



Rotary International

Club Committee Manual

This is the 2003 edition of the *Club Committee Manual* (226-EN). It is intended for use by club committees functioning 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, override policy as stated in this publication.

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Introduction

Rotary International is the association of Rotary clubs. Rotary International is effective if its member clubs are effective. The *Club Committee Manual* (226-EN) was developed to help committee chairs establish goals and understand their responsibilities related to increasing club effectiveness.

Prior to the district assembly, review materials related to your committee in order to fully understand and prepare for your leadership responsibilities. Selected discussion questions that will be covered at the district assembly have been included on pages 3-9 to enhance your preparation. Advance preparation will enable you to receive the maximum benefit from the facilitated discussions in which you will participate at the district assembly.

During the district assembly, the *Club Committee Manual* serves as the handout material for the training you will receive. Because of the complementary role these materials play in the training conducted, it is recommended that you bring the relevant portions of the *Club Committee Manual* with you when attending the district assembly.

In addition to serving as the preparatory material for the district assembly, the *Club Committee Manual* also serves as a functional resource to support you and the members of your committee in fulfilling your primary responsibility of increasing club effectiveness throughout the year.

Structure of the Manual

The organization of the *Club Committee Manual* reflects the recommended curriculum for the district assembly. This introduction and chapter 1 are intended for all committee chairs. They discuss the structure of the manual, goal setting, and selecting team members. Make copies of these sections as necessary to distribute to each chair. Chapters 2-7 relate to a key aspect of club operation and effectiveness and contain the following information:

- A listing of club committees and their basic responsibilities
- Individual pages devoted to specific topics; for example, a page in chapter 3, "Service Projects," is devoted to conducting a needs assessment. Topic-specific pages are generally one to three pages in length, making them easy to reproduce and distribute for committee meetings; specific topics are readily referenced in the table of contents.
- Appendixes are worksheets or additional information club committees can use to support their activities.

Club committee chairs who are attending the district assembly should determine which chapter is most closely associated with their responsibilities for the coming year. If more than one club member will represent the club for a particular function of club operations, additional copies of the resource material should be made. For example, if the chairs of two service committees will attend the district assembly, they will need to copy the chapter regarding service projects so that both representatives have the reference material available. Additional copies of the *Club Committee Manual* can also be downloaded for free from the RI Web site or ordered from the RI *Catalog*.

Comments?

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

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The *Club Committee Manual* (226-EN) is unbound in order to make it easier to distribute relevant chapters to the appropriate committee chairs, who in turn can share individual pages with committee members, as needed.



District Assembly Discussion Questions

Complete the appropriate discussion questions using this manual to prepare for the facilitated discussions you will participate in at the district assembly. Advance study of the *Club Committee Manual* (226-EN) and thought regarding these questions will help prepare committee leaders for their training.

Roles and Responsibilities

1. Have you served on a committee related to your current committee appointment?
2. What were your greatest challenges?
3. What did you learn?

Committees Related to Club Administration

1. What responsibilities are related to club administration?
2. How can you encourage regular attendance?
3. What should successful weekly meetings achieve?
4. What creative strategies does your club use to develop relevant and informative club programs?
5. What can you do to stimulate and improve fellowship in your club?
6. How does the club bulletin support effective club administration?

7. How can you use THE ROTARIAN or a Rotary regional magazine to benefit the club?

Committees Related to Club Fundraising

1. What makes a fundraising activity successful?
2. What steps are important for planning a fundraising activity?
3. What should club members consider when setting a fundraising goal?
4. How can you motivate fundraising volunteers?
5. How can the club promote a fundraising activity?
6. Why is evaluating the club's fundraising activity important?
7. What fundraising activities has your club held or is planning to hold for this year?

Committees Related to Club Public Relations

1. What are the club's public relations responsibilities?
2. As club leaders, how can you promote positive public relations in your community?

3. What can every club member do to promote positive public relations?
4. How can club leaders establish relationships with the media?
5. What activities attract positive media attention?
6. What basic steps should you take when preparing to work with the media?

Committees Related to Membership Recruitment and Induction

1. What steps can you take to recruit and induct new members?
2. How can the classification principle be used to help recruit members?
3. How can you involve club members in identifying and recruiting new members?
4. What are the benefits and responsibilities of membership in your club?
5. What are the opportunities for service in your club?
6. What are some answers to the question — “Why join Rotary?”
7. What information does your club give to prospective members?

8. What process must be followed to elect a new member?
9. How can the club ensure that its induction ceremonies are meaningful?

Committees Related to New Member Orientation and Mentoring

1. Why is it important to orient and educate new club members?
2. What subjects should be addressed in a new member orientation program?
3. What are the benefits and responsibilities of membership in your club?
4. What are the opportunities for service in your club?
5. What does your club include in its orientation program?
6. How can you involve new members in club activities?
7. What orientation techniques have worked for your club?
8. Why is mentoring a good way to orient new members?
9. How has your club used mentoring to involve new members?

Committees Related to Service Projects

1. How can successful service projects benefit your club?
2. What are your responsibilities for conducting service projects?
3. How do you determine community needs?
4. What steps must be taken to plan and carry out a successful service project?
5. What are the RI Structured Programs that clubs can use to provide service in their community and communities in other countries?
6. What resources are available from The Rotary Foundation to support club service efforts?
7. How can clubs increase public awareness of Rotary through service projects?
8. What questions should you consider when evaluating the success of club projects?

Committees Related to The Rotary Foundation

1. What are the responsibilities of club Rotary Foundation leaders?
2. What can clubs gain by participating in Rotary Foundation projects?

3. What are the Educational Programs of The Rotary Foundation?
4. What do all Educational Programs have in common?
5. What are the Humanitarian Grants of The Rotary Foundation?
6. What are the standards for Humanitarian Grants?
7. What can Rotarians do to continue to support the goal of global polio eradication?
8. How does your club establish an annual giving goal?

Working with Your Team (for all committees)

1. What characteristics should you consider when selecting committee members?
2. How can you motivate team members?
3. How can you work with other club leaders to pursue your committee's goals?
4. What are the characteristics of an effective team?
5. What strategies can club leaders use to develop an action plan to achieve club goals?

6. How can you communicate effectively with your team members? Other club members? The club president and board?
7. Who is available at the club level to assist club leaders?
8. Who is available at the district level to support club plans?

Goals (for all committees)

1. What goals will your committee pursue?
2. What strategies will you use to achieve those goals?

1

Selecting Club Committee Members and Setting Goals

If the club's bylaws do not contain information regarding the committee's purpose, the club should amend the club bylaws to include it. If the club determines that the committee does not serve a purpose, the committee should be disbanded.

To amend the club's bylaws:

- 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.

Selecting and Preparing Club Committee Members

Developing an effective team is one of the most important responsibilities of a club committee chair. As the leader of a club committee, you will be responsible for ensuring the committee functions effectively in order to achieve committee and club goals.

Committee Chair Responsibilities

- Recruit members who have the skills, knowledge, experience, or desire to do the best job.
- Provide appropriate instruction and orientation.
- Plan and conduct productive meetings.
- Hold members accountable for the tasks they have accepted.
- Inform the club president and board of directors of progress.
- Recognize those who have served well.

Effective committees share the following characteristics:

- Clearly defined purpose
- Well-formulated goals
- Step-by-step plan of action
- Open lines of communication among team members and other club leaders
- Knowledgeable and motivated team members

Determining a Committee's Purpose

Committee members must have a clear understanding of the committee's purpose in order to effectively establish and achieve goals. To identify a committee's purpose:

- **Review the club's bylaws**, which should contain information related to each club committee, including the committee's general purpose.
- **Review the club's goals for the coming year**, to help the committee establish goals that support the club's main goals for the year.
- **Meet with the club's board and the president**, to foster discussion about the relationship between club goals and the committee's purpose, as well as the committee's role in achieving these goals.

Preparing and Motivating Your Team

As a committee chair, you will help committee members prepare by

- Supplying newer members with background information on the committee and its activities
- Providing members with a list of district activities and meetings
- Encouraging networking with counterparts in other clubs (use the district directory)
- Pairing new members with more experienced members
- Knowing the resources available to your team

Committee members must also be motivated to achieve success. The following steps will help ensure committee members are engaged and enthusiastically support committee activities:

- Create a sense of ownership by involving committee members in the planning process.
- Regularly acknowledge their efforts and accomplishments.
- Show you value their input by asking for and incorporating their suggestions.
- Provide them with challenging tasks.
- Explain how their duties and tasks contribute to larger club, district, and Rotary International goals.



Establishing and Achieving Goals

Effective clubs set goals and identify the strategies necessary to achieve them. As a club committee chair, you will work with the club president and other club leaders to ensure that the committee's goals support club goals.

Characteristics of an Effective Goal

Setting committee goals that are consistent with club goals and are meaningful to the committee should be a top priority as you prepare for your term as a committee chair. It is important that the goals set by the committee are

- **Shared.** Members who participate in setting a goal and formulating the strategies to meet it will be committed to achieving it.
- **Measurable.** A measurable goal can be stated in quantifiable terms and can therefore be objectively evaluated.
- **Challenging.** Challenging goals require effort, teamwork, vision, planning, and follow-through by you and your committee members. The interest and enthusiasm of committee members will suffer if the goals you set are not challenging enough.
- **Achievable.** Achievable goals are realistic ones, based on the resources — both material and volunteer time — that you have or expect to have available within the time frame you have established for realizing the goal. Overly ambitious goals can lead to frustration.
- **Time specific.** A timeline with specific deadlines will keep the committee's progress on track.

Establishing Achievable Goals

Your committee will establish a variety of goals related to its purpose. To ensure that the goals established accurately reflect committee capabilities and club interests:

- Compare goals to previous goals that have been achieved by the committee and the club.
- Consult with club leaders and 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 helps the club president 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 an opportunity to work on the planning guide with your club president and other club leaders during the district assembly.

The *Planning Guide for Effective Rotary Clubs* can be used throughout the year to help measure progress toward established goals. It will be periodically reviewed by the club president and also by the assistant governor or district governor throughout the year, during club visits.

Developing a Plan of Action

Establishing goals is the first step that a committee chair should take to ensure that the committee will be effective and successful during the coming year.

An action plan provides the bridge between the vision stated in a goal and the practical achievement of that goal. Action plans provide the following benefits that support achievement of club goals:

- The process of creating an action plan for the committee generates commitment among members and stimulates club interest in committee and club activities.
- Well-organized plans motivate team members to increase their participation in committee activities and discussions.
- Strategies devised to meet goals provide committees with a means to measure progress and establish effective practices for the club.

Planning Steps

Committee chairs must also work with club leaders and committee members to ensure steady progress is being made toward achievement of goals as envisioned. The following steps can help club committee chairs motivate committee members to work together to achieve a goal:

- Outline **specific actions** that need 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 better achieve subsequent goals.

Importance of Communication

A committee cannot act effectively in isolation. Its operations and decisions must be based on the communicated needs of the club. Similarly, members of a committee must communicate with each other to ensure smooth working relationships and avoid miscommunication or duplication of effort. Committee chairs should regularly share the committee's progress toward its goals with all club members.

It is especially important to keep the club president and board informed regarding the activities of the committee.

- Share action plans including the name of members to whom specific responsibilities have been assigned.
- Provide regular updates regarding progress made toward the team's objectives.
- Seek advice and feedback to improve the work of the team and help overcome challenges and difficulties.



Identifying and Using Resources

It is important for you to be able to identify the resources that can help you implement committee plans. Committee members will look to you for guidance and answers. While you cannot be expected to know all the answers, you should know where to find them.

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
- Club members
- Spouses and families of club members
- Leaders and members of other clubs
- Web sites or literature of other clubs

District-level Resources

The district exists to serve clubs. This means that there are a variety of resources available from the district to support club efforts. District-level resources include:

- District governor
- Assistant governor
- District committee chairs and members
- District trainer
- Past district officers
- Governor's monthly letter
- District Web site

To locate the district leader who can best serve your needs, you may wish to consult your club president, assistant governor, district governor, or district directory.

Basic Resources Available from Rotary International

Rotary International produces several items to which you will refer repeatedly during your term, including:

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

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 each meeting of the Council on Legislation.

RI Catalog (019-EN) — A list of RI publications, audiovisual programs, forms, and supplies, revised annually. An online version is available on the RI Web site.

RI Web site (www.rotary.org) — Updated regularly, the RI Web site is a resource for general RI information, news, and materials. Many of the publications available in the RI *Catalog* are available for free download.

THE ROTARIAN or Rotary regional magazine — The official monthly magazine of Rotary International, which covers news of the programs of RI and The Rotary Foundation, RI official communications, and news of interest originating in the clubs and districts. More than 30 regional magazines in 22 languages serve Rotarians around the world.

Rotary News Basket (546-EN) — A weekly report of Rotary news and short features, available in print and on the Web.

Rotary World (050-EN) — An eight-page newspaper published for Rotary club, district, and international leaders, which covers RI and Foundation programs and news, plus news originating in clubs and districts.

In addition to these materials, the following individuals can serve as informational resources:

- RI Board of Directors and Rotary Foundation Trustees
- RI and Rotary Foundation task forces and committees
- RI staff at RI World Headquarters in Evanston, Illinois, USA, and the international offices around the world

Consult the *Official Directory* (007-EN) to find contact information for Rotary International Directors, Rotary Foundation Trustees, RI and Rotary Foundation task forces and committees, and RI staff.

2 Membership

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 it is important to choose Rotarians whose diversity of ages, professions, and experience best represents the club and community. Other important characteristics to consider include:

- Professional experience in recruiting, hiring, 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:

Classifications

- 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

The committee should prepare its own classifications survey. The local telephone directory, chamber of commerce, and other business directories are good resources when developing a classifications survey. Such a survey is

never final. As the business and professional composition of a community changes, classifications are apt to change. From the survey, share a compiled roster of filled and unfilled classifications with the club.

The committee must also help educate the club regarding the purpose of the classification principle. Emphasize that one of Rotary's strengths lies in the following characteristics:

- Diversity of the businesses and professions represented in the club
- An inclusive, rather than exclusive membership
- Members' acquaintance with other occupations
- Fellowship based on diversity of interests rather than similarity of interest

The committee should act promptly on all membership proposals. Their report to the board of directors should explain the extent of the committee's investigation and the reasons for its conclusions.

In assessing a candidate's qualifications for membership, the following points should be considered:

- Is the individual above reproach?
- Is the reputation of the individual's firm exemplary?
- Is the person service-minded?
- Can the candidate meet the financial obligations of membership and attend weekly meetings?
- Is the candidate committed to getting involved in the club's projects, programs, and committees?

Membership

- 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

Membership Development

- 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

- 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

It is the duty of the membership development committee to present the names of suitable candidates for club membership. Increasing the number of members enhances the club's ability to provide service to its community and the world and may ensure a diverse representation of the community.

Realistic membership growth targets must be set to provide tangible goals. The first step in setting a goal is formulating a membership development and growth plan. To do this, chart the club's membership totals for the past five to ten years. If your club has been successful in recruiting and retaining new members, the changes that are required to continue gaining members may be minimal. However, if your club has been losing members, it is prudent to develop an aggressive membership growth and retention plan. Membership growth and retention cannot stem from the efforts of a few individuals, but rather it must come from all of the club's members. It is important that the entire club take responsibility for proposing new members. However, retaining current club members eliminates the need for constant recruitment and leads to a more experienced club.

Rotary Information

- 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
- Informs members of developments in the administrative operation of Rotary International
- Plans an activity to observe Rotary Awareness Month (January)

It is the duty of this committee to communicate information about Rotary to prospective and new members, as well as experienced Rotarians. The committee should plan informational meetings for new members and also assign an experienced mentor to each new member to aid his or her assimilation into the club.

As Rotary policies and programs change, the Rotary information committee should convey these changes to the club's membership. Members who are well informed with up-to-date information are more likely to be valuable in their service to the community and the club.

Working with Other Club Committees

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

- **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 Guidelines

Potential members are

- Men and women of good character who possess an excellent business or professional reputation.
- Individuals whose residence or place of business falls in the locality of the club or the surrounding area.

For more information on the qualifications for membership, consult the *Manual of Procedure* (035-EN).

Classification

The classification principle is designed to ensure that Rotary clubs' membership reflects the diversity of the community.

A member's classification describes the principal and recognized activity of the firm, company, or institution with which a member is connected, or a member's own principal and recognized business or professional activity.

Clubs should 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. Members who are retired are not included in the total number of members from a classification. If a member changes classification, the club may continue the member's membership under the new classification regardless of these limitations.

Each year the club should conduct a classification survey. The purpose of the survey is to identify the various classifications within the community. This list should be compared with the classifications held within the club to determine classifications to be targeted in recruitment efforts. The goal is to maintain a fair representation of businesses and professions within the community.

Types of Membership

Rotary recognizes two types of membership: active and honorary.

- **Active members** are classified in accordance with the member's business or profession and may fully participate in the club.
- **Honorary members** have distinguished themselves in service to the Rotary ideal; they cannot vote in club elections, or be elected to club office, hold no classification, and pay no club dues or admission fees.



Membership Resources

A variety of information regarding membership is available from Rotary International for new and prospective members as well as for those supporting membership development.

New and Prospective Member Materials

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

Rotary Basics (595-EN) — An eight-page membership education piece on what every Rotarian should know.

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.

Membership Development Materials

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.

RI Web site (www.rotary.org) — Contains a wide array of information on membership development, orientation, and retention strategies that have been successfully used by clubs.

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

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 or task forces
- Other clubs that face common membership challenges (beneficial to share experiences and strategies)



Membership Recruitment and Induction

Quality new members are crucial to an effective Rotary club. Because membership in Rotary is by invitation only, club members must reach out to friends, family, business associates, and other community members by asking them to join. Club membership leaders must remind all club members of the importance of identifying and inviting prospective members.

Responsibilities

- Be familiar with guidelines related to recruiting new members.
- Work with the club president to develop and implement a membership recruitment plan.
- Identify all potential candidates for membership.
- Lead by example: Club membership leaders should bring in one new member during the first month of the Rotary year.
- Provide relevant information about your club and Rotary International to prospective members.

Creating an Effective Recruitment Strategy

An effective membership recruitment strategy has several important components, including the following steps:

1. **Identify** all potential candidates for membership. Consider all qualified candidates. Create new classifications if a prospective member's profession is not on the club's classification list. When seeking members, clubs should look to the following resources:
 - Prominent businesses and corporations in the area
 - Professional and trade associations
 - Chamber of commerce
 - Local and regional government offices
 - Business associates
 - Leaders of other nonprofit associations
 - Rotary Foundation alumni
 - Current and former Rotaractors
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. (Refer to new member orientation information found on pages 26-27.)
3. **Invite** candidates to join in a manner that highlights their personal interests and reasons for joining, not those of their sponsor. Membership in Rotary is by invitation only. Clubs must ask people to join.

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.

4. **Induct** new members in a ceremony that is dignified and meaningful.
5. **Orient** the prospective new member about your club and RI properly. Providing an effective orientation for prospective members through education is vital to their growth as individual Rotarians and will enable them to participate effectively in club activities.
Assign an individual mentor to the new member, to help him or her become a part of the club.

For more information on mentoring, please see Appendix 2 (pages 31-32) and Appendix 3 (pages 33-34).



See Appendix 2 on pages 31-32 for new member orientation ideas.

New Member Orientation

Your club's orientation program must give new members the knowledge and confidence necessary for them to be active Rotarians.

An effective new member orientation and education program ensures the following benefits:

- New members who gain knowledge regarding Rotary can become immediately involved in club activities.
- Educated members will feel more comfortable interacting with experienced members.

The most effective way to assimilate new members into the club is by immediately involving them in programs and activities.

Responsibilities

- Work with the club president to develop and implement a new member orientation and mentoring program.
- Ensure club members have the skills and knowledge to assist in new member orientation.
- Facilitate new member orientation by assigning a mentor to each new member.
- Involve new members in club projects and activities that match their interests immediately.

The process of new member orientation should build on the information provided to prospective members. Work with the club president and relevant club and district leaders to devise goals and strategies that ensure the smooth integration of new members into the club.

The Essentials for New Members

One of the first steps in any new member orientation program is communicating basic information about Rotary to new members regarding the benefits, responsibilities, and opportunities for service related to Rotary membership.

The **benefits** of Rotary membership include:

- Participating in activities that have a positive impact on the local community and communities in other countries
- Meeting individuals in different professional capacities
- Associating with a group with high standards of character and integrity

Being a Rotarian requires a considerable commitment of time and resources.

The **responsibilities** of membership include:

- Following the club's attendance requirements
- Paying dues to Rotary International and the club
- Participating in club projects, programs, and activities
- Proposing qualified individuals for membership

With responsibility comes opportunity. Based in thousands of communities around the world, Rotary is often in an ideal position to affect positive change — improving the lives of countless people and giving its members many **opportunities** for service. For example:

- Club members can develop and conduct their own service projects.
- Rotary offers the chance to serve both locally and globally.
- The Rotary Foundation offers the chance to participate in a wide variety of educational and humanitarian programs.
- Club members can make a difference by contributing funds to The Rotary Foundation.

Involving New Members

The most effective way to help new members become a part of 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 new members to serve on an active committee immediately after induction. This is most effective if you
 - Select a committee that relates to the new member's interests
 - 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 new members to participate in a service project.
- Assign a new member to be an official greeter or to introduce a speaker at a weekly meeting.
- Assign a mentor to each new member.



Member Satisfaction and Resigning Member questionnaires can be found on pages 39-44.

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 informed of changes and opportunities will ensure that they remain in the club as challenged, motivated, and enthusiastic members. Members who are dedicated and motivated help the club function effectively and are also more likely to attract new members.

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 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* or Rotary regional magazine, and *Rotary World*.
- Make club meetings fun and find ways to involve family members.
- Include membership items in the 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.



Appendix 1: Electing and Inducting New Members

Electing a New Member

In order for a candidate to become a member, he or she must meet membership qualifications and be approved by the club's board of directors. The following procedure should be followed to elect a new member:

1. A sponsor, an active member of the club, submits the name of the potential member to the club's board through the club secretary. A transferring or former member of another club may be proposed to active membership by the former club or a member of that club.
2. The board ensures that the proposed member meets all the classification and membership requirements of the club constitution.
3. The board deliberates for not more than 30 days and informs the sponsor of its decision through the club secretary.
4. If the decision is favorable, the prospective member is informed of the privileges and responsibilities of membership.
5. The prospective member is requested to sign a membership proposal and to permit his or her name and classification to be published to the club.
6. If there is no written objection from any active club member within seven days, and the admission fee is paid, the proposed member is considered elected to the club.
7. If a written objection is filed, the board shall vote on the matter at its next meeting. Check your club's bylaws to determine how many votes are needed to overturn the objection.
8. If the board approves membership despite objections and the admission fee is paid, the proposed member is considered elected.

Inducting New Members

Conducting a dignified and meaningful induction ceremony can mark the beginning of many years of devoted service and fellowship. The club can ensure that an induction ceremony is memorable by

- Highlighting the benefits and responsibilities of becoming a Rotarian
- Ensuring there is adequate time to properly introduce and welcome the member
- Inviting the new member's family to attend the induction ceremony
- Inducting new members in a group
- Presenting the new Rotarian with a lapel pin and, if appropriate, other carefully selected material

Sample Induction Ceremony

The following script is a sample Rotary induction ceremony, which can be modified, shortened, or expanded to meet the needs of your club.

You have been chosen to membership in the Rotary Club of _____ because your fellow members believe you to be a leader in your vocation and because you embody those qualities of mind and spirit which enable you to interpret and impart the message of Rotary to those you meet.

You are the representative of your vocation in this club and any contribution of an educational value pertaining to that vocation must naturally come to us through you. On the other hand, you become the ambassador from us to your classification, and it becomes your duty to carry the ideals and principles of service to your work.

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.

I charge you to judge yourself by The Four-Way Test of the things you think, say, or do:

First. Is it the TRUTH?

Second. Is it FAIR to all concerned?

Third. Will it build GOODWILL and BETTER FRIENDSHIPS?

Fourth. Will it be BENEFICIAL to all concerned?

The community will know and judge Rotary through your embodiment of it in character and service, and we accept you as a member because we believe our principles and organization to be safe in your keeping.

We also expect much from you in help and inspiration, which will enable us to be better Rotarians, and with this hope we most heartily offer you the hand of Rotary fellowship.



Appendix 2: New Member Orientation — Strategies for Success

Immediately involving new members in club operations is of great importance. It is equally important to structure programs that are directly targeted at educating new members. Effective orientation programs include:

- Mentoring programs
- Rotary information programs
- New member programs, in which all club members who join in the same time period work together on a project and/or meet for social occasions
- Distribution of Rotary publications

While orientation programs may differ in form, they have the same function: giving new members the knowledge and confidence to become Rotarians in name and spirit. It is important to note that a club does not have to choose a single orientation strategy, but should combine and adapt strategies to meet its individual needs.

Mentoring

Mentoring programs are particularly popular and effective. While Rotarians chosen to be mentors may be present or former club or district officers, more important they should

- Have a high level of knowledge and interest about the club and Rotary
- Be willing and able to help the new member to whom they have been assigned fully participate in the club

Mentors, who may be assigned to new members before or immediately after induction, should generally assume the following tasks:

- Monitor the new member's comfort level with and involvement in the club through periodic personal meetings.
- Attend club meetings with the new member and introduce him or her to other club members.
- Explain the various club committees and guide the new member to a committee assignment that is compatible with his or her interests.
- Inform the new member about special meetings, such as new member meetings and Rotary social events throughout the year. The mentor should also attend as many of these events as possible and act as an informal host to the new member and his or her family, introducing them to other members and making sure they are comfortable.
- Make sure that the new member understands all club rules, including the attendance requirement.
- Monitor the attendance of the new member. If he or she must miss a regular meeting, offer to accompany them to a make-up meeting.
- Involve the new member in his or her committee activity if the new member has not been appointed to another committee.
- Be available to answer questions and provide requested counsel or guidance.

Rotary Information Programs

Many clubs also offer special Rotary information programs for new members. These programs should inform new members about the structure, history, and ideals of Rotary, as well as club programs. In general, Rotary information programs for new members should cover the following topics:

- Rotary policies and procedures
- Opportunities for service
- History and traditions of Rotary International and the local club

New Member Programs

Another tool that has been used successfully in helping to orient members is a new member program in which all the club's new members, as a group, learn about the club and participate in joint activities or projects.

One such program is the STAR (Special Training for Action in Rotary) program. The program was developed by the Rotary Club of El Paso, Texas, USA, and has proven to be very effective in helping to educate new members and prepare members to assume leadership positions within the club. In the STAR program, all new members who join in the same year form the STAR committee along with several former and/or current club leaders, one of whom should be the committee chair. This committee meets for breakfast once a month in order to get to know one another and experienced club leaders, as well as to discuss club activities and issues facing the club, the district, and Rotary International. Additional information on the STAR program is included in Appendix 5.

Materials Available from Rotary International

Rotary International offers a number of publications and other resources that help provide a comprehensive Rotary education. Strongly consider distributing some of these publications to prospective members before induction. This will help integrate the new member into the club following induction.



Appendix 3: 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.

Date Completed

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. *Rotary Basics*
 - B. *The ABCs of Rotary*
 - C. *A Menu of Service Opportunities*
 - D. *The Rotary Foundation Quick Reference Guide*
3. Listen to the audiotape *Rotary in an Hour*. _____
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.



Appendix 4: Rotary Information Programs

Rotary information programs for new members provide an opportunity to offer training on the club, district, and Rotary. Clubs should determine the topics and number of programs that they will provide. Each program should include reference materials that the new members can use after their training. Below please find a suggested outline for three Rotary information programs.

Clubs are encouraged to find appropriate ways to involve the families of new members in orientation activities. Clubs may also consider inviting their assistant governor or district committee chairs to present Rotary information programs.

Rotary Policies and Procedures

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

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

New members should consult with their mentors and choose a specific club committee in which to become personally involved. New members should also be introduced to Rotarians who have been active in programs of mutual interest.

History and Traditions of Rotary International

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

Orientation materials should be presented in an engaging and accessible format. Interactive activities such as worksheets or question-and-answer sessions can help to keep participants interested. Some innovative clubs have even developed CD-ROMs for new member orientation.

Continuing Education for Members

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

- Frequent communication of Rotary news and information
- A set number of club programs focused on continuing education, per year
- 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
- Sharing of ideas and information on Rotary programs, projects, and activities at regular committee and informal meetings
- Attendance at meetings of other clubs

Members will feel more a part of the club and Rotary's mission if they are kept abreast of changes and events. Use your club and district Web sites, weekly meetings and e-mails, and club bulletins to share information from your district governor or the RI Secretariat. Make sure everyone knows about such RI programs as Youth Exchange, Ambassadorial Scholars, and World Community Service. Becoming involved in one of these programs can spark a lifelong commitment to Rotary. Encourage all members to attend the district conference and the RI Convention as a way of meeting many Rotarians and learning more about Rotary's activities worldwide.

RI publications are also excellent continuing education tools. By reading publications such as *THE ROTARIAN*, regional magazines, and *Rotary News Basket*, club members can stay up-to date on Rotary activities worldwide. Members should be encouraged to access the RI Web site (www.rotary.org) to keep abreast of current events and resources.

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

- *Official Directory* (007-EN)
- *Catalog* (019-EN)
- *Manual of Procedure* (035-EN)
- *Rotary Fact Pack* (267-EN)*
- *The District Rotary Foundation Committee Manual* (300-EN)
- *This Is Rotary* (449-EN) videotape or DVD

* Other fact sheets are available from the RI Public Relations Division at the World Headquarters or on the RI Web site at www.rotary.org.

- *Rotary in an Hour* (512-EN) audiotape
- *Rotary Basics* (595-EN)
- *Take a Look at Rotary* (867-EN) videotape
- *My Road to Rotary* (922-EN)



Appendix 5: 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.



Appendix 6: Membership Satisfaction Questionnaire

This survey is intended for use by the club. All club members should complete this questionnaire to help assess member satisfaction with club activities and projects. Please return completed forms to the club secretary. Your response is confidential.

Do you feel welcome in our Rotary club? ☐ Yes ☐ No

If no, why not? (Please mark all that apply)

☐ I feel demographically isolated: (Please mark the appropriate response)

Other members were

☐ older ☐ younger ☐ different gender ☐ different ethnicity

Other demographic reason _____

☐ I have not made an effort to meet other members.

☐ Other members have not made an effort to interact with me.

Do you feel comfortable sharing concerns with club leaders? ☐ Yes ☐ No

If no, why not? (Please mark all that apply)

☐ Club leaders have so many responsibilities I do not want to burden them.

☐ Club leaders have their own agenda and are not interested in other ideas.

☐ I have not been a member long enough to feel comfortable approaching club leaders.

☐ I do not want to be perceived as a complainer.

☐ Other _____

How do you feel about the level of our club's involvement in the following types of activities?

(Mark appropriate response)

ACTIVITY

LEVEL OF CLUB INVOLVEMENT

Membership Development	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Member Orientation and Education	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Local Service Projects	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
International Service Projects	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Club Public Relations	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Fundraising	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
The Rotary Foundation	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Fellowship	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware

Have you participated in club projects and activities? ☐ Yes ☐ No

How did you become involved? ☐ I volunteered ☐ I was asked

Please indicate your involvement in the following types of activities:

ACTIVITY	LEVEL OF INVOLVEMENT	
Membership Development	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved
Member Orientation and Education	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved
Local Service Projects	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved
International Service Projects	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved
Club Public Relations	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved
Fundraising	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved
The Rotary Foundation	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved
Fellowship	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved
Other _____	<input type="checkbox"/> I am currently involved	<input type="checkbox"/> I would like to be involved

I am VERY SATISFIED / SATISFIED / DISSATISFIED with my participation in club activities and projects. (Circle the appropriate response)

If you are dissatisfied, why? (Please mark all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Insufficient knowledge | <input type="checkbox"/> Lack of resources |
| <input type="checkbox"/> Personality conflicts | <input type="checkbox"/> Lack of support from other members |
| <input type="checkbox"/> Cost | <input type="checkbox"/> Insufficient family involvement |
| <input type="checkbox"/> Personal time conflicts | <input type="checkbox"/> Other _____ |

How do you feel about the following costs associated with membership in our club?

TYPE OF COST	PERCEPTION OF COST		
Club dues	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate
Cost of weekly meetings	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate
Amount of club fines/assessments	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate
Voluntary contributions to service projects	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate
Voluntary contributions to The Rotary Foundation	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate

Do you enjoy our weekly meetings? ☐ Yes ☐ No

Please circle the appropriate response in the following questions:

The amount of Rotary content in our meetings is ADEQUATE / EXCESSIVE / INSUFFICIENT.

The length of our meetings is ADEQUATE / EXCESSIVE / INSUFFICIENT.

Our club should have MORE / SAME AMOUNT / FEWER fellowship activities.

Our club bulletin contains SUFFICIENT / EXCESSIVE / INSUFFICIENT Rotary information.

Our club bulletin is (please circle all that apply)

INTERESTING / USEFUL / INFORMATIVE / BORING / LIMITED / UNINFORMATIVE.

Our meetings are WELL ORGANIZED / POORLY ORGANIZED.

Our meeting time is CONVENIENT / INCONVENIENT.

If inconvenient, suggestion for an alternate time:

The location of our meeting is CONVENIENT / INCONVENIENT.

If inconvenient, suggestion for a different location:

Which of the following aspects of our meeting place do you find to be unsatisfactory?

(Mark all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Service | <input type="checkbox"/> Décor/atmosphere |
| <input type="checkbox"/> Meal quality | <input type="checkbox"/> Meal variety |
| <input type="checkbox"/> Parking availability | <input type="checkbox"/> Safety of the area in which it is located |
| <input type="checkbox"/> Other _____ | |

Suggestion(s) for change: _____

The following changes would improve our club meetings:

- | | |
|--|---|
| <input type="checkbox"/> Better speakers | <input type="checkbox"/> More focus on fellowship |
| <input type="checkbox"/> Increased variety of program topics | <input type="checkbox"/> Increased emphasis on vocational information |
| <input type="checkbox"/> More involvement of family | <input type="checkbox"/> Better time management |
| <input type="checkbox"/> More service opportunities | <input type="checkbox"/> More leadership opportunities |

Is there anything else you would like to see changed?

How does your spouse/partner/family feel about your involvement in Rotary?

- | | |
|---|---|
| <input type="checkbox"/> Proud of my involvement | <input type="checkbox"/> Feels it takes too much of my time |
| <input type="checkbox"/> Wants to know more/be involved | <input type="checkbox"/> Feels it is too expensive |
| <input type="checkbox"/> Seeks interaction with other
Rotary spouses/partners/families | |
| <input type="checkbox"/> Other _____ | |

Thank you for taking the time to complete this questionnaire and for your commitment to improving our club.



Appendix 7: Resigning Member Questionnaire

We regret that you are leaving our club. This questionnaire will help us assess your satisfaction with your experience as a member of our club. The information you provide will benefit current and future club members. Please return the completed questionnaire to the club secretary.

Why are you leaving our club? (Please mark all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Relocating to a new community | <input type="checkbox"/> My fellowship expectations were not met |
| <input type="checkbox"/> Lack of time | <input type="checkbox"/> My service expectations were not met |
| <input type="checkbox"/> Competing priorities | <input type="checkbox"/> My networking expectations were not met |
| <input type="checkbox"/> Financial constraints | <input type="checkbox"/> Did not feel included |
| <input type="checkbox"/> Other _____ | |

If you are moving, would you consider joining a Rotary club in your new place of residence or occupation? ☐ Yes ☐ No

Did you feel welcome in our Rotary club? ☐ Yes ☐ No

If no, why not? (Please mark all that apply)

- ☐ I felt demographically isolated: (Please mark/circle all reasons that apply)
- ☐ Other members were OLDER / YOUNGER / DIFFERENT GENDER / DIFFERENT ETHNICITY.
- ☐ Other demographic reason _____
- ☐ I did not make an effort to meet other members.
- ☐ Other members did not make an effort to interact with me.

Did you feel comfortable sharing concerns with club leaders? ☐ Yes ☐ No

If no, why not? (Please mark all that apply)

- ☐ Club leaders had so many responsibilities, I did not want to burden them.
- ☐ Club leaders had their own agenda and were not interested in other ideas.
- ☐ I was not a member long enough to feel comfortable approaching club leaders.
- ☐ I did not want to be perceived as a complainer.
- ☐ Other _____

Did you participate in club projects and activities? ☐ Yes ☐ No

How did you become involved? ☐ I volunteered ☐ I was asked

I was VERY SATISFIED / SATISFIED / DISSATISFIED with my participation in club activities and projects. (Please circle the appropriate response.)

If you were dissatisfied, why? (Please mark all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Insufficient knowledge | <input type="checkbox"/> Lack of resources |
| <input type="checkbox"/> Personality conflicts | <input type="checkbox"/> Lack of support from other members |
| <input type="checkbox"/> Cost | <input type="checkbox"/> Insufficient family involvement |
| <input type="checkbox"/> Personal time conflicts | <input type="checkbox"/> Other _____ |

How do you feel about the level of our club's involvement in the following types of activities?

ACTIVITY	LEVEL OF CLUB INVOLVEMENT			
Membership Development	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Member Orientation	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Local Service Projects	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
International Service Projects	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Club Public Relations	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Fundraising	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
The Rotary Foundation	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware
Fellowship	<input type="checkbox"/> Excessive	<input type="checkbox"/> Adequate	<input type="checkbox"/> Insufficient	<input type="checkbox"/> Not Aware

How do you feel about the following additional costs associated with membership in our club?

TYPE OF COST	PERCEPTION OF COST		
Club dues	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate
Cost of weekly meetings	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate
Amount of club fines/assessments	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate
Voluntary contributions to service projects	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate
Voluntary contributions to The Rotary Foundation	<input type="checkbox"/> Excessive	<input type="checkbox"/> Reasonable	<input type="checkbox"/> Inadequate

Did you enjoy our weekly meetings? ☐ Yes ☐ No

Please circle the appropriate response in the following questions:

The amount of Rotary content in our meetings was ADEQUATE / EXCESSIVE / INSUFFICIENT.

The length of our meetings was ADEQUATE / EXCESSIVE / INSUFFICIENT.

Our club should have held MORE / SAME AMOUNT / FEWER fellowship activities.

Our club bulletin contained SUFFICIENT / EXCESSIVE / INSUFFICIENT Rotary information.

Our club bulletin was (please circle all that apply)

INTERESTING / USEFUL / INFORMATIVE / BORING / LIMITED / UNINFORMATIVE.

Our meetings were WELL ORGANIZED / POORLY ORGANIZED.

Our meeting time was CONVENIENT / INCONVENIENT.

Suggestion for change (if appropriate) _____

The location of our meeting was CONVENIENT / INCONVENIENT.

If inconvenient, suggestion for a different venue _____

Which of the following aspects of our meeting place do you find to be unsatisfactory?

(Mark all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Service | <input type="checkbox"/> Décor/atmosphere |
| <input type="checkbox"/> Meal quality | <input type="checkbox"/> Meal variety |
| <input type="checkbox"/> Parking availability | <input type="checkbox"/> Safety of the area in which it is located |
| <input type="checkbox"/> Other _____ | |

Suggestion(s) for change _____

The following changes would improve club meetings:

- | | |
|--|---|
| <input type="checkbox"/> Better speakers | <input type="checkbox"/> More focus on fellowship |
| <input type="checkbox"/> Increased variety of program topics | <input type="checkbox"/> Increased emphasis on vocational information |
| <input type="checkbox"/> More involvement of family | <input type="checkbox"/> Better time management |
| <input type="checkbox"/> More service opportunities | <input type="checkbox"/> More leadership opportunities |

How did your spouse/partner/family feel about your involvement in Rotary?

- | | |
|---|---|
| <input type="checkbox"/> Proud of my involvement | <input type="checkbox"/> Felt it took too much of my time |
| <input type="checkbox"/> Wanted to know more/be involved | <input type="checkbox"/> Felt it was too expensive |
| <input type="checkbox"/> Sought interaction with other Rotary spouses/partners/families | |
| <input type="checkbox"/> Other _____ | |

Is there anything that our club could have done differently to meet your needs?

Would you like us to contact the Rotary club in your new place of residence to notify them that you are interested in joining their club? ☐ Yes ☐ No

New place of residence:

_____	_____	_____
City	State/Province	Country

Thank you for taking the time to complete this questionnaire and for your commitment to improving our club.

3

Service Projects

Club Committees Related to Service Projects

Developing successful service projects is a collaborative effort. Many different club committees work together with club leaders to successfully select, plan, implement, and evaluate a service project.

Selecting Committee Members

When choosing Rotarians to serve on service-related committees it is important to select those who have a strong knowledge of the socioeconomic conditions of the community. Other important considerations include:

- Professional experience related to service, such as:
 - Medicine
 - Education
 - Law enforcement
 - Clergy
 - Nonprofit organization management
 - Civil service
- Experience working with youth and/or senior citizens
- International work, study, or travel experience, if applicable
- Extensive community volunteer experience
- Enthusiasm

Service projects are the primary responsibilities of the following committees:

Community Development

- 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

- 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

- 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

- Promotes the welfare of all people in the 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

- 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

- 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 (the week of 13 March)
- Plans an activity to observe New Generations Month (September)
- Plans an activity to observe World Interact Week (the week of 5 November)

Rotary Volunteers

- 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

- 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

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

Youth

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

Working with Other Committees

To be effective service project leaders, committees should confer periodically with other club committees and leaders, especially in the following areas:

- **Fundraising.** Consult with club fundraising leaders to discuss project goals and ascertain funding needs and possible funding sources.
- **The Rotary Foundation.** Meet with club Foundation leaders to consider ways in which The Rotary Foundation can serve as resource to achieve the club's service goals.
- **Public relations.** Coordinate with public relations leaders to help organize efforts to improve Rotary's public image by conducting service projects and encouraging community participation.
- **Club administration.** Inform administrative leaders of service projects so they can publish project information in the club bulletin and pass along successful ideas to the RI Secretariat or THE ROTARIAN (or Rotary regional magazine).
- **Membership.** Work with club membership leaders to use Rotary's ideal of Service Above Self to orient new and attract potential members.



Service Project Guidelines

Service Projects

- Clubs are encouraged to focus on addressing real community concerns by analyzing their service activities on a regular basis to ensure that the projects undertaken have relevance to the communities being served.
- It is important for clubs to have a balanced service program that encompasses all Avenues of Service — Club, Vocational, Community, and International.
- Clubs are encouraged to plan and implement service projects in which spouses and family members of Rotarians can easily participate.
- Every club should have a service activity that requires the collective cooperation of all its members.
- Clubs are encouraged to invite the presidents of other Rotary clubs to their regular meetings. Such visits allow club presidents to
 - Share information regarding their club's service projects and activities
 - Facilitate good interclub relations
- Clubs are encouraged to initiate international service activities and exchanges with clubs in new Rotary countries to help educate these new clubs about Rotary and its opportunities for service.
- Clubs may cooperate in sponsoring projects; however, there is no provision in RI constitutional documents for an association of clubs outside the framework of RI.

Opportunities for Service

- Community service encourages and fosters the application of the ideal of service in each Rotarian's personal, business, and community life.
- The development of understanding and goodwill among Rotarians and among the general population is the specific task of international service in Rotary.
- The World Community Service (WCS) program consists of activities within International Service that
 - Improve lives
 - Meet human needs
 - Promote international understanding
 - Produce goodwill by means of technical and professional activities

Public Relations and Club Projects

Clubs should

- Sponsor a major community service project each year
- Seek to actively inform the public about the projects carried out successfully by Rotary clubs
- Overcome any negative perceptions of Rotary by creating positive service projects
- Undertake, if feasible, both annual and continuing projects that will be clearly identified with the club and visible to the community

Community, National, and International Affairs

The general welfare of the community, the nation, and the world are the concern of members of all Rotary clubs. The merits of any public question involving such welfare issues is a subject for fair and thoughtful discussion and study. However, clubs should not

- Express an opinion on any pending controversial public legislation
- Endorse or recommend any candidate for public office, nor shall clubs discuss the merits or demerits of any candidate
- Adopt or circulate resolutions or views or take corporate action dealing with world affairs or international policies of a political nature
- 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



Service Projects Resources

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

- Service-oriented club committees (as described on pages 45-47)
- Project organizing committee
- Other human resources
- Information
- Finances

Project Organizing Committee

Successful service projects depend upon 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



RI's Structured Programs and Menu of Service Opportunities help clubs and districts achieve their service goals in their own communities and in communities abroad.

Structured Programs

- Interact
- Rotaract
- Rotary Community Corps (RCC)
- Rotary Fellowships
- Rotary Friendship Exchange
- Rotary Volunteers
- Rotary Youth Leadership Awards (RYLA)
- World Community Service
- Youth Exchange

Menu of Service Opportunities

- Children at Risk
- Disabled Persons
- Health Care
- International Understanding and Goodwill
- Literacy and Numeracy
- Population Issues
- Poverty and Hunger
- Preserve Planet Earth
- Urban Concerns

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)
- *International Service in Action: A WCS Video Workshop* (753-EN)
- *A 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)
- *Vocational Service in Your Community* (509-EN)
- *World Community Service Handbook: A Guide to Action* (742-EN)
- World Community Service Projects Exchange on the RI Web site

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



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

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).

Successful Service Projects

An important Rotary ideal is represented in the motto, Service Above Self. Clubs put this motto into action by implementing service projects that benefit their communities and communities around the world. The exemplary efforts of thousands of Rotarians and their clubs are making real differences in the lives of people.

A successful service project is one that

- Responds to a genuine 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

Benefits to the Club

While service projects can have a profound effect upon the communities they serve, they also benefit the club. A successful service project can

- Inspire and motivate members to increase the club's and their own service activities
- Attract potential members by demonstrating that Rotary membership is a worthwhile use of time and resources

General Criteria

To achieve success, your club's service efforts should be guided by the following principles:

- **Balance.** Your club's service program should encompass all Avenues of Service — Club, Vocational, Community, and International.
- **Relevance.** Review regularly the club's service efforts to ensure that they focus on the real concerns of the community and project beneficiaries.
- **Cooperation.** Conduct service activities that require the involvement and participation of club members and their families.
- **Communication.** Exchange information about service projects with other club presidents (for example, by inviting them to regular club meetings) and communicate with the district and Rotary International, thus helping to spread effective practices throughout the Rotary world.

Your Responsibilities

Service projects require a systematic approach in order to achieve maximum success. As a club leader responsible for ensuring the success of service projects you should implement these steps:

- Work with club officers and members to ensure that the club develops projects that are both appealing to members and relevant to project beneficiaries.

- Be aware of the many resources available from the district, Rotary International, and The Rotary Foundation that can support club projects.
- Know the basic steps of a successful project:
 - Needs assessment
 - Planning
 - Implementation
 - Evaluation



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 a club service leader, you must 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.

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 if 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 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 communicate 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 to 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.



Project Planning and Implementation

As a club service leader, you help oversee the planning process, working with committee members and other club leaders to shape project plans that address real community needs. Ensure that project plans 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 6, "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 commitments to any ongoing projects.

What will be the goal of the project?

Ensure 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, and 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?

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

Selecting a Service Project (pages 60-61) and the Fund-raising Worksheet (page 74) have been included to help you plan service projects.

Successful planning 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 project beneficiaries well informed.
- Communicate regularly with Rotarians, community members, and those benefiting from the project.



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).

Evaluation

Evaluation plays an important role in the club's current service project and its future projects. As a club service leader, you should evaluate all project activities in which the club engages. A thorough evaluation enables the club to

- Review successes and failures and learn from those experiences
- 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 not?
- 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 a survey 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 in the future.



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

Visit the WCS Projects Exchange on the RI Web site. You can search by project type to find a project to support. If you are looking for an international partner to assist with your project, submit a description of your project to RI to be included on the projects exchange.

International Service Projects

In Rotary, the idea of community extends far beyond the location of a single Rotary club; it encompasses people in places throughout 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.

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 on the RI Web site.
- Speak with the district World Community Service committee 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 the club develops its WCS project, remember that many WCS projects qualify for funding from The Rotary Foundation. Consider the Foundation's Humanitarian Grants when planning to enhance and increase the impact of WCS projects:

- District Simplified Grants
- Individual Grants
- Matching Grants

For more information on using Humanitarian Grants to help finance your international service projects, refer to chapter 5, "The Rotary Foundation."



Appendix 8: 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.*

4 Fundraising for Service Projects

Fundraising plays an important role in supporting many club activities, specifically service projects and annual giving to The Rotary Foundation. Club fundraisers are a collaborative effort that involves club leaders, the club secretary and/or treasurer, and often several club committees. Club committee chairs must understand the principles of conducting fundraisers to ensure the success of their fundraising activities and the projects they support.

Fundraising Responsibilities

The following responsibilities are associated with raising funds to sustain or expand club project activities:

- Ensuring broad participation by club members in fundraising activities
- Carefully managing the finances associated with fundraisers



Forming a Fundraising Organizing Committee

Strive to involve all club Rotarians, not just those committees whose projects are directly affected by a fundraiser. For maximum effectiveness, consider forming an ad hoc organizing committee responsible for planning, conducting, and evaluating each club fundraiser.

Selecting Committee Members

When choosing Rotarians to serve on an ad hoc fundraising organizing committee, it is important to select club members with the following characteristics:

- Professional or volunteer fundraising experience
- Sales experience
- Accounting experience
- Legal or insurance experience
- Logistical planning experience
- Strong connections to a cross section of the community, including:
 - Business relationships
 - Professional associations
 - Local civic groups
 - Members of the media
 - Local government agencies
 - Other nonprofit organizations

Working with Other Club Leaders

Other club leaders who should participate in preparing and conducting fundraisers include:

- **Public relations** leaders, who can ensure that the fundraiser is adequately promoted in the community
- **Club administration** leaders, who can use the club bulletin to promote the fundraiser within the club
- **Service project and Rotary Foundation** leaders, who can
 - Clarify the club's service goals
 - Help ensure that fundraising efforts are focused and goal driven
 - Ensure that club projects are complementary and do not compete for available funds

Keys to a Successful Fundraiser

While fundraising purposes and methods may vary, it is important to be aware of the elements necessary for a successful fundraiser, including:

- Advance planning and preparation
- Working with volunteers
- Sound financial management
- Promotion
- Evaluation



Club Fundraising Guidelines

Liability Protection — Insurance and Incorporation

- Clubs are urged to obtain advice of legal counsel or liability counsel regarding the need for protection against liability from any club project or activity.
- It may be advisable to seek the incorporation of a club or an activity of that club.
- Incorporation is a matter for determination by a club's local circumstances. Contact your Club and District Administration representative at RI for further information on incorporation in your area.
- When a club is involved in an unusual activity it may be advisable to incorporate the activity rather than the club itself.
- The RI Board offers no objection to incorporation of a Rotary club provided the club includes within the articles of incorporation a phrase stating its allegiance to and submission of the club to the RI Constitution and Bylaws, as it now exists and as may hereafter be amended. The articles of incorporation should be submitted to the RI Board through your Club and District Administration representative. Your club will then receive a letter from the RI Board offering no objection.
- Clubs should maintain liability insurance for their activities as appropriate for their geographic region.
- Clubs in the United States and its territories and possessions automatically participate in a general liability insurance program administered by RI. Clubs outside the United States should contact their international office for specific information about their area.

Commercialization and Circularization

- Rotarians are prohibited from using the *Official Directory* of Rotary International as a commercial mailing list.
- Rotarians are prohibited from making the *Official Directory* available to anyone for commercial purposes.
- No organization may circularize the member clubs of Rotary International.
- Under limited circumstances, it is permissible to circularize other clubs regarding matters that do not affect business interests, with these stipulations:
 - A member club that desires to request cooperation from another club in connection with any matter whatsoever, must first submit its purpose and plans and secure the permission of the respective governor or governors.
 - No member club shall solicit financial aid from any other club or from individual Rotarians, other than its own members, until it first secures authorization from the RI Board.
- Official directories of RI, a country, a district, or a club should not be made available to districts, clubs, or Rotarians for the purpose of circularization.

- The RI Board does not look with favor on the use of commercial telemarketing by Rotary clubs or districts for any purpose.
- Ordinarily, RI does not furnish lists of Rotarians for any purpose without the express permission of the RI Board.
- Those seeking a list of club members must seek permission from the individual club.
- If a governor seeks a list of club members from the general secretary, the general secretary will supply it to the governor.

Fundraising Activities

- When participating and planning to collect funds, or engaging in other activities, clubs should be careful not to engage in undignified practices that do not contribute to upholding and strengthening the club's prestige.
- Clubs are discouraged from using unsolicited e-mail as a fundraising technique, as such e-mail solicitations are often viewed negatively in different nations.
- If local law requires a provision in a club's constitution for fundraising, a club desiring such an authority should seek the approval of the RI Board.
- Clubs are not authorized to offer prepaid telephone cards as a fundraising activity.

Compliance with National Laws

- Every Rotary club is expected to comply with the laws of the country in which it functions.
- If an article in any RI constitutional document imposes requirements inconsistent with local law, the affected club should present the problem to the RI Board.



See Steps for a Successful Fundraiser (pages 72-73) for a detailed checklist your club can use when planning a fundraiser.

To help determine fundraising goals and budgeting needs use the Fundraising Worksheet (page 74).

Planning a Fundraiser

Before conducting a fundraiser, take the following steps:

- Assess the club's financial needs with respect to its current service projects and its service-oriented goals.
- Determine the purpose of the possible fundraising activity.
- Set a fundraising goal.
- Assess current volunteer resources and determine how many more volunteers may be necessary.
- Apply the lessons learned from past fundraisers.

Developing a Budget

The funding required for community service projects will help determine the size and scope of a club's fundraising effort. The following questions can help the organizing committee set a budget and fundraising goal:

- What project(s) will benefit from the fundraiser?
- How much money is currently available in the club budget to support the project(s)?
- Does the club budget contain funds to defray the cost of conducting a fundraising activity?
- How much additional money will the project(s) require?
- How will the money benefit the project(s)?
- Are there external sources that could support the project(s)?

The budget should include all estimated expenditures for conducting the fundraiser as well as estimated revenues.

Logistical Considerations

When planning a fundraiser, consider the following logistical factors:

- Venue
- Resources (people and materials)
- Timing of the event

When determining the best time to conduct a fundraiser, consider the following:

- Allow ample time to plan and promote the event.
- Consider weather conditions and make accommodations for inclement weather.
- Check community calendars to ensure that the fundraiser does not conflict with other planned community events.
- Avoid conflicts with major national or religious holidays or sports events.
- Take advantage of holidays when appropriate and when the club might be able to sell goods associated with a particular holiday tradition.
- Ensure that the fundraiser does not coincide with a district- or zone-level Rotary event if you want the governor or other district leadership to participate.



Working with Volunteers

Conducting a successful fundraiser requires the collaborative efforts of many people, so being able to coordinate and motivate volunteers is essential.

Coordinating Volunteers

Consider these steps as you coordinate volunteers for a fundraising activity:

- Form working committees that report to the organizing committee. These committees, which can organize, plan, and implement the event, can meet periodically and with increasing frequency as the event nears.
- Chairs of each working committee should meet regularly with the organizing committee to report progress and coordinate activities.
- Ensure that volunteers have clearly defined tasks.
- Ensure that there are sufficient volunteers to follow up on final arrangements immediately preceding the event or activity.
- Solicit feedback from volunteers on how fundraising efforts might be improved.

Motivating Volunteers

To motivate volunteers, the fundraising organizing committee should do the following:

- Involve volunteers (who may be from the club or community) from the beginning of any effort. Involvement will give the volunteers a stake in the fundraiser's ultimate success, and thus they will be more willing to devote their time and energy to the fundraising effort.
- Solicit feedback regarding how fundraising efforts can be improved. Volunteers' experience can provide valuable insights into club efforts.
- Remember to thank all volunteers at every meeting; show appreciation after the event by giving volunteers thank-you notes, photos, plaques, or even small gifts if appropriate.

Finding Volunteers

Volunteers for fundraising efforts can be found within the club as well as in the community. Cooperation with community members and other organizations increases awareness of Rotary and helps identify potential members. Volunteers from outside the club can include:

- Family members and friends
- Rotaract or Interact club members
- Rotary Foundation alumni
- Youth Exchange students and RYLA participants
- Members of other service organizations in the community
- Local public officials (for example, official from public health department)
- Representatives from local religious institutions
- Secondary school and university students

Proper Management of Funds

Clubs are urged to handle their finances in a businesslike way, including requiring a counter-signature on disbursement checks and an annual audit. The club treasurer, who is responsible for handling and managing funds, should work closely with any committees that conduct fundraisers. In a club without a treasurer, the club secretary often fulfills these responsibilities.

You can help ensure a fundraiser's financial integrity with additional procedures such as the following:

- Determine a fundraising budget, including anticipated expenses and revenue.
- Establish a separate bank account for monies associated with the fundraiser to facilitate bookkeeping and preserve the club's financial propriety.
- Account for all expense payments made and donations collected.
- Purchase insurance to cover the unlikely event of property damage, accident, or injury (depending on the type of event or activity planned).

Additionally, the club treasurer or secretary should consider issuing reports on the disposition of money collected from the community to assist in projects. If necessary, consult an accountant to determine if there are any tax or other liabilities.



Prominent use of the Rotary logo will ensure the community is aware that the fundraiser is sponsored by a Rotary club. For more information about the use of the Rotary logo, refer to the *Visual Identity Style Manual* (547-EN).

Promoting a Fundraiser

The number of people who participate in a fundraiser is largely dependent upon how the club promotes it. A well-publicized event will not only draw a large number of participants and volunteers, but will also help build public awareness of Rotary and appreciation for its community service work. The organizing committee should closely coordinate its efforts to promote the fundraiser with the club's public relations committee.

Ideas for promoting the club's fundraiser include:

- Promoting the event in the club bulletin and governor's monthly letter
- Distributing fliers throughout the community
- Posting signs in prominent locations
- Printing T-shirts to be worn by volunteers
- Buying advertising in the media to reach a large audience
- Seeking media coverage, if the event is newsworthy, from local newspapers, radio stations, and/or television stations

Additional information about effectively promoting club projects and activities can be found in chapter 6, "Public Relations," or by consulting *Effective Public Relations: A Guide for Rotary Clubs* (257-EN).



Evaluating a Fundraiser

It is important to discuss the strengths and weaknesses of the fundraiser with club leaders as soon as possible after the event. This process allows the club to learn lessons that can be applied to planning future efforts. Particularly successful fundraisers can be repeated or continued and shared with other Rotary clubs, the district, and RI.

Falling Short of a Funding Goal

If the fundraiser does not achieve its funding goal, the club can consider

- Seeking financial assistance from other groups in the community who may support the project goal of the fundraiser (You're more likely to avoid a shortfall by involving others in a coalition from the start.)
- Scaling back the original project goals

Evaluation is especially important for a fundraiser that does not achieve goals as planned. Examining why the fundraiser was not successful will benefit future fundraising efforts.

Exceeding Expectations

If a fundraiser is particularly successful, funding goals may be exceeded. It is important to have a contingency plan in case this happens. Possible plans for excess funds include:

- Placing funds in an account for future community service projects
- Expanding ongoing projects
- Funding new projects
- Contributing funds to The Rotary Foundation

Benefits of a Successful Fundraiser

Fundraising can be an extremely beneficial activity. Through the efforts of Rotarians and other volunteers, a successful fundraiser can support projects that make a real difference in people's lives. Other less tangible benefits include:

- Demonstrating how the efforts of Rotarians and other volunteers can make a real difference in other peoples' lives
- Fostering fellowship among club members as they work together to reach a common goal
- Providing an opportunity for community members to learn more about Rotary and its tradition of service
- Allowing clubs to work with other community organizations — an opportunity to share resources and expenses, as well as build goodwill and strengthen ties within the community

Ensuring Continuity

To ensure continuity of expertise gained in planning your fundraiser, follow these steps:

- Keep careful financial records and then share them with succeeding committee members or club treasurer.
- Turn over any funds, books of account, records of club property, or electronic files to relevant club members.
- Discuss any outstanding issues that the new treasurer and club fundraising leaders will have to address.



Appendix 9: Steps for a Successful Fundraiser

The following list outlines the main steps necessary to conduct a successful fundraiser. You may need to change the order of the list when adapting it for use in your club.

1. Determine fundraising needs.
 - Work closely with service project and Rotary Foundation leaders to determine funding objectives.
 - Decide the type of event appropriate to meet the club's funding needs.
 - Determine if the planned event warrants incorporation.
2. Establish a budget.
 - Consult with the club president, club treasurer (or club secretary), and other club leaders regarding the amount of funding available in the club budget.
 - Determine expenditures required to conduct the fundraiser.
 - Determine the anticipated revenues.
 - Set the fundraising goal.
3. Determine the resources available and the resources required to meet fundraising goals.
 - Determine the human resources needed to plan and implement the fundraiser.
 - List donated goods and services for the fundraising effort.
4. Determine the logistics of the fundraiser.
 - Choose an appropriate date and venue for the event.
 - Make necessary reservations and arrangements.
 - Establish a timetable for each step involved.
 - Ensure compliance with local and national laws.
5. Organize volunteers.
 - Determine roles and tasks for volunteers; ensure that each volunteer has something to do.
 - Involve community members, as appropriate.
 - Involve friends, family, and business associates, as appropriate.
6. Publicize the event.
 - Work with the club's public relations committee to develop promotional strategies.
 - Determine the most effective way to publicize the event.
 - Determine the target audiences in both the club and in the community.
 - Consider seeking the attention of the local media.
7. Implement the fundraiser.
 - Carry out the plans for the event.
 - Encourage volunteers to monitor progress, noting successes and challenges to be discussed during evaluation.

8. Track the funds raised.
 - Set up a tracking procedure before collecting any funds.
 - Deposit funds in an account opened for the event.
 - Account for all contributions and expenditures.
 - Issue a report on the disposition of the funds raised.
9. Recognize volunteers and contributors.
 - Thank volunteers frequently (before, during, and after the event).
 - Publicly recognize volunteers' efforts during club meetings and at the event itself.
 - Follow up with personalized thank-you notes, photos, plaques, or even small gifts, if appropriate. You may wish to thank sponsors via the media.
10. Evaluate the effort.
 - Discuss the event with the fundraising organizing committee, club president, and other club leaders.
 - Record lessons learned so they can be applied to future fundraisers.
 - Share ideas and experiences with other clubs and Rotary International.
11. Ensure continuity for future fundraising efforts.
 - Review club fundraising records with incoming club leaders or the club treasurer.
 - Turn over any funds, books of account, records of club property, or electronic files to appropriate club members.
 - Discuss any outstanding issues with the incoming treasurer and new members of the fundraising organizing committee.



Appendix 10: Fundraising Worksheet

Fundraiser will support (please list each item below)

Amount Needed

_____	_____
_____	_____
_____	_____
_____	_____

1. Total funding needed

Amount needed to conduct the fundraiser

Promotion

(T-shirts, community / media outreach, etc.)

Materials

(invitations, tickets, decorations, etc.)

Volunteer expenses

(transport, meals, etc.)

Other _____

(please specify)

2. Total support amount needed

3. Add items 1 and 2 for total needed

4. Total provided for in club budget

5. Subtract item 4 from 3 for fundraising goal

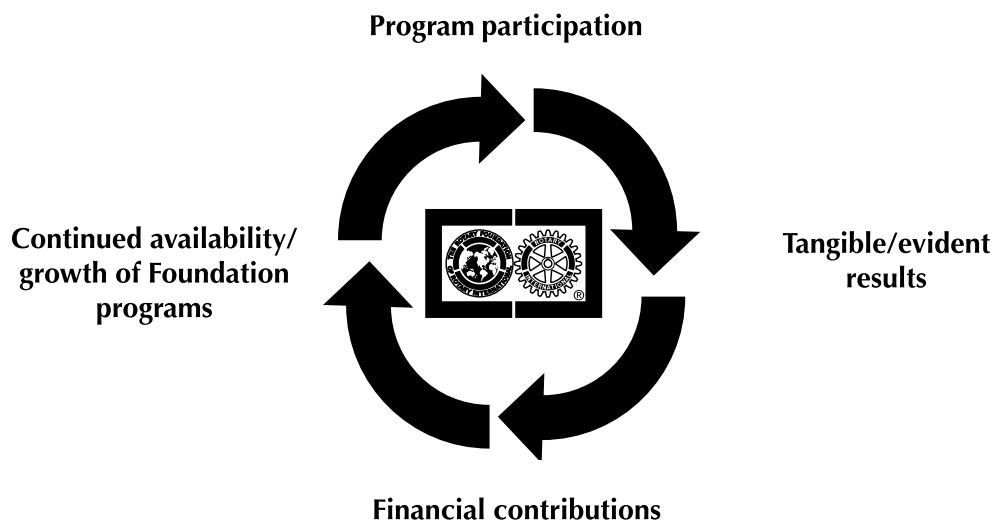
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The Rotary Foundation

Club Committees Related to The Rotary Foundation

The mission of The Rotary Foundation is to support the efforts of Rotary International in the fulfillment of the Object of Rotary, Rotary's mission, and the achievement of world understanding and peace through local, national, and international humanitarian, educational, and cultural programs. Club committees and subcommittees are an integral part of Rotary Foundation activities in your club. The club-level committee structure for The Rotary Foundation committee and subcommittees parallels the district-level committee structure. You should adapt it to meet the needs of your club. For example, if the club plans to apply for a humanitarian grant, it 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 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.

Refer to The Rotary Foundation section of the *Planning Guide for Effective Rotary Clubs* found in the *Club President's Manual* (222-EN) when considering how the club's committee structure relates to 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)

The Rotary Foundation committee can have the following subcommittees:

Alumni

- 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

Annual Giving

- Explains the relationship between Rotary Foundation programs and Annual Programs Fund giving
- Encourages every Rotarian to make a 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

Grants

- Knows each grant program and where to find information regarding eligibility criteria and application processes
- Understands the District Designated Fund (DDF), how funds 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

Group Study Exchange (GSE)

- Knows the program objectives 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 past team members to speak at club meetings

- Promotes home hosting and vocational opportunities to club members and offers to host the visiting team
- Publicizes the visit and activities of a team visiting the local community

Permanent Fund

- Secures Benefactor commitments (bequests and outright gifts of US\$1,000 or more to the Permanent Fund)
- Communicates regularly with the district Permanent Fund chair, identifying prospects for major gifts within the club and helping to cultivate and solicit 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

PolioPlus

- 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

Scholarships

- 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 the district and helps promote their activities, as requested by district leadership

Selecting Committee Members

When selecting committee members who will lead the club in pursuing Rotary Foundation goals, the following are important assets:

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
- Fundraising or sales experience
- Presentation skills
- Financial experience (e.g., accounting)



Program Participation: Educational Programs and Humanitarian Grants Program

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

Educational Programs

Through 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 sharing with them the service opportunities available through Rotary to help address those needs. The newest 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 the Humanitarian Grants Program 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

Educational Programs:

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

Humanitarian Grants Program:

- District Simplified Grants
- Individual Grants
- Matching Grants

Each educational and humanitarian grants program has specific eligibility criteria and application forms, which are available through the RI *Catalog*, the RI Web site, www.rotary.org, or from the district Rotary Foundation committee.

- *Demonstrates a commitment to financial stewardship of Rotary Foundation funds, which were donated by thousands of Rotarians*

Information on how your club can participate in the programs of The Rotary Foundation can be found in *The Rotary Foundation Quick Reference Guide* (219-EN).



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.

PolioPlus

Rotary's most recognized humanitarian program is the initiative in support of the global eradication of polio known as PolioPlus. By 2005, Rotary's contributions to the global polio eradication effort will 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. Clubs can support this effort 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.
- Work with local health officials to educate the community about the importance of reporting any cases of acute flaccid paralysis.
- 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.



Financial Support of The Rotary Foundation

When Rotarians can see the 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 in making those opportunities possible. It is essential that the club Rotary Foundation committee (particularly subcommittees related to Foundation giving) 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

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.

Unrestricted gifts. Gifts to the Annual Programs Fund 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 may be made to certain Rotary Foundation programs, specifically Matching Grants and PolioPlus, and are considered restricted 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, the club's emphasis should be on Annual Programs Fund giving.

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.

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 Fund (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

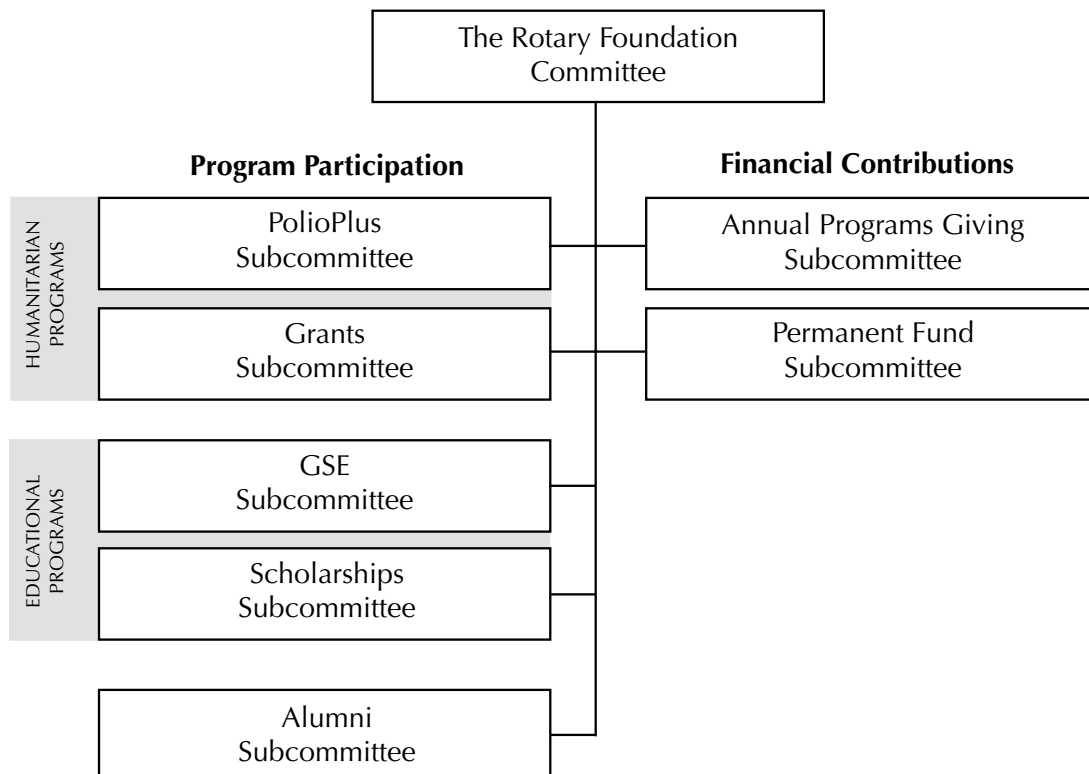


Achieving Balanced Support of The Rotary Foundation

Direct participation in Rotary Foundation programs enables 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. Their contributions enable the Foundation to offer more programs that support its mission, which increases program participation. This cycle ensures the future of The Rotary Foundation. The Rotary Foundation's 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.

Effective clubs support The Rotary Foundation through both program participation and financial contributions. The club Rotary Foundation committee and subcommittees should work to motivate club members to participate in Rotary Foundation activities in these two important ways. They should also provide club members with the knowledge necessary to support The Rotary Foundation effectively.





Rotary Foundation District Resources

District Committees

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. For general questions or to request guidance, contact your district Rotary Foundation chair.

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 earlier. 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 that reflect the 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 District Designated Funds availability. 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.

District Rotary Foundation Seminar

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

6 Public Relations

Public Relations Committee

Raising Rotary's public image is essential to a club's ultimate success. Public relations can greatly enhance the impact of club activities ranging from membership recruitment to community service. While many different groups in the club may be concerned with public relations, the public relations committee is responsible for coordinating public relations efforts.

Selecting Committee Members

When choosing Rotarians for the public relations committee it is important to select articulate Rotarians who are knowledgeable about Rotary International and the club and can be effective spokespeople when dealing with the media. Rotarians to consider include:

- Media professionals
- People with ties to the media through business or other professional activities, such as advertising
- Individuals with speaking, writing, or photography skills
- Civic, academic, or religious leaders within the community
- Rotarians with a thorough knowledge of the club and Rotary International
- Web designers

Public Relations Committee Responsibilities

- Presents information to the public about the club, Rotary, its history, goals, and accomplishments throughout the Rotary year, 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 updates it regularly
- 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
- Keeps the district public relations chair informed of larger stories that may generate interest beyond the local community
- Works with the magazine committee to keep RI informed of newsworthy club projects

Preparing Committee Members

The committee chair should do the following to help committee members operate effectively as club public relations leaders:

- Inform committee members about the responsibilities associated with club public relations.
- Share examples of past public relations efforts, both successful and unsuccessful, and discuss why those efforts did or did not work in order to apply lessons to current efforts.
- Provide committee members with a calendar of club and community events to facilitate planning.
- Prepare a list of visitors who may be of interest to the local media, including:
 - Ambassadorial Scholars
 - Youth Exchange participants
 - Group Study Exchange team members
 - District governor
 - Unique or noteworthy program speakers

Working with Other Club Leaders

Although the public relations committee is directly responsible for coordinating a club's public relations campaign, other club committees and officers can also play important roles in enhancing and sustaining Rotary's positive public image. Other committees that support club public relations include:

- **Membership development committee.** Can assist in recruiting qualified media representatives as members
- **Rotary information committee.** Can ensure that new and existing members are knowledgeable about Rotary and club information
- **Magazine committee.** Can provide THE ROTARIAN or Rotary regional magazine to local media and other community venues
- All **service-oriented committees** that may be conducting activities worthy of media coverage



Club Public Relations Guidelines

Purpose of Rotary Public Relations

- Foster understanding, appreciation, and support for the Object and programs of Rotary.
- Promote awareness that good publicity, favorable public relations, and a positive image are desirable and essential goals.

Responsibilities of the Individual Rotarian in Public Relations

- Be fully informed about the Object of Rotary and Rotary's programs and activities.
- Seek opportunities to further the aims and accomplishments of Rotary through personal, business, and professional contacts.
- Help their clubs become more identifiable in their communities by personally informing others about what Rotary is and does.

Dealing with Adverse Public Relations

- A club should counter misperceptions with well-directed public information and community relations efforts and, where appropriate, strengthen its service program.
- If a condition exists or a problem arises which may affect other clubs or RI, a club should advise the governor at the earliest opportunity so that a cooperative effort can be made to deal with it.
- It is the governor's responsibility to advise and assist clubs in preventing or solving local public relations problems. The general secretary shall assist governors and clubs, keeping the president and the RI Board advised and referring to them problems that may require their consideration.

Public Relations and Club Projects

- Sponsor a major community service activity each year.
- Actively seek to inform the public about the projects successfully carried out by Rotary clubs.
- Counter any negative perceptions about Rotary by creating positive service programs.
- Undertake, where feasible, both annual and continuing projects with which the club will be clearly identifiable and visible to the community.

Rotary and News Media Relationships

- Undertake appropriate action to improve relationships between Rotary and the news media.
- Take into account social and cultural conditions and the state of local media relations and consider initiating the following club and district activities to improve Rotary and news media relationships:
 - Invite news media personnel to speak at club meetings on the role of the media
 - Coordinate small discussion groups between Rotarians and news media personnel

- Encourage Rotarians to attend news media and public relations training seminars
- Award grants to young journalists for the purpose of broadening their experience, and require the awardees to report back to the club
- Include news media representatives in Group Study Exchange teams
- Increase efforts to bring representatives of the news media into club membership

Speakers

Rotary clubs should make available to groups in their community speakers who can effectively talk about Rotary.

RI Public Relations Award

Rotary clubs should take advantage of this award that recognizes clubs and districts that achieve outstanding media coverage of Rotary activities in their areas and that implement programs that demonstrably improve the image of Rotary in their communities.

Attracting New Members to Rotary through Public Relations

Rotary clubs should

- Find ways to increase the appeal of Rotary to the growing number of young persons who are occupying positions of responsibility in business and the professions
- Take measures to have appropriate weekly club programs better reported and identified with the Object of Rotary
- Focus relevant community service activities to provide a greater public relations impact

Public relations is important in attracting new members to Rotary and in retaining present members. The importance of public relations should be emphasized to Rotary clubs and, in particular, to club membership development committees.



Public Relations Resources

RI Resources

The following public relations RI 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)

Promoting Rotary on the Web (271-EN)

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 (register at the Effective Public Relations section of the RI Web site)

RI Web site (www.rotary.org) — Contains information on public relations, including examples of successful public relations efforts undertaken around the world, sample press releases, tips, and suggestions.

Rotary Public Relations for the 21st Century (269-EN) videotape

Rotary public service announcements (PSAs) — For print, radio, and television, produced by Rotary International.

Human Resources

- RI's 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; and Rotary Youth Exchange participants



Enhancing Rotary's Public Image

The practice of public relations varies throughout the world. Regardless of the cultural differences from one country to another, all Rotary clubs have audiences with which they should communicate. Clubs must ensure that the community is aware of Rotary and its activities and take positive steps to enhance the club's image. 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 and its members aids membership recruitment efforts and assists in attracting community support (financial and volunteer) for club service activities.

Public Relations Responsibilities

The RI Board has outlined the following club responsibilities related to public relations:

- Maintain positive news media relations.
- Seek publicity for community-focused projects and activities.
- Use *THE ROTARIAN* or Rotary regional magazine, *Rotary World*, and other tools and techniques to promote Rotary's aims and accomplishments.
- Encourage Rotarians to inform their friends and associates about Rotary.
- Cultivate the understanding of community leaders, young people, and special interest groups that should be aware of Rotary.
- Take positive steps to prevent or correct any attitudes within the community that may harm Rotary's reputation and limit its effectiveness.
- Use public relations to enhance membership development efforts.
- Obtain full representation of the news media in club membership.

Public Relations Committee Responsibilities

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.

Within the club, you can educate members about their responsibility to promote public relations by

- Encouraging them to be fully informed about the Object of Rotary, Rotary programs, and club activities
- Urging them to seek opportunities to further the aims and accomplishments of Rotary through personal, business, and professional contacts

Within the community, you can enhance the public's perception of the club and Rotary International by

- Promoting club projects and activities that appeal to the local media
- Developing a club brochure or Web site to provide information about Rotary International and your club
- Cultivating relationships with the local media



Starting a Public Relations Campaign

Effective public relations campaigns require time, effort, and planning. It is important to work closely with the club president and other committee members to develop a strategy before or at the beginning of the Rotary year. A practical starting point for such a strategy is a timetable that lays out the plan for the year. An effective way to create a plan is to lay out 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.

Targeting Audiences

Ensuring a positive image of Rotary in the community requires public relations targeted at different groups or audiences, including:

- Local media (newspaper, radio, television)
- Specialized media that 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 specific 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 or Rotary Foundation projects
- Participants in Rotary exchange programs such as Youth Exchange, Ambassadorial Scholarships, or Group Study Exchange
- 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

See appendixes 13 and 14, Media Tools and Key Rotary Messages, for additional information that can help you prepare for working with the media.

Preparing to Work with the Media

To make good use of your media contact's time, as well as your own, it is wise to be prepared when promoting a story. Some ways to organize your effort include:

- Knowing the facts of the story you wish to promote
- Appointing an articulate, knowledgeable spokesperson
- Preparing a fact sheet
- Writing a news release or media alert

Establishing a Relationship with the Media

Journalists are often pressed for time; however, establishing a good, working relationship with representatives of the media is essential to your club's public relations efforts. The following methods have helped clubs establish relationships with members of the news media:

- Bringing news media representatives into the club as members
- Developing awards for journalists
- Inviting members of the news media to speak to the club about their profession
- Conducting discussion groups or seminars and inviting Rotarians and members of the news media to attend

Media Outlets

Most communities are served by a variety of media outlets, including:

- Newspapers and their online counterparts
- Local radio stations
- Broadcast and cable television stations

Before choosing a particular media outlet, ensure that the project or activity that you wish to publicize matches the media's format. For example, stories with a strong visual element may appeal to the local television station.

There is such tremendous competition for media time and space, it may be worth considering the following less-traditional media sources to promote the projects, activities, and work of your Rotary club:

- Online publications
- Trade publications
- Public-access cable stations
- Radio public affairs shows and talk radio
- Corporate newsletters and professional associations
- University publications, such as campus newspapers
- Newsletters of other community organizations



Appendix 11: 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. While the club's president is the club's primary spokesperson, the public relations committee can help prepare other club members to fill this role. Sometimes the best spokespeople for Rotary are those who have benefited from Rotary service.

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. High-quality photographs can 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 kit or produce one on your own.

Idea letter. More personal than a press release, an idea letter 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 conference. A conference with a group of local journalists should only be called if the club has an announcement of significant interest to the community. Alternately, distribute 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 air-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 air-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.



Appendix 12: Key Rotary Messages

You may wish to use or adapt the following messages to convey Rotary messages to the media.

- 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 more than 160 countries, Rotary is ideally situated to address such problems 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, 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.

7

Club Administration

Club Committees Related to Club Administration

Club administration provides the framework that enables the club to function effectively. Key administrative activities required for the operation of a Rotary club include:

- Encouraging, tracking, and reporting attendance
- Organizing programs for regular weekly and special meetings
- Promoting fellowship among club members
- Providing information including:
 - Club bulletin
 - Rotary's official magazine, *THE ROTARIAN*, or an approved Rotary regional magazine

Club administrative leaders must work together — coordinating their efforts in all the above areas — to ensure effective club operations.

Selecting Committee Members

When choosing members for administrative committees, select Rotarians who possess the following characteristics:

- Attention to detail
- Thorough knowledge of Rotary policies regarding club administration
- Strong organizational skills
- Understanding of logistics
- Communication and writing skills
- Design or publishing experience
- Computer skills

These administrative issues are the primary concern of the following club committees:

Attendance

- 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 conferences, district training meetings, intercity meetings, and RI conventions

Club Bulletin

- Reports news of the club, its members, and Rotary around the world through the weekly 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

- 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

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

Magazine

- Stimulates interest in THE ROTARIAN or official 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 ROTARIAN or your official Rotary regional magazine

Program

- 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

Working with Other Committees

While the committees listed above are directly responsible for various administrative duties, their effort can be enhanced by periodically collaborating with other club committees and leaders who can play an important role. For example:

- **Membership committees** responsible for new member orientation and mentoring can help orient new members to important Rotary and club policies and procedures.

- **Public relations committee** members can devise a list of individuals and organizations to which THE ROTARIAN, or Rotary regional magazine, can be distributed in order to increase community awareness of the goals and activities of Rotary.
- **Service committee** leaders can use the club bulletin to ensure that timely and accurate information about projects and activities reaches club members.



Administrative Resources

Online Resources

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

Member Access (previously called Rotary Business Portal) — An online tool accessed from the RI Web site which club presidents and secretaries can use to perform administrative functions for their club, including update club and membership data, pay club dues, search an online version of the *Official Directory* (007-EN), and view reports related to Rotary Foundation contributions.

Recommended Rotary Club Bylaws (Web only)*

Standard Rotary Club Constitution (Web only)*

Reference Publications

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

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 Trustees of The Rotary Foundation, issued every three years following each meeting of 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 and secretaries, meeting times, and locations.

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 — The official magazine of RI published monthly. In addition to THE ROTARIAN, more than 30 Rotary regional magazines, in over 20 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 World Headquarters and international offices who can answer many administrative questions. For a list of international offices and RI staff contact information, consult the *Official Directory* (007-EN) or the RI Web site.

*Also included in the *Manual of Procedure*.



Attendance

Encouraging Attendance

Attendance is a key measure of club health. Because falling attendance rates often indicate a larger problem, an adverse trend should be identified and addressed as quickly as possible. As an administrative leader, you can promote regular attendance with the following methods:

- Carefully monitor attendance trends; if attendance rates are declining, find out why.
- Devise a questionnaire to determine the reasons why members fail to regularly attend weekly meetings, the results of which can help club leaders mold their plans to improve meetings and other club activities to foster increased attendance.
- Create a support system within the club to encourage and monitor attendance.
- Work with leaders in charge of club programs to ensure that weekly meetings are relevant to club members' concerns and worthy of their time.
- Stress the importance of attendance to new members and their mentors.
- Encourage members to make up missed meetings.
- Conduct attendance competitions in your club or with another club.
- Recognize members with exemplary attendance records.

It is critical that you call or contact members with three absences in a row to remind them that four absences in a row may lead to automatic termination.

Attendance Guidelines

The RI Board has established the following attendance guidelines:

- Every member should attend regular club meetings.
- A member is considered present if in attendance for at least 60 percent of the meeting.
- A member can make up absences 14 days before or after the usual time for meeting in the following ways:
 - Attending at least 60 percent of a regular meeting at another Rotary club
 - By the direction of the club, attending a regular meeting of a Rotaract club, Interact club, or Rotary Community Corps
 - Attending a convention of RI, Council on Legislation, International Assembly, or any other Rotary meeting of past, present, or future officers of RI
 - Being present at the usual meeting time and place of another club, even if the club is not present
 - Attending and participating in a club service project or a club-sponsored community event or meeting authorized by the club's board
 - Attending a meeting of the club's board, or, if authorized by the board, a meeting of a service committee to which the member is assigned

Work with the club secretary to ensure that your club forwards its monthly attendance report to the governor within 15 days of the last meeting of each month.

- An absence is also considered made up if the member is
 - Traveling to or from an official Rotary meeting of past, present, or future officers of RI
 - On official Rotary business serving as an officer or member of a committee of RI or a Trustee of The Rotary Foundation
 - Directly engaged in a district-sponsored, RI, or Rotary Foundation-sponsored service project in a remote area
 - Engaged in Rotary business authorized by the club board that precludes attendance at the club meeting
- A member's absence can be excused for the following reasons:
 - The absence complies with the conditions and circumstances approved by the club's board. The board may excuse a member's absence for reasons that it considers to be good and sufficient.
 - The member's age and years in one or more clubs total 85 years or more, and the member has notified the club's secretary in writing of the desire to be excused from attendance and has received approval from the board.
 - The member is a current officer of RI.

Attendance Reports

The following RI Board-approved guidelines exist for attendance reports:

- Each club must forward monthly attendance reports to its governor within 15 days of the last meeting of each month.
- Non-districted clubs must forward attendance reports to the RI general secretary.
- Any member whose absences are excused by the board must be included in the membership figures to compute the club's attendance.
- Any member whose absences are excused due to their age and years in Rotary totaling 85 years or more should not be included in the membership figures used to compute the club's attendance; further, neither their absence nor attendance should be used for that purpose.

Termination of Membership

A member's membership shall be subject to termination for one or more of the following reasons:

- Failure to attend at least 60 percent of regular club meetings in each half of the Rotary year
- Failure to attend at least 30 percent of your club's regular meetings in each half of the Rotary year
- Missing and failing to make up four consecutive regular club meetings, without the consent of the board

Failure to meet attendance requirements can lead to termination of membership unless the board consents to such nonattendance for good cause.



For a suggested weekly meeting guide and list of special observances held throughout the Rotary year, see *Guidelines for Developing Weekly Meeting Programs* (pages 109-110).

Weekly Club Meeting 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

- 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 members more aware of and connected to their local and world community

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 canceled.
- 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).
- Devote one entire meeting per month to communicating Rotary information, Rotary education, and leadership training to members.

Weekly Programs Guidelines

- It is essential that each club provide in its bylaws for a definite order of business at its regular weekly meetings.
- Regular weekly meetings should include an address or other program as well as time for fellowship.
- Efforts should be made to encourage programs on Rotary subjects.

- Clubs are encouraged to invite presidents from other Rotary clubs to their meetings as a way to encourage interclub cooperation, communication, and fellowship.
- Visiting presidents should be given time to briefly report on their club's programs and activities.
- Clubs should periodically hold regular meetings devoted club business, activities, and club affairs.



Fellowship Activities

Rotary's excellence as a service organization or business-networking group may attract members, but fellowship — friendship and good relations among club members — is what helps retain them. Fellowship is a great motivating factor. It keeps members active and fosters cooperation in club activities and projects. Without fellowship, it would be difficult for clubs to achieve any goals. 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.

While fellowship may arise naturally in a club, it can also be nurtured in the following ways:

- Circulate a letter at the beginning of the year asking members to advise the fellowship committee of important dates, such as birthdays and anniversaries.
- Make sure members wear name badges at meetings to make introductions easier.
- Rotate seating arrangements to break up groups and ensure that members get to know each other. Appoint a "captain" at each table to promote fellowship.
- Use the club bulletin to publish news about members and social events.
- Appoint a different member each week to introduce new members and speakers.
- Ensure that new members and guests have been greeted and feel included.
- Foster relationships with other Rotary clubs in the district, region, and around the world.

Fellowship Guidelines

- The use by Rotarians of the given or first name is solely a custom; the adoption of this custom by Rotary clubs is strictly optional.
- All Rotary clubs and Rotarians should take members' spouses and families into account when planning activities because these individuals contribute to the service and fellowship that derive from association with a Rotary club. It is intended that groups of spouses and other family members be only informally associated with the local club.



Sharing Information: Club Bulletin Committee

An important aspect of administering the club is sharing information with club members. Rotarians who are informed are more likely to take an active role in club activities and projects. In addition to making announcements at weekly club meetings, pertinent information can be communicated to club members through the club bulletin and *THE ROTARIAN* (or an official Rotary regional magazine).

Club Bulletin

Your club's bulletin is a valuable resource for providing club members with important information. Use the club bulletin to

- Provide a schedule of upcoming club activities
- Discuss club goals, plans, and projects
- Report highlights of various club, district, and other meetings
- Foster fellowship by highlighting special events in members' lives
- Address critical issues facing the club and Rotary International

It is important for those charged with producing the club bulletin to maintain regular communication with other club committees and club leaders to ensure that all club issues and activities are adequately discussed and publicized.

- In producing the bulletin, it is important to include regular features that provide club members with news of club and committee activities, membership development information, anniversaries and birthdays, and district and Rotary information.
- Incorporate photos of club members and events to gain reader interest.
- Mention as many members as possible throughout the year.
- Position headings, text, and pictures in a visually pleasing manner.

Word processing or desktop publishing software can be ideal ways to produce the club bulletin. Also, consider sending the club bulletin to club members by e-mail or producing an online version of the club bulletin to post on the club's Web site.

Sources of information for the club bulletin can include:

- Club board members and committee chairs
- The governor's monthly letter
- *Rotary News Basket*
- Club, district, and Rotary International meetings
- *THE ROTARIAN* or Rotary regional magazines
- *Rotary World* and other Rotary International publications
- RI Web site, www.rotary.org

Club Bulletin Guidelines

- The club bulletin should be published weekly.
- Its purpose is to provide club members with information that
 - Stimulates interest
 - Improves attendance
 - Announces the programs of upcoming meetings

- Relates highlights of previous meetings
- Promotes fellowship
- Contributes to the Rotary education of all members
- Reports news of the club, its members, and the worldwide program of Rotary
- It promotes district activities.
- The RI Board suggests that a club member with newspaper experience give assistance in contributions and suggestions regarding the club bulletin, but should not be called upon to edit the club bulletin.



Sharing Information: Magazine Committee

Magazine

The club should use *THE ROTARIAN* or an official Rotary regional magazine to promote Rotary's aims and accomplishments within the community. The magazine can play an important role in educating members regarding Rotary and its international scope. Club leaders maximize the effectiveness of the magazine by

- Periodically reviewing the contents of the magazine at club meetings, emphasizing articles that can stimulate program and project ideas
- Giving the magazine or a gift subscription to prospective members, guests, speakers, and program participants to help them learn more about Rotary and its ideals
- Archiving past issues to provide the club with reference material for club activity and project ideas

Magazine Guidelines

- It is a condition of membership that members of all Rotary clubs subscribe to either *THE ROTARIAN* or an official Rotary regional magazine.
- The club is expected to use *THE ROTARIAN* or an official Rotary regional magazine to promote Rotary's aims and accomplishments within the community.
- During Magazine Month in April, clubs are requested to present programs on the magazine.



Appendix 13: Guidelines for Developing Weekly Meeting Programs

The following is a suggested weekly meeting program 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 committee responsible for the program)
- 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:

- Literacy Month (July)
- Membership and Extension Month (August)
- New Generations Month (September)
- Vocational Service Month (October)
- Rotary Foundation Month (November)
- World Interact Week (week of 5 November)
- Family Month (December)
- Rotary Awareness Month (January)
- World Understanding Month (February)

- Anniversary of Rotary International and World Understanding and Peace Day (23 February)
- World Rotaract Week (week of 13 March)
- Magazine Month (April)
- Rotary Fellowships Month (June)



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