

Rotary International

Club Committee Manual

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Introduction

Rotary International is the association of Rotary clubs. Rotary International is effective if its member clubs are effective. This edition of the *Club Committee Manual* was developed to provide committee chairpersons essential information to help them establish goals and understand their responsibilities related to increasing club effectiveness.

The *Club Committee Manual* will help prepare club committee chairpersons for their year in office. Prior to the district assembly, club committee chairpersons should review materials related to their committee in order to fully understand and prepare for their leadership responsibilities. This advance preparation will enable them to receive the maximum benefit from the training they will receive at the district assembly.

During the district assembly, the *Club Committee Manual* serves as the handout material for club committee chairpersons. Because of the complementary role these materials play in the training conducted, it is essential that all club leaders bring relevant portions of the *Club Committee Manual* with them when they attend the district assembly.

In addition to serving as reference material for the district assembly, the *Club Committee Manual* also serves as a functional resource to support committees in fulfilling their 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. Each chapter relates to a key aspect of club operation and effectiveness and contains 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, “Effective 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.

- Appendices containing worksheets or additional information club committees can use to support their activities.

Club committee chairpersons 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 chairpersons of two service committees will attend the district assembly, they will need to copy the chapter regarding successful service projects so that both representatives have the reference material available. Additional copies of the *Club Committee Manual* can also be ordered from the Rotary International Publications Order Services Section.

Club committee chairpersons are encouraged to review this entire manual to gain a comprehensive understanding of the role of committees in supporting club effectiveness.

Comments?

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

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Selecting Club Committee Members and Goal Setting



Selecting and Preparing Club Committee Members

For Your Information

If the club's bylaws do not contain information regarding the committee's purpose, the club should amend the club bylaws to include this information.

To amend the club's bylaws, these requirements must be met:

- 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.

If it is determined that the committee does not serve a purpose, it should be disbanded.

Committee Chairperson Responsibilities

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

- Recruiting members that have the skills, knowledge, experience or desire to do the best job;
- Providing appropriate instruction and orientation;
- Planning and conducting productive meetings;
- Holding members accountable for the tasks they have agreed to carry out;
- Informing the club president of progress; and
- Recognizing those who have served well.

Effective committees also share the following characteristics:

- A clearly defined purpose
- Well-formulated goals
- A step-by-step plan of action
- Clear 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. A committee's purpose can be identified by

- **Reviewing the club's bylaws**, which should contain information related to each club committee, including the committee's general purpose;
- **Reviewing the club's goals for the coming year**, which helps the committee establish goals that match the club's overall plan for the year; and
- **Meeting with the club's board and the president**, which will foster discussion regarding the relationship between club goals and the committee's purpose, as well as its role in achieving these goals.

Preparing and Motivating Your Team

As a committee chairperson, you will be responsible for providing committee members with the knowledge and skills necessary to operate effectively. You can accomplish this by

- Supplying newer members with background information regarding 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 ones and stronger members with weaker ones; and
- 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.
- 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 chairperson, 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 chairperson. It is important that the goals set by the committee are

- **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.
- **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.
- **Shared.** Members who participate in setting a goal and formulating the strategies to achieve it will be committed to working towards its achievement.
- **Measurable.** A measurable goal can be stated in quantifiable terms and can therefore be objectively evaluated.

Establishing Achievable Goals

Your committee will establish a variety of goals related to its purpose. How can you 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.

Goal Setting 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 four 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 and/or district governor throughout the year, during club visits.

Developing a Plan of Action

Establishing goals is the first step that a committee chairperson should take to ensure that the committee will be effective and successful during the coming year. Without proper follow-through, even the best-defined goals cannot be

For Your Information

The *Planning Guide for Effective Rotary Clubs* is available in the *Club President's Manual* (222-EN).

achieved. 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 creates “buy-in” by 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 chairpersons 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 chairpersons motivate committee members to work together to achieve a goal:

- Develop a point-by-point strategy outlining **specific actions** that need to be taken in order for a goal to be realized.
- Determine **who is responsible** for implementing each step or action and hold those members accountable for their respective tasks.
- Create a **time frame** for each step in the process. This will help in measuring progress towards the goal over time.
- Create specific **criteria for measuring progress**. This will allow members to see if a plan is actually working and highlight special efforts that may be required.
- Consider the **resources and tools** that are available at the club and district level and from the RI Secretariat.
- Continually **motivate** committee members to maintain their involvement. Keep everyone informed of progress made toward the committee’s goal.
- **Evaluate** the success or failure of your strategy to learn how to better implement future committee projects and 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 chairpersons should regularly share the committee’s progress towards its goals with all club members.

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

- 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 Utilizing 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 chairpersons and members
- Past district officers

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

In addition to these human resources, many districts also produce their own directory and/or feature their own Web site that lists the names and contact information for district officers.

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 and secretaries; and meeting times and places.

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

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.

The Rotarian — The monthly official magazine of Rotary International, which covers news of programs of RI and The Rotary Foundation, RI official communications, and news of interest originating in the clubs and districts. In addition, 27 regional magazines in 21 languages serve Rotarians around the world.

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

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

For Your Information

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.

RI Web site — www.rotary.org

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

- The RI Board of Directors and Rotary Foundation Trustees
- RI and Rotary Foundation Task Forces and Committees
- RI Staff at RI Headquarters in Evanston, Illinois, USA, and the service centers around the world — for more specific information consult the Secretariat page in the *Official Directory* or the “At Your Service” page in *The Rotarian* magazine

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Membership



Club Committees Related to Membership

Developing a comprehensive club membership strategy is a collaborative effort. Many different club committees must work closely with club leaders to successfully recruit, orient, and retain club members. Membership issues are the primary concerns of the following committees:

- Membership Development Committee
- Classifications Committee
- Membership Committee
- Rotary Information Committee

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, and/or sales;
- Strong connections to a diverse cross-section of the community including:
 - Businesses
 - Professional associations
 - Local civics 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; and
- An outgoing and sociable personality.

Committee Descriptions and Responsibilities

Membership Development Committee

- Establishes a club goal for growth, together with the president;
- Assists the president in developing a membership plan for the club;
- Develops strategies to reach the established goal for growth, increase club member satisfaction, and prevent membership loss;
- Encourages all members to propose prospective members;
- Promotes the district membership development seminar;
- 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 persons to the board to fill open classifications;

- Observes Membership and Extension Month (August) by organizing a club forum on this critical topic, holding a special guest day for prospective members, or recognizing current members who have brought in new members; and
- 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. While the club must maintain high standards for membership, the committee and the club need to maintain a positive attitude regarding membership growth by creating new classifications, if necessary, or admitting members in the additional active category. Increasing the number of Rotarians does not mean decreasing the quality of Rotary, but rather increasing the capacity of the club to achieve change in the community and the world.

Realistic membership growth targets must be set to provide tangible goals. The first step in setting a goal is formulating a membership 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 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 plan. Membership growth cannot stem from the efforts of a few individuals, but rather it must come from all of the club's members. It is important to impress upon committee and club members the club-wide responsibility for proposing new members.

Classifications Committee

- Conducts a classifications survey of the community each year as early as possible, but no later than 31 August;
- Compiles a roster of filled and unfilled classifications based on the classification survey;
- Reviews existing classifications represented in the club; and
- 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 makeup 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 Rotary's strength lies in the following characteristics:

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

Membership Committee

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

The Membership Committee considers proposals for membership. It is charged with appraising the candidates for membership and reporting the findings of their investigations to the club's board of directors.

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?

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.

Rotary Information Committee

- Oversees the orientation of new members during their first year in the club;
- Provides information about the privileges and responsibilities of Rotary membership to prospective, new, and longstanding members of 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; and
- Observes Rotary Awareness Month (January) by showing RI videos at weekly meetings, updating the club's library of RI publications, or sponsoring a quiz-show competition on Rotary information.

It is the duty of this committee to communicate information about Rotary to prospective and new members, as well as experienced Rotarians. The Rotary Information Committee informs prospective members about Rotary, stressing the benefits and responsibilities of membership and the opportunities for service that Rotary affords. This committee also ensures that new-member education and orientation is effective. The committee should not only plan informational meetings for new members, but 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 are more likely to be effective 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 can also play an important role in improving club membership. These committees include:

- The Public Relations Committee, because recruiting new members is linked to effective club public relations
- All service committees, because involving non-Rotarians in service projects that benefit the community can help prospective members better understand the opportunities for service Rotary membership represents.

Additional information in this chapter includes:

Key Membership Concepts

Guiding Principles — A synopsis of key policies related to membership.

Membership Resources — A list of materials and other resources available to support club membership efforts.

Membership Recruitment and Induction — An outline of the responsibilities of club leaders and related to membership recruitment and induction.

New-Member Orientation — Responsibilities of club leaders regarding effective orientation of new club members.

Membership Retention — Responsibilities of club leaders related to ensuring club members remain active and enthusiastic.

Membership Appendices

Great Ideas for Clubs — A list of successful membership recruitment ideas that can be used by clubs.

Electing and Inducting New Members — A review of the process for electing and inducting a new member; includes a sample induction ceremony.

New-Member Orientation — Strategies for Success — Strategies that have been successfully used to educate and integrate new club members.

Welcome to Rotary — Mentoring Worksheet — A guided list of assignments designed to integrate and educate a new member.

STAR (Special Training for Action in Rotary) — An overview of a unique and successful new-member orientation program designed by Rotarians in Texas, USA.

Membership Satisfaction Questionnaire — A survey that can be used by clubs to assess club member satisfaction.

Resigning Member Questionnaire — A questionnaire that can be used by the club to obtain feedback from resigning members.



Guiding Policies Related to Membership

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

Qualifications for Membership

Potential members are

- Men and women of good character who possess an excellent business or professional reputation.
- Individuals whose residence or place of business is within, or immediately adjacent to, the club's territory.

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

The Classification System

- It is designed to ensure that the membership of Rotary clubs reflects the diversity of the community.
- Each club should have one representative from each business or profession in the community.
- A member's classification covers 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.

The classification system should be used as a guide, not a barrier. Qualified members may be admitted under new classifications or as additional active members.

How does the classification system relate to membership recruitment? Each year the club should undertake a classification survey. The purpose of the survey is to ascertain and catalog the various classifications within the community. This catalog should be compared with the classifications held within the club to determine ways to target qualified members.

Types of Membership

Rotary recognizes five types of membership: *active* members, *additional active* members, *senior active* members, *past service* members, and *honorary* members.

- **Active members** are classified in accordance with the member's business or profession.
- **Additional active members** meet all the qualifications of membership, but an active member already holds their classification. Active members can propose additional active members for membership in their own classification.
- **Senior active members** are past or current officers of RI or have been club members for 15 or more years; they do not hold any classification.
- **Past service members** have retired from a business or professional activity but are otherwise qualified for membership.
- **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

Recommended Materials

A variety of information regarding service projects is available from Rotary International. These include:

www.rotary.org — Rotary's Web site, containing a wide array of information including membership development, orientation, and retention strategies that have been successfully used by clubs.

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.

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

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

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

Rotary News Basket (546-EN) — Weekly newsletter available on Rotary's World Wide Web site (www.rotary.org) or by mail.

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

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.

Getting Started in Rotary (333-EN) — Guide for sponsors, new members, and family members.

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

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

Human Resources

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

- District leaders including the district governor, assistant governor, and district committees, especially the district Membership Development Committee
- Rotary International Committees and/or Task Forces. Consult the *Official Directory* for further information.
- Other clubs that face common membership challenges and therefore benefit from sharing experiences.



Membership Recruitment and Induction

Recruiting quality new members is the single most important task in Rotary today. Because membership in Rotary is by invitation only, club members must reach out to friends, family, business associates, and other community members — asking them to join. Club membership leaders must remind all club member of the importance of identifying and inviting prospective members.

Your Responsibilities

- Be familiar with the guiding principles 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 demonstrate their commitment to membership development by bringing in one new member during the first month of the Rotary year.

Creating an Effective Recruitment Plan

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

1. **Identify** all potential candidates for membership. Consider all qualified candidates. If necessary, create new classifications or admit candidates as additional active members. Clubs should target the following when seeking new members:
 - Prominent area businesses and corporations
 - Professional and trade associations
 - The chamber of commerce
 - Local and regional government offices
 - Business associates
 - Leaders of other nonprofit associations
 - Rotary Foundation alumni
 - Rotaractors 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 the next page.)
3. **Invite** candidates to join in a manner that highlights their personal interests and reasons for joining, not the proposer's. 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 and allows them to see firsthand the benefits and commitments that accompany membership.
4. **Induct** new members in a ceremony that is dignified and meaningful. Assign an individual mentor to the new member prior to the time of induction to help oversee the process of assimilation into the club.

For Your Information

See Appendix 1 on page 23 for a list of creative membership recruitment strategies.



New-Member Orientation

New members will not remain “new” for long. Soon after joining, they should feel as if they are integral parts of the club who contribute to its effective operation. Your club’s orientation program must give new members the knowledge and confidence necessary for them to be active and effective Rotarians.

An effective orientation and new-member 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 its programs and activities. Involve new members by

- Assigning them to serve on an active committee immediately after induction;
- Encouraging them to participate in a service project; and/or
- Assigning the new member to be an official greeter or to introduce a speaker at a weekly meeting.

Your Responsibilities

- Work with the club president to develop and execute 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 immediately.

The process of new-member orientation should begin at the most critical period for assimilating new members — immediately after induction. 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 Basics 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:

- A widened circle of friends and contacts;
- The opportunity to associate with a group with high standards of character and integrity; and
- The chance to participate in activities that positively impact the local community and communities in other countries.

Being a Rotarian requires a considerable commitment of time and resources. The **responsibilities** of membership include:

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

With responsibility comes **opportunity**. Based in thousands of communities around the world, Rotary is often in an ideal position to achieve 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 unique 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 assimilate new members is to involve them in club activities from their very first day as Rotarians. An active, involved member will value his or her participation and feel a true connection to the club. The following methods effectively engage new members in club activities.

- Assign them to serve on an active committee immediately after induction. This is most effective if you
 - personally introduce the member to the committee chairperson;
 - ensure that the committee chairperson assigns the new member a specific task and explains the timing and extent of that assignment; and
 - 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.



Membership Retention

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

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

Effective membership retention strategies include:

- Inviting every Rotarian to become personally involved in club projects and activities;
- Encouraging club-wide participation in community service and Rotary Foundation programs;
- Using surveys to identify what is important to your membership and to ensure that their interests and expectations are being met;
- Ensuring that members maintain current knowledge about Rotary International and The Rotary Foundation by conducting a minimum of four club programs per year that address issues related to continuing education;
- Conducting multi-club meetings so club members can benefit from sharing experiences with other Rotarians;
- Participating in district level meetings and events — particularly those focused on continuing education such as the district assembly, district leadership seminar, and district Rotary Foundation seminar;
- Encouraging Rotarians to continue their education by reading the Governor's Monthly Letter, *Rotary News Basket*, *The Rotarian*, and *Rotary World*; and
- Including 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 it does well and where improvements can be made to prevent further membership losses.

For Your Information

Member Satisfaction and Resigning Member Questionnaires can be found on pages 33-36.



Appendix 1: Membership Recruitment: Great Ideas for Clubs

1. **Lead by example** — Encourage club leaders, particularly those responsible for membership, to bring in one new member during the first month of the Rotary year.
2. **Simultaneous Inductees** — Induct several new members into the club simultaneously.
3. **Former Members** — Encourage the Membership Development Committee to keep track of former club members. If possible, invite the former members to rejoin the your club or encourage them to join another club.
4. **Community Projects** — A successful project attracts new members. Utilize your community service projects to identify and involve potential members. Such projects are also essential in developing effective public relations and enhancing the image of Rotary in your community.
5. **Six-Month Plan** — Encourage every new member to bring in another new member within six months. A district in Arkansas, USA, experienced 17 percent growth using this plan.
6. **Additional Active** — Make use of the “additional active” classification by asking every active and senior active member to invite an outstanding leader from their business or profession to become a Rotarian.
7. **Red-Dot Plan** — Place a red dot on a member’s name card and do not remove it until he or she proposes someone for membership.
8. **Five-for-One Plan** — Five Rotarians join together with the goal of recruiting one new member.
9. **Proposer Recognition** — Make it a point of honor to present a new member. Recognize the proposer in the club bulletin or at the weekly meeting.
10. **Rotary Guest Day** — Develop a list of potential members and distribute invitations to those on the list. Host a meal and information evening for those who accept the invitation.
11. **Survey** — Conduct a survey to help members consider contacts they have who might be potential members.
12. **Classifications** — The Rotary Club of Trenton, Ontario, Canada, reads a list of unfilled classifications at each meeting. This regular reminder helps club members consider potential members during their daily interaction with a wide variety of people. The Rotary Club of Trenton gained 20 new members through this strategy.
13. **Club forum** — Hold a club forum on membership development to discuss ways to seek out potential members.
14. **Increase Efforts** — Increase the scope of current efforts and focus on attracting underrepresented demographics — for example, members of a different age, gender, or ethnicity. These increased efforts can be further strengthened if several members of different backgrounds are inducted at the same time.
15. **Diary** — Encourage club members to keep a 24-hour diary of everyone with whom they interact. Select potential members from that list.

16. **Rechartering** — Reorganize very small clubs as if they were new clubs through invitation meetings.
17. **Bring a Friend Day** — Encourage all members to bring guests to club functions. Designate one meeting a month as “Bring a Guest” meeting.
18. **Don’t Reinvent the Rotary Wheel!** — Access the Membership Development Corner at www.rotary.org to learn ideas that other clubs have used successfully. Or, use the Rotary Web site to share your membership development success story with other clubs which can benefit from your club’s experience.



Appendix 2: 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 proposer (active, senior active, or past service member of the club) submits, through the club secretary, the name of the potential member to the club's board.
2. The board ensures that the proposed member meets qualifications and can hold a classification.
3. The board deliberates for not more than 30 days and informs the proposer 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 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.
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 spouse to attend the induction ceremony;
- Inducting new members in a group; and
- Presenting the new Rotarian with a lapel pin and, if appropriate, other carefully selected material.

Sample Induction Ceremony

The following script, adapted from the ceremony used by the Rotary Club of Ulverstone, Tasmania, Australia, is a typical Rotary induction ceremony, which can be modified, shortened, or expanded to meet the needs of your club.

Club President: " _____, it is my great pleasure on behalf of the board of directors and members of the Rotary Club of _____ to welcome you as a member. We welcome you not only for the fine fellowship that we shall share, but also for your strong arm that will help us to carry out our many projects to make our community, our country, and the world a better place in which to live.

“Rotary is not a political organization, but all Rotarians are vitally concerned with everything pertaining to good citizenship and the election of good men and women to public office.

“Rotary is not a charitable organization, yet its activities exemplify the charity and the sacrifices that one should expect from people who believe that they have a responsibility to help others.

“Rotary is not a religious organization, but it is built on those eternal principles that have served as the moral compass for people throughout the ages.

“Rotary is an organization of business and professional people pledged to upholding the highest professional standards. Rotarians believe that worldwide fellowship and international peace can be achieved when business people unite under the banner of service.”

(President requests those present to stand for the delivery of the charge that follows.)

“You, _____, have been chosen for membership of the Rotary Club of _____ because your fellow members believe you to be a leader in your special line of activity and because you manifest those qualities of head and heart that fit you to interpret and impart the message of Rotary.

“You are the representative of your vocation in this club and any information of an educational value pertaining to your craft must naturally come to us through you.

“At the same time you become an ambassador from us to your classification, and we rely on you to carry the principles and ideals of service, which we here inspire, to those who share your professional activity.

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

“We also expect you to give us the inspiration that will help us to become better Rotarians, and it is with this hope that I ask your sponsoring member to invest you with the distinguishing badge of a Rotarian, and gladly offer you the right hand of Rotary fellowship.”

(President asks those present to be seated.)

“It is also my pleasure to present you with this folder of information pertaining to Rotary, which I hope you will read and think about.

“Your membership identification card shows that you are a member in good standing of the Rotary Club of _____. It is all the identification you need to visit any other Rotary club in the world.

“Fellow Rotarians, I have much pleasure in presenting to you Rotarian _____.”

(The new member addresses the club, and the president offers the following closing statement.)

“I invite everyone to introduce yourselves to our new member at the earliest opportunity.

“(New member’s name), for the remainder of this Rotary year, you have been placed on the _____ Committee and your chairperson will be Rotarian _____.”



Appendix 3: New-Member Orientation — Strategies for Success

Immediately involving new members in club operations is, without a doubt, of great importance. It is equally important to structure programs that are directly targeted at educating new members. Effective orientation programs include:

- New-member mentoring programs
- Rotary information programs
- “Commencement” 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 various orientation programs 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 the above strategies to best fit local conditions.

Mentoring

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

- experienced — having a high level of knowledge and interest about the club and Rotary; and
- willing and able to devote the time and energy necessary to help the new member, to whom they have been assigned, fully participate in the club.

Mentors, who may be assigned to new members prior to 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 telephone calls and personal contact.
- Attend periodically 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, “fireside chats,”* 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 spouse or guests, 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.

* A popular Rotary tradition, the “fireside chat” is an informal meeting held in the homes of members in which current and former club leaders discuss various aspects of Rotary.

For Your Information

For more information on Mentoring, please see the “Welcome to Rotary” Mentoring Worksheet on page 30.

- Monitor the attendance of the new member. If he or she must miss a regular meeting, offer to go along on a make-up.
- Involve the new member in his or her committee activity if he or she has not been appointed to another committee.
- Be available to answer questions and provide requested counsel or guidance.

Information Programs

Many clubs also offer special 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, information programs for new members should cover the following topics:

- The history and organization of Rotary International
- The types of membership and criteria for each
- The Four Elements of Effective Clubs and how the club strives to fulfill each of them
- The importance of service that meets real community needs
- The programs of Rotary and information about how members can be involved
- The Rotary Foundation, its humanitarian and educational programs, and support for it through participation and financial contributions.

Commencement Programs

Another tool that has been used successfully in helping to orient members is the “commencement” 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 chairperson. This committee meets for breakfast once a month in order to meet each other and experienced club leaders, as well as to discuss club activities and issues facing the club, district, and Rotary International.

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 prior to induction. This will facilitate post-induction integration into the club.

For Your Information

For further information on the STAR program, please see page 32.

WELCOME TO ROTARY — Mentoring Worksheet

Name _____

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

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

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

- | | <i>Date Completed</i> |
|---|------------------------------|
| 1. Attend new-member orientation meeting or meetings as prescribed by our club. | _____ |
| 2. Read two or more of the following booklets (preferably read all): | _____ |
| A. <i>Getting Started in Rotary</i> | |
| B. <i>The ABCs of Rotary</i> | |
| C. <i>Communities in Action: A Guide to Effective Projects</i> | |
| D. <i>A Menu of Service Opportunities</i> | |
| 3. Listen to the audiotape <i>Rotary in an Hour</i> . | _____ |
| 4. Display the <i>Object of Rotary</i> and <i>The 4-Way Test</i> at your place of business. | _____ |
| 5. 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: _____ | |
| 6. 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. | |

- 7. Make-up a meeting at another club. _____

- 8. Expand Rotary to others (at least one). _____
 - A. Invite a guest to Rotary.
 - B. Propose a new member.

- 9. 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.

- 10. 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: _____)

- 11. Choose a committee on which you would like to serve. _____

- 12. 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.

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 chairperson and/or co-chairperson 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 chairperson (usually a past district governor or past president), co-chairperson (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 chairperson 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 chairperson publishes a monthly report in the weekly club bulletin.

Appendix 6: Membership Satisfaction Questionnaire

This survey is intended for use within 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)

Club cliques

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

Other members were

older younger different gender different race

Other demographic reason (please explain) _____

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)

TYPE OF 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:

TYPE OF ACTIVITY

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 (please explain) _____ |

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 (please explain) _____ | |

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 (please explain) _____ | |

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)

- Relocating to a new community My fellowship expectations were not met
 Lack of time My service expectations were not met
 Competing priorities My networking expectations were not met
 Financial constraints Did not feel included
 Other (please explain) _____

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)

- Club cliques
 I felt demographically isolated: (Please mark/circle all reasons that apply)
 Other members were OLDER / YOUNGER / DIFFERENT GENDER / DIFFERENT RACE.
 Other demographic reason (please explain): _____
 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)

- Insufficient knowledge Lack of resources
 Personality conflicts Lack of support from other members
 Cost Insufficient family involvement
 Personal time conflicts Other (please explain) _____

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

TYPE OF 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

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)

- Service
- Meal quality
- Parking availability
- Other (please explain) _____
- Décor/atmosphere
- Meal variety
- Safety of the area in which it is located

Suggestion(s) for change: _____

The following changes would improve club meetings:

- Better speakers
- Increased variety of program topics
- More involvement of family
- More service opportunities
- More focus on fellowship
- Increased emphasis on vocational information
- Better time management
- More leadership opportunities

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

- Proud of my involvement
- Wanted to know more/be involved
- Sought interaction with other Rotary spouses/partners/families
- Other (please explain) _____
- Felt it took too much of my time
- Felt it was too expensive

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

Effective Service Projects



Club Committees Related to Effective Service Projects

Developing effective service projects is a collaborative effort. Many different club committees can work together with club leaders to successfully select, plan, implement, and evaluate a service project. Service projects are the primary responsibilities of the following committees:

- Rotary Volunteers Committee
- Career Development Committee
- Vocation at Work Committee
- Vocational Awareness Committee
- Vocational Awards Committee
- Human Development Committee
- Community Development Committee
- Environmental Protection Committee
- Partners in Service Committee
- RYLA Committee
- International Youth Projects Committee
- World Community Service Committee

Selecting Committee Members

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

- Participation from service professionals such as
 - Medical practitioners
 - Educators
 - Police officers
 - Clergy
 - Nonprofit organization managers
 - Local government officials
- Experience working with youth and/or senior citizens
- International work, study, or travel experience, if applicable
- Extensive community volunteer experience

Committee Descriptions

Rotary Volunteers Committee

- Identifies appropriate projects that need volunteers;
- Exchanges ideas of worthy Rotary and non-Rotary volunteer opportunities with club committees such as World Community Service;
- Compiles a club volunteer directory;
- Keeps everyone informed on projects receiving volunteer support; and
- Recommends outstanding volunteers to the district governor or district Vocational Service chairperson to receive a Rotary Volunteer Certificate of Recognition.

Career Development Committee

- Develops projects that use members' experience to help young people find jobs;
- Initiates or supports apprenticeship programs that help unskilled or disabled workers acquire marketable skills;
- Organizes career-planning programs in schools to help students make informed choices about their futures; and
- Promotes efforts to retrain adults whose skills have been outdated by technology or who are returning to the workforce after raising families.

Vocation at Work Committee

- Develops projects designed to generate new jobs within the community;
- Supports efforts to help retirees remain productive by placing them in volunteer and part-time positions;
- Promotes programs that address the problems of illiteracy and drug and alcohol abuse in the workplace;
- Initiates projects that promote positive employment relations in the workplace;
- Supports activities that promote knowledge and application of The 4-Way Test throughout the community; and
- Increases members' awareness of the "Declaration of Rotarians in Businesses and Professions," and encourages them to practice and promote high ethical standards throughout the business community.

Vocational Awareness Committee

- Develops projects and programs that increase members' knowledge and appreciation of various occupations; and
- Emphasizes the worthiness to society of all useful occupations.

Vocational Awards Committee

- Develops ways of recognizing those who achieve vocational excellence;
- Devises means of recognizing those who practice high ethical standards in their vocations.

Human Development Committee

- Promotes the welfare of all human beings in your community;
- Develops projects and service activities relating to child care and early immunization, crime prevention, the disabled, drug abuse prevention, the elderly, women, health education and care, AIDS education and awareness, literacy, hunger, poverty, safety programs, and youth activities;
- Promotes RI Family Week (2nd week of February).

Community Development Committee

- Addresses issues dealing with the physical state of a community and its outlying suburban and rural areas; and
- 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.

Environmental Protection

- Examines threats to the environment on both global and community levels; and
- 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.

Partners in Service Committee

- Recognizes the need to promote and enhance relationships between Rotarians and Rotary-sponsored organizations such as Rotaract (service club for young adults, ages 18-30); Interact (service club for secondary-school-age students, or those 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 implement community development projects;
- Promotes World Rotaract Week (the week of 13 March);
- Promotes New Generations Month (September); and
- Promotes World Interact Week (the week of 5 November).

RYLA Committee

- Promotes youth leadership by organizing RYLA events locally; and
- Recruit youth with leader potential for district RYLA events.

International Youth Projects Committee

- Participates in the RI Youth Exchange program, which arranges for young people from other countries to live and study in the club's community and for youth from the local community to study abroad; and
- Extends hospitality to international students who are already enrolled in local schools.

World Community Service Committee

- Provides Rotarians with information on the World Community Service program and resources available from Rotary International and its Foundation;
- Identifies opportunities to form World Community Service partnerships with clubs in other countries; and
- Promotes World Understanding Month (February) and World Understanding and Peace Day, 23 February, by supporting a WCS project.

Working with Other Committees

To be effective service project leaders, committees need to periodically collaborate 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 personnel 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/or pass on successful ideas to the RI Secretariat and/or *The Rotarian* (or regional Rotary magazine.)
- Membership — Work with club membership leaders to use Rotary’s ideal of “Service Above Self” to orient new members and attract potential ones.

Additional information in this chapter includes:

Key Service Concepts

Guiding Principles — A synopsis of key policies related to service projects.

Resources for Effective Service Projects — A list of materials and other resources available to support the club’s service efforts.

Successful Service Projects — A description of the importance of service to Rotary and the basic responsibilities and steps required for a successful service project.

Needs Assessment — Determining Project Requirements — A guide for ascertaining community needs and club capabilities.

Project Planning — An outline of the steps necessary to plan and implement an effective service project.

Evaluating Service Projects — Reasons for evaluating service projects and methods for carrying out such evaluations.

Service Appendices

Workplan Worksheet — A useful tool that can be used to delineate a project’s steps and assign club members to carry out specific tasks.

Fundraising Worksheet — A resource that can help develop a project’s budget and ascertain its funding needs.

RI Project Database Project Submission Form — A form that can be used to submit information to Rotary International regarding successful projects undertaken at the club level.



Guiding Policies for Service Projects

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

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; and
 - facilitate good inter-club 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 which
 - improve lives;
 - meet human needs;
 - promote international understanding; and
 - produce goodwill by means of technical and professional activities.
- Rotary International does not specifically endorse any of the WCS projects listed on the Web, nor does it support any other specific Rotary club project.

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; and
- undertake, if feasible, both annual and continuing projects with which the club will be clearly identifiable 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 measure;
- 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; or
- 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.



Resources for Effective Service Projects

There is a wide variety of resources available to help the club conduct a needs assessment and to plan, implement, and evaluate service projects. To be successful, the club should take advantage of such resources, including:

- Service-oriented club committees (as described on pages 38-40)
- A project organizing committee
- Other human resources
- Information
- Finances

Project Organizing Committee

Effective service projects depend upon the hard work and commitment of many people. The club committee structure recommends the formation of a variety of service-oriented committees. Additionally, it is recommended that a *project organizing committee* be formed to collaborate on specific projects. The organizing committee, in cooperation with other club members, is responsible for the following:

- Helping to devise a project's goals and objectives;
- Maintaining contact with relevant community members and organizations;
- Promoting the project both within the club and in the community;
- Encouraging widespread club and community involvement in the project;
- Managing resources such as funds, materials, and club member time;
- Monitoring progress toward project completion; and
- Conducting an evaluation and completing an evaluation report.

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

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



Other Human Resources

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

- Rotarians and their families
- District committees (particularly the World Community Service Committee and the Rotary Foundation Committee)
- Community organizations and other interested citizens
- Rotary Foundation alumni
- 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:

- www.rotary.org — Rotary International Web site
- *Communities in Action: A Guide to Effective Service Projects* (605A-EN)
- *Menu of Service Opportunities* (605B-EN)
- *World Community Service Handbook: A Guide to Action* (742-EN)
- *World Community Service Project Exchange* — available at www.rotary.org
- *Vocational Service in Your Community* (509-EN)
- *Interact Handbook* (654-EN)
- *Rotaract Handbook* (562-EN)
- *International Service in Action: A WCS Video Workshop* (753-EN)
- *Rotary Community Corps Handbook* (770-EN)

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



Successful Service Projects

An important Rotary ideal is represented in its motto, “Service Above Self.” Clubs put this motto into action by implementing effective 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 real people.

An effective service project is one that

- responds to a real issue, not a perceived or imagined one;
- improves the lives of community members;
- 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; and
- builds working networks.

Benefits to the Club

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

- inspire and motivate members to increase the club’s and their own service activities; and
- 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 four 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 regarding service projects with other club presidents — 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 effectiveness. 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 elements, or basic steps, of an effective project:
 - **Needs Assessment** — determining the needs of the club and community;
 - **Planning** — identifying the steps, people, and resources necessary to implement the project;
 - **Implementation** — effectively implementing the plan developed; and
 - **Evaluation** — determining the effectiveness of the project and learning lessons to apply to the future.



Needs Assessment — Determining Project Requirements

What makes a community service project effective? *Relevance*. Effective 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 response.
- Determine what resources within and outside the club might be available to support potential projects.
- Ascertain which community issues can be best addressed by the club, given member interest and the financial and human resources at hand.

In reviewing the points above, you will note that an effective 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 unique mix of ages, 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; and
- The composition of the club in terms of the
 - 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, and
 - satisfaction level for past projects.

Evaluation of 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.

Community Assessment

Another important step is to conduct an external evaluation, or community assessment. 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

For Your Information

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).

To properly conduct a community assessment, club service leaders must 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; and
- Religious leaders.

These contacts will enable 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 regarding community issues, project strategies, and future club service projects. In addition, working with community members to develop and implement service projects helps identify potential new Rotarians.

Rotary's History of Service

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



Project Planning and Implementation

Project planning and implementation go hand-in-hand. Without effective planning, club members are likely to encounter obstacles during project 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

- involve and motivate club members throughout the planning and implementation process;
- develop a detailed budget and work plan based upon the requirements;
- supplement financial resources through well-organized fundraising; and
- 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 about public relations see Chapter 6, "Public Relations," pages 85-95.*)

Initial Considerations

The following questions should be considered before beginning a service project.

In what projects are club members currently involved?

Pay particular attention to how a new project may affect any ongoing projects to which the club is committed.

What will be the goal of the project?

Ensure the goal is specific, challenging, measurable, realistic, 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.

Effective planning involves the following steps:

- Set well-defined and measurable goals.
- Establish a realistic time frame to plan and implement a project.
- Identify the person(s) responsible for accomplishing each task.
- Develop a budget.
- Promote the project and the club's role in it.
- Use available resources.
- Keep Rotarians, community members, and project beneficiaries well-informed.
- Share relevant information, contacts, and materials with incoming club officers if the project will continue beyond the current Rotary year.

For your Information

The "Work Plan Worksheet" on page 54 and "Fundraising Worksheet" on page 55 have been included to help facilitate planning for service projects.



Evaluating Service Projects

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; and
- apply lessons learned to increase the effectiveness of future service projects.

To Do

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

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

The "RI Projects Submission Form" can be found in Appendix 3 on pages 56-57.

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, in adult literacy classes, participants 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, a project that focuses on raising levels of awareness regarding AIDS in a community might employ a survey before and after its campaign 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, in a project that establishes a Rotary Community Corps it might be useful to interview participants about how the project has affected their lives and community.

These three forms of evaluation may be used together in order to gain as much knowledge as possible. The more the club is able to learn about the impact of its service efforts, the more effective those efforts will be in the future.



International Service

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

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.

For Your Information

For more information regarding these programs please consult Chapter 5, "The Rotary Foundation" found on pages 73-83.

Further information on WCS and using the programs of The Rotary Foundation to help finance your international service projects can also be found in the *World Community Service Handbook: A Guide to Action* (742-EN).

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. This can be done by

- Exploring the World Community Service Projects Exchange on Rotary's Web site;
- Speaking with the district's World Community Service chairperson;
- Contacting your district Rotary Foundation Committee chairperson and exploring Rotary Foundation grant programs;
- Using the *Official Directory* to find members of various RI committees or task forces to contact for project assistance;
- Networking with fellow Rotarians at district and international meetings;
- Observing what other organizations are doing around the world; and
- Reaching out to fellow Rotarians on the Internet.

The Rotary Foundation Programs and WCS

As the club develops its WCS project, remember that The Rotary Foundation has an array of tools to enhance and increase the impact of WCS projects. Consider the following Humanitarian Grants programs in your planning:

- Matching Grants for International Humanitarian Projects
- Grants for Rotary Volunteers
- Health, Hunger and Humanity (3-H) Grants
- Discovery Grants
- New Opportunities Grants



Appendix 1: Work Plan Worksheet*

Be as specific as possible.

GOAL:

Objective:

TASK:

Person Responsible for Task

Target Date for Completion of Task

Resources Available for Completion of Task

Estimate Expenditures Needed to Complete Task

Expected Outcome

Notes

TASK:

Person Responsible for Task

Target Date for Completion of Task

Resources Available for Completion of Task

Estimate Expenditures Needed to Complete Task

Expected Outcome

Notes

* Make copies as necessary.



Appendix 2: 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 Amount Needed to Conduct the Fundraiser

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

RI Projects Database Project Submission Form

(Please print or type information)

This form should be submitted after each service project is complete. Please send completed forms by mail to Rotary International, Community Programs Section (PD210), One Rotary Center, 1560 Sherman Avenue, Evanston, IL 60201-3698, USA; or by Fax to 847-866-6116.

Project Title _____

Districts _____

Country _____

Type of club(s): Rotary Interact Rotaract Rotary Community Corps

Start Date _____ End Date _____ Ongoing? Yes No

Topic(s):

(select topics from the list below or add your own in the space provided)

- | | | | |
|---|---|--|---|
| <input type="checkbox"/> 4-Way Test | <input type="checkbox"/> Drug/Alcohol Abuse | <input type="checkbox"/> Literacy | <input type="checkbox"/> Small Businesses |
| <input type="checkbox"/> Adult Education | <input type="checkbox"/> Education | <input type="checkbox"/> Medical Supplies | <input type="checkbox"/> Training |
| <input type="checkbox"/> Aging | <input type="checkbox"/> Environment | <input type="checkbox"/> Peace | <input type="checkbox"/> Tree Planting |
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Ethics | <input type="checkbox"/> Population | <input type="checkbox"/> Tutoring |
| <input type="checkbox"/> AIDS | <input type="checkbox"/> Food Distribution | <input type="checkbox"/> Poverty | <input type="checkbox"/> Unemployment |
| <input type="checkbox"/> Animal Husbandry | <input type="checkbox"/> Fundraising | <input type="checkbox"/> RCC | <input type="checkbox"/> Vocational Service |
| <input type="checkbox"/> Awards | <input type="checkbox"/> Health | <input type="checkbox"/> Recycling | <input type="checkbox"/> Water |
| <input type="checkbox"/> Career Development | <input type="checkbox"/> Homelessness | <input type="checkbox"/> Revolving Loan Fund | <input type="checkbox"/> Women |
| <input type="checkbox"/> Children | <input type="checkbox"/> Housing | <input type="checkbox"/> Rotaract | <input type="checkbox"/> Youth |
| <input type="checkbox"/> Clean-Up | <input type="checkbox"/> Hunger | <input type="checkbox"/> Sanitation | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Disabled | <input type="checkbox"/> Immunization | <input type="checkbox"/> Scholarships | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Diseases | <input type="checkbox"/> Interact | <input type="checkbox"/> Schools | <input type="checkbox"/> _____ |

Project Objectives:

How did your club determine the need for this project?

4

Fundraising for Effective Service Projects



Fundraising — Forming an Organizing Committee

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 chairpersons must understand the principles of conducting effective 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 projects activities:

- Ensuring broad participation by club members in fundraising activities; and
- 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 effected 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:

- Previous fundraising experience
- Sales experience
- Accounting experience
- Legal and/or insurance experience
- Logistical planning experience
- Strong connections to a diverse cross-section of the community that include:
 - 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 promote the fundraiser within the club using the club bulletin; and

- Effective service and Rotary Foundation leaders who can
 - clarify the club’s service goals,
 - help ensure that fundraising efforts are focused and goal-driven, and
 - ensure that club projects are complementary and do not compete for available funds.

Additional information in this chapter includes:

Key Fundraising Concepts

Guiding Policies — A synopsis of key policies related to fundraising.

Planning a Fundraiser — Important concepts that apply to all fundraisers and the role of planning to ensure success.

Working with Volunteers — Information about how to coordinate, motivate, and find volunteers to aid in club fundraising efforts.

Promoting Fundraisers — Ideas for successfully promoting a club fundraiser.

Fundraiser Follow-up — Explanation of the importance of evaluating a club fundraiser, tips on how to handle the funds received, and ways to ensure continuity.

Fundraising Appendices

Fundraising Steps — A quick reference guide listing the steps necessary to conduct a successful fundraiser.

Fundraising Worksheet — A tool for helping to determine a club or project’s funding goals.



Guiding Policies for Club Fundraising

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

Club Funds

- Rotary clubs are urged to handle their finances in a businesslike way. This includes requiring a counter signature on disbursement checks and conducting an annual audit.

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 projects and activities.
- It may be advisable to purchase liability insurance or seek the incorporation of a club or an activity of that club.
- Incorporation is a matter for determination by a club's local circumstances.
- 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.

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 district, or club should not be made available to districts, clubs, or Rotarians for the purpose of circularization.
- The RI Board does not look with favor upon 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 such a list 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 which do not contribute to upholding and strengthening the club's prestige.
- 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 pre-paid 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.



Planning a Fundraiser

Elements of 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
- Volunteer coordination
- Sound financial management
- Promotion
- Evaluation

Initial Planning

Prior to conducting a fundraiser, it is important to take the following steps that set parameters for possible club fundraisers:

- Assess the club's financial needs with respect to its current service projects and its service-oriented goals.
- Determine the purpose of a possible fundraiser.
- Assess present volunteer resources and determine how many volunteers may be necessary.
- Build upon past experience by evaluating past fundraisers and apply the lessons learned.

Developing a Budget to Support a Fundraising Goal

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 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 answers to these questions will provide a basis for establishing a fundraiser. The budget should include all estimated expenditures for conducting the fundraiser as well as estimated revenues.

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. Ensuring a fundraiser's financial integrity requires following some additional procedures that include:

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

Additionally, the club 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.

For Your Information

LEGAL CONSIDERATIONS

Raising funds through the club often has legal ramifications. Before collecting any money, it is vital to ensure that the club's fundraising efforts will not violate local or national laws. If local law requires it, amend the club's constitution to allow for fundraising; but if this becomes necessary, be sure to seek guidance from Rotary International.

It may also be important to seek legal and liability counsel to determine

- the need for liability protection, and
- the advisability of incorporating the club or a club activity.

For more information regarding Rotary's policy on incorporation consult the *Manual of Procedure* (035-EN).

See "Steps for a Successful Fundraiser" on page 70 for a detailed checklist your club can use when planning a fundraiser.

To help determine fundraising goals and budgeting needs use the "Fundraising Worksheet" on page 72.

Logistical Considerations

When planning a fundraiser, consider the following logistical factors:

- Venue
- Resources in terms of 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 a major national or religious holiday or sports event.
- Take advantage of holidays, however, 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 the participation of the governor or other district leadership is desired.
- Ascertain the optimal time period to allow maximum volunteer participation.



Working with Volunteers

Successfully carrying out a fundraiser requires the collaborative efforts of many people. Thus, being able to coordinate and motivate volunteers is essential.

Coordinating Volunteers

In order to coordinate volunteers it may be useful to take these steps:

- Form working committees (to report to the organizing committee). These committees, which can organize, plan, and implement the event, can assemble periodically and with increasing frequency as the event nears.
- Chairpersons of each working committee should meet regularly with the organizing committee to report progress and coordinate activities.
- Ensure that volunteers are assigned clearly defined tasks.
- Ensure that there are sufficient volunteers to follow up on final arrangements immediately preceding the event or activity.

Motivating Volunteers

To motivate volunteers it is important for the fundraising organizing committee to 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 are often experienced and 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 an official from the public health department
- Representatives from local religious institutions
- Secondary school and university students



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 flyers 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; and
- Seeking media coverage, if the event is newsworthy, from local newspapers, radio stations, and/or television stations.

For Your Information

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

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).



Fundraiser Follow-Up

Evaluation

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 — Please note: You are 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. The reasons why the fundraiser was not successful should be examined to benefit future fundraising efforts.

Exceeding Expectations

If a fundraiser is particularly successful, funding goals may be exceeded. It is important to have a pre-established 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; and/or
- Contributing funds to The Rotary Foundation.

The Effects 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:

- 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; and
- 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

Effective fundraisers often depend upon a few experienced club members. However, by following a few simple steps, the club members can not only help ensure successful fundraisers, they can also expand member expertise. These steps include:

- Keeping careful financial records and then sharing them with succeeding committee members and/or the succeeding club treasurer;

- Turning over any funds, books of account, records of club property, and/or electronic files to relevant club members; and
- Discussing any outstanding issues that the new treasurer and club fundraising leaders will have to address.



Appendix 1: Steps for a Successful Fundraiser

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

1. Ascertain 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 volunteer and 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.
 - Ascertain the human resources needed to plan and implement the fundraiser.
 - Procure goods to facilitate the fundraising effort.
4. Determine the logistics of the fundraiser.
 - Choose an appropriate date and venue for the event.
 - Make necessary reservations and arrangements.
 - Determine a timetable for each step involved.
 - Ensure compliance with local and national laws.
5. Organize volunteers.
 - Determine roles and tasks for volunteer and make sure that there is something for volunteers to do!
 - Consider involving community members, depending upon the type of fundraiser.
 - Involve friends, family, and business associates, as appropriate.
 - Secure volunteers to help with last-minute tasks.
6. Publicize the event.
 - Work with the club's Public Relations Committee to develop promotional strategies.
 - Ascertain 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.
 - Execute plans.
 - 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 especially 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 and/or the club treasurer.
 - Turn over any funds, books of account, records of club property, and/or electronic files to appropriate club members.
 - Discuss any outstanding issues with the incoming treasurer and new members of the fundraising organizing committee.



Appendix 2: 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 Amount Needed to Conduct the Fundraiser

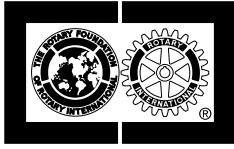
3. Add Items 1 and 2 for Total Needed

4. Total Provided For in Club Budget

5. Subtract Item 4 from 3 for Fundraising Goal

5

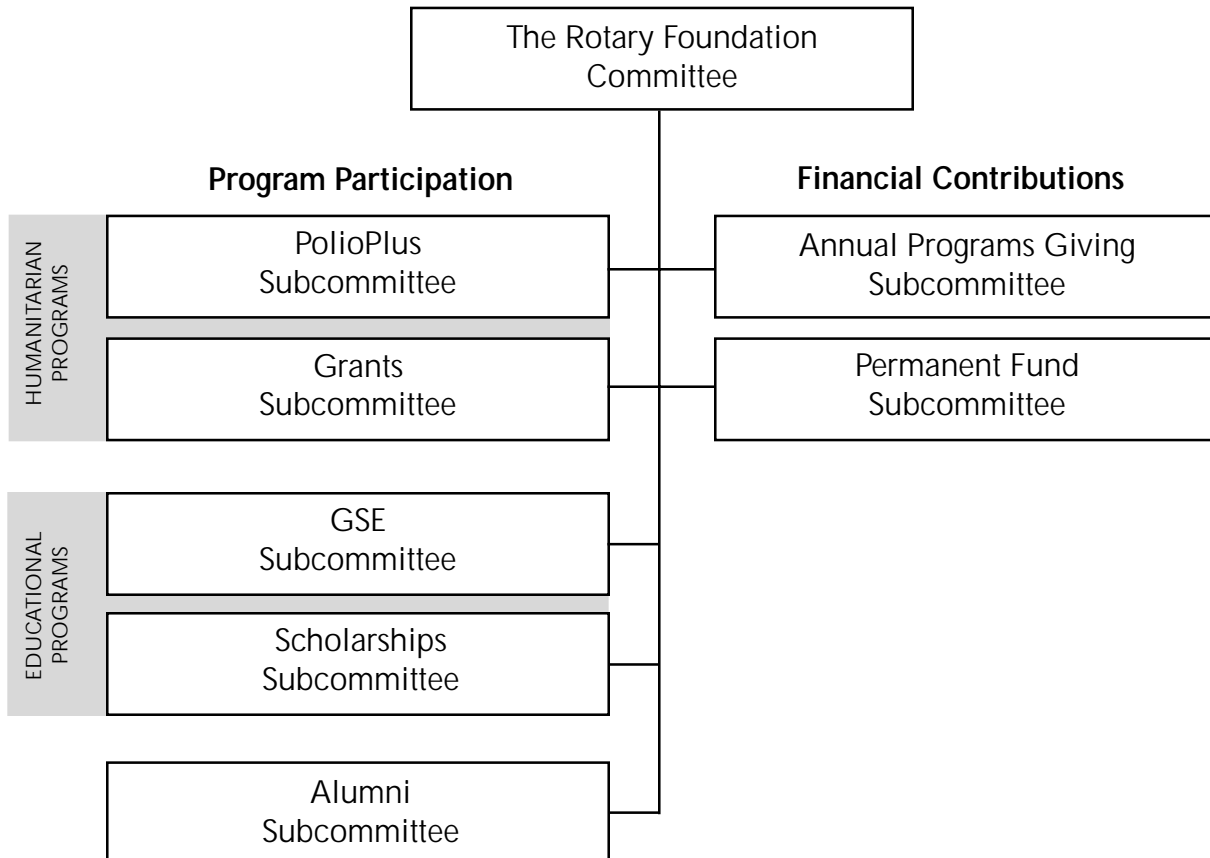
The Rotary Foundation



Club Committees Related to The Rotary Foundation

Committees and Their Responsibilities

The following is the recommended committee structure for The Rotary Foundation club subcommittee. This structure mirrors that found at the district level.



Rotary Foundation Committee

- Coordinates the activities of Rotary Foundation subcommittees;
- Encourages active participation in Rotary Foundation programs;
- Encourages financial support of The Rotary Foundation; and
- Publicizes the work of The Rotary Foundation both inside and outside the club.

Annual Programs Giving Subcommittee

- Explains the relationship between Rotary Foundation Programs and Annual Programs Fund giving;
- Encourages every Rotarian to make an annual contribution to the Annual Programs Fund; and
- Inspires financial support through promotion of success stories.

Permanent Fund Subcommittee

- Secures Benefactor commitments (bequests and outright gifts of US\$1,000 or more to the Permanent Fund qualify);
- Solicits major gifts to the Foundation from those individuals capable of making them; and
- Encourages Rotarians and friends to include The Rotary Foundation in their estate plans for a minimum of US\$10,000 or more and to notify the Foundation of their intention in writing.

Scholarships Subcommittee

- Becomes familiar with the program objectives and application procedures for Ambassadorial Scholarships, Rotary Centers for International Studies, and Grants for University Teachers;
- Confirms with the district Rotary Foundation Committee the availability of scholarships at the district level and the deadline for receipt of club-endorsed applications;
- Publicizes the availability of Ambassadorial Scholarships, University Teachers Grants, and Rotary World Peace Scholarships and identifies Ambassadorial Scholar candidates to endorse to the district; and
- Identifies host counselors for Ambassadorial Scholars, University Teachers, or Rotary World Peace Scholars coming to the district and helps promote their activities.

Group Study Exchange (GSE) Subcommittee

- Becomes familiar with the objectives of the program and the application procedure;
- Identifies team member candidates to endorse to the district;
- Promotes home hosting and vocational day opportunities to club members and offers to host the visiting exchange team;
- Publicizes the experience of any team members selected from the club's community; and
- Publicizes the visit activities of an exchange team visiting the local community.

Grants Subcommittee

- Becomes familiar with each grant program and knows where to find information regarding eligibility criteria and application processes;
- Understands District Designated Funds (DDF), how they may be used to support grant applications, and how to obtain the governor's approval to use them in support of club projects;
- Works closely with international service committees such as the World Community Service Committee and Vocational Service Committee; and
- Ensures timely submission of reports for all Foundation grants the club has received.

PolioPlus Subcommittee

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

Alumni Subcommittee

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

Selecting Committee Members

Refer to The Rotary Foundation section of *Planning Guide for Effective Rotary Clubs* found in the *Club President's Manual (222-EN)* when considering club goals as they relate to the club's committee structure. 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 chairperson 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.

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

- Intrinsic interest in supporting The Rotary Foundation
- Excellent communication skills
- Patience
- Access to e-mail and/or fax
- International business, study, or travel experience
- Financial experience (e.g., accounting)
- Community or international volunteer experience

For subcommittees focused on Financial Contributions

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

Preparing Rotary Foundation Club Leaders — Two Key Opportunities

The **district assembly** is crucial because it

- features sessions to provide basic information about leadership roles and responsibilities related to supporting The Rotary Foundation;
- enables club Rotary Foundation leaders to interact and share experiences; and
- provides an opportunity for club Rotary Foundation leaders to work with other leaders from their club to establish Rotary Foundation-related goals.

Club Rotary Foundation committee and subcommittee chairpersons should be sure to attend this important meeting.

The purpose of the **district Rotary Foundation seminar** is to increase knowledge of the Foundation by educating district membership about the opportunities available through the Foundation. Topics discussed at the district Rotary Foundation seminar are generally linked to the district's Foundation-related goals for the year.

The Rotary Foundation seminar is usually held no later than 15 November. This timing enables club leaders to share experiences and learn how to achieve the goals they have set well before the end of the calendar year.

Additional information in this chapter includes:

Key Rotary Foundation Concepts

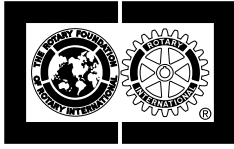
Achieving Balanced Support of The Rotary Foundation — Rationale for maintaining a balance between program participation and financial support of The Rotary Foundation.

Rotary Foundation Program Participation — PolioPlus — Brief history and purpose of the PolioPlus program and suggested activities for clubs.

Rotary Foundation Program Participation — Humanitarian and Educational Programs — Brief description of TRF Humanitarian and Educational Programs, the two key program areas in which clubs can participate.

Financial Support — Lifeblood of The Rotary Foundation — Discussion of the importance of contributing to The Rotary Foundation and the main ways to contribute.

Rotary Foundation District Resources — Information about district-level resources available to support club Foundation-related efforts.



Achieving Balanced Support of The Rotary Foundation

“So when you ask, ‘Can Rotarians do anything?’ I answer:
They can do everything.”
Bill Moyers, journalist, former press secretary to U.S. President
Lyndon B. Johnson, and Rotary Foundation alumnus

Spoken many years ago, these words truly capture the spirit of The Rotary Foundation’s mission which is

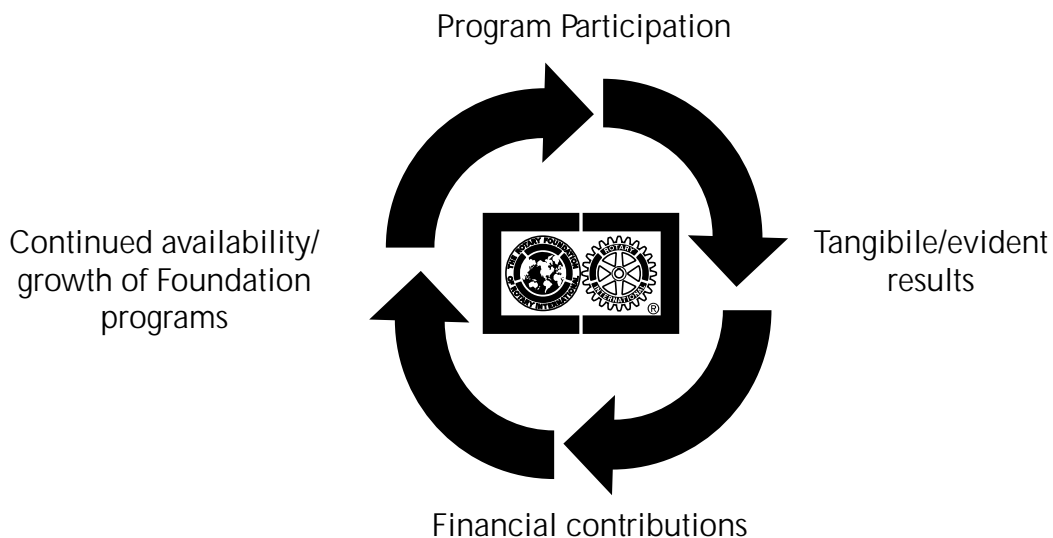
“to support the efforts of Rotary International in the fulfillment of the Object of Rotary, Rotary’s mission, and the achievement of world understanding and peace through local, national, and international humanitarian, educational, and cultural programs.”

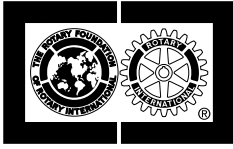
The Rotary Foundation provides clubs the opportunity to participate in and contribute to programs that make a real difference in the lives of people around the globe. It also enables Rotarians to increase world understanding and peace through meaningful cooperation with other clubs around the world.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

Effective clubs support The Rotary Foundation through both **program participation** and **financial contributions**. Club Rotary Foundation committees 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.

Achieving Balance

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. Contributions and hands-on participation are the lifeblood of The Rotary Foundation.





Rotary Foundation Program Participation — PolioPlus

Rotary's most famous 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 be approximately a half billion dollars. In addition, Rotary members around the world serve as a powerful volunteer army at the local level providing support at clinics and mobilizing their communities for immunization or other polio eradication activities. The 1998 Council on Legislation reaffirmed Rotary's commitment to the global eradication of polio as Rotary's highest priority until polio is eradicated from the face of the earth. Clubs can support this emphasis by ensuring that PolioPlus activities are included in the club's participation in Rotary Foundation programs.

For Your Information

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

Brief History

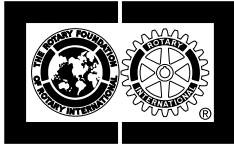
In 1985, Rotary International launched PolioPlus, a 20-year commitment to eradicate polio. PolioPlus is one of the most ambitious humanitarian undertakings ever by a private entity. It will serve as a paradigm for private-public collaborations in the fight against disease well into the 21st century.

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 polio virus 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. Rotary looks to celebrate the global eradication of polio in 2005, the organization's centennial year.

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.
- Feature a club program on the topic of PolioPlus.
- Ensure club members remain informed and involved until the world is certified polio-free.



Rotary Foundation Program Participation — Humanitarian and Educational Programs

For Your Information

Each humanitarian grant and educational program has specific eligibility criteria and application forms that are available through Publication Order Services, the Rotary Web site (www.rotary.org) or from the district Rotary Foundation Committee.

Brief information about the variety of ways your club can participate in the programs of The Rotary Foundation can be found in the *The Rotary Foundation Quick Reference Guide* (219-EN).

Program Participation

The two primary program areas of The Rotary Foundation are Educational Programs and Humanitarian Programs.

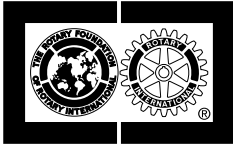
Through its **Educational Programs**, The Rotary Foundation furthers international understanding by providing opportunities for students, educators, and business and professional people to experience another culture and forge long-lasting relationships. Educational Programs also support the mission of 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.

Rotarians are significantly involved in the selection, orientation, and hosting of Educational Program participants. Rotarians are also encouraged to maintain contact with former participants in the Foundation's programs and foster a lifelong association with Foundation alumni.

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

Humanitarian Programs fund international Rotary club and district projects to improve the quality of life, providing health care, clean water, food, education, and other essential needs, primarily in the developing world. Basic criteria for Humanitarian Grant programs include:

- **Internationality**, which supports The Rotary Foundation's mission of achieving world understanding and peace through the collaborative efforts of at least two clubs or districts in different countries.
- **Significant Rotarian involvement**, which
 - enables club members 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; and
 - instills a sense of accomplishment.
- **Financial stewardship**, because
 - The funds that support Rotary Foundation grants were donated by thousands of Rotarians.
 - Rotarians have a responsibility to demonstrate that grant funds, contributed by fellow Rotarians, are used in a manner that is consistent with The Rotary Foundation's mission.



Financial Support — Lifeblood of The Rotary Foundation

Financial support is the second part of the equation that equals total 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) explains to club members the fundamental connection between program participation and financial support.

There are three common ways that clubs contribute to The Rotary Foundation:

- Gifts to the Annual Programs Fund;
- Restricted gifts in support of specific programs; and/or
- Gifts to the Permanent Fund.

Annual Programs Fund Giving — For Support Today

Encourage every Rotarian to make a gift to the Annual Programs Fund every year to ensure the continuity of Rotary Foundation programs. Gifts in any amount are welcome and are eligible for Paul Harris Fellow recognition when the appropriate giving levels are reached.

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

- They are invested for a period of three years.
- The investment earnings are used to pay for the administrative costs of The Rotary Foundation so that the entire amount of the original contribution can be used to support the educational and humanitarian programs of The Rotary Foundation.

Your club may also make contributions to a **specific project** in which it is participating through a Rotary Foundation program. Such gifts are **restricted** because the intended destination of the funding is specified. Although you may think of restricted gifts as “financial support” of The Rotary Foundation, they should actually be considered part of “program participation” due to the fact that such gifts do not benefit The Rotary Foundation. 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 an intended 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.

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 of US\$25 and above and appreciation; — registration of appropriate Paul Harris Fellow, Multiple PHF, and Major Donor recognition; and — 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 so that the entire amount of each contribution goes directly to Foundation programs. 3. After three years: <ul style="list-style-type: none"> — 60% of the original contribution is made available to the district as District Designated Funds* (DDF, also known as <i>SHARE</i> funds) that the district, in cooperation with its clubs, can use to support Educational and Humanitarian Program goals. — The remaining 40% of the original contribution is placed in the World Fund. The World Fund 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 of US\$25 and above and appreciation; — registration of appropriate Paul Harris Fellow, Multiple PHF, and Major Donor recognition; and — provision of tax credit where applicable. 2. The gift is channeled to its intended destination. Examples of restricted gifts include: <ul style="list-style-type: none"> — An approved Matching Grant project — An approved 3-H Grant project — An approved PolioPlus Partners project

The Permanent Fund — Securing the Future of The Rotary Foundation

A contribution to the Permanent Fund is an investment in Rotary's future. While gifts to the Annual Programs Fund ensure the day-to-day operation of the programs of The Rotary Foundation, they do not substantially enable growth of these programs or development of new initiatives. Contributions to the Permanent Fund enable The Rotary Foundation to meet the urgent needs of the future through an endowment.

- Contributions to the Permanent Fund are not spent but are invested.
- A portion of the earnings supports Foundation programs.
- The amount available to support programs grows as the principal of the Permanent Fund increases.
- Gifts of US\$25,000 or more are requested.

*See the next page for more detail on District Designated Funds.



Rotary Foundation District Resources

District Committees

The recommended structure for the club Rotary Foundation Committee and related subcommittees is mirrored at the district level. Your district should have a Rotary Foundation subcommittee to match any club-level subcommittee. District-level committee representatives are usually experienced and able to provide the type of context-specific guidance that may be difficult to obtain from a publication. District-level committee representatives may also be able to put the club in contact with other clubs in the district that may be able to assist your club. Often, the district Rotary Foundation chairperson (DRFC) is a past district governor who may be called upon for help.

District Designated Funds

District Designated Funds (DDF) reflect 60 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 or the sponsor portion of a Matching Grant.

General decisions about how the district will allocate, or spend, the DDF within a given year are made by the district governor, governor-elect, governor-nominee (if known), immediate past governor, and current district Rotary Foundation Committee chairperson, often in consultation with clubs in the district. Many districts invite the top three per capita giving clubs to participate in the decision-making process. These general decisions are made by 1 March of the year preceding the year in which the funds are intended to be used.

How does this affect you? Your district may have funds available to support the club's Foundation-related activities. The district Rotary Foundation Committee chairperson can advise you about the availability of District Designated Funds. The process for obtaining authorization to use DDF varies from district to district; however, in all districts the governor must authorize the use of the funds in writing.

6

Public Relations



Public Relations Committee

Raising Rotary's public image is essential to a club's ultimate success. Effective 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 spokespeople for the club when dealing with the media. Rotarians who might ably serve on such a committee include:

- Media professionals
- Persons with ties to the media through business or other professional activities, such as advertising
- Individuals with writing or photography skills
- Civic, academic, or religious leaders within the community
- Web page designers and others with skills to create a club/community Web site

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 club committees that are conducting service activities to publicize successful club projects through the local media;
- Creates a list of media contacts and regularly updates it;
- Responds quickly and accurately to media inquiries about club activities;
- Advises the club president on public relations matters;
- Communicates with key organizations and leaders within the community;
- Works with the district Public Relations chairperson to keep him or her informed of larger stories that may generate interest beyond the local community; and
- Works with the Magazine Committee to keep RI apprised of newsworthy club projects.

Preparing Committee Members

The committee chairperson 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.
- Give committee members examples of past successful and unsuccessful public relations efforts discussing 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 that may be of interest to the local media, including:
 - Ambassadorial Scholars
 - Youth Exchange participants
 - Group Study Exchange team members
 - District governor
 - Interesting 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, which can assist in recruiting qualified media representatives as members;
- Rotary Information Committee, which can ensure that new and existing members are knowledgeable about Rotary and club information;
- Magazine Committee, which can provide *The Rotarian* or Rotary regional magazine to local media and other community venues; and
- all service-oriented committees that may be conducting activities worthy of media coverage.

Additional information in this chapter includes:

Key Public Relations Concepts

Guiding Principles — A synopsis of key policies related to public relations.

Public Relations Resources — A list of materials and other resources available to support club public relations efforts.

Enhancing Rotary's Public Image — A summary of club and committee public relations responsibilities.

Utilizing the Media — Tips regarding attracting positive attention and working with the media.

Public Relations Appendices

Media Tools — A guide to public relations tools that can be used to enhance Rotary's public image.

Key Rotary Messages — A list of important Rotary facts and accomplishments.



Guiding Policies for Club Public Relations

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

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 Rotary's Object, 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:
 - Talks to clubs by news media personnel on the role of the media
 - Small discussion groups comprised of Rotarians and news media personnel

- Forums or seminars attended by Rotarians and news media personnel
- Club awards for young journalists for the purpose of broadening their experience, the awardees to report back to the club thereon
- Inclusion of news media representatives in Rotary Foundation Group Study Exchange teams
- Increased efforts to bring representatives of the news media into club membership

Speakers Services

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 and means of increasing 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; and
- consider adopting more sharply focused activities as a means of providing 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

Materials Available from RI

The following is a partial list of RI publications and materials helpful to public relations. For more information please consult the *Catalog* (019-EN).

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

PR Tips — Rotary club public relations success stories, press releases, fact-sheet updates, and other valuable public relations tips, available via e-mail on a regular basis by visiting www.rotary.org and registering as directed to become part of Rotary's electronic global PR team.

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

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

Promoting Rotary on the Web (271-EN)

Public Service Announcements (PSAs) for print, radio, and television.

Human Resources

- Public Relations and Rotary's Image Task Force Members — Rotarians who are experienced and knowledgeable about promoting Rotary at the local level; contact your district governor for the name of the Rotary task force member who can offer guidance and counsel on how to get your club project in the news.
- Rotary International's Public Information Department — Staff members who can provide general public relations guidance; fact sheets that highlight Rotary's history, major programs, and service activities; graphics; and slides; and can help publicize local stories with a national or international appeal.

Phone: 847-866-3000

Fax: 847-866-8237

E-mail: pid@rotaryintl.org

- District committees (particularly the district Public Relations Committee).
- International, district, and club officers; Rotary Foundation alumni; Ambassadorial Scholars; and Rotary Youth Exchange participants — all of whom can serve as Rotary spokespersons.



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 successful service projects;
- Utilize *The Rotarian*, *Rotary World*, Rotary's regional magazines, 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; and
- Obtain full representation of the news media in club membership.

Public Relations Committee Responsibilities

The only way the public can learn about Rotary is if Rotarians make a conscious effort to share their knowledge with non-Rotarians. Proactively creating a positive public image for your club must take place both internally — within the club — and externally — within 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; and
- 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

- Working to promote club projects and activities that appeal to the local media;
- Developing a club brochure and/or Web site that provide information about Rotary International and your club; and
- 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 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 in the community, including:

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

For example, a business writer for the local newspaper might be interested in a club's career day for local students, while an education writer might wish to interview an Ambassadorial Scholar.

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 to be 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 are examples of specific types of Rotary stories that can be effectively promoted:

- Outstanding volunteers
- The interaction of people in developed and developing countries
- Local Rotary and/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

For Your Information

Further information that can help you best prepare for working with the media can be found in Appendices 1 & 2 — “Media Tools” and “Key Rotary Messages.”

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; and
- 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 exciting profession; and
- 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:

- Local newspapers
- Local radio stations
- Local television stations

Before choosing a particular media outlet, it is important to 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
- Local access cable television stations
- Radio public affairs talk shows
- Corporate newsletters
- Newsletters of other community organizations



Appendix 1: Media Tools

The following tools can be used effectively to enhance your club's public image:

Spokespersons — 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.

The Press Release — A brief report that answers the basic questions of Who? What? Where? When? Why? and How? It should quickly communicate to the media information that can be used as the basis for a news story.

Photographs — If high-quality, they 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 kits or produce one on your own.

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

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

Rotary Public Service Announcements (PSAs) — 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.

The 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.

For Your Information

"Key Rotary Messages" on the next page provides essential information about Rotary that should be conveyed to the public and the media.



Appendix 2: Key Rotary Messages

Following are sample messages you may wish to select, adapt, or use to create the messages you want conveyed to the media.

- 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. An example is the PolioPlus program through which Rotary is working to eradicate polio by the year 2005.
- 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 29,000 clubs serving communities in 162 countries, Rotary is ideally situated to address such problems as poor health and sanitation, hunger, and environmental deterioration.
- Through PolioPlus, Rotary leads private sector participation in the global effort to eradicate polio. Its financial commitment, expected to be valued at US\$500 million by 2005, is multiplied by the thousands of volunteers working in more than 100 countries to support childhood immunization.
- Rotary's volunteer and financial assistance in vaccination efforts is helping to eliminate polio in nation after nation, and region after region. Polio eradication cannot occur, however, until the disease disappears from all nations and all regions.
- Rotary's community-based leadership in target countries was a deciding factor in the World Health Assembly's choice of the goal of polio eradication. Rotary International is the key private partner in the global fight to eradicate polio.

7

Club Administration



Committees Related to Club Administration

Basic Responsibilities

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; and
- Providing *information* including:
 - The Club Bulletin and
 - Rotary's magazine, *The Rotarian*, or your official regional Rotary magazine.

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

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

- Attendance
- Program
- Club Bulletin
- Magazine
- Fellowship Activities
- Rotary Recreational and Vocational Fellowships

Selecting Committee Members

When choosing members for administrative committees it is important to 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

Committee Descriptions and Responsibilities

Attendance Committee

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

Program Committee

- Prepares and arranges the programs for all club meetings, including the club anniversary; and
- Designs and balances these programs to ensure that they are relevant and meaningful to club members.

Club Bulletin Committee

The committee creates the weekly bulletin that

- 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; and
- Reports news of the club, its members, and the worldwide Rotary program.

Magazine Committee

- Stimulates interest in *The Rotarian* or official regional magazine;
- Observes Magazine Month (April) at a weekly meeting, perhaps by using a recent article as the basis for a panel discussion or debate;
- 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; and
- Sends news and action photographs of club projects to the editor of *The Rotarian* or the official regional magazine.

Fellowship Activities Committee

- Promotes acquaintance and friendship among the members;
- Promotes participation by members in the club's recreational and social activities;
- Welcomes visiting Rotarians and guests; and
- Works toward achieving the goals of the club, as outlined by the president or the board.

Rotary Recreational and Vocational Fellowships Committee

- Promotes Fellowship activities to club members through club programs and projects, in coordination with the service project committees;
- Encourages club members to join existing RI Fellowships or to start new ones; and
- Observes Rotary Recreational and Vocational Fellowships Month (June) by conducting a club program on these Fellowships.

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 that can play an important role. For example:

- 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 other official Rotary 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 regarding projects and activities reaches club members.

Additional information in this chapter includes:

Key Club Administration Concepts

Administrative Resources — A list of materials and other resources available to support club administration.

Attendance — Principles; attendance reports; ideas to encourage regular attendance.

Developing Effective Weekly Meeting Programs — Arguments for good club programming; guidance regarding planning and conducting weekly meetings.

Fellowship — Ideas that can foster fellowship among club members.

Sharing Information — Ways the club bulletin and *The Rotarian* or regional Rotary magazine can be used to provide essential information to club members and others.

Administrative Appendix

Guideline for Developing Weekly Meeting Programs — A sample meeting agenda and list of special observances during the Rotary year that can provide a framework for club programming.



Administrative Resources

Reference Publications

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

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

“Standard Rotary Club Constitution” (012A-EN) — Also included in the *Manual of Procedure*.

“Recommended Rotary Club Bylaws” (012B-EN) — Also included in the *Manual of Procedure*.

Official Directory (007-EN) — Includes 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 and secretaries; and meeting times and places.

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

Club Secretary’s Manual (229-EN) — A component of the *Club Officers’ Kit* that includes an overview of the responsibilities of the club secretary, as well as information regarding the roles of the club treasurer and sergeant-at-arms.

News Publications

The Governor’s Monthly Letter — A letter sent by the district governor for the purpose of informing and motivating club leaders and recognizing excellence at the club level.

The Rotarian — The official magazine of RI published monthly. In addition to *The Rotarian*, 27 regional magazines in 21 languages also serve Rotarians around the world.

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

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

RI Staff Contacts

Club and District Administration representatives — These key resources at RI World Headquarters and service centers can answer many administrative questions. A list of service centers and their contact information can be found in the front section of the *Official Directory*.



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 should promote regular attendance by

- Getting to know each member;
- Carefully monitoring attendance trends (If attendance rates are declining, find out why!);
- Devising a questionnaire that attempts 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;
- Creating a support system within the club to encourage and monitor attendance;
- Working with leaders in charge of club programs to ensure that weekly meetings are relevant to club members' concerns and worthy of their time;
- Stressing the importance of attendance to new members and their mentors;
- Encouraging members to make up missed meetings;
- Conducting attendance competitions in your club or with another club; and
- Recognizing 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 leads to automatic termination!

Guiding Principles Related to Attendance

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

- 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, a Council on Legislation, an 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; and
 - Attending a club service project authorized by the club's board.

To Do

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 under 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; or
 - engaged in Rotary business authorized by the club board that precludes attendance at the club meeting.
- If an absence is made up at another club, notice must be given the member's club, either by the member or by the other club's secretary.
- A member's absence can be excused for the following reasons:
 - Ill health.
 - Stay in a country for more than two weeks in which Rotary clubs do not exist.
 - The member is a senior active member whose age and years in one or more clubs total 85 years or more and who has notified the club's secretary in writing of the desire to be excused from attendance and the board has approved.

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.
- Members whose absences have been excused because of ill health or travel in a non-Rotary country shall not be included in the club's attendance records for the period in question.
- Senior active members whose absences have been excused by the club's board 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 is automatically terminated for the following reasons:
 - Failure to attend at least 60 percent of the time allotted for regular club meetings in each half of the Rotary year
 - Failure to attend at least 30 percent of the 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



Developing Effective Weekly Meeting Programs

Club Programs

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

- update members on important Rotary information;
- promote club projects, activities, district meetings, and events; and
- increase fellowship.

Remember that club members are busy individuals whose time is very valuable. Meetings that are organized and which 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; and
- reinforce the value of continued membership.

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

- Developing an agenda for each regular weekly meeting, ensuring that each meeting includes time for an address or program as well as fellowship;
- Preparing contingency plans in case scheduled programs are cancelled; and
- Beginning and ending the meeting punctually.

A 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, it is vital that you take these actions:

- 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.
- Encourage members to invite guests and potential members to weekly meetings.
- 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).
- Include programs that update members on the latest Rotary information.

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

Sharing Great Club Program Ideas

District 5810 in Texas, USA, has developed a “Program Bank,” a clearing-house for creative club programs. District 5810’s Program Bank provides a form for clubs to fill out on its district Web site. The form allows a club to notify the district of a particularly outstanding, informative, or creative program and provides contact information for the speaker who conducted the program. The district then shares this information with all the other clubs in the district.

Guiding Principles Related to Developing Club Programs

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

For Your Information

For a suggested weekly meeting guide and list of special observances held throughout the Rotary year, see Appendix 1, “Guidelines for Developing Weekly Meetings” on page 109.

- 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 rather than programs designed chiefly to amuse.
- Clubs are encouraged to invite club presidents from other clubs to their meetings as a way to encourage inter-club 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

Fellowship, or friendship and good relations among club members, is one of the hallmarks of Rotary. Rotary's excellence as a service organization or business-networking group may attract members, but fellowship 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 by

- Circulating a letter at the beginning of the year asking members to advise the Fellowship Committee of important dates, such as birthdays, anniversaries, and births in the family;
- Making sure members wear name badges at meetings;
- Rotating seating arrangements to break up cliques and ensure that members get to know each other — appoint a “captain” at each table to promote fellowship among table mates;
- Using the club bulletin to publish news regarding members and social events;
- Appointing a different member each week to introduce new members and speakers;
- Paying special attention to new members and guests — ensure that they have been greeted and do not feel excluded; and
- Fostering relationships with other Rotary clubs in the district, region, and around the world.

Guiding Principles Related to Fellowship

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

- 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 as 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

An important aspect of administering the club is sharing important 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, important information can be effectively communicated to club members through the club bulletin and *The Rotarian* (or one of Rotary's 27 regional magazines).

The 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; and
- 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 actually 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 pique reader interest.
- Track which members are mentioned in the bulletin and make sure that as many members as possible are mentioned 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 Internet.

Sources of information for the club bulletin can include:

- Club board members and committee chairpersons
- The Governor's Monthly Letter
- Club, district, and Rotary International meetings
- *Rotary World* and other Rotary International publications
- *The Rotarian* or regional Rotary magazines
- Rotary's Web site at www.rotary.org

Guiding Principles Related to the Club Bulletin

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

- 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, and
 - reports news of the club, its members, and the worldwide program of Rotary.
- The RI Board suggests that the newspaper representative in the club should give assistance in contributions and suggestions regarding the club bulletin, but should not be called upon to edit the club bulletin.

Magazine

The club should use *THE ROTARIAN* or 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 truly 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; and
- Archiving past issues to provide the club with reference material for ideas regarding club activities and projects.

Guiding Principles Related to the Magazine

Excerpted from the *Manual of Procedure* and *Rotary Code of Policies*.

- It is a condition of membership that members of all Rotary clubs subscribe to either *THE ROTARIAN* or other official regional Rotary magazines.
- The club is expected to use *THE ROTARIAN* or one of Rotary's regional magazines 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 1: Guidelines for Developing Weekly Meeting Programs

The following is a suggested weekly meeting guide. It should be adapted to the needs of the individual club.

I. Opening

- As per local custom

II. Meal and Fellowship Period

III. President's Time

- Introduction of visiting Rotarians and guests.
- Rotary information — Present relevant Rotary opportunities to serve and summarize key Rotary program information.
- 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.
- Recognition of individual Rotarians per local customs — Recognize any honors members may have received and/or members' birthdays and anniversaries.
- Introduction of new members and inductions.
- Reminders and announcements.

IV. Program

- The chairperson of the committee responsible for the program should introduce the speaker. Following the speaker's program, closing remarks can be made.

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)
- Rotary Awareness Month (January)
- World Understanding Month (February)
- Family Week (2nd week of February)
- Anniversary of Rotary International and World Understanding and Peace Day (23 February)
- World Rotaract Week (week of 13 March)
- Magazine Month (April)
- Rotary Recreational and Vocational Fellowships Month (June)



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