings of other clubs when a member is unable to attend the home club
- Keeps all members informed of attendance requirements
- Works to rectify conditions that contribute to unsatisfactory attendance
- Promotes attendance by all club members at all Rotary meetings, including the district conference, district training meetings, intercity meetings, and RI Convention

Club Bulletin Committee

- Reports news of the club, its members, and Rotary around the world through the weekly club bulletin
- Stimulates interest in the club's activities and promotes attendance
- Announces the program for the upcoming meeting
- Relates highlights of the previous meeting
- Promotes fellowship
- Contributes to the Rotary education of all members

Club Service Committee

- Guides and assists members of the club in carrying out their club service duties
- Coordinates the work of all committees related to club service

Fellowship Activities Committee

- Promotes acquaintance and friendship among club members
- Promotes participation by members in the club's recreational and social activities
- Welcomes visiting Rotarians and guests

Magazine Committee

- Stimulates interest in THE ROTARIAN or a Rotary regional magazine
- Plans an activity to observe Magazine Month (April)
- Arranges for brief monthly reviews of the magazine's contents during regular club programs
- Encourages use of the magazine when inducting new members
- Provides a copy of the magazine to non-Rotarian speakers at weekly or other meetings
- Obtains subscriptions for libraries, hospitals, schools, and other reading rooms
- Sends news and action photographs of club projects to the editor of THE ROTARIAN or a Rotary regional magazine

Program Committee

- Prepares and arranges the programs for all regular and special meetings of the club
- Designs and balances these programs to ensure that they are relevant and meaningful to club members

Club Administration Resources

Online Resources

RI Web site (www.rotary.org) — Contains a wealth of RI information.

Member Access — An online tool accessed from the RI Web site which club presidents and secretaries can use to perform administrative functions for their club, including updating club and membership data, paying club dues, searching an online version of the *Official Directory* (007-EN), and viewing reports related to Rotary Foundation contributions.

Many RI publications and forms are available for free download from the RI Web site, www.rotary.org.

Reference Publications

Catalog (019-EN) — A working list of RI publications, audiovisual programs, forms, and supplies, updated annually (also online at www.rotary.org).

Club Committee Manual (226-EN) — A component of the *Club Officers' Kit* (225-EN) that includes an overview of the responsibilities and general guidelines for club committee chairs.

Club Secretary's Manual (229-EN) — A component of the *Club Officers' Kit* (225-EN) that includes an overview of the responsibilities of the club secretary, as well as information about the role of the club treasurer.

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.

Official Directory (007-EN) — Includes contact information for RI officers, committees, and administrative personnel; listing of districts and governors worldwide; alphabetical listing within districts of clubs with names of presidents, secretaries, meeting times, and locations (online version available to club presidents and secretaries through Member Access).

Visual Identity Style Manual (547-EN) — The standard reference for the design of publications at all levels of Rotary and the proper use of Rotary marks and emblems.

News Publications

Governor's monthly letter — A letter sent by the district governor to inform and motivate club leaders and recognize excellence at the club level.

THE ROTARIAN or Rotary regional magazine — The official magazine of RI published monthly. In addition to THE ROTARIAN, 30 regional magazines, published in 22 languages also serve Rotarians around the world.

Rotary News Basket (546-EN) — A weekly report of Rotary news and short features.

Rotary World (050-EN) — An eight-page newspaper published for Rotary club, district, and international leaders.

RI Staff Contacts

Club and District Administration representatives — Key RI staff members at RI World Headquarters and international offices who can answer many administrative questions. For a list of international offices and RI staff contacts, consult the *Official Directory* (007-EN) or the RI Web site.

4 Membership

An effective club is able to sustain and/or increase its membership base. A 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 the club's membership base.

A comprehensive membership development strategy must incorporate well-developed plans in the following areas:

Recruitment — Identifying and inducting qualified candidates for membership

Retention — Ensuring that existing members remain motivated and committed to Rotary

Organizing new clubs — Identifying opportunities for new clubs in your area and acting as a sponsor for new clubs

Your Responsibilities

- Make membership a priority throughout your entire year as president.
- Develop a comprehensive membership plan.
- Ensure that your club has a new member orientation program to welcome new members into the club and involve them in club activities.
- Know your members. Each member's reason for joining Rotary is different. As the club's leader, solicit regular feedback from club members to ensure that the club is meeting members' interests and expectations.
- Take advantage of the variety of resources available to support membership development, new member orientation, and membership retention efforts.
- Seek opportunities to organize a new club in your area.

Membership Recruitment and Induction

Proposing new members is the *responsibility of all Rotarians*. New members bring important benefits to the club including:

- Fresh ideas and enhanced energy
- Long-term continuity to the club and Rotary
- A more accurate representation of the community
- Replacements for members lost through natural attrition

A larger club composed of knowledgeable, experienced members and committed new members will increase the club's capacity to

- Serve the local community and communities around the world
- Support The Rotary Foundation through program participation and financial contributions

Your Responsibilities

As club president, it is your duty to make growth a priority for all club members. You can raise awareness of the importance of recruiting new members by taking these steps:

- Inform members that increasing the club's membership base is one's personal priority.
- Lead by example — personally recruit a new member during the first month of the Rotary year — and encourage club committee chairs responsible for membership to do the same.
- Ensure that the club board of directors understands the importance of membership growth and makes it a special concern throughout the year.
- Appoint active, knowledgeable committee chairs.
- Set ambitious but attainable membership recruitment goals.
- Conduct a club assembly on the need for new members and the best ways in which to recruit them.
- Encourage a fair and comprehensive representation of the community.
- Promote participation in the district membership seminar.
- Encourage club members to discuss Rotary and its goals with friends, family, and colleagues and to ask those who would make good members to join Rotary.
- Promote community awareness of the club and its activities. (Improving your club's public image will be discussed in greater detail in chapter 8, "Public Relations.")

Developing an Effective Recruitment Strategy

An effective membership recruitment strategy follows these four steps:

1. **Identify** all potential candidates for membership. Consider all qualified candidates. When seeking members, clubs should look to the following resources:
 - Prominent area businesses and corporations in the area
 - Professional and trade associations
 - The chamber of commerce

Information about selecting and inducting new members, including a sample induction ceremony, can be found in the *Club Committee Manual* (226-EN).

- Local and regional government offices
- Business associates
- Leaders of other nonprofit organizations
- Rotary Foundation alumni
- Current and former Rotaractors

The broad range of professions and members represented in a club means wide-ranging types of experience and knowledge. This diversity enables the club to use the expertise of its members to be more effective in its many pursuits.

One way to ensure professional diversity in your club is to regularly conduct classification surveys so that your classification list accurately represents the community. The presence of diversity in a club should be noted as an accurate reflection of the community.

2. **Inform** prospective members about Rotary, including its history, ideals, and information about the club and its activities. Focus on the benefits and responsibilities of membership as well as the opportunities for service Rotary provides. (For more information, see “New Member Orientation” below.)

Inviting candidates for membership to a Rotary club meeting is an excellent way for potential members to meet Rotarians. Such a visit allows them to see the benefits and commitments that accompany membership.

3. **Invite** candidates to join in a manner that highlights their personal interests and motivation for joining, not those of their sponsor. Membership is by invitation only. Rotarians must ask people to join.
4. **Induct** new members in a ceremony that is dignified and meaningful. Assign an individual mentor to the new member to help oversee the process of assimilation into the club.

Membership Recruitment Strategies

Club membership recruitment goals and plans can be strengthened by

- Reviewing the five-year membership profile of the club with the district governor or assistant governor
- Visiting RI’s Web site for membership recruitment strategies that have worked for other clubs

New Member Orientation

The process of new member orientation should begin immediately after induction. As club president, you must work with the relevant club and district leaders to devise goals and strategies that ensure new members become part of the club.

Communicating Basic Information

One of the first steps in any new member orientation program is informing new members of the benefits, responsibilities, and opportunities for service that arise from Rotary membership.

Refer to the *Membership Development Resource Guide* (417-EN) for more information on educating and involving new club members.

Involving New Members

A helpful way to integrate new members into the club is to involve them in club activities from their very first day as Rotarians. Active, involved members will value their participation and feel a true connection to the club. The following methods engage new members in club activities:

- Appoint them to serve on an active committee immediately after induction. This can be most effective if you
 - Personally introduce the member to the committee chair
 - Ensure that the committee chair assigns the new member a specific task and explains the timing and extent of that assignment
 - Supply the new member with a job description for the assignment
- Encourage them to participate in a service project.
- Assign new members to be official greeters or to introduce speakers at the weekly meeting.
- Assign a mentor to each new member.

Membership Retention

While bringing new members into the club is important, ensuring that they remain dedicated and enthusiastic is just as valuable. A high turnover rate in existing clubs is one of the most pressing membership issues facing Rotary today. Closely monitor trends regarding attendance and participation in club activities as such trends can highlight concerns that may need to be addressed.

Keeping members apprised of changes and opportunities will ensure that they remain in the club as challenged, motivated, and enthusiastic members. Members who are dedicated and motivated support the effective functioning of the club and are also more likely to attract new members.

Your Responsibilities

- Make continuing education of members a club priority.
- Involve the following committees in membership retention efforts:
 - Membership development committee
 - Rotary information committee
 - Public relations committee
- Appoint a Rotary information committee chair who is enthusiastic about updating members on the latest Rotary developments.
- Conduct a club assembly regarding member education.
- Include local and international Rotary information in every club meeting.

Membership Retention Strategies

- Invite every Rotarian to become personally involved in club projects and activities.
- Ensure that club programs and projects are relevant and interesting to members.
- Encourage club-wide participation in community service projects and Rotary Foundation programs.

- Use surveys to identify what is important to your membership and to ensure that their interests and expectations are being met.
- Assess the needs of the community to ensure projects are effective.
- Follow up with members who are missing meetings.
- Ensure that members maintain current knowledge about Rotary International and The Rotary Foundation by conducting one club program every month on Rotary information.
- Conduct multiclub meetings so club members can benefit from sharing experiences with other Rotarians.
- Make sure that club meetings are relevant and professional.
- Participate in district-level meetings and events, particularly those focused on continuing education such as the district assembly, district leadership seminar, district membership seminar, and district Rotary Foundation seminar.
- Encourage club members to review items related to continuing education in the governor's monthly letter, *Rotary News Basket*, *THE ROTARIAN*, and *Rotary World*.
- Make club meetings fun and find ways to involve family members.
- Include membership items in your club bulletin.

If a club member resigns, be sure to conduct an exit survey to determine why he or she is leaving. The results will help club leaders understand what the club does well and where improvements can be made to prevent further membership losses.

Member Satisfaction and Resigning Member questionnaires can be found in the *Club Committee Manual* (226-EN), as well as the *Membership Development Resource Guide* (417-EN).

Club Committees Related to Membership

Developing a comprehensive membership development strategy is a collaborative effort. Many different club committees must work closely with club leaders to successfully recruit, orient, and retain club members.

Selecting Committee Members

When choosing members to serve on membership related committees look for a group of Rotarians whose diversity of ages, professions, and experience best represents the club and community. Other important considerations include:

- Professional experience in recruiting, hiring, and/or sales
- Strong connections to a cross section of the community including:
 - Businesses
 - Professional associations
 - Local civic groups
 - Members of the media
 - Local government agencies
 - Other nonprofit organizations

- Professional experience related to training, education, or hospitality
- Thorough knowledge of the benefits and responsibilities of membership and the opportunities for service
- An outgoing and sociable personality

Membership issues are the primary concerns of the following committees:

Membership Development Committee

- Establishes a club goal for growth, together with the president
- Assists the president in developing a membership plan for the club
- Develops strategies to reach the established goal for growth, increases club member satisfaction
- Finds ways to promote membership retention
- Encourages all members to propose prospective members
- Promotes the district membership development seminar and membership seminars sponsored by Rotary International membership coordinators and zone coordinators
- Oversees a club assembly on membership as soon as the goals, plans, and strategies are developed
- Reviews the club roster of filled and unfilled classifications
- Presents a program on membership development and retention
- Proposes names of qualified people to the board to fill open classifications
- Plans an activity to observe Membership and Extension Month (August)
- Reminds members of the club's membership development goals regularly

Membership Committee

- Assists the board in investigating the character, business or profession, community standing, and general eligibility of all people proposed for membership
- Reports the committee's decision on all proposals to the board

Classifications Committee

- Conducts a classifications survey of the community each year as early as possible, but no later than 31 August
- Compiles a roster of filled and unfilled classifications based on the classification survey
- Reviews existing classifications represented in the club
- Confers with the board on all classification problems

Rotary Information Committee

- Provides information about the privileges and responsibilities of Rotary membership to prospective, new, and current members of the club
- Oversees the orientation of new members during their first year in the club

- Provides information about Rotary, its history, object, scope, and activities to members
- Plans an activity to observe Rotary Awareness Month (January)

Other Club Committees That Can Support Membership

Although the committees listed in this section have responsibilities directly related to membership issues, other club committees also impact club membership.

- Public relations committee — Recruiting new members is linked to effective club public relations.
- Programs committee — Interesting club programs help retain current members.
- All service committees — Involving non-Rotarians in service projects that benefit the community can help communicate the service opportunities of Rotary membership to prospective members.

Membership Resources

Recommended Materials

Rotary International offers a variety of information regarding membership, including:

The ABCs of Rotary (363-EN) — Compilation of short articles about Rotary history, traditions, structure, and programs.

Effective Public Relations: A Guide for Rotary Clubs (257-EN) — Tips and suggestions for promoting club activities.

How to Propose a New Member (254-EN) — Outline of basic procedure for selection and election of members.

Membership Development Package (916-EN) — Brochure containing membership development ideas, tools, and suggestions.

Membership Development Resource Guide (417-EN) — Basic procedures for building club membership and suggestions on how to retain members.

Official Directory (007-EN) — Annual listing of all Rotary clubs, districts, and officers; club meeting locations and times; directory of hotels and licensed suppliers of Rotary; and much more.

RI Web site (www.rotary.org) — Information on membership development, orientation, and retention strategies that have been successfully used by clubs is available in the Membership section of the Download Center.

Rotary Basics (595-EN) — A short membership education piece on what every Rotarian should know.

Rotary News Basket (546-EN) — Weekly newsletter available on the RI Web site or by mail.

STAR Program — The STAR Program is an example of a successful new member orientation program included as an appendix at the end of this chapter.

Take a Look at Rotary (867-EN) — Six-minute video designed for prospective Rotarians.

This Is Rotary (001-EN) — Brochure providing a brief overview of Rotary.

This Is Rotary (449-EN) — Comprehensive video overview of Rotary, its mission, and its service programs.

What's Rotary? (419-EN) — Wallet-size card answering frequently asked questions about Rotary.

For additional membership-related publications and material consult the *Catalog* (019-EN).

Human Resources

Additional expertise in membership development, orientation, and retention is available from these groups:

- District leaders including the district governor, assistant governor, and district committee members, especially the district membership development committee
- Rotary International membership coordinators (RIMCs) and Rotary International membership zone coordinators (RIMZCs), who serve as resources on membership issues to clubs and districts
- Rotary International committees and/or task forces
- Other clubs that face common membership challenges (beneficial to share experiences and strategies)

STRATEGIES FOR MEMBER EDUCATION

For Rotary to remain viable into the next century, we must constantly recruit and develop new Rotarians who embrace the high standards of service and ethics that have characterized Rotary from the start. There are three essential stages in the recruitment and development of Rotarians:

1. **Consideration and Selection** of qualified men and women
2. **Orientation and Education** of new Rotarians
3. **Continuing Education** for current Rotarians

Primary responsibility for educating new members belongs at the club level. The district membership chair is also a vital resource for new member education. An effective orientation program must include the following key elements:

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

Clubs should take advantage of as many different information mediums as possible, including traditional paper documents, CD-ROMs, online services including the World Wide Web and e-mail, and faxback capabilities.

The following pages describe specific recommendations and appropriate reference material for each stage of recruitment and development of Rotarians.



CONSIDERATION AND SELECTION

This stage covers three key areas: information, invitation, and induction.

Information

Clubs are encouraged to take every opportunity to introduce Rotary to all non-Rotarian visitors — by explaining Rotary International programs at meetings and providing a club profile that outlines the club's service efforts. It is the responsibility of the district governor to ensure that every club develops and distributes a club profile. This document could be added as an insert to *This Is Rotary* and presented to all visitors.

Invitation

The most important part of this stage is a personal visit to the prospective member (and spouse) preferably by the proposer and a member of the club's membership committee. The visit could be made by one Rotarian, but a second member provides additional Rotary knowledge and experience and gives the prospective member another point of contact after being accepted into the club.

During the personal visit, each prospective member should hear a clear message about what makes Rotary unique, including a simple, straightforward description of

- The international scope of our service and fellowship
- Our emphasis on high standards of character and integrity
- Our broad-based community representation
- Our attendance requirements and the club's dues structure
- Other facts deemed necessary by those making the invitation

The two Rotarians extending the invitation must be well prepared and should consider ahead of time the personal interests and abilities of the prospective member in order to highlight areas of potential personal involvement.

Induction

The induction ceremony should be dignified and meaningful. Use it as an opportunity to underscore the benefits and responsibilities of becoming a Rotarian. In addition to the presentation of a Rotary lapel pin, some carefully selected materials may also be appropriate.

An individual mentor, preferably a past president, should be assigned to the new member prior to the time of induction to help oversee the process of assimilation. Clubs may refer to the *Membership Development Resource Guide* (417-EN) for ideas on establishing a mentor relationship with new Rotarians and conducting a meaningful induction ceremony.

The following resources can be ordered from the RI *Catalog* (019-EN) and/or downloaded from the RI Web site (www.rotary.org), or obtained from official licensees whose names can be found listed in the *Official Directory* (007-EN) or on the RI Web site.

► Resources

- *This Is Rotary* (001-EN)
- Recent copy of THE ROTARIAN or Rotary regional magazine

► Resources

- All prospective members should receive
- Loaned copy of the video *Take a Look at Rotary* (867-EN)
- An additional copy of *This Is Rotary* (001-EN)
- *What's Rotary?* fact card (419-EN)
- *The Rotary Foundation Facts* (159-EN)
- Recent copy of THE ROTARIAN or appropriate Rotary regional magazine

► Resources

Materials which should be provided to the new member include:

- Rotary lapel pin
- Membership Identification Card (418-EN)

ORIENTATION AND EDUCATION

In order to provide the warm welcome essential for all new members, clubs are encouraged to develop programs such as STAR (Special Training for Action in Rotary). A general outline of this highly effective orientation program appears after the “Continuing Education” section.

In addition, all new members should be given a checklist outlining the many opportunities for gaining knowledge about Rotary and becoming involved in club activities. A sample checklist, “Welcome to Rotary,” has been provided for you. The mentor should deliver the checklist to the new member within one week of induction and provide guidance on completing each step.

New member orientation should also include several opportunities for feedback on a wide range of issues, including the process and results of the orientation program itself. Effective feedback includes a mechanism for reporting comments to the club president, the assistant governor, and the district governor as appropriate.

Consider periodic meetings between new members and the assistant governor, along with new member forums (facilitated by the RI president’s representative) at the district conference.

Consider scheduling the formal orientation programs in three sessions to enhance retention of information. Each session should cover one of three key areas

- Rotary Policies and Procedures
- Opportunities for Service
- History and Traditions of Rotary International

If you are using the STAR program, these topics could be addressed in individual committee meetings.

Rotary Policies and Procedures

1. How to propose a new member
2. Make-ups
3. Club structure
4. Club meetings
 - Regular meetings
 - Committee meetings
 - Club assemblies
 - Board meetings
 - Fellowship events
5. Attendance expectations
6. Finances (participation, contributions)
7. District structure

► **Resources**

The following items should be reviewed with and given to the new member:

- Club membership roster
- *Rotary Basics* (595-EN)
- *How to Propose a New Member* (254-EN)

Additional recommended resources to be included in the club library:

- Standard Rotary Club Constitution
- Recommended Rotary Club Bylaws

Opportunities for Service

(Club, district, and international)

1. Current club and district projects
2. RI programs
3. The Rotary Foundation programs
4. An inventory of interests

It is suggested that each new member consult with their mentor and choose a specific club committee in which he or she can become personally involved.

Clubs are encouraged to find appropriate ways to involve the spouses of new members in orientation activities. New members should also be introduced to Rotarians who have been active in programs of mutual interest.

History and Traditions of Rotary International and the Local Club

1. Origin, growth, and achievements of RI
2. Tradition of high ethical standards
3. History and achievements of local club
4. Spouse and family involvement

District governors should prepare and furnish to all clubs a district profile or fact sheet (including, but not limited to, the district committee structure and projects).

► **Resources**

The following items should be reviewed with and given to the new member:

- *Communities in Action: A Guide to Effective Projects* (605A-EN)
- *A Menu of Service Opportunities* (605B-EN)
- *You and Your Rotary Foundation* (171-EN)

► **Resources**

The following item should be reviewed with and given to the new member:

- *The ABCs of Rotary* (363-EN)

Additional recommended resources to be available through the club library:

- *Rotary in an Hour* (512-EN) audiotope
- *This Is Rotary* (449-EN) videotape

CONTINUING EDUCATION

Retaining good members is as critical to Rotary's long-term health as is the induction of new members. Your recruitment efforts will be more effective if your club has a large number of experienced and informed Rotarians in its ranks.

Research has shown that a positive program of continuing education can help to increase a club's overall retention rate. Such a program would include some of the following components:

- Frequent communication of Rotary news and information
- Monthly club programs focused on continuing education
- Attendance at multidistrict meetings that address continuing education
- At least two informational club assemblies a year
- Personal involvement of Rotarians in club and district projects and activities, particularly those that require hands-on action
- District-level seminars on continuing education
- Stimulating and efficiently run weekly meetings that keep members interested in Rotary
- Promotion of fellowship and enjoyable activities within the club
- Sharing of ideas and information on Rotary programs, projects, and activities at regular committee and fireside meetings
- Attendance at meetings of other clubs

► Resources

All clubs are urged to establish and maintain a club library of current RI materials. Following is a minimum suggested list of resources that should be available to all Rotarians through their club library:

- *Catalog* (019-EN)
- *This Is Rotary* (449-EN)
14-minute videotape
- *Take a Look at Rotary* (867-EN)
6-minute videotape
- *Rotary in an Hour* (512-EN) audiotape
- *Manual of Procedure* (035-EN)
- *Official Directory* (007-EN)
- *The District Rotary Foundation Committee Manual* (300-EN)
- *Rotary Fact Pack* (267-EN), which includes the following:
 - Rotary Facts
 - Rotary Facts and Figures at a Glance
 - The Rotary Foundation
 - PolioPlus
 - Rotary History
 - Ambassadorial Scholars
 - Rotary and Peace

Please note: Other fact sheets are available by contacting the Public Relations Division at the World Headquarters.

STAR (SPECIAL TRAINING FOR ACTION IN ROTARY)

The STAR Program was developed by the Rotary Club of El Paso, Texas, USA, in 1976. It has proven to be a very effective tool for creating a better informed membership and preparing members for club leadership positions. Clubs are encouraged to adopt similar programs to promote a more involved and knowledgeable membership.

Because there is a complete annual turnover of new members, the program can be repeated every year. In addition to serving as a vehicle for Rotary information, the STAR breakfasts help new members get acquainted with each other and at least a few of the club's more experienced Rotarians. The friendly and informal atmosphere created by small group meetings leads to more questions and good discussions. In a large club, this can be a very helpful tool for promoting fellowship.

The following STAR guidelines can be adapted for use by your club:

- Each new member is placed on the STAR Committee and requested to complete a questionnaire and provide a photo. The new member's biographical sketch is then presented in the club's weekly bulletin. New members are distinguished by a red star pasted on their Rotary badge with a red ribbon attached, and experienced members are requested to sit with them at club meetings and become acquainted.
- Within two weeks of joining Rotary, all STAR members are visited personally in their place of business by the chair and/or co-chair of the STAR Committee.
- Hour-long STAR breakfast meetings are held once a month except in December. All new members are expected to attend these meetings for one year. No attendance credit for a club meeting is granted as it is a committee meeting.
- The STAR Committee is made up of the chair (usually a past district governor or past president), co-chair (the immediate past president of the club), and three or four other members who are past presidents, the president-elect, and a few continuing STAR members, if they request to stay.
- All club members are invited to attend at any time to update themselves on Rotary information and to meet the new members. In addition, members of any other clubs in the city or district are welcome to attend.
- Typical programs feature a welcome to first-time attendees, recognition of new STAR graduates, announcements of upcoming club and district activities and events, and the meeting program followed by questions and answers. Program topics include each of the four Avenues of Service, attendance, club history, The Rotary Foundation, and the programs of Rotary International. Programs are presented by directors or the committee chair responsible for the topic being covered.
- The new members of the STAR Committee are given the responsibility of organizing the "Holiday Luncheon" in December.
- Make-up meetings are held once a month immediately after the regular Rotary luncheon.
- The STAR Committee chair publishes a monthly report in the weekly club bulletin.

WELCOME TO ROTARY — Mentoring Worksheet

Name _____

The members of the Rotary Club of _____ are pleased to help you learn and explore the many facets of Rotary.

_____ has been assigned as your mentor, who will answer your questions about procedures and dates and help you succeed in providing service to others.

Completion of items listed below within six months will expand your vision about opportunities for Rotary service.

- | | <i>Date Completed</i> |
|--|-----------------------|
| 1. Attend new member orientation meeting or meetings as prescribed by our club. | _____ |
| 2. Read two or more of the following booklets (preferably all). A. <i>Rotary Basics</i> B. <i>The ABCs of Rotary</i> C. <i>A Menu of Service Opportunities</i> D. <i>The Rotary Foundation Quick Reference Guide</i> | _____ _____ |
| 3. Listen to the audiotape <i>Rotary in an Hour</i> . | _____ |
| 4. Attend one or more of the following club functions: A. Fellowship activity B. Board meeting (scheduled date(s): _____) C. Committee meeting D. Project activity E. Other: _____ | _____ _____ |
| 5. Complete one or more of the following tasks: A. Serve as a greeter at a club meeting. B. Give a classification talk at a club meeting. C. Participate in a club service project. | _____ |
| 6. Make up a meeting at another club. | _____ |
| 7. Extend Rotary to others (at least one). A. Invite a guest to Rotary. B. Propose a new member. | _____ _____ |

Date Completed

- 8. Experience the internationality of Rotary (at least one). _____
 - A. Host a Youth Exchange student for a meal or other activity.
 - B. Host a Foundation Scholar for a meal or other activity.
 - C. Host a Group Study Exchange team member for a meal or other activity.
 - D. Host a Rotarian from another country in your home.
 - E. Invite a business or professional non-Rotarian to apply for Group Study Exchange.
 - F. Invite a non-Rotarian to apply for a Foundation scholarship.
 - G. Join a Rotary Fellowship
 - H. Participate in a Rotary Friendship Exchange
- 9. Attend one or more district meetings (listed in order of priority). _____
 - A. District conference (scheduled date: _____)
 - B. District assembly (scheduled date: _____)
 - C. Foundation seminar (scheduled date: _____)
 - D. Other district meeting _____
(scheduled date: _____)
- 10. Choose a committee on which you would like to serve. _____
- 11. Accept an assignment to serve on a club committee. _____

NOTE: This form is to be reviewed with your mentor on a monthly basis and delivered to our club secretary within six months of your induction.

5 What Motivates Rotarians

Motivation is essential for effective clubs. Motivated members are actively involved in club activities, work together to make a club successful in all its aspects, and inspire others through their commitment and enthusiasm.

Your Responsibilities

- Identify what motivates club members and seek opportunities to incorporate a variety of motivating factors into club activities.
- Acknowledge the valuable contributions club members make of their time, service, and money.
- Use the recognition programs available through Rotary International and The Rotary Foundation.

Motivating Rotarians

People become involved in Rotary for a wide variety of reasons, including:

- Fellowship
- Service
- Networking
- Recognition from their peers and the community

Recognizing these motivating factors helps maintain member commitment to Rotary and encourages continued participation in club activities.

Fellowship

Fellowship is one of the main reasons people join Rotary. Although the club may conduct specific fellowship activities, fellowship should be more than an event that occurs once or twice a year. It should be a regular part of every club meeting, project, and activity.

- Encourage collaboration on a hands-on service project.
- Organize club outings and other club-wide events.

Service

Participation in local or international service projects can

- Instill a sense of pride and ownership in club activities and service efforts
- Encourage members to expand service activity by regularly discussing important issues facing the community and the world
- Demonstrate that individuals, through cooperation and through Rotary, can improve their communities and the world

Networking

Provide ample opportunity for club members to make contact with other civic-minded individuals, build business opportunities, and share expertise and advice unique to their own professions.

Recognition

Recognition can help motivate and enthuse club members.

- Promote RI and Rotary Foundation awards programs among club members and inform individuals or the club of awards for which they are eligible.
- Promote any awards that are available from your district.
- Create unique club awards to recognize members.
- Present awards and contribution recognition in a meaningful manner.

Club activities that combine these four motivating factors are particularly effective.

Recognizing Excellence

As club president, you are responsible for recognizing those club members who actively participate in service activities, strive to make the club more effective, and contribute to and support The Rotary Foundation. Recognition is important because it

- Encourages Rotarians to continue contributing and serving
- Conveys your appreciation
- Motivates others to serve and contribute
- Signifies appreciation for a commitment to a cause beyond personal gain
- Provides positive feedback to Rotarians devoted to serving their communities and the world

Both Rotary International and The Rotary Foundation offer a variety of ways to recognize the excellence and generosity of Rotarians through individual and club service awards and recognition for financial contributions.

Districts often develop their own awards to acknowledge outstanding achievement within the district. Contact your governor or assistant governor to learn about available award opportunities.

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

Presenting Awards and Recognizing Contributions

Here are some ideas 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
 - Arrange for a surprise presentation if appropriate
- 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 at a future date.

Individual and Club Service Awards

Rotary's motto is Service Above Self. Rotarians around the world work tirelessly volunteering their time individually and through their clubs to make their communities and the world a better place to live. As club president, it is essential that you recognize club members who set an example for other members through their outstanding participation in club projects and activities.

Your Responsibilities

- Develop club goals that will meet award program requirements.
- Promote award programs among members.
- Inform members of various award programs for which they or the club might be eligible.
- Communicate with district leadership regarding possible nominees in your club as soon as possible.

By acknowledging the efforts of Rotarians whose work makes a difference in the club, community, and the world, you not only encourage their continued commitment, but you also help motivate others to take an active role in helping the community and improving the club.

Individual Service Awards

Service awards available from Rotary International and The Rotary Foundation to recognize the work of individual Rotarians include the following:

- **Four Avenues of Service Citation for Individual Rotarians**

This citation provides a means for Rotary clubs to personally recognize one member in good standing for his or her outstanding efforts in the

four Avenues of Service — Club Service, Vocational Service, Community Service, and International Service. Candidates for nomination should be Rotarians in good standing in their clubs who have consistently demonstrated their support of the Object of Rotary by participating in service activities in each of the four Avenues of Service. Only one person per club may be nominated per year. Current club presidents and immediate past and current district governors are not eligible. The club president must endorse the nomination and inform the district governor when nominating a Rotarian for this award. Nominations are considered on a rolling basis. For more information, contact RI Programs staff.

- **RI Service Above Self Award***

The purpose of this award is to recognize individual Rotarians in good standing who have demonstrated exemplary humanitarian service, in any form and at any level, with an emphasis on personal volunteer efforts and active involvement in helping others through Rotary. This is Rotary International's highest honor for individual Rotarians. Only current and immediate past district governors, and current and past RI directors are eligible to nominate candidates for this award. All nominations must be received by mid-September for consideration by the RI Board of Directors. A maximum of 150 recipients are selected each year. Nominations received after the deadline will be ineligible. For specific deadline dates and award requirements, contact RI Programs staff.

- **District Service Award***

The Rotary Foundation District Service Award is given by a district governor to any Rotarian whose service to humanity through The Rotary Foundation deserves special recognition.

- **Service Awards for a Polio-Free World (regional and international)**

These awards were established by the Trustees of The Rotary Foundation in order to recognize outstanding contributions to the polio eradication effort and to encourage participation in the final eradication efforts. Regional awards for outstanding service in polio eradication, solely or primarily with the region, are made annually, not exceeding 10 per region. International awards for broad service to the cause of polio eradication also are made annually, not to exceed 10 individuals. A Rotarian may receive only one of each award. Previous receipt of a regional award is not a condition of, nor does it preclude, consideration for the international award.

- **Citation for Meritorious Service***

This Trustee award recognizes one Rotarian per district each year who has given outstanding service to The Rotary Foundation over a period of more than one year.

* As club president, it is your responsibility to notify district leadership of possible nominees for these awards. District leaders can then determine whether to proceed with an award nomination.

Work with the public relations committee to help publicize awards given to your club or Rotarians within it. Many communities feature awards for outstanding volunteers or service organizations for which your club or individual members may be eligible. Recognition of the club and individual Rotarians can improve the club's public image and membership recruitment efforts.

Nomination forms for awards are revised annually. For more information about eligibility requirements, exact deadline dates, and a wide variety of other awards, consult the RI Web site, www.rotary.org, or contact RI Programs staff and Foundation staff.

- **Distinguished Service Award***

The Rotary Foundation Distinguished Service Award is given by the Trustees for exceptional active service to The Rotary Foundation; not more than 50 Rotarians worldwide receive the award each year. Nominees must have already received the Citation for Meritorious Service Award at least four years before being nominated for this award.

- **Alumni Service to Humanity Award***

The Rotary Foundation Alumni Service to Humanity Award honors one outstanding former Foundation program recipient whose extraordinary service to humanity and professional achievements exemplify the Rotary ideal of Service Above Self.

In addition to club and district awards, Rotary International encourages clubs to present to their members the following awards as deemed appropriate:

- **Family and Community Service Award**

Club presidents may confer this award at their discretion to individuals (Rotarians and non-Rotarians alike) and organizations in recognition of outstanding service to families or communities. Presentations may be made in December during Family Month celebrations. Family and Community Service Award certificates (757-EN) may be purchased through the RI *Catalog* (019-EN).

- **Vocational Service Award**

Club presidents may present this award at their discretion to individuals demonstrating excellence in vocational service.

Club Service Awards

In addition to the awards and recognition for individual Rotarians, RI and The Rotary Foundation also offer a variety of awards to outstanding clubs that demonstrate excellence in service to Rotary's ideals. Nominations for club service awards must be submitted to Rotary International by the district governor. These awards include:

- **Presidential Citation**

The purpose of the Presidential Citation is to increase Rotary club involvement in a variety of service activities, while at the same time 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 to receive the award. The award is revised on an annual basis by the Rotary International president and traditionally highlights the RI theme for the year. Nominations must be submitted by mid-April. For exact deadline dates and award requirements, contact RI Programs staff.

* As club president, it is your responsibility to notify district leadership of possible nominees for these awards. District leaders can then determine whether to proceed with an award nomination.

- **RI Public Relations Award**

This award recognizes Rotary clubs that have generated increased awareness and understanding of Rotary through outstanding media coverage or public relations efforts. Entries must relate to a single club project, event, or single-topic campaign that improves Rotary's visibility and image within the community. Competition is open to all clubs, and selection of winning entries takes place on the district level. The nomination form and supporting materials must be received by mid-May for consideration by a review committee. For exact deadline dates and award requirements, contact RI Programs staff.

- **Significant Achievement Award**

This award recognizes outstanding club service projects that demonstrate the personal involvement of most or all club members, meet a significant local community need, and can be emulated by other Rotary clubs. No club may receive a Significant Achievement Award more than once for the same project. District governors may submit only one nomination per district for this award. The nomination must be received by mid-March in order to be considered by a review committee. For exact deadline dates and award requirements, contact RI Programs staff.

Contribution Recognition

The Rotary Foundation presents recognition to donors in appreciation of financial contributions or commitments for future contributions. Such recognition should not be considered an award, but rather an expression of gratitude for demonstrated generosity.

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 donations and support.

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

- Rotary Foundation Sustaining Member
- Paul Harris Fellow
- Multiple Paul Harris Fellow
- Memorial Paul Harris Certificate
- 100% Paul Harris Fellow Club banner
- Benefactor
- Annual Programs Fund Recognition banners
- Major Donor
- The Rotary Foundation Bequest Society
- Certificate of Appreciation

As club president, you should promote contributions by

- Leading by example (become a Rotary Foundation Sustaining Member)
- Recognizing members who become Rotary Foundation Sustaining Members, Paul Harris Fellows, and Bequest Society members at club meetings and in the club bulletin

You can access information on your club members' contribution levels through Member Access on the RI Web site.

Awards and Recognition Resources

Reference Materials

All of the following nomination forms and materials can be downloaded from the RI Web site, www.rotary.org.

Citation for Meritorious Service Award Nomination Form

Distinguished Service Award Nomination Form

Donor Recognition Booklet (189-MU) — Explains all forms of donor recognition available from The Rotary Foundation.

Four Avenues of Service Citation for Individual Rotarians Nomination Form

Presidential Citation Brochure (900A-EN)

Presidential Citation Certification Form (900B-EN)

RI Public Relations Award Nomination Form

RI Service Above Self Award Nomination Form

RI Significant Achievement Award Nomination Form

Service Award for a Polio-Free World Nomination Form

RI Staff Contacts

RI Programs staff can answer questions about RI service awards. Contact them by e-mail: riawards@rotaryintl.org; phone: (847) 866-4494; or fax: (847) 866-6116.

Rotary Foundation staff can answer questions regarding Foundation service awards. Contact them by phone: (847) 866-3303 or fax: (847) 491-9364.

Rotary Foundation Donor Services staff can answer questions about recognition for contributions to The Rotary Foundation. Contact them by e-mail: donorservices@rotaryintl.org; phone: (847) 866-3364; or fax: (847) 328-4101.

6 Service Projects

Rotary clubs develop service projects that meet the needs of their own communities and communities in other countries. Through a process of careful selection, planning, and evaluation, Rotary clubs can successfully carry out service projects that address the needs of communities around the world.

A successful service project is one that

- Responds to a real issue or need
- Improves community members' lives
- Incorporates the abilities of those who are served
- Recognizes all participants' contributions as important
- Is based on a realistic assessment of resources available
- Aims for specific goals and objectives with measurable results
- Builds working networks

Your Responsibilities

Service projects require a systematic approach in order to achieve maximum effectiveness.

- Ensure that your club is developing and conducting successful service projects by following the basic steps of conducting successful service projects (needs assessment, planning and implementation, and evaluation).
- Review the status of current club projects before your year in office to determine how they will affect your program for the coming year.

Taking these important steps will give club leaders the information necessary to select, plan, and carry out the service projects the club will undertake during your year as president.

Needs Assessment

What makes a community service project successful? Relevance. Successful community service projects must address real, current community concerns. A project need not be expensive or elaborate — just necessary. As club president, you will need to ensure that the service projects undertaken reflect community needs as well as club capabilities and interests. You will accomplish this by working with the club service leaders to do the following:

- Determine club members' interests and capabilities to help you decide which type of service activity will generate the greatest enthusiasm and participation.
- Determine what resources within and outside the club might be available to support potential projects.
- Determine which community issues can be best addressed by the club, given member interest and the financial and human resources at hand.

To learn more about working with your club and community to develop a service project, consult *Communities in Action: A Guide to Effective Projects* (605A-EN).

A needs assessment has two components: an internal assessment focused on the club and an external assessment focused on the targeted community.

Internal Assessment

It is important to consider whether a particular project fits the club's mix of skills, interests, and abilities. Through an internal assessment, club members review the following factors:

- Skills and talents of club members
- Past project experiences and the lessons learned from them
- The composition of the club, including:
 - Number of members willing to participate
 - Diversity of skills
 - Level of member interest in potential projects
 - Level of involvement club members are willing to have in community affairs
 - Satisfaction level for past projects

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

External Assessment

Another important step is conducting an external assessment, or community evaluation. Such an assessment will help Rotarians better serve their community.

To determine key areas of concern in a community examine these aspects:

- Economic situation
- Geographical setting
- Educational strengths and weaknesses
- Demographic profile
- Political conditions

To properly conduct an external assessment, club service leaders should meet with a wide cross section of community members, including:

- Local government officials and social service providers
- Community organizations and civic groups, police, and firefighters
- Educators
- Religious leaders

Meeting with these contacts will help the club gain an accurate impression of the community and the issues it faces and will also build relationships with a variety of community leaders and organizations. These groups can provide the 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.

Rotary's first service project, in 1907, entailed the construction of public restrooms in bustling downtown Chicago, Illinois, USA. While far from glamorous, the project was successful because it met a real community need.

Project Planning and Implementation

Thorough planning can minimize delays and failures of service projects. Work with service committees to ensure that committee members do the following:

- Involve and motivate club members throughout the planning and implementation process.
- Develop a detailed budget and work plan of who will be responsible for what based on the requirements.
- Supplement financial resources through well-organized fundraising.
- 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 information, see chapter 8, "Public Relations").

Initial Considerations

Consider the following questions before beginning a service project.

Which projects are club members currently involved in?

Carefully consider how a new project might affect the club's commitment to any ongoing projects.

What will be the goal of the project?

Ensure that the goal is shared, measurable, challenging, achievable, time specific, and **reflective of expressed community needs**.

Who will be involved?

Club members? Community groups? Interact, Rotaract, or Rotary Community Corps members? Families, friends, and colleagues? How will volunteers be recognized?

When will the project occur?

How much preparation time will be needed? Are there special timing considerations such as holidays or school schedules?

Where will the project occur?

Are there any special considerations such as transportation costs or safety and liability concerns associated with the project venue?

Why is the club undertaking the project?

The project must represent a meeting of community needs and club interests and capabilities in order for individuals to be willing to commit their time and money to it.

How will the club achieve its project goals?

Will additional volunteers be required? Will the club need to seek additional funding for the project? How will the club promote the project?

Selecting a Service Project on page 60 has been included to help you plan for service projects.

Once these important questions have been answered, the club will be prepared to develop an implementation plan for the project.

Successful planning and implementation involves the following steps:

- Set well-defined, measurable goals.
- Determine what can realistically be achieved, and divide project into smaller segments, if necessary.
- Assign responsibilities for accomplishing each task.
- Identify and use all available resources.
- Work with club public relations leaders to promote the project and the club's role in it.
- Keep Rotarians, community members, and beneficiaries of the project well informed.
- Communicate regularly with Rotarians, community members, and those benefiting from the project.

Reviewing Current Projects

Before your year as president begins, you should review the status of current club projects to determine how they will affect your program for the coming year.

- Assess whether projects currently underway are meeting the needs of the communities they are intended to serve. If projects will continue into your year as club president, how can they be improved?
- Determine whether club projects match the interests and capabilities of club members. Is there broad participation in the projects? If not, how can participation be increased?
- Learn from past successes and challenges. Were there any areas that require improvement? Were there successful strategies that can be replicated in future projects?

Evaluation

Evaluation plays an important role in the club's current service project and its future projects. As club president, ensure that club service leaders evaluate all project activities in which the club engages. A thorough evaluation enables the club to

- Review successes and failures
- Determine whether a project achieved its goals and objectives
- Apply lessons learned to future service projects

When evaluating a service project, it is especially important to consider the following questions:

- Did the project meet the community needs revealed in the needs assessment? If not, why?
- Were there sufficient opportunities for club and community members to participate in the project?
- Was there a balance between financial support and hands-on assistance?
- Was there adequate media coverage of the project?
- Did club and project financial resources meet the financial requirements of the project?

Consider conducting the following types of evaluation:

- **Data analysis.** Compare data from before and after the project. For example, participants in adult literacy classes can be tested at the start and end of the program, and the results can be compared.
- **Survey.** Useful for results that are not easily quantifiable. Surveys should be designed to measure changes in attitude or knowledge. For example, for a project that focuses on raising levels of AIDS awareness in a community, the club might conduct surveys before and after the project to track levels of awareness.
- **Case study.** A case study records the effects of a project on a limited number of people and can supply details that other forms of evaluation might not provide. For example, for a project that establishes a Rotary Community Corps, interview participants about how the project has affected their lives and community.

Using these three forms of evaluation together can help club members gain as much insight as possible. The more the club is able to learn about the impact of its service efforts, the more successful those efforts will be.

Ask all club members who participated in the project to write an evaluation report that is succinct, easy to understand, and practical. A copy of the evaluation report can then be sent to RI Programs staff for possible inclusion in RI publications.

A reporting form can be found in *Communities in Action: A Guide to Effective Projects* (605A-EN). Also consider listing your project on the RI Community Projects Database on the RI Web site. This database allows clubs around the world to access examples of successful projects.

International Service Projects

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

The basic strategies for international service projects are the same as for local service projects. However, because at least two clubs in different countries must work together, communication is even more critical to a project's success.

Finding an International Partner

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

- Explore the World Community Service Projects Exchange database on the RI Web site.
- Speak with the district's World Community Service chair.
- Contact your district Rotary Foundation committee chair and explore the Foundation's Humanitarian Grants Program.
- Use the *Official Directory* (007-EN) to find members of various RI committees or task forces to contact for project assistance.
- 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.

World Community Service and The Rotary Foundation Programs

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 is available for Rotary clubs with local community service projects seeking an international partner, or to 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:

- Matching Grants
- Individual Grants
- District Simplified Grants

For more information on using the Humanitarian Grants of The Rotary Foundation to help finance your international service projects, see chapter 7, "The Rotary Foundation."

More information on WCS can be found in the *World Community Service Handbook: A Guide to Action* (742-EN).

Club Committees Related to Service Projects

Service projects are the primary concern of several committees:

Community Development Committee

- Addresses issues dealing with the physical state of a community and its facilities
- Focuses on projects that deal with community centers, health facilities, infrastructure improvement, libraries, parks and recreational facilities, public facilities, safety, sanitation, schools, and urban and rural revitalization

Community Service Committee

- Coordinates the work of community service-related committees or committees working to improve the local community
- Plans community service projects that include all members

Environmental Protection Committee

- Examines the state of the environment in the community
- Develops projects that promote animal protection, beautification/cleanup campaigns, clean air, energy resource protection/promotion, forestation, noise abatement, recycling, soil conservation, toxic waste disposal, waste management, and water management

Human Development Committee

- Promotes the welfare of all people in your community
- Develops projects and service activities relating to the whole span of life by providing assistance and support to those in need
- Plans an activity to observe Family Month (December)

International Service Committee

- Guides and assists members in carrying out their international service duties
- Plans international service projects that include all members
- Provides support to RI programs that are international in scope, such as Youth Exchange and Friendship Exchange
- Plans an activity to observe World Understanding Month (February) and World Understanding and Peace Day, 23 February

Partners in Service Committee

- Recognizes the need to promote and enhance relationships between Rotarians and Rotary-sponsored organizations such as Rotaract (service club for young adults, ages 18-30), Interact (service club for young people, ages 14-18), and Rotary Community Corps (groups of non-Rotarians who wish to serve their community)
- Provides leadership training to Rotary-sponsored groups that will help them organize and carry out community development projects
- Plans an activity to observe World Rotaract Week (week of 13 March)

- Plans an activity to observe New Generations Month (September)
- Plans an activity to observe World Interact Week (week of 5 November)

Rotary Volunteers Committee

- Identifies appropriate local projects that need volunteers
- Functions as a subcommittee of the Vocational Service committee
- Enhances the use of Rotary Volunteers services
- Develops local community service projects in which Rotary Volunteers can be used

Vocational Service Committee

- Promotes high ethical standards in all vocations
- Plans vocational service activities for all vocations represented in the club
- Plans an activity to observe Vocational Service Month (October)

World Community Service Committee

- Functions as a subcommittee of the International Service committee
- Provides Rotarians with information on the World Community Service program and resources available from RI and its Foundation
- Submits projects in need of assistance or seeks projects to support on the World Community Service Projects Exchange

Youth Committee

- Coordinates club activities for youth
- Promotes Rotary Youth Leadership Awards (RYLA) events
- Promotes the RI Youth Exchange program

Service Projects Resources

Various resources are available to help your club conduct a needs assessment and to plan, implement, and evaluate service projects successfully, including:

- Service-oriented club committees (as described above)
- Project organizing committee
- Other human resources
- Information
- Finances

Project Organizing Committee

Successful service projects depend on the hard work and commitment of many people. The recommended club committee structure includes a variety of service-oriented committees. Alternately, a project organizing committee could be formed to collaborate on specific projects. The organizing committee, in cooperation with other club members, has the following responsibilities:

- Helps to devise project goals and objectives
- Maintains contact with relevant community members and organizations
- Promotes the project in both the club and the community

- Encourages widespread club and community involvement in the project
- Manages resources such as funds, materials, and club member time
- Monitors progress toward project completion
- Conducts an evaluation and completes an evaluation report

A project organizing committee should include individuals whose interests and talents best correspond to the project’s needs. If possible, include:

- Non-Rotarian community members
- Members of existing service-oriented committees
- Local Interact, Rotaract, and Rotary Community Corps members

Other Human Resources

People are the key to a successful service project. They serve as volunteers, help determine project goals, consult on community needs, and provide assistance in evaluating a project. Such human resources might include:

- Rotarians and their families
- District committees (particularly World Community Service committee and The Rotary Foundation committee)
- 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)



Information

A wide variety of information regarding service projects is available from Rotary International, including:

- *Communities in Action: A Guide to Effective Projects* (605A-EN)
- *Interact Handbook* (654-EN)
- *Menu of Service Opportunities* (605B-EN)
- RI Web site, www.rotary.org
- *Rotaract Handbook* (562-EN)
- *Rotary Community Corps Handbook* (770-EN)
- *Rotary Volunteers: Hand in Hand* video (386-EN)
- Selecting a Service Project (see below)
- *Vocational Service in Your Community* (509-EN)
- *World Community Service Handbook: A Guide to Action* (742-EN)
- World Community Service Projects Exchange (online at www.rotary.org)

For additional service-related publications and materials, consult the *RI Catalog* (019-EN).

Financial Resources

Many clubs hold fundraisers to support service projects. Other financial resources include:

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

Selecting a Service Project

1. Identify community needs.

Which social, community, or international development issues are present that members of your Rotary club can address?

Consider developing a project that addresses one of the items on the Menu of Service Opportunities for clubs. Which of these would be of most interest to the members of your club?

- **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, immunization, avoidable blindness, overseas surgeries, medical equipment donation/distribution, clinics, drug and alcohol abuse, elderly care/aging, mental health.
- **International Understanding and Goodwill** includes peace, conflict resolution, refugees, de-mining.
- **Literacy and Numeracy** includes adult literacy, education of girls, book donation/distribution, computer/technological literacy.
- **Population Issues** includes reproductive health, child-spacing, population education, prenatal health.

- **Poverty and Hunger** includes low-cost housing, homelessness, food collection/distribution, food production, animal husbandry, micro-credit, vocational training.
 - **Preserve Planet Earth** includes water sustainability, sanitation, wells, irrigation systems, recycling, tree and garden planting, solar cooking, pollution, community clean-ups, trail building/maintenance.
 - **Urban Concerns** includes crime reduction, violence prevention, immigrant assistance, prisons, traffic safety, gangs.
2. Conduct an internal assessment.

Identify your club's resources.

What special skills do club members have?

What funds are available to support a project?

What international contacts do Rotarians in your club or district have?
 3. Conduct an external assessment.

Identify community resources.

What other organizations in the community could your club work with to ensure success?
 4. Identify Rotary International and Rotary Foundation resources.

Consider RI Programs when planning your project. Program participants and resources may help your club achieve its service goals.

 - **Interact** — Service clubs for youth, ages 14-18, or of secondary school age, fostering leadership and responsible citizenship
 - **Rotaract** — Service clubs for young people ages 18-30 promoting professional development and leadership
 - **Rotary Community Corps (RCC)** — Groups of non-Rotarians working to improve the conditions of their communities with Rotary club support
 - **Rotary Friendship Exchange** — Reciprocal visit among Rotarians
 - **Rotary Fellowships** — Groups of Rotarians with common interests
 - **Rotary Volunteers** — Volunteering internationally
 - **Rotary Youth Leadership Awards (RYLA)** — Leadership development for youth
 - **World Community Service** — Assisting a service project in another country
 - **Youth Exchange** — Secondary school-age students studying/traveling abroad
 5. Consider the funding resources available to your club through The Rotary Foundation.

Investigate the possibility of obtaining a Humanitarian Grant.

 - Matching Grants
 - Individual Grants
 - District Simplified Grants
 6. Select a project and begin planning

Appoint a project organizing committee, set project goals, develop a budget and timeline, and begin implementation.

7 The Rotary Foundation

“So when you ask, ‘Can Rotarians do anything?’ I answer: They can do everything.”

— Bill Moyers

Journalist, former press secretary to U.S. President Lyndon B. Johnson, and Rotary Foundation alumnus

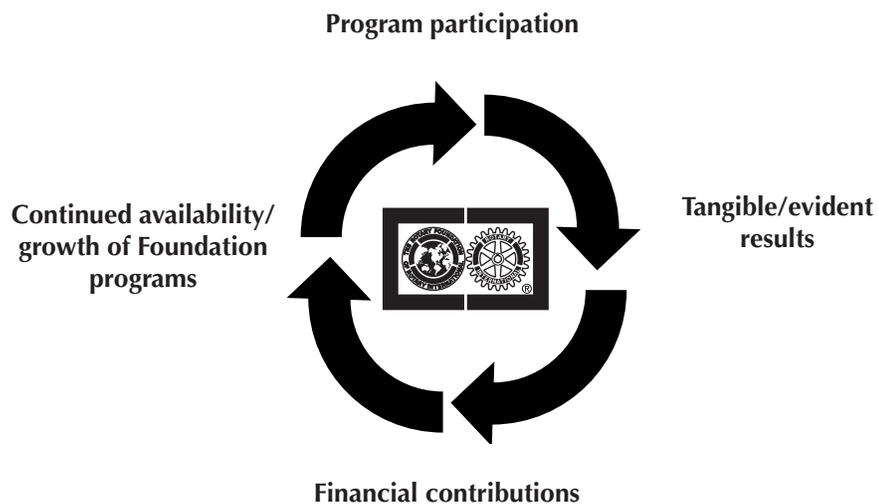
These words truly capture the spirit of The Rotary Foundation’s mission. This mission is to support the efforts of Rotary International in the fulfillment of the Object of Rotary, Rotary’s mission, and the achievement of world understanding and peace through local, national, and international humanitarian, educational, and cultural programs.

The Rotary Foundation provides clubs the opportunity to participate in and contribute to programs that make a real difference in the lives of people around the globe. It also enables Rotarians to increase world understanding and peace through meaningful cooperation with other clubs around the world. Participation in Rotary Foundation activities can help attract and retain members.

Your Responsibilities

As president, you lead your club in supporting the Rotary Foundation through both program participation and financial contributions.

- Understand the relationship between program participation and financial support of The Rotary Foundation.
- Work with club leaders to establish program participation and financial contribution goals.
- Inspire club members to support The Rotary Foundation in these two essential areas.
- Know the resources that are available to help the club support The Rotary Foundation.



Ensure that Foundation-related activities are interesting and relevant to club members. Direct participation in Rotary Foundation programs allows club members to actively pursue the mission of The Rotary Foundation and witness the tangible results of their efforts. When Rotarians directly experience Foundation programs, they can be inspired to contribute to The Rotary Foundation.

Program Participation: Educational Programs and the Humanitarian Grants Program

The program areas of The Rotary Foundation are Educational Programs and the Humanitarian Grants Program.

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 forge long-lasting relationships. Educational Programs support the mission of The Rotary Foundation by educating participants on the needs of their local and world communities and by exposing the opportunities available through Rotary to help address those needs. The newest Educational Program, the Rotary Centers for International Studies, also supports the Foundation's mission by providing Rotary World Peace Scholars with the knowledge and tools needed to overcome the obstacles to world peace through graduate studies in international relations, peace, and conflict resolution combined with practical training opportunities.

Rotarians are involved in the selection, orientation, and hosting of Educational Programs participants. Rotarians are also encouraged to maintain contact with former Foundation program participants and to foster a lifelong association with Foundation alumni.

Clubs may find that sponsoring or hosting Ambassadorial Scholars, Rotary World Peace Scholars, Group Study Exchange team members, or University Teachers can help serve as a catalyst for establishing links with clubs in other countries leading to partnerships on humanitarian projects.

Humanitarian Grants Program

The Humanitarian Grants Program funds Rotary club and district projects to improve the quality of life, providing health care, clean water, food, education, and other essential needs to a community in need. Basic criteria for Humanitarian Grant programs include:

- *Addresses a humanitarian need*, which improves the lives of individuals in a community and addresses the mission of The Rotary Foundation
- *Assists in the development of stronger Rotary networks*, through collaboration with another group on a project which will lead to future service projects
- *Involves active Rotarians*, which
 - Enables club members to learn from interaction with other project participants
 - Creates a sense of project ownership
 - Challenges members to think creatively to address project challenges
 - Raises the profile of the club
 - Instills a sense of accomplishment
 - Promotes membership retention by participating in worthwhile projects
- *Demonstrates a commitment to financial stewardship of Rotary Foundation funds*, which were donated by thousands of Rotarians

The Educational Programs include:

- Ambassadorial Scholarships
- Group Study Exchange
- Rotary Grants for University Teachers
- Rotary Centers for International Studies in peace and conflict resolution

The Humanitarian Grants Program includes:

- District Simplified Grants
- Individual Grants
- Matching Grants

Specific eligibility criteria and application forms for each humanitarian grant and education program are available through the RI *Catalog*, the RI Web site, www.rotary.org, or the district Rotary Foundation committee.

Brief 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* (219-EN).

Program Participation: PolioPlus

Rotary's most recognized humanitarian program is the initiative in support of the global eradication of polio, known as PolioPlus. Rotary's contributions to the global polio eradication effort exceed US\$500 million. 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. As club president, you can support this emphasis by ensuring that PolioPlus activities are included in the club's participation in Rotary Foundation programs.

Brief History

In 1985, Rotary International launched PolioPlus, a 20-year commitment to eradicate polio. As the polio-eradication program grew, so did Rotary's commitment and involvement. By 1990, Rotary moved from providing polio vaccine to children in developing countries to assisting health-care workers in the field, providing training for laboratory personnel to track the poliovirus and working with governments around the world in supporting the historic health drive. In 1995, the PolioPlus Partners program was created as a way for Rotarians in polio-free countries to provide direct, supplemental support for eradication activities in polio-endemic countries.

Achieving the Goal

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

- Decrease the risk of polio in your community by working with local health officials to maintain high rates of immunization.
- Contribute to the PolioPlus program to support critical global eradication needs in top-priority, polio-endemic countries.
- Participate in the PolioPlus Partners program to help provide supplemental support to Rotarians who are working to eradicate polio in their countries.
- Devote a weekly club program to the topic of polio eradication.
- Ensure club members remain informed and involved until the world is certified polio-free.

Additional information about the history, accomplishments, and remaining challenges of PolioPlus can be found on the RI Web site, www.rotary.org, or by contacting RI PolioPlus staff at polioplus@rotaryintl.org.

Financial Support

When Rotarians can see extraordinary results and play active roles in making the world a better place through education, cultural exchanges, and humanitarian projects, they understand the important role of financial support of The Rotary Foundation in making those opportunities possible.

As club president, it is essential that you explain to club members the fundamental connection between program participation and financial support. In general, clubs contribute to The Rotary Foundation in three ways:

- Gifts to the Annual Programs Fund
- Restricted gifts in support of specific programs or projects
- Gifts to the Permanent Fund

Annual Programs Fund — For Support Today

As club president, you will lead your club in establishing a goal for Annual Programs Fund giving. Annual Programs Fund contributions are the primary source of support for all of the Foundation's educational and humanitarian programs. Encourage each Rotarian to make a gift to the Annual Programs Fund every year to ensure that Rotary Foundation programs continue. Remember that people give because they are asked. Gifts in any amount are welcome and are eligible for recognition. All Rotarians are encouraged to become Rotary Foundation Sustaining Members by contributing US\$100 or more every year.

Because Annual Programs Fund contributions provide general support for all of the Foundation's educational and humanitarian programs they are often referred to as **unrestricted** gifts, which have the following characteristics:

- They are invested for a period of three years.
- The investment earnings are used to pay for the administrative costs.

Restricted Gifts

Club contributions intended for certain Rotary Foundation programs, specifically Matching Grants and PolioPlus, are considered **restricted** contributions because the intended destination of the funding is specified. The Rotary Foundation is not able to invest the gift or benefit from earnings; instead, the funds go directly to the destination specified by the club.

For example, if your club were involved in an approved Matching Grant project, it would make a contribution to The Rotary Foundation to support that specific project. Because the gift has a specified purpose, it merely flows through The Rotary Foundation and is paid directly to the project beneficiary.

While the Foundation encourages *all* contributions, your emphasis as club president should be on Annual Programs Fund giving.

| What Happens to a Gift to The Rotary Foundation | |
|--|---|
| Unrestricted Gift to the Annual Programs Fund | Restricted Gift |
| <ol style="list-style-type: none"> 1. The Rotary Foundation acknowledges the contribution by <ul style="list-style-type: none"> — Written confirmation of receipt of gifts (minimum amount of contribution varies by country) — Registration of appropriate Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, and Major Donor recognition — Provision of tax credit where applicable 2. The gift is invested for a period of three years. The earnings from the investments are used to support administration of The Rotary Foundation. 3. After three years: <ul style="list-style-type: none"> — Fifty percent of the original contribution is placed in the District Designated Funds (DDF, also known as <i>SHARE</i> funds) that the district, in cooperation with its clubs, can use to support Educational and Humanitarian Program goals. — Fifty percent of the original contribution is placed in the World Fund. The World Fund is available to all districts and supports specific programs offered by The Rotary Foundation. | <ol style="list-style-type: none"> 1. The Rotary Foundation acknowledges the contribution by <ul style="list-style-type: none"> — Written confirmation of receipt of gifts (minimum amount of contribution varies by country) — Registration of appropriate Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, and Major Donor recognition — Provision of tax credit where applicable 2. The gift is channeled to its intended destination. Examples of restricted gifts include an approved: <ul style="list-style-type: none"> — Matching Grant project — PolioPlus Partners project — Named scholarship |

The Permanent Fund — To Secure Tomorrow

A contribution to the Permanent Fund is an investment in Rotary's future. Although gifts to the Annual Programs Fund ensure the day-to-day operation of the programs of The Rotary Foundation, contributions to the Permanent Fund enable The Rotary Foundation to meet the needs of the future through an endowment. Most contributions to the Permanent Fund come in the form of major gifts of US\$10,000 or more, or as bequest gifts from a donor's final estate.

- Contributions to the Permanent Fund are invested, not spent.
- A portion of the earnings supports Foundation programs.
- The amount available to support programs grows as the principal of the Permanent Fund increases.

Club presidents and secretaries can review their club's Foundation contributions using Member Access on the RI Web site, riweb.rotaryintl.org.

Rotary Foundation Goals

Club goals should support district goals for Foundation fundraising and program participation.

Establishing Goals

The Rotary Foundation section of the *Planning Guide for Effective Rotary Clubs*, pages 83-88, has useful strategies for goal setting. The planning guide asks you to establish a goal for annual giving as well as a goal for program participation. Discuss the suggested activities with club leaders to determine additional strategies to meet Foundation goals. The earlier you begin developing your goals, the better. You will be asked to set preliminary goals during the goal-setting session of the presidents-elect training seminar. You will continue to work toward developing goals and strategies for achieving those goals during the goal-setting session at the district assembly.

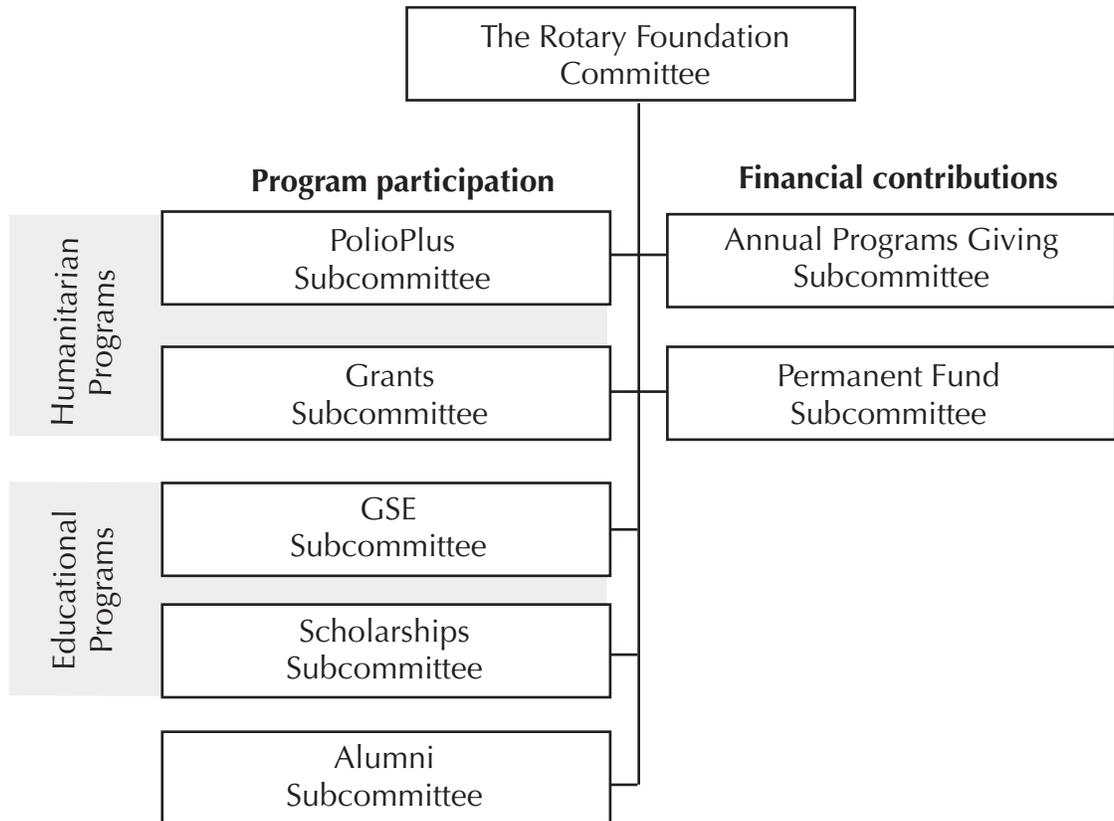
Achieving Goals

Establishing goals is just the first step. As club president, your leadership will be particularly important to ensure that steady progress is made toward the achievement of goals. Here are just a few ways to stimulate club members to support club goals:

- Inspire members through Rotary Foundation-focused weekly club programs. Contact your district Rotary Foundation committee chair to find an alumnus or volunteer to relate his or her experience.
- Know your club. Review club Foundation giving records to identify members who have not previously supported The Rotary Foundation.
- Encourage involvement by expanding current activities through Foundation programs.
- Lead by example by personally contributing to The Rotary Foundation.
- Ask members of your club to contribute to the Foundation.
- Reward participation by meaningfully acknowledging contributions and involvement in Foundation programs.

Club Committees Related to The Rotary Foundation

The following is a possible committee structure for The Rotary Foundation club committee and subcommittees and their primary responsibilities. This structure parallels that found at the district level and should be adapted to meet the needs of your club goals.



Rotary Foundation Committee

- Coordinates the activities of Rotary Foundation subcommittees
- Encourages active participation in Rotary Foundation programs
- Encourages financial support of The Rotary Foundation
- Publicizes the work of The Rotary Foundation both inside and outside the club
- Plans an activity to observe Rotary Foundation Month (November)

Annual Programs Giving Subcommittee

- Explains the relationship between Rotary Foundation Programs and Annual Programs Fund giving
- Encourages each Rotarian to make an annual contribution of US\$100 or more to the Annual Programs Fund every year
- Designs and carries out a program to achieve the club's annual giving goal

Permanent Fund Subcommittee

- Secures benefactor commitments (bequests and outright gifts of US\$1,000 or more to the Permanent Fund qualify)
- Communicates regularly with the district Permanent Fund chair, identifying prospects for major gifts within the club and helping with the cultivation and solicitation of those prospects as appropriate
- Encourages those Rotarians and friends who are able to join the Bequest Society by including The Rotary Foundation in their estate plans for US\$10,000 or more and notifying the Foundation of their intention in writing

Scholarships Subcommittee

- Knows the program objectives and application procedures for Ambassadorial Scholarships, Rotary World Peace Scholarships, and Rotary Grants for University Teachers
- Confirms with the district Rotary Foundation committee the type and quantity of scholarships and grants available at the district level and the deadline for receipt of club-endorsed applications
- Publicizes the availability of Ambassadorial Scholarships, Rotary Grants for University Teachers, and Rotary World Peace Scholarships and identifies candidates to endorse to the district
- Helps provide Rotary orientation to scholars and university teachers sponsored by the club
- Identifies host counselors for Ambassadorial Scholars, University Teachers, and Rotary World Peace Scholars coming to your district and helps promote their activities, as requested by district leadership

Group Study Exchange (GSE) Subcommittee

- Knows the objectives of the program and the application procedure
- Identifies team member candidates to endorse to the district
- Publicizes the experience of any past team members selected from the club's community and invites them to speak at club meetings
- Promotes home hosting and vocational day opportunities to club members and offers to host the visiting team
- Publicizes the visit and activities of a team visiting the local community

Grants Subcommittee

- Knows each grant program and where to find information regarding eligibility criteria and application processes
- Understands District Designated Funds (DDF), how they may be used to support grant applications, and how to obtain the district Rotary Foundation committee's approval to use them in support of club projects
- Works closely with International Service committees, such as the World Community Service committee
- Works closely with the district grants subcommittee chair to ensure that all grant applications are completed properly
- Ensures timely submission of reports for all Foundation grants the club has received

PolioPlus Subcommittee

- Sponsors a local polio immunization activity for children in the community
- Supports a PolioPlus Partners project
- Promotes PolioPlus fundraising initiatives
- Features a club program about PolioPlus
- Updates the club regularly on the status of global polio eradication efforts

Alumni Subcommittee

- Identifies appropriate alumni as potential Rotarians
- Maintains a complete list of Foundation alumni within the community
- Advises the district and RI of any changes in the contact information for Foundation alumni
- Invites Foundation alumni to participate in club activities and to speak to the club about their experiences

Determining Your Club's Committee Structure

Refer to The Rotary Foundation section of *Planning Guide for Effective Rotary Clubs* when considering how club goals relate to the club's committee structure. If your plans include applying for a Humanitarian Grant, the club may want to have a grants subcommittee. In a smaller club, the Rotary Foundation committee chair may be responsible for all aspects of Foundation support, or The Rotary Foundation and World Community Service committee responsibilities might be handled jointly. Strive to ensure that the committee structure meets club needs and that the club maintains a balance between program participation and financial contributions.

What should you consider when determining who will lead the club in pursuing Rotary Foundation goals? The following are a few considerations:

For subcommittees focused on program participation

- Experience as a former program participant (e.g., scholar, GSE team member, Rotary volunteer)
- Excellent communication skills
- Community or international volunteer experience
- International business, study, or travel experience, with ability in a second language helpful

For subcommittees focused on financial contributions

- Personal commitment to supporting The Rotary Foundation
- Financial experience (e.g., accounting)
- Fundraising or sales experience
- Presentation skills

Rotary Foundation District Resources

District Committees

Because the recommended structure for the club Rotary Foundation committee and related subcommittees is mirrored at the district level, your district should have a Rotary Foundation subcommittee to match any club-level subcommittee. Most district-level committee members are experienced and able to provide the type of context-specific guidance that may be difficult to obtain from a publication. District-level committee members may also be able to put the club in contact with other clubs in the district that may be able to assist your club. The district Rotary Foundation chair is often a past district governor, who can serve as a valuable resource.

District Rotary Foundation Seminar

The purpose of the district Rotary Foundation seminar is to educate Rotarians about opportunities available through the The Rotary Foundation. Topics discussed at the seminar are generally linked to the district's Foundation-related goals for the year.

District Designated Funds

The District Designated Fund (DDF) reflects 50 percent of the cumulative gifts that were made to the Annual Programs Fund by all individuals and clubs in the district three years ago. These funds are made available to the district for use in support of a variety of Foundation programs — for example, Ambassadorial Scholarships, District Simplified Grants, or the sponsor portion of a Matching Grant.

The district Rotary Foundation committee makes general decisions about how the district will use its DDF within a given year, often in consultation with clubs in the district. The district Rotary Foundation committee chair signs applications and requests reflecting committee decisions.

Your district may have funds available to support your club's Foundation-related activities. The district Rotary Foundation committee chair can advise you of the availability of District Designated Funds. The process for obtaining authorization to use DDF varies from district to district; however, in all districts the district Rotary Foundation committee chair must authorize the use of the funds in writing.

8 Public Relations

Clubs must ensure that the community is aware of Rotary and its activities and take positive steps to enhance the club's image. Regardless of the cultural differences from one country to another, all Rotary clubs have audiences with which they should communicate. All club members share in this responsibility.

Effective public relations can take many forms, from promotion of the club's service activities in the club bulletin to newspaper coverage of an interesting speaker who visits the club. A positive public perception of Rotary aids membership recruitment efforts and assists in attracting community support (financial and volunteer) for club service activities.

Your Responsibilities

- Appoint a club public relations committee to work with the media.
- Ensure that the club conducts projects and activities that will attract positive media attention.
- Seek publicity for successful service projects or other activities that illustrate Rotary's mission and accomplishments.
- Seek to fill any unfilled membership positions related to media classifications.
- Serve as the club spokesperson when working with the media.
- Provide regular updates to business and civic leaders, young people, and other organizations regarding Rotary's mission and the club's community efforts.
- Ensure that club members understand and carry out their responsibilities related to club public relations.
- Cultivate relationships with representatives of local media.

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

You can create a positive image of Rotary within the club by doing the following:

- Ensure that every club member is fully informed about Rotary's history and ideals and the club's programs and activities
- Encourage club members to seek opportunities to further the aims and accomplishments of Rotary through personal, business, and professional contacts

You can help create a positive image of Rotary in the community through a public relations campaign.

Starting a Public Relations Campaign

Effective public relations campaigns require time, effort, and planning. You should work with the club's public relations committee chair to develop a strategy before or at the beginning of the new Rotary year. A practical starting point for such a strategy is a timetable that outlines the plan for the year.

Targeting Audiences

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

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

What Is News?

The type of information that typically interests reporters and others in the media varies from place to place. The following subjects are generally considered newsworthy:

- Community projects or activities
- Community emergencies
- Timely human-interest stories
- Local stories that illustrate a national or global trend
- Activities of prominent community members
- Stories that have a strong visual element

The following types of Rotary stories are just some of many that can be effectively promoted:

- Outstanding volunteers
- Cooperation between people of different nationalities and cultures
- Local Rotary and/or Rotary Foundation projects
- Participants in Rotary exchange programs such as Youth Exchange, Ambassadorial Scholarships, or Group Study Exchange
- An unusual or prominent speaker at a club meeting
- Human interest stories of people benefiting from Rotary service
- PolioPlus activities, particularly in polio-endemic areas
- Projects that involve local youth or a prominent community member
- Stories with a strong, visual element

An effective way to create a public relations plan is to look at a blank calendar for the coming year and mark those dates when your club will be conducting potentially newsworthy activities, such as service projects that directly affect the community.

More information on starting a club public relations campaign can be found in *Effective Public Relations: A Guide for Rotary Clubs* (257-EN).

Working with the Media

These tips can help you prepare for contact with the media:

- Promote club service projects to local print, radio, and television reporters.
- Prepare for an interview — by knowing your key messages and points and presenting them in a clear, straightforward manner.
- Concentrate on facts, and avoid personal opinion.

Media Tools

You can use a number of media tools to enhance your club's public image.

Spokespeople. Accessible, informed, and articulate Rotarians who are well versed about Rotary and the club. As the club's elected leader for the year, you should be the club's primary spokesperson.

Press release. A brief report that answers the basic questions of who, what, where, when, why, and how. It should quickly communicate to the media information that can be used as the basis for a news story.

Photographs. If high quality, they greatly improve your press release's chance of being used. Be imaginative when taking a picture; try to convey action or tell a story. Newspapers generally require a black-and-white photo. Be sure to include a caption with the photo describing the event and naming anyone pictured. Use a professional photographer whenever possible.

Fact sheets. Valuable background information on a particular topic that helps broaden the story from a specific local example to Rotary's volunteer efforts around the globe. Rotary produces a number of fact sheets on Rotary programs. Include them in your media kits or produce one on your own.

Idea letter. More personal than a press release, it presents an idea for a story and an offer to help develop it. It should be carefully tailored to a specific reporter and medium.

News conferences. Conferences with a group of local journalists should only be called if the club has an announcement of significant interest to the community. Ordinarily, issue press releases and work with reporters on a one-on-one basis.

Rotary public service announcements. In some countries, radio and television stations are required to allot a limited amount of time to public service announcements (PSAs). They are broadcast at no cost and are used mainly by nonprofit groups to announce special events or messages of special interest. In other countries, there may be an opportunity for nonprofit groups to purchase time at a discounted price. A variety of public service announcements are available from Rotary International; consult the *Catalog* (019-EN) for more information.

Media kit. Background information that is especially useful at events and other planned activities. Ideally, the kit is a pocket folder with a Rotary identifier that contains general material about the club and Rotary, as well as information about the specific event or activity taking place.

Basic Rotary information. In any communication with the public or the media, be sure to include basic Rotary information. Too often, a Rotary activity is reported, but little about Rotary is actually communicated.

Key Rotary Messages

You may wish to use or adapt the following messages for a media interview.

- Rotary is a global network of community volunteers.
- Rotary works to improve the quality of life for all people.
- Rotary is an international service organization of 1.2 million business and professional men and women who, as volunteers, address needs of their home and international communities.
- Rotary exists to do good in the world. Rotary initiates local and international service projects to promote world understanding and peace and improve living conditions for people of all ages and cultures.
- Rotary's strength lies in the volunteer service of its membership, an international network of business and professional leaders implementing a wide range of programs to meet human needs.
- Rotarians are men and women of integrity who represent a cross section of business and professional backgrounds. Volunteers of all ages, they work to address community and international concerns.
- Rotary's strength is that it is both international and local. With more than 30,000 clubs serving communities in over 160 countries, Rotary is ideally situated to address critical problems such as poor health and sanitation, hunger, and environmental deterioration.
- Rotary's volunteer and financial assistance in vaccination efforts is helping to eliminate polio in nation after nation, and region after region. Polio eradication cannot occur, however, until the disease disappears from all nations and all regions.
- Rotary's community-based leadership in target countries was a deciding factor in the World Health Assembly's choice of the goal of polio eradication. Rotary International is the key private partner in the global fight to eradicate polio.

Club Committees Related to Public Relations

When appointing a chair for your club's public relations committee, strive to select a club member who has professional public relations experience and is familiar with the local media. The public relations committee has the following responsibilities:

- Presents information to the public about the club and Rotary — its history, goals, and accomplishments — especially during Rotary Awareness Month (January)
- Works with the media to secure proper publicity for the club's activities
- Works with club committees that are conducting service activities to publicize successful club projects through the local media
- Creates a list of media contacts and regularly updates it
- Responds quickly and accurately to media inquiries about club activities
- Advises the club president on public relations matters
- Communicates with key organizations and leaders within the community
- Works with the district public relations chair to keep him or her informed of larger stories that may generate interest beyond the local community
- Works with the magazine committee to keep RI apprised of newsworthy club projects

Other committees support club public relations:

- Membership development committee — Can assist in recruiting qualified media representatives as members
- Rotary information committee — Can develop a club brochure or Web page and organize a packet of Rotary information for guests and other members of the community and the media
- Magazine committee — Can provide *THE ROTARIAN* or Rotary regional magazine to local media and to community venues, such as libraries, hospitals, and schools
- All service-related committees — Can keep the public relations committee informed of activities worthy of media coverage

Public Relations Resources

RI Resources

The following public relations publications, materials, and resources are just some of those available from Rotary International. For more information, please consult the *RI Catalog* (019-EN).

- *Effective Public Relations: A Guide for Rotary Clubs* (257-EN)
- RI Web site (www.rotary.org) — Contains information regarding public relations, including examples of successful public relations efforts undertaken around the world, sample press releases, and other tips and suggestions
- PR Tips — E-mail newsletter that provides Rotary club public relations success stories, press releases, fact-sheet updates, and other valuable

public relations tips on a regular basis (registration at the Effective Public Relations section of the RI Web site)

- *Public Relations: Make It Work for You* videotape (269-EN)
- Rotary public service announcements (PSAs) — For print, radio, and television, produced by Rotary International

Human Resources

- RI Public Relations Division — Offers general public relations guidance; fact sheets highlighting Rotary's history, major programs, and service activities; graphics; and publicity for local stories with a national or international appeal.

Phone: (847) 866-3000

Fax: (847) 866-8237

E-mail: pr@rotaryintl.org

- District committees (particularly district public relations committee)
- Rotary spokespeople — Includes international, district, and club officers; Rotary Foundation alumni; Ambassadorial Scholars; Rotary Youth Exchange participants

9 Important Documents

General Resources

Club members will look to you for guidance and answers to questions about a variety of subjects. Although you may not know all the answers to these questions, you will be expected to know where to find them. The following list provides a quick reference of resources — information and people — available to support club projects and activities.

Club-level Resources

Be sure to take advantage of the experience base within your own club as well as that of other clubs. Club-level resources include:

- Past club leaders
- Other club officers
- Club members
- Spouses and families of club members
- Leaders and members of other clubs
- Web sites or literature of other clubs

District-level Resources

As outlined in chapter 3, the district exists to serve clubs. District-level resources include:

- District governor
- Assistant governor(s)
- District trainer
- District secretary
- District committee chairs and members
- Past district officers

- District directory
- District Web site

Basic Resources Available from Rotary International

Rotary International produces many resources and reference materials you'll use often during your term, including:

Manual of Procedure (035-EN) — Policies and procedures established by legislative action, the RI Board of Directors, and Trustees of The Rotary Foundation, issued every three years following the Council on Legislation.

Member Access (riweb.rotaryintl.org) — An online tool, available to all Rotarians, with special administrative functions for club presidents and secretaries. Club officer functions for Member Access include:

- Updating club membership data
- Paying the club's semiannual dues
- Searching the *Official Directory*
- Updating club information
- Viewing club Foundation contribution summaries

Official Directory (007-EN) — Names, addresses, and phone numbers of RI officers, committees, and administrative personnel; worldwide listing of districts and governors; alphabetical listing within districts of clubs with names of presidents and secretaries; and meeting times and places.

RI Catalog (019-EN) — A working list of RI publications, audiovisual programs, forms, and supplies, revised annually.

RI Web site — A wealth of information is available at www.rotary.org.

THE ROTARIAN — The monthly official magazine of Rotary International featuring news of all programs of RI and The Rotary Foundation, official communications, and stories originating in clubs and districts.

Rotary News Basket (549-EN) — A weekly report of Rotary news and short features available in both printed and electronic versions.

Rotary World (050-EN) — A newspaper published for RI leaders covering news of all programs of RI and The Rotary Foundation, official communications, and features originating in the clubs and districts.

In addition to these materials, the following groups serve as informational resources for RI:

- RI Board of Directors
- Trustees of The Rotary Foundation
- RI and Rotary Foundation task forces and committees
- Regional Rotary Foundation coordinators (RRFCs)
- Rotary International membership coordinators (RIMCs)
- RI staff members

Community Resources

Maintaining close contact with the community can help clubs determine real community needs and find potential new members. Remember the following resources available in your community:

- Chamber of commerce or other local business groups
- Other service organizations and nonprofit groups
- Local schools
- Government offices
- Community vocational programs
- Hospitals, clinics, and medical groups

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs establish goals for the coming year. The form can be used to track general club trends in membership and club administration. The *Planning Guide for Effective Rotary Clubs* is based on the concept of an effective club. An effective club is able to

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

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 are encouraged to complete this form in cooperation with their club and submit a copy of it to their governor-elect or assistant governor by 1 July.

Please type or print legibly

ROTARY CLUB OF _____

Name of president: _____ Rotary year of office _____

Mailing address: _____

Telephone _____ Fax _____ E-mail _____

DEMOGRAPHIC INFORMATION (as of 30 June)

Current number of members: _____

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

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

Average age of members: _____

Number of Rotarians who have been members for:

Less than 1 year: _____ 1-3 years: _____ 3-5 years: _____
5-10 years: _____ 10-25 years: _____ More than 25 years: _____

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

Does club membership reflect the diversity of the community? Yes No

Our classification survey was updated on _____ and contains _____ classifications,
(date) (number)

of which _____ are unfilled.
(number)

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

If yes, has your club implemented a plan to provide follow-up orientation for members of the sponsored club? Yes No

MEMBERSHIP DEVELOPMENT (Recruitment, Retention, and Organizing New Clubs)

Our club has established the following membership goal for the upcoming Rotary year:

Our club will strive to have _____ members by 30 June _____.
(number) (year)

We have 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
- Appoint a committee of club members who have been trained in effective recruitment techniques
- Develop a recruitment plan that focuses on a true representation of the business and professional leadership in the community
- Develop a recruitment plan that focuses on a true representation of the diversity of the community
- Develop a recruitment plan that clearly explains the expectations of membership to potential Rotarians
- Implement an orientation program for new members to support their successful assimilation into the club
- 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
- Conduct a public awareness program targeted at the business and professional community to increase awareness about what Rotary is and what it does
- Encourage members to join a Rotary Fellowship to experience the internationality and friendship of RI
- Participate in the RI Membership Development award programs
- Seek opportunities to organize a new club
- Other (please describe):

What makes this a good club to attract new members?

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

Action steps:

SERVICE PROJECTS

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

For our local community:

For communities in other countries (international service):

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

- Appoint a committee of club members who have been trained in how to plan and conduct a successful service project
- Review the club's current and ongoing service projects to determine whether they are relevant, needed, and 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 the club's project funding needs
- Involve each club member 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
 - Rotaract
 - Rotary Community Corps
 - Rotary Friendship Exchange
 - Rotary Volunteers
 - Rotary Youth Leadership Awards
 - World Community Service
 - Youth Exchange
- Use the resources of The Rotary Foundation to support a project identified by the club
- Other (please describe):

Action steps:

THE ROTARY FOUNDATION

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

Our club will strive to achieve an annual giving goal of US\$ _____.

Our club will participate in Rotary Foundation programs by:

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

- Appoint a committee of club members who understand the programs of The Rotary Foundation and who are committed to promoting financial support of the Foundation
- Help club members understand the relationship between Foundation giving and Foundation programs
- Schedule presentations that inform club members about the international service opportunities available through the programs of The Rotary Foundation
- Send a representative to the district Rotary Foundation seminar
- Use the resources of The Rotary Foundation 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 make a gift to the Annual Programs Fund
- Participate in:
 - Group Study Exchange
 - Matching Grants
 - District Simplified Grants
 - Individual Grants
 - PolioPlus/PolioPlus Partners
 - Host/Sponsor an Ambassadorial Scholar(s)
 - Sponsor a Rotary World Peace Scholar
 - Sponsor a University Teacher
- Invite Foundation program participants and alumni to participate in club programs and activities
- Other (please describe):

Action steps:

FUTURE ROTARY LEADERS

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

Our club will identify _____ members as potential future leaders and notify the district by 30 June _____.
(number) (year)

How does the club plan to build future Rotary leaders? (check all that apply)

- Encourage committee chairs to attend the district assembly
- Encourage interested past presidents to attend the district leadership seminar held in conjunction with the district conference
- Use the expertise of the club's assistant governor
- Arrange for district committees to make presentations to club members
- Have club leaders work with the district governor and assistant governor to maximize the effectiveness of the governor's official visit
- Encourage new members to assume positions of leadership through participation in club committees
- Have club members visit other clubs to exchange ideas and share the knowledge they gain with the rest of the club
- Other (please describe):

Action steps:

GENERAL ADMINISTRATION

What plans have you made to carry out the administrative tasks required for the effective operation of the club? (check all that apply)

- Board meetings have been scheduled on a regular basis.
- _____ club assemblies have been scheduled.
(number)
- Club elections will be held on _____.
(date)
- Our club will send at least _____ delegates to the district conference.
(number)
- A club bulletin editor has been appointed to provide information that is beneficial to club members.
- The club Web site will be updated _____ times per year.
(number)
- A committee of motivated club members has been appointed to develop interesting and relevant weekly club programs.
- A committee of motivated club members has been appointed to plan a variety of fellowship events.
- Monthly attendance figures will be reported to the district leadership by the _____ day of the following month.
(number)



*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 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 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 6 Membership

Section 1 General Qualifications. This club shall be composed of adult persons of good character and good business and professional 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

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

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

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

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

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

Article 7 Classifications

Section 1 General Provisions.

- (a) *Principal Activity.* Each member shall be classified in accordance with the member's business or profession. 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.
- (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 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 8 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 sections 3 or 4 of this article shall not be included in the membership figure used to compute this club's attendance nor shall such absences or attendances be used for that purpose.

Article 9 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 11, 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 upon the election of a successor. 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.

Article 10 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 6, section 4 shall not be required to pay a second admission fee.

Article 11 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 7, section 2.

Section 4 Termination — Non-attendance.

- (a) *Attendance Percentages.* A member must
 - (1) attend or make up at least 60 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.

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 8, 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.
- (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.

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 15.

(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 15.

(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.

Article 12 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 13 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 14 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 15 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 Rotary International 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 16 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 17 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 18 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.





*Bylaws of the Rotary Club of

Article 1 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 _____ members of the board of 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 have 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 president elected in such balloting shall be the president-nominee and serve as a member of the board for the year commencing on the first day of July next following the election, and shall assume office as president on the first day of July immediately following that year. The president-nominee shall take the title of president-elect upon the election of a successor.

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

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

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

Article 2 Board of Directors

The governing body of this club shall be the board of directors consisting of _____ members of this club, namely, _____ directors elected in accordance with article 1, section 1 of these bylaws, the president, vice president, president-elect (or president-nominee, if no successor has been elected), secretary, treasurer, and the immediate past president.

Article 3 Duties of Officers

Section 1 — *President.* It shall be the duty of the president to preside at meetings of the club and board and to perform such 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 member of the board of directors of the club 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 board in the absence of the president and to perform such other duties as ordinarily pertain to the office of vice president.

Section 4 — *Secretary.* It shall be the duty of the secretary to keep the records of membership; record the attendance at meetings; send out notices of meetings of the club, board, and committees; record and preserve the minutes of such meetings; make the required reports to RI, including the semiannual reports of membership, which shall be made to the general secretary of RI on 1 January and 1 July of each year, and including prorated reports to the general secretary on 1 October and 1 April of each active member who has been elected to membership in the club since the start of the July or January semiannual reporting period, the report of changes in membership, which shall be made to the general secretary of RI, and the monthly report of attendance at the club meetings, which shall be made to the district governor within 15 days of the last meeting of the month; collect and remit to RI subscriptions to *The Rotarian*; and perform such 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 same to the club annually and at any other time upon demand by the board, and to perform such 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 such other duties as may be prescribed by the president or the board.

Article 4 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 5, 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...")

* 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 club constitution and with the constitution and bylaws of Rotary International. If any doubt exists, the proposed changes should be submitted to the general secretary for the consideration of the board of directors of RI. For the most up-to-date version of the recommended club bylaws, please see the RI Web site.

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 article 8, sections 3 and 4 of 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 8, 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) members of the board, due notice having been given.

Section 5 — A majority of the board members shall constitute a quorum of the board.

Article 5 Fees and Dues

Section 1 — The admission fee shall be \$ _____ to be paid before the applicant can qualify as a member.

Section 2 — The membership dues shall be \$ _____ per annum, payable semiannually on the first day of July and of January, with the understanding that six dollars (US\$6.00) of each semiannual payment shall be applied to each member's subscription to *The Rotarian* magazine.

(Note: The subscription price of *The Rotarian* is US\$12.00 per annum.)

Article 6 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.

Article 7 Committees

Section 1

- (a) The president shall, subject to the approval of the board, appoint the following standing committees:
 - Club Service committee
 - Vocational Service committee
 - Community Service committee
 - International Service committee
- (b) The president shall, subject to the approval of the board, also appoint such committees on particular phases of club service, vocational service, community service, and international service as deemed necessary.
- (c) The club service committee, vocational service committee, community service committee, and international service committee shall each consist of a chairman,

who shall be named by the president from the membership of the board, and not less than two (2) other members.

- (d) The president shall be *ex officio* a member of all committees and, as such, shall have all the privileges of membership thereon.
- (e) Each committee shall transact such business as is delegated to it in the 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 to the board and approved by the board.
- (f) The president may appoint one or more committees dealing with various aspects of youth activities, which, depending on their respective responsibilities, may be under any, or all, of the vocational service, community service, or international service committees. Where feasible and practicable in the appointment of such committees, there should be provision for continuity of membership, either by appointing one or more members for a second term or by appointing one or more members to a two-year term.

Section 2 — Club Service Committee.

- (a) The chairman of the club service committee shall be responsible for all club service activities and shall supervise and coordinate the work of all committees appointed on particular phases of club service.
- (b) The club service committee shall consist of the chairman of the club service committee and the chairmen of all committees appointed on particular phases of club service.
- (c) The president shall, subject to the approval of the board, appoint the following committees on particular phases of club service:

- Attendance committee
- Club bulletin committee
- Fellowship committee
- Magazine committee
- Membership committee
- Membership development committee
- Program committee
- Public relations committee

Appoint one member each year to the following committees:

- Classifications committee
- Rotary information committee

- (d) The president shall appoint the president-elect or vice president to oversee and coordinate the work of the classifications, membership, membership development, and Rotary information committees.
- (e) Where feasible and practicable in the appointment of club committees, there should be provision for continuity of membership, either by appointing one or more members for a second term or by appointing one or more members to a two-year term.

- (f) The classifications and Rotary information committees shall each consist of three (3) members, one member of each committee to be appointed each year for a term of three (3) years. The first appointments made under this provision shall be as follows: one member for a term of one year; one member for a term of two (2) years; one member for a term of three (3) years.
- (g) The magazine committee shall, wherever feasible, include the editor of the club publication and a local newspaper or advertising member of the club.

Section 3 — Community Service Committee.

- (a) The chairman of the community service committee shall be responsible for all community service activities and shall supervise and coordinate the work of all committees appointed on particular phases of community service.
- (b) The community service committee shall consist of the chairman of the community service committee and the chairmen of all committees appointed on particular phases of community service.
- (c) The president shall, subject to the approval of the board, appoint the following committees on particular phases of community service:
 - Human development committee
 - Community development committee
 - Environmental protection committee
 - Partners in service committee

Article 8 Duties of Committees

Section 1 — Club Service Committee. This committee shall devise and carry into effect plans which will guide and assist the members of this club in discharging their responsibilities in matters relating to club service. The chairman of the club service committee shall be responsible for regular meetings of the committee and shall report to the board on all club service activities.

- (a) *Attendance Committee.* This committee shall devise means for encouraging attendance at all Rotary meetings — including attendance at district conferences, intercity meetings, regional conferences, and international conventions by all club members. This committee shall especially encourage attendance at regular meetings of this club and attendance at regular meetings of other clubs when unable to attend meetings of this club; keep all members informed on attendance requirements; promote better incentives for good attendance; and seek to ascertain and remove the conditions that contribute to unsatisfactory attendance.
- (b) *Classifications Committee.* This committee shall as early as possible, but no later than 31 August of each year, make a classification survey of the community; shall compile from the survey a roster of filled and unfilled classifications, applying the classification principle; shall review, where necessary, existing classifications represented in the club; and shall counsel with the board on all classification problems.
- (c) *Club Bulletin Committee.* This committee shall endeavor, through the publishing of a weekly club bulletin, to stimulate interest and improve attendance, announce the program of the forthcoming meeting, relate high-

lights of the previous meeting, promote fellowship, contribute to the Rotary education of all members, and report news of the club, of its members, and of the worldwide Rotary program.

- (d) *Fellowship Activities Committee.* This committee shall promote acquaintance and friendship among the members, promote participation by members in organized Rotary recreational and social activities, and do such work in pursuance of the general object of the club as may be assigned by the president or the board.
- (e) *Magazine Committee.* This committee shall stimulate reader interest in *The Rotarian*; sponsor a magazine month; arrange for brief monthly reviews of the magazine on regular club programs; encourage the use of the magazine in the induction of new members; provide a copy of the magazine for non-Rotarian speakers; secure international service and other special subscriptions for libraries, hospitals, schools, and other reading rooms; send news items and photographs to the editor of the magazine; and in other ways make the magazine of service to the club members and non-Rotarians.
- (f) *Membership Committee.* This committee shall consider all proposals for membership from the personal side and shall thoroughly investigate the character, business, social and community standing, and general eligibility of all persons proposed for membership and shall report their decisions on all applications to the board.
- (g) *Membership Development Committee.* This committee shall review continually the club roster of filled and unfilled classifications and shall take positive action to initiate and present to the board the names of suitable persons to fill unfilled classifications.
- (h) *Program Committee.* This committee shall prepare and arrange the programs for the regular and special meetings of the club.
- (i) *Public Relations Committee.* This committee shall devise and carry into effect plans (1) to give the public general information about Rotary, its history, object, and scope; and (2) to secure proper publicity for the club.
- (j) *Rotary Information Committee.* This committee shall inform prospective members about the privileges and responsibilities of Rotary club membership; keep members informed about the history, object, and activities of Rotary at all levels; and oversee the orientation of new members during their first year in the club.

Section 2 — Vocational Service Committee. This committee shall devise and carry into effect plans which will guide and assist the members of this club in discharging their responsibilities in their vocational relationships and in improving the general standards of practice in their respective vocations. The chairman of this committee shall be responsible for the vocational service activities of the club and shall supervise and coordinate the work of any committees that may be appointed on particular phases of vocational service.

Section 3 — Community Service Committee. This committee shall devise and carry into effect plans which will guide and assist the members of this club in discharging their responsibilities in their community relationships. The chairman of this committee shall be responsible for the community service activities of the club and shall supervise and coordinate the work of any committees that may be appointed on particular phases of community service.

- (a) *Human Development Committee.* This committee shall devise and carry into effect plans which will guide and assist the members of this club in dealing within the community with the welfare of human beings of all kinds throughout the whole span of life by providing assistance and support to those in need.
- (b) *Community Development Committee.* This committee shall devise and carry into effect plans which will guide and assist the members of this club in working to make the community a better place to live by improving the physical condition of the community and its facilities.
- (c) *Environmental Protection Committee.* This committee shall devise and carry into effect plans which will guide and assist the members of this club in monitoring and improving the quality of the community's environment.
- (d) *Partners in Service Committee.* This committee shall devise and carry into effect plans which will guide and assist the members of this club in building relationships with other Rotary-sponsored organizations within the community and in cooperating with them in service.

Section 4 — *International Service Committee.* This committee shall devise and carry into effect plans which will guide and assist the members of this club in discharging their responsibilities in matters relating to international service. The chairman of this committee shall be responsible for the international service activities of the club and shall supervise and coordinate the work of any committees that may be appointed on particular phases of international service.

Article 9 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 article 8, sections 3 and 4 of the standard Rotary club constitution is not computed in the attendance record of the club.)

Article 10 Finances

Section 1 — The treasurer shall deposit all funds of the club in some bank to be named by the board.

Section 2 — All bills shall be paid only by checks signed by the treasurer upon vouchers signed by any two officers. A thorough audit by a certified public accountant or other qualified person shall be made once each year of all the club's financial transactions.

Section 3 — Officers having charge or control of funds shall give bond as may be required by the board for the safe custody of the funds of the club, cost of bond to be borne by the club.

Section 4 — 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 magazine

subscriptions to RI shall be made on 1 July and 1 January of each year on the basis of the membership of the club on those dates.

(Note: Magazine subscriptions for members joining during a semi-annual period are payable upon invoice from the Secretariat.)

Section 5 — At the beginning of each fiscal year the board shall prepare or cause to be prepared a budget of estimated income and estimated expenditures for the year, which, having been agreed to by the board, shall stand as the limit of expenditures for the respective purposes unless otherwise ordered by action of the board.

Article 11 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 for the time being 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 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 induction of the new member; the club secretary shall issue a membership card and shall report the new member to RI; and the Rotary information committee shall provide appropriate literature for presentation at the induction and assign a member to assist in the assimilation of the new member.

Article 12 Resolutions

No resolution or motion to commit this club on any matter shall be considered by the club until it has been considered by the board. Such resolutions or motions, if offered at a club meeting, shall be referred to the board without discussion.

Article 13 Order of Business

Meeting called to order.

Introduction of visiting Rotarians.

Correspondence and announcements.

Committee reports if any.

Any unfinished business.

Any new business.

Address or other program features.

Adjournment.

Article 14 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 club constitution and with the constitution and bylaws of RI.



Club President's Monthly Checklist

This checklist is designed to help Rotary club presidents-elect and presidents plan and monitor club activities on a monthly basis. It also serves as a monthly reminder of activities and deadlines that apply to all Rotary clubs.

You should read the entire checklist to gain an overall perspective of the next 18 months. You may wish to place a check (✓) in each box after the item has been addressed to your satisfaction. An asterisk (*) indicates a Rotary Foundation-related item. Please contact The Rotary Foundation of Rotary International for more details.

The Rotary events listed below do not have fixed dates. Write the dates that your club will attend the events on the lines below and then add them to the appropriate month on the blank lines provided. You can also use the blank lines in each month to add local events that are specific to your club.

District conference _____

District leadership seminar _____

District membership seminar _____

District Rotary Foundation seminar _____

Official visit of district governor _____

Assistant governor visits _____

Club assemblies _____

Visit the RI Web site, www.rotary.org, for details on specific programs listed or contact your Club and District Administration representative with any questions. You may also download this form from the RI Web site.

As President-elect

January *Rotary Awareness Month*

- Begin developing goals and appointing committee chairs.
- Begin preparing for next year's club budget and reviewing the status of continuing club projects.
- Register for presidents-elect training seminar (PETS).
- Encourage all incoming club officers and new members to attend the district assembly.
- _____
- _____
- _____

February *World Understanding Month*

- Hold the first meeting of the board-elect.
- _____
- _____
- _____

March

- Attend PETS on ____ March.
- Set the club's annual giving goal to The Rotary Foundation.
- _____
- _____
- _____

April *Magazine Month*

- Attend the district assembly with other incoming club officers on ____ April or May.
- _____
- _____
- _____

May

- Review the status of current club projects and how they will affect planning for the upcoming year.
- Hold club assembly to discuss plans made at district assembly and upcoming RI theme.
- _____
- _____
- _____

June *Rotary Fellowships Month*

- Finalize the *Planning Guide for Effective Rotary Clubs* and submit it to the district governor-elect before 1 July.
- Finalize the club budget for the coming year.
- Confer with the outgoing president to ensure a smooth transition.
- Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.
- _____
- _____
- _____

As President

July *Literacy Month*

- Conduct literacy-related activities and programs.
- Plan and conduct monthly board meeting.
- Plan and conduct a club assembly to discuss and adopt the year's program.
- Work with the club secretary to complete the RI semiannual report and send with dues to RI. Submit district per capita dues, if applicable; RI dues become past due on 1 August.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Endorse the nomination of a club member for the Four Avenues of Service Citation for Individual Rotarians, between 1 July and 30 June. Inform the governor. Contact the RI Programs staff for details.
- Submit applications for Matching Grants. *
- Educate the club about the Group Study Exchange (GSE) program and promote it in your community. *
- Recruit young professions between the ages of 25-40 and encourage qualified candidates to submit a GSE Team Member Application. *

- _____
- _____
- _____

August *Membership and Extension Month*

- Conduct club activities to support membership development and extension efforts.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.

- Send monthly membership and attendance report to the district governor or district secretary.
- Promote attendance at the district membership seminar.
- Consider nominating a club member for one of these service awards from The Rotary Foundation: District Service Award, Citation for Meritorious Service, or Distinguished Service Award. *

- _____
- _____
- _____

September *New Generations Month*

- Conduct youth-related activities and programs.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary.
- Endorse qualified GSE team members' applications and submit them to the district GSE selection committee for consideration. *

- _____
- _____
- _____

October *Vocational Service Month*

- Conduct vocation-related activities and programs.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.

- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary.
- Ambassadorial Scholarships: applications due to The Rotary Foundation from districts by 1 October. Check with district scholarships chair for district deadline. *
- Rotary Grants for University Teachers: applications due to The Rotary Foundation from districts by 1 October. Check with district scholarships chair for district deadline. *
- Rotary World Peace Scholarships: applications due to The Rotary Foundation from districts by 1 October. Check with district scholarships chair for district deadline. *
- _____
- _____
- _____

November Rotary Foundation Month

- Conduct related activities and programs on Rotary Foundation programs and fund development.
- 1 November: deadline for receipt at RI of nominations for the Rotary Award for World Understanding and Peace. Contact RI Programs staff for details.
- Week including 5 November is World Interact Week. Support your local Interact club or help organize one.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- 15 November: Deadline to submit nominations for The Rotary Foundation Distinguished Service Award. *
- 15 November (U.S. clubs only): Deadline to

submit IRS Form 990 (and possibly form 990-T) to U.S. Internal Revenue Service. Contact the IRS for report forms, filing limits, and other requirements.

- Send monthly membership and attendance report to the district governor or district secretary.
- Offer assistance in hosting visiting GSE teams in the district. *
- _____
- _____
- _____

December Family Month

- Conduct activities to demonstrate your club's commitment to family and community.
- Hold annual club election no later than 31 December.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary.
- _____
- _____
- _____

January Rotary Awareness Month

- Conduct activities and programs to provide members with continuing education on RI and to publicize Rotary to the community.
- Plan to send club representatives to the district conference and to the RI Convention.
- Work with the club secretary to complete the semiannual report and send with dues to RI. Submit district per capita dues, if applicable. RI dues become past due on 1 February.

- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Conduct a semiannual checkup on all committee activities and objectives.
- Plan and conduct club assembly to review progress toward club goals.
- Send monthly membership and attendance report to the district governor or district secretary.
- Promote attendance at the district conference.
- Promote availability of Ambassadorial Scholarships and Rotary Grants for University Teachers locally. Check with district scholarships chair on deadline for clubs to submit applications for the district-level competition. *
- Promote availability of world-competitive Rotary World Peace Scholarships. Check with district scholarships chair on deadline for clubs to submit applications for the district-level competition. *
- 31 January: Deadline for reporting next year's club president and secretary to RI for the *Official Directory* (007-EN), and to the district governor-elect.
- _____
- _____
- _____

February *World Understanding Month*

- Conduct club activities to promote world understanding and peace.
- 23 February (Rotary's anniversary) is World Understanding and Peace Day. Conduct activities that emphasize Rotary's commitment to international understanding, friendship, and peace.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.

- Promote attendance at the RI Convention.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary.
- _____
- _____
- _____

March

- Week including 13 March is World Rotaract Week. Conduct activities in support of your local Rotaract club or help organize one.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- 15 March: Deadline for governors to submit one club nomination for RI's Significant Achievement Award. Contact the district governor for details.
- Send monthly membership and attendance report to the district governor or district secretary.
- 31 March: Last day to submit Matching Grant or District Simplified Grant applications for funding consideration in the current Rotary year. *
- _____
- _____
- _____

April Magazine Month

- Conduct a club program on *THE ROTARIAN* or a Rotary regional magazine.
- Consider a nominee for The Rotary Foundation Citation for Meritorious Service; nominations received after 15 May will be returned to the nominator. Contact your district governor for details. *
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- 15 April: Deadline for governors to submit Presidential Citation certification forms for clubs to RI. Advise the district governor if the club has met the qualifications for the Presidential Citation according to the schedule determined by the district governor.
- Send monthly membership and attendance report to the district governor or district secretary.
- _____
- _____
- _____

May

- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary.
- 15 May: Deadline for governors to submit one club nomination for the RI Public Relations Award. Contact the district governor for details.

- 15 May: Deadline to submit nominations for The Rotary Foundation Citation for Meritorious Service. *

- _____
- _____
- _____

June Rotary Fellowships Month

- Promote club members' participation in Rotary Fellowships.
- Send club representatives to the RI Convention.
- Prepare a year-end audit of the club's financial transactions, working with club secretary and treasurer. Submit a financial statement to the club about its fiscal status.
- Monitor membership development goals and projects. Provide the club with a final report on membership growth.
- Confer with the president-elect to ensure a smooth transition.
- Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary.
- Assess all Humanitarian Grants activity and provide progress or final reports to The Rotary Foundation for all open grant projects. *
- Plan a dignified ceremony for the installation of next year's club officers.
- _____
- _____
- _____

Inventory for the Rotary Club of _____

(Use the preceding Rotary year as a base)

The club inventory follows the guidelines set forth for effective clubs. The RI Board has determined that success in the following areas is essential to being an effective club.

**Effective clubs are able to
Sustain and/or grow their membership base**

Use the following to help evaluate the club's effectiveness in terms of membership.

1. Number of members as of 30 June
of the preceding Rotary year: _____
2. Peak club membership since charter: _____
3. Net membership growth in our club: _____
4. Club's monthly attendance average: _____
5. What orientation does your club give to new members?

6. Does your club have a Rotary information program in place for both new and continuing members?

Yes No

Please describe:

18. Club participation in educational programs:

Number of Ambassadorial Scholars: Nominated _____

Selected _____

Hosted _____

Number of GSE team members: Nominated _____

Selected _____

Hosted _____

Number of Rotary Grants for University Teachers awarded: _____

19. Contributions:

General _____

Restricted _____

Cumulative total _____

Percentage of members contributing _____

Current year goal in US\$ _____

Will this be achieved? Yes No

Effective clubs are able to
Develop leaders capable of serving in Rotary beyond the club level

Use the following to ascertain the status of the club's leadership development.

20. Did your predecessor attend PETS last year? Yes No

21. Number of club members who attended the district assembly: _____

22. Number of club members who attended the district Rotary Foundation seminar: _____

23. Number of club members who attended the district conference: _____

24. Number of club members who attended the RI Convention: _____

25. Number of club members who attended the district leadership seminar: _____

26. Number of members who have served, or expressed interest in serving as:

Assistant governor _____

Member of a district committee _____

Club Operations

27. How frequently does the board meet? _____

28. How frequently are club assemblies held? _____

29. When was the most recent classification roster updated? _____

30. Does the club have a budget? Yes No

If yes, is it audited annually? Yes No

31. Does the board receive regular financial reports? Yes No

32. How frequently is your club bulletin published? Weekly Monthly

33. How often does your club observe the special months of the Rotary calendar, such as World Understanding Month, Foundation Month, and Magazine Month?

Always Occasionally Never

34. Name the last club activity covered by the media and when it took place:

This event was covered by (check all that apply):

Television Newspapers Radio

35. Does your club budget for promotion of its activities? Yes No

36. Do club members receive periodic training concerning the *Manual of Procedure* and the club's constitutional documents? Yes No

Discussion Questions for PETS

Complete the following discussion questions using this manual to prepare in advance for the facilitated discussions you will participate in at PETS. Advance study of the *Club President's Manual* (222-EN) and thought regarding these questions will help prepare you for your training and maximize the usefulness of the time spent with district leaders and your fellow presidents-elect at PETS.

The Elements of an Effective Club

What are the elements of an effective club? How do they relate to your role as club president?

Roles and Responsibilities of the Club President

What are the duties of club president?

Who will you work with as part of your club leadership team?

Goal Setting

Why is it important to set goals at the club and district levels?

What are some ways to ensure that a goal is realistic?

What are some strategies that your club can use to ensure that a goal can be achieved?

Club Administration

What should you know about your club's bylaws before taking office?

What are some things you can do to help ensure that your club is financially healthy?

What are some of the events for which club presidents must prepare?

Resources

What resources are available at the club level?

How would you find district leaders who can help you?

What are some useful community resources?

Membership: Recruitment, Education, and Retention

Why is membership important to you as club president?

What are some of the challenges to attracting new members?

What are some key elements in an effective orientation program?

What steps can your club take to retain members? What steps can your club take to attract new members?

What successful strategies have you used in your club that you would like to share with your fellow incoming presidents?

How can you determine and measure how well your club is meeting the needs of its members?

How can you determine and measure the reasons why members have left your club?

What Motivates Rotarians?

What motivates people to be active members of Rotary?

How can participation in local or global community service projects motivate club members?

Why is recognition important?

What activities has your club conducted that have motivated your members?

Service Projects

What are the characteristics of a successful service project?

What steps must be taken to implement a service project?

How are international projects different from other service projects?

Why is it important to perform an evaluation for every club project?

Has your club conducted any successful service projects that may be undertaken in other clubs within the district?

The Rotary Foundation

What is the mission of The Rotary Foundation?

Why is The Rotary Foundation different from other charitable organizations?

What are the Educational Programs of The Rotary Foundation? What is the Humanitarians Grants Program of The Rotary Foundation?

Where can you find out more information on the programs and activities of The Rotary Foundation?

Can you share any strategies to promote The Rotary Foundation (both in program participation and funding) that have worked for your club?

Object of Rotary

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

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

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

Third. The application of the ideal of service in every 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.



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