

LEAD YOUR CLUB

President

2019-22 EDITION

Rotary

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Rotary

This is the 2018 edition of the Lead Your Club: President manual for club presidents holding office in 2019-20, 2020-21, and 2021-22. The information in this publication is based on Rotary's constitution and policy documents and the RIBI constitutional documents for club leaders in Rotary in Great Britain and Ireland (RIBI). Please refer to those resources for exact Rotary policy. Changes to Rotary's constitution and policy documents override policy as stated in this publication.

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INTRODUCTION

Congratulations on your position as club president. Use this manual to learn more about your role before you attend the presidents-elect training seminar (PETS) and district training assembly. The Club President Basics course in the Learning Center can also help you prepare.

As a member of Rotary's global network of more than 34,000 clubs, you have access to a wealth of services and resources available through My Rotary. You'll find information, resources, club data, and the Grant Center, where you'll apply for and manage Rotary grants to carry out effective and sustainable projects. You'll also get support from Rotary staff. To start using My Rotary, create your account.

If you have questions or comments about this manual or any of Rotary's training resources, please contact:

Learning and Development Team
Email: learn@rotary.org
Phone: +1-847-866-3000

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YOUR JOB AS CLUB PRESIDENT

As president you lead your club, engage and inspire members, and promote Rotary in your community.

AS PRESIDENT-ELECT

Consult the club president on the current status of the club
Serve as a director of your club's board
Appoint committee chairs and a trainer for your year*
Supervise preparation of the club budget
Encourage incoming club officers to attend the district training assembly
Create an account on My Rotary
Attend your presidents-elect training seminar (PETS), district training assembly, and district conference (and, in RIBI, district council meetings)
Set and track goals for your club in Rotary Club Central on My Rotary
Ensure all club officers are reported on My Rotary so they can receive important communications from Rotary International

*Responsibility is indicated in the Rotary Code of Policies.

AS PRESIDENT

Set goals for each committee. Encourage communication between club and district committees. Review activities, goals, and expenditures, and participate in decisions.*

Supervise the preparation of a club budget and proper accounting practices, including an annual financial review*

Make sure your secretary and treasurer have an account on My Rotary to update membership and club data regularly. In RIBI use the Data Management System (DMS).

Collaborate with the governor and assistant governor on club and district matters*

Communicate important information from the governor and Rotary International to club members*

Prepare for the district governor's required visit

Follow Rotary's youth protection policies and the Statement of Conduct for Working With Youth, and implement the requirements for the Youth Exchange program

Plan and lead monthly board meetings*

Plan and lead interesting and relevant club meetings, and organize fun social events*

Ensure that comprehensive training is conducted for club members, as needed*

Involve members in carrying out your club's goals, outlined in Rotary Club Central. Track your club's goals in Rotary Club Central.

Encourage members to attend district meetings, and promote the Rotary Convention

Attend the district conference*

Submit an annual report to your club on the club's status before leaving office*

Work with your successor before leaving office*

Arrange for a joint meeting of the incoming board of directors with the outgoing board*

*Responsibility is indicated in the Rotary Code of Policies.

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CHAPTER 1

PLANNING YOUR YEAR



What are your goals for your year as club president? How will you connect with leaders in your community, club, and district to make positive, lasting change?

As president, you're in a unique position to strengthen relationships, discover and celebrate your club's diverse perspectives, and apply your members' professional expertise and experience to improve communities at home and around the world.

Rotary's guiding principles give members a common purpose and direction, serving as a foundation for our relationships with one another and for the action we take in the world.

In 2017, Rotary adopted a new vision statement to guide the organization into the future: "Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves." Consider how your club can further this vision as you set goals for your year as president.

Work with your club's leadership team to set goals for your year as club president and after. Rely on the Strategic Planning Guide for developing goals and action plans.

GOAL-SETTING RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Develop and evaluate your club's strategic plan to make sure it's current and relevant	Implement action plans and regularly evaluate your club's progress toward its goals
Set annual goals in Rotary Club Central that build toward your club's long-range goals	Inspire every club member to participate in club activities
Create an action plan for each goal	Celebrate accomplishments
Attend training events to develop goals with your leadership team	

STRATEGIC PLANNING

Your club's strategic plan is a long-term commitment requiring the support of all your members. Rotary International encourages clubs and districts to align their goals with Rotary's strategic plan.

Clubs that follow a strategic plan report higher levels of member engagement, retention, and satisfaction. Clubs with more engaged members are more successful at achieving their goals. Use the Strategic Planning Guide to develop or refine a collaborative strategic plan that works for your club.

SETTING ANNUAL GOALS

You can use your club's strategic goals to help set annual goals. Start by meeting with your assistant governor before your presidents-elect training seminar to examine past club trends and current practices. You can find a five-year history of your club's performance on Rotary Club Central. Your club leadership team will carry out the club's plans, so be sure to involve the team in goal development too.

To determine which goals to set, survey members to find out what they like about the club and what they would like to change. Find a sample membership questionnaire in Membership Assessment Tools. Review the results with your club leadership team to determine a course of action.

For best results, set goals that are specific, measurable, attainable, realistic, and time-specific. "Increase membership by 10 percent by the end of the year" is a more effective goal than "Add new members."

Set and track your annual goals for membership, service, and Rotary Foundation giving in Rotary Club Central. (The Rotary Club Central Resources course in the Learning Center can help you with this.) You can assess your progress using Rotary Club Central's trend graphs and reports. Review your goals often to determine whether you need to make adjustments.

The following club officers can set and edit goals in Rotary Club Central for the year of their term, starting the year before they take office and ending the year after:

- President
- Secretary
- Treasurer
- Foundation chair
- Membership chair
- Executive secretary

Although only designated club leaders can revise goals in Rotary Club Central, all members can view and track club achievements on My Rotary.

After you've defined your goals, continue to work with your club leadership team to plan how you'll achieve them. Involve all members in implementing your club's action plans.

ROTARY CITATION

The Rotary Citation goals have helped many clubs strengthen their operations and engage their members. Most of the goals are consistent from year to year, although the Rotary president often includes some additional goals designed to focus club activities around the presidential theme. Clubs have the entire year, from 1 July to 30 June, to achieve the goals. Club officers can use their club management system, as well as a variety of Rotary applications such as Rotary Club Central, Rotary Ideas, and Rotary Showcase, to record and track progress toward the citation.

EVALUATING GOALS

As you monitor progress toward your club's goals, talk with members to identify strategies that have been effective. Then apply these insights and share them with the club president-elect and president-nominee.

Review long-term and annual goals with your assistant governor and district governor when they visit your club.

DISCUSSION QUESTIONS

How does your club reflect Rotary's vision statement?

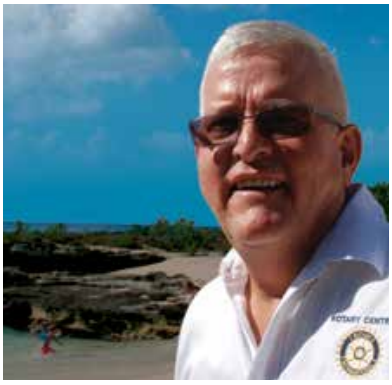
Which part of your club's strategic plan has the biggest impact on your club?

How will you involve your members in setting goals?

NOTES on Planning Your Year

WHAT ARE YOU WAITING FOR?
BE A VIBRANT CLUB







Be a Vibrant Club guide includes:

- A club success story from your region
- Ideas for your club to try
- Resources for your club on My Rotary





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CHAPTER 2

LEADING ROTARIANS



During your year as club president, you'll provide the vision to tackle social issues in your community, and the leadership to strengthen your club as it joins with Rotary in addressing the world's toughest challenges. Take advantage of your members' expertise and your community's resources to carry out this work. Find support from your district leaders and Rotary International on topics including public relations, membership development, and more.

LEADERSHIP RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint club committee chairs based on their skills and report them on My Rotary	Provide clear communication among your club and district leaders
Prepare your club's leadership team for the coming year	Recognize the accomplishments of club leaders and members
Identify the types of support your district offers	Motivate members to reach goals
Provide continuity of leadership in the club and its committees	Listen to all members and make sure their needs are met

WORKING WITH YOUR LEADERSHIP TEAM

Your club leadership team includes club board members as well as the club trainer, sergeant-at-arms, and committee chairs. Be sure your club has committees that meet its needs. See the sample club committee structure (appendix 1) for possibilities.

Encourage club leaders to attend district training meetings to prepare for their roles. See appendix 2 for a table of Rotary training events. They also can prepare by taking courses specific to their roles in the Learning Center. The courses will enhance their knowledge by giving them tools and other resources to succeed.

ELECTIONS

During your first six months in office, you will oversee the election of club officers and the board of directors for the next Rotary year. The club board consists of the president, president-elect, secretary, treasurer, and the immediate past president. A vice president, if elected, may also serve on the board. Check your club's bylaws for information about the board selection process. Officers and directors must be members in good club standing.

CLUB BOARD RESPONSIBILITIES

Meeting with your club board is an important part of your role as president. Use these meetings to explore ideas, evaluate progress, and make decisions about new members, club practices, and other matters affecting the entire club. Be sure to clearly communicate your expectations to your team and allow time for everyone to report on and discuss their goals, activities, and projects.

The board is elected to manage the interests of the club as a whole and to work closely with you to achieve club goals. You are responsible for running regular club board meetings. Based on the Recommended Rotary Club Bylaws, your club's board of directors has these responsibilities:

- Oversee the work of all club officers and committee members
- Review the monthly report of club finances to
  - Make sure the budget includes realistic amounts for club operations and projects
  - Approve all expenditures not accounted for in the club budget
- Approve or reject proposed and other prospective members, including online membership leads, and communicate the decision to those who proposed the members, and to the membership candidates, within 30 days (club secretary communicates with the proposer)
- Review club policies in your club bylaws to ensure they are being implemented as intended, and revise them if they are no longer current
- Consider innovative ways to make the club more flexible, vibrant, attractive to new members, and engaging to current members
- Explore the needs of your community and international communities to establish club goals

Secretary. Your secretary is responsible for administering most day-to-day club operations, as detailed in the Club Secretary Basics course in the Learning Center.

Work with the secretary and membership committee chair throughout the year to review your club's membership trends in Rotary Club Central. At the end of the year, ask your secretary to help you document achievements and activities, as well as goals that weren't met.

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

Treasurer. Meet with your club treasurer regularly to make sure club funds, transactions, and reports are being handled properly. The treasurer manages the club's financial transactions, keeps financial records, and helps plan the club budget, as detailed in the Club Treasurer Basics course in the Learning Center.

Sergeant-at-arms. The sergeant-at-arms is responsible for maintaining orderly and effective Rotary club meetings, including acting as greeter and usher.

CLUB COMMITTEES

You're responsible for overseeing the work of all committees to help them reach their goals for the year.

The following club committees are recommended:

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

You may appoint additional committees and subcommittees as needed. See appendix 1 for examples of club committee structures.

SELECTING AND PREPARING COMMITTEE CHAIRS

Appoint your committee chairs based on their professional abilities, personal interests, and talents. Because committee activities may carry over from one year to the next, you may choose to make multiyear appointments or reappoint some members to ensure continuity. Each committee chair should have experience as a member of that committee.

Encourage all chairs to:

- Take the online course in the Learning Center specific to their role
- Attend the district training assembly to hone committee leadership skills
- Attend other district training events to learn more about their role

See appendix 2 for a list of training events.

WORKING WITH YOUR COMMITTEES

Your club's committees plan, promote, and implement activities and projects to meet the club's annual and long-range goals. Work with your committees to help achieve these goals and develop leaders within your club.

To maximize the potential of your club's committees and encourage their continuing effectiveness:

- Review and discuss the status of each committee's action plan
- Coordinate the sharing of ideas and actions among committees
- Motivate your committees to be innovative and take on new challenges

YOUR SUCCESSION PLAN

You can help foster continuity in your leadership team, especially for activities extending beyond a single Rotary year, by developing a working relationship with your successor. Collaborate with your team to outline a smooth transition process. Prepare new team members by involving them in activities and leadership roles before they take office.

MEMBER EDUCATION

Cultivate club members' leadership skills by holding a workshop. Use Leadership in Action: Your Guide to Starting a Program as a resource.

Make sure your club members have the tools, resources, and information they need to achieve the goals of your club and of Rotary. A designated club trainer can help members with topics including new member orientation, youth protection, and leadership development. Have your club trainer work closely with club and district leaders to develop programs and activities that are relevant and informative.

The district conducts training on a variety of Rotary topics, such as membership, public image, and The Rotary Foundation. Although these events are targeted to the related committees, they are open to all members. See the list of Rotary training events in appendix 2 for more information.

Independent study. Members can take courses in the Learning Center to improve their Rotary knowledge. Encourage new and long-time members to explore the courses available for all members.

MOTIVATING MEMBERS

Common motivators for members include:

- Belief that goals will benefit their community and club and that goals are achievable
- Social opportunities to connect with other volunteers
- Career networking opportunities
- Milestones showing progress
- Recognition of their efforts

MOTIVATION AND RECOGNITION

An important part of your role is to motivate club members to learn about Rotary, get excited about Rotary's work, and take action to achieve goals. Like you, club members are volunteers who value their time. Keep expectations reasonable and show appreciation for their efforts. Find out what motivates each member of your club to get involved, using the list above as a starting point. Regularly assess if the motivators are working and make changes as needed.

One way to show appreciation for your members' commitment is to recognize them with awards such as the Service Above Self Award, Rotary Foundation Distinguished Service Award, Service Award for a Polio-Free World, and Avenues of Service Citation. See the Awards page on My Rotary to learn more about these and other honors.

Make recognition events inspiring and motivational by:

- Inviting the governor to present the award
- Inviting family members to attend
- Photographing the presentation and sharing the images on your club website and social media
- Inviting prospective members

Your district may have its own awards for clubs or individuals; ask your governor or assistant governor. Individual clubs are encouraged to develop their own awards too.

DISCUSSION QUESTIONS

How will you strengthen your relationships with your club leadership team?

How will you motivate your members to achieve club goals?

How will you develop future leaders?

What ideas do you have for working with your assistant governor and governor?

APPENDIX 1

SAMPLE CLUB COMMITTEE STRUCTURE

Rotary recommends five club committees. Clubs can add, eliminate, or combine committees or subcommittees according to their interests, activities, and number of members. Assistant governors or district governors can help club leaders determine suitable subcommittees.

OPTION 1: Standard Rotary Club Committees

COMMITTEES	POSSIBLE SUBCOMMITTEES
Club administration	• Club program • Member communi-cations • Website • Social events
Membership	• Attraction • Engagement • New member orientation • Diversity
Public image	• Media relations • Advertising and marketing • Web and social media
Service projects	• International • Community • Vocational • Youth service • Fundraising (for club projects)
Rotary Foundation	• Polio • Fundraising (for grants) • Grants

OPTION 2: Small Rotary Club Committees

COMMITTEES
Club administration
Membership
Public image
Service projects
Rotary Foundation

OPTION 3: Large Rotary Club Committees

COMMITTEES	Club administration	Membership	Public image	Service projects	Rotary Foundation
POSSIBLE SUBCOMMITTEES	• Club program • Club communi-cations • Website • Social events	• Attraction • Engagement • New member orientation • Diversity • New clubs • Membership leads • Assessment	• Media relations • Advertising and marketing • Web and social media	• International • Community • Vocational • Youth service • Fundraising (for club projects)	• Polio • Fundraising (for grants) • Grants • Annual giving • Major giving • Stewardship

APPENDIX 2

ROTARY TRAINING EVENTS

ROLE-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR-ELECT

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
District Team Training Seminar February	Assistant governors and district committee leaders learn about their roles and set goals with the district leadership team.	District training committee	Trainers Assistant governors Committees
Presidents-elect Training Seminar (PETS) February or March	Club presidents-elect learn their role and work with assistant governors to set goals.	District training committee	Trainers Presidents
District Training Assembly March, April, or May (after PETS)	Club presidents-elect develop leadership skills; other incoming club leaders learn about their roles; together, club leaders set goals.	District training committee	Trainers Presidents Secretaries Treasurers Committees

TOPIC-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
District Rotary Foundation Seminar Determined by district	Club Rotary Foundation committee chairs and interested Rotarians learn about the Foundation.	District Rotary Foundation committee, district training committee	Trainers Club Rotary Foundation committee chairs
District Membership Seminar Determined by district	Club presidents, club membership committee chairs, interested Rotarians, and district leaders learn about membership.	District membership committee	Trainers Participants
District Public Image Seminar Determined by district	Club and district leaders and interested members learn how to enhance Rotary's public image.	District training committee	Trainers (Participants' materials are developed by the club or district)
Grant Management Seminar Determined by district	Club presidents-elect (or appointees) learn how to manage Rotary grants.	District Rotary Foundation committee, district training committee	Trainers Participants
Rotaract District Leadership Training Anytime after club open elections and before 30 June	Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and non-Rotarians learn about Rotaract.	District Rotaract representative	Participants

NOTES on Leading Rotarians

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WELCOME PROSPECTIVE MEMBERS

Club brochure template

ENGAGE CURRENT MEMBERS

Member Satisfaction Survey

ASSESS AND STRENGTHEN YOUR CLUB

Rotary Club Health Check

DEVELOP NEW CLUBS

Starting a Rotary Club

Available for download
rotary.org/membership

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CHAPTER 3

RUNNING YOUR MEETINGS



Although managing your club is the board's responsibility, you're responsible for planning and running engaging meetings. Whether you're planning board meetings and club assemblies, preparing for required visits from district leaders, or overseeing club finances, your leadership is vital.

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint and meet with your club administration committee	Run engaging and fun club meetings, board meetings, and club assemblies
	Oversee the club's reporting requirements and check with the club secretary to make sure updates to your membership list are made within 30 days
	Prepare for the district governor's visit and visits from your assistant governor

CLUB ADMINISTRATION COMMITTEE

Although you oversee the management of your club, your administration committee carries out the specific responsibilities.

Appoint your club secretary and treasurer to this committee. The committee chair, also appointed by you, will be part of your club leadership team (see chapter 2 for more information). Give your club administration committee these responsibilities:

- Help the club secretary with meeting logistics
- Organize interesting and fun club meetings
- Organize social events for club members
- Produce club communications, such as the club newsletter

CREATING AN ENGAGING CLUB EXPERIENCE

Being club president isn't just about running effective meetings. It's about creating an experience for your members that keeps them involved and connected. Start by assessing your club with Rotary tools such as the Rotary Club Health Check and Member Satisfaction Survey. Then work with your fellow club leaders to implement changes the club wants to make. Research shows that clubs with more freedom to be flexible can better attract new members and keep current members engaged.

Your clubs can do any of the following to be more flexible for your members:

- Meet only twice a month
- Try a different meeting day and time
- Count service projects or social events as meetings
- Choose whether to meet in person or online, to alternate between online and in-person meetings, or to use both formats at the same time (for instance, a member could participate in an in-person meeting through a video chat)
- Offer alternative membership types, such as associate, corporate, and family, as long as these individuals are reported as active members and you collect RI membership dues from them
- Offer dual membership for Rotaractors who meet the qualifications

Plan meetings to coincide with special observances on the Rotary calendar, such as Rotary Fellowships Month (June), Membership and New Club Development Month (August), and Rotary Foundation Month (November).

Get creative and have fun! Your club administration committee can help you develop flexible, engaging club meeting formats and agendas. Get more ideas in the chart below, which features sample meeting formats and examples of how clubs have used them.

SAMPLE FORMATS FOR CLUB MEETINGS

REGULAR MEETINGS	SOCIAL EVENTS
• Allow time for members to share ideas for making the community better. • Use meeting time to plan activities and projects. • Offer members the option to participate virtually if they can't make the meeting in person. • Have members speak about themselves rather than booking a guest speaker. • Give each meeting a different theme. • Rotate meeting locations. • Make meals optional. • Discuss Rotary business for the first half of the meeting and use the second half for fun activities. • Invite prospective members to speak as industry experts on topics related to your projects.	• Hold an annual retreat with your club to have fun and reflect on the work you've done in the past year. • Meet once a month at a restaurant or other venue to socialize. • Plan events and outings that include family members and Rotaractors year-round. • Celebrate personal milestones and other special occasions that are important in your members' lives.
NETWORKING AND TRAINING EVENTS	**SERVICE PROJECTS**
• Hold a networking meeting to build relationships and rapport with one another. • Conduct a networking event with business professionals in the community to increase visibility of your club, bring in new members, and form potential partnerships. • Plan a training event to enhance members' leadership skills or teach them a new skill that will help them carry out a project.	• Partner with other organizations to expand your outreach. • Make sure members are involved in activities that genuinely interest them. • Create regular opportunities to volunteer in the community together and discuss the experience in a subsequent meeting. • Ask newer or younger members to propose and lead service projects, with an experienced member to guide them.

See the Club Flexibility page on My Rotary and the Practicing Flexibility and Innovation course in the Learning Center to get started.

CLUB ASSEMBLIES

Club assemblies offer an opportunity to exchange ideas and share information about issues that are important to your members. Most clubs hold four to six assemblies per year.

You or another designated club officer should lead club assemblies. Encourage all members to attend, but especially new members. Seek out member input to make sure the meetings address their interests and concerns. See the chart below for suggested timeframes and topics for club assemblies.

TIMING	PURPOSE
Immediately after the district training assembly (before 1 July)	To share plans developed at the district training assembly (club president-elect presides)
After 1 July	To discuss goals for the year
Two weeks before the district governor's visit	To prepare for the visit
During the governor's visit	To discuss the club's status with the governor
Midpoint of year (January/February)	To review progress toward club goals and overall member satisfaction, and determine the plan for the rest of the year, including any needed changes
April or May	To provide an opportunity for open discussion (ideas for bringing club projects and activities to completion)

GOVERNOR'S VISIT

One of your district governor's core responsibilities is to visit all clubs in the district, either individually or in groups, to provide support and guidance, update members on district goals, and motivate members to achieve club goals.

If possible, schedule the governor's visit to coincide with an event that highlights your club's accomplishments, such as a charter night, induction ceremony, new member orientation program, award presentation, or Rotary Foundation event.

To prepare for the visit:

- Review your club's progress toward its goals. Reflect on member morale. Identify questions or concerns you want to discuss with your district governor.
- Organize reports of committee plans, activities, and accomplishments.

DISCUSSION QUESTIONS

How can your club vary meetings to get members excited about coming to them?

What does your club do at club assemblies, and how are they different from club meetings?

How can you prepare for and involve members in your governor's visit?

NOTES on Running Your Meetings

CHAPTER 4

RUNNING YOUR CLUB



As president, you're charged with seeing that your club runs efficiently and effectively. My Rotary has resources to help you manage your club. Assistant governors and your Club and District Support representatives can also answer questions throughout the year.

AS PRESIDENT-ELECT	AS PRESIDENT
Learn about club policies and procedures by reviewing the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws	Oversee the management of club finances and make sure your club invoice is paid
Work with club leaders to update your club's constitution and bylaws	Encourage members to attend district training meetings
	Minimize risk associated with club activities
	Make certain the Rotary logos are used properly

ROTARY CLUB STANDARDS

The Rotary International Board of Directors has adopted these minimum standards for an effective club:

- Pays per capita dues to RI
- Meets regularly as per RI constitutional documents
- Ensures its members subscribe to a Rotary World Magazine Press publication
- Implements service projects that address the needs of the local community and communities in other countries

- Accepts the visit of the assistant governor, governor, or any officer of Rotary International
- Maintains liability insurance appropriate for the region (United States and U.S. territories only)
- Acts in a manner consistent with the RI Constitution and Bylaws and the Rotary Code of Policies
- Pays RI membership and district dues without outside assistance
- Keeps membership list current in Rotary's database by using My Rotary or one of the club management system vendors
- Resolves club disputes amicably
- Maintains cooperative relations with the district
- Cooperates with RI by not initiating or maintaining litigation against Rotary International or The Rotary Foundation, including their directors, trustees, officers, and employees
- Follows and completes the election review process established in the RI Bylaws

These standards are only the beginning of what makes a successful Rotary club. Use the best practices in Be a Vibrant Club: Your Club Leadership Plan and ideas in the Rotary Club Health Check to ensure your club is healthy and vibrant.

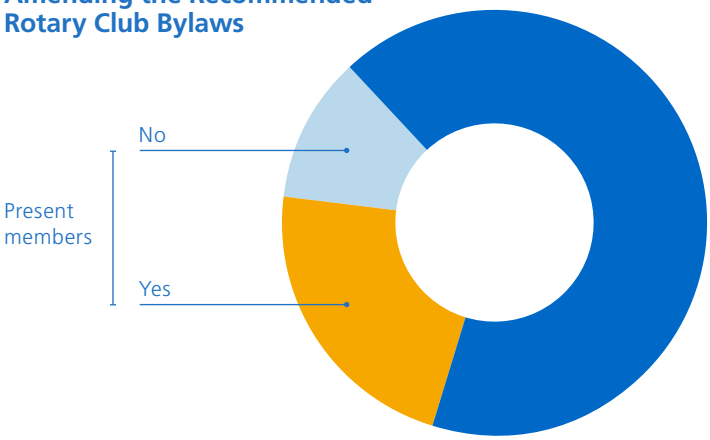
CLUB CONSTITUTION AND BYLAWS

The Standard Rotary Club Constitution provides the basic rules for all Rotary clubs. It is updated every three years to include changes enacted by the Council on Legislation. Your club's bylaws provide additional guidelines for managing your club. Use the Recommended Rotary Club Bylaws, which reflect current Rotary policy, as a template, adapting them to reflect your club's culture. Review your club bylaws regularly and update them as needed.

Your club members must vote on any proposed amendments to the bylaws. Be sure to notify members about the proposed amendment at least 10 days before a regular meeting, then be sure at least one-third of active members (a quorum) are present to vote. In order to pass, the amendment needs the votes of two-thirds of the members present.

Amendments must conform to the Standard Rotary Club Constitution and the Rotary International Constitution and Bylaws. Clubs within Rotary International in Great Britain and Ireland should refer to the RIBI Constitutional Documents.

Amending the Recommended Rotary Club Bylaws



Quorum: 1/3 of members
Pass: ≥ 2/3 of quorum

Example:
63 Members in a club
21 Members are present
14 or more members need to vote yes to amend the bylaws

ROTARY'S ONLINE TOOLS

By creating an account on My Rotary, you gain access to the latest reports, information, and tools. Your account helps you do Rotary business quickly and efficiently and ensures that Rotary has accurate records for your club. It also allows you to:

- Customize and share your profile to easily network with your fellow Rotarians
- Join or start a discussion group to share best practices and hear innovative ideas
- Find volunteers, partners, and donations for your projects to increase your club's impact
- Take online courses to help you prepare for your year as club president

The Manage tab on My Rotary reveals the tools and links you'll need to effectively manage your club. Use these features and resources to make your year a success.

While staying informed, you can carry out a variety of administrative tasks on My Rotary, such as:

- Update personal information
- View and edit Rotary Club Central goals and reports
- Manage your membership leads
- Update club data
- Update membership data (add, edit, or remove members)
- Access reports including:
  - Club members
  - Daily club balance
  - Contribution and recognition
  - SHARE and polio
- Manage newsletter subscriptions
- Search the Official Directory

You, the club secretary, executive secretary/director, club treasurer, Foundation chair, and membership chair can activate access rights for other officers, so be sure that club officers are reported by 1 February for the following year. Add new officers by using the link on the Club Administration page of My Rotary or by entering them into your club management system.

DELEGATION

As a club leader, you can delegate your administrative tasks on My Rotary to another team member. This temporary permission, known as *delegation*, is not intended to relieve you of your duties as president; it simply extends your president-level access to My Rotary to another club leader with a My Rotary account. Your delegate can't view your personal information, such as your profile, contribution history, or discussion group activity. This person can, however, access the same tools and sensitive information that you can as a president. See How to Delegate Your Online Access for more information.

REPORTING REQUIREMENTS

It is essential to keep your club information in Rotary's database up-to-date. Make sure your club has a procedure for reporting officers and their contact information (including email addresses) to Rotary International, as well as changes to club member data. If your club uses a club management system, report your officers and changes to member information in that system, and work with your secretary or club administrator to make sure Rotary International receives the updates.

Every club is required to submit the following to Rotary International:

- Changes to club member data by 1 July and 1 January in order to receive a correct club invoice
- New and terminated members within 30 days, but no later than 1 July or 1 January
- New officers for the next Rotary year and new club meeting information by 1 February
- Information for the Official Directory by 1 February
- Use of Rotary Foundation funds, if your club has been awarded a grant (In RIBI, district grants are reported through the district foundation grants and stewardship teams.)
- Club goals, including your membership goal, by 1 June (using Rotary Club Central)

FINANCIAL MANAGEMENT

Your fiscal responsibilities include monitoring club funds, practicing good stewardship, and making sure that the club complies with all applicable local laws, including those concerning taxes and nonprofits.

DUES AND FEES

Work with your club officers to review or establish a system for collecting payments from members and paying dues and fees to Rotary International and your district.

Club dues. Club dues should be collected from members weekly, monthly, or quarterly, as determined by your club, with the dues amount set each year. These dues, which vary by club, generally fund operating expenses such as meetings, meals, speaker gifts, and supplies and should be based on your annual budget.

District dues. Many districts maintain funds for financing district-sponsored projects and supporting district administration, with each club contributing through per capita dues. The amount is approved each year at the presidents-elect training seminar, district training assembly, or district conference.

Rotary International dues. Twice a year, clubs are charged per capita dues by Rotary International as follows:

2018-19: $32.00
2019-20: $34.00*

All dues are payable on 1 July and 1 January. For each new member admitted within a club billing cycle, the club must pay prorated dues to Rotary International — one-sixth of the amounts listed above for each full month of membership.

These dues cover the organization's general operating expenses and give you access to Rotary International services and resources, including publications in multiple languages; club, district, and project support; training, guidance, and resources for incoming club leaders; and the Rotary website.

Rotary fees. Besides dues, Rotary members are charged for required magazine subscriptions, Council on Legislation fees, and other expenses. Two Rotarians residing at the same address may subscribe jointly to The Rotarian or their regional magazine.

CLUB INVOICE

Rotary sends an invoice to the club secretary via email in July and in January, based on your club's membership list on 1 July and 1 January.

Your secretary is responsible for keeping the list updated by adding and removing members' names within 30 days of any changes. Be sure a current club membership list is reported to Rotary International so you receive an accurate

**Dues will remain constant after 2019-20 unless changed by the Council on Legislation.*

invoice. The following club leaders can pay the invoice by credit card on My Rotary's Club Administration page:

- President
- Club secretary
- Executive secretary/director
- Club treasurer
- Membership chair
- Rotary Foundation chair

Your club's invoice includes Rotary per capita dues and subscriptions to the Rotary magazine for your region. Your July invoice also includes Council on Legislation fees. Liability insurance fees are included in the July invoice for the United States and its territories.

Paying dues guarantees your club's membership and good financial standing in Rotary International as well as access to Rotary resources. See the Club Invoice FAQ for more information on how to pay.

TERMINATION AND REINSTATEMENT

Any club that doesn't pay its dues and fees to Rotary will be terminated. The club can also be suspended or terminated if any of its members has misused funds from The Rotary Foundation.

Termination. Four months after the 1 January or 1 July invoice date, clubs with unpaid per capita Rotary dues will be terminated. Clubs that have not fulfilled their entire financial responsibility within 150 days of termination will lose their original charter and will not be eligible for reinstatement.

Reinstatement. Any terminated club wanting to be reinstated must pay all financial obligations to Rotary, including a reinstatement fee of $30 per member, within 150 days of termination. It must also provide a current list of members to ensure that accurate data is recorded at the time of reinstatement.

Member termination. Your club secretary should contact any club member who fails to pay dues within 30 days after the deadline, communicating an absolute deadline and the amount owed in writing. If the dues aren't paid within 10 days of the notification date, membership may be terminated, if the board agrees. The board may reinstate membership if the terminated member petitions and pays all his or her club debts.

TAXES

Check with local and national tax codes to determine which forms your club must file, if any. Consult your district finance committee and assistant governor for more information.

All clubs in the United States are required by law to submit an informational return to the Internal Revenue Service every year. Contact the IRS for more information.

The Club Treasurer Basics course in the Learning Center has more information about club foundations. Learn more about planning a fundraiser in the Club Service Projects Committee Basics course.

FUNDRAISING

Make an impact during your year as president with projects and activities that meet the needs of your community. An effective fundraising plan is key to supporting your projects and Rotary's global humanitarian efforts.

Make sure your members follow these financial best practices to promote transparency and good stewardship of funds:

- Report raised funds in accordance with local laws.
- Require the chair of an event to sign for charitable expenses.
- Specify which causes the event proceeds will support in your promotions.
- Issue receipts to donors if your fundraiser qualifies as a tax-deductible event.
- Establish a procedure for sending contributions to The Rotary Foundation.
- Submit contributions to The Rotary Foundation separately from payments to Rotary International.

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

Voluntary contributions from Rotarians and friends of Rotary make Rotary Foundation grants possible. Find more information in The Rotary Foundation Reference Guide.

RISK MANAGEMENT

Whether you are holding meetings, running fundraisers, or working with youth, risk management responsibilities are part of your role. In this context, risk management refers to a proactive process that aims to identify causes of possible loss and determine how to lessen the financial impact of a possible loss. Managing risks involves:

- Reviewing activities from the perspective of "What can go wrong?"
- Modifying activities to lessen the risk
- Using contracts and agreements to clearly define roles and responsibilities of all parties involved (consult local legal counsel to draft and review legal documents)
- Following established policies, procedures, and guidelines

Being proactive can help reduce the effects of losses. In your role, you are in a position to set the tone for your club. Being aware of and managing risk will help protect Rotarians, program participants, and club assets.

Clubs are urged to obtain professional legal and insurance advice about liability protection. For example, seek professional advice about incorporating the club (or its activities) or purchasing appropriate liability insurance coverage. Clubs in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability

insurance through a program arranged by Rotary and paid for by U.S. Rotarians. Clubs outside the United States should consider purchasing insurance if they do not already have it. See article 72.050. of the Rotary Code of Policies for additional information.

WORKING WITH YOUR DISTRICT

Your district leaders — governor, assistant governors, committees, trainer, secretary, and past governors — want your club to succeed. The district supports your club in many ways, including:

- Providing guidance on issues such as membership and projects
- Connecting clubs with similar issues or projects
- Offering leadership and service opportunities
- Communicating policy updates
- Coordinating Rotary programs such as district grants, global grants, Rotary Youth Leadership Awards (RYLA), Rotary Youth Exchange, and Rotary Peace Fellowships

Your assistant governor is your district point person, available to support your club throughout the year. Because assistant governors interact with a variety of clubs, they can observe a wide range of approaches to common issues and share insights that can help you meet goals and overcome challenges.

DISCUSSION QUESTIONS

What are your personal goals for managing your club?

What is one area of your club operations you would like to improve?

How will you ensure good stewardship of club funds?

APPENDIX 3

ROTARY'S ONLINE TOOLS

Resource	What is it?	Who adds or updates content?	Need help?
Rotary.org	Rotary.org is the public face of Rotary, designed to inform the public.	RI staff	website@rotary.org
My Rotary	My Rotary (rotary.org/myrotary) has more detailed information for Rotarians and the family of Rotary. Users don't need to sign in to access some of the content. But with a My Rotary account, you can view and access information tailored to your Rotary role.	RI staff	
Profile and Connections	Rotarians and Rotaractors can manage and personalize their My Rotary profiles, and connect and message each other directly, without exposing personal email.	Rotarians and Rotaractors	social@rotary.org
Discussion Groups	Rotary discussion groups offer a place for Rotarians, Rotaractors, Rotary Peace Fellows, and alumni to share their experiences and ideas with members of the Rotary family from around the world. All discussion groups can be found in My Rotary (must be signed in to access). Join an existing group or start a new one based on your interests.	Rotarians, Rotaractors, and program alumni	social@rotary.org
Rotary Ideas	Rotary Ideas allows Rotary or Rotaract clubs to seek resources for their service projects, such as partners, volunteers, or material and direct financial contributions through PayPal. Project listings can be posted on club or district websites, and the site is open to the public. Leaders are also encouraged to use the site to find projects to partner on and to make other contributions to projects happening in the Rotary community.	Rotary club leaders and Rotaract club presidents	social@rotary.org
Rotary Showcase	Rotary Showcase allows Rotarians and Rotaractors to share successful project stories, photos, and video with one another and the public. It also allows them to identify partners and report the project's contribution to Rotary's global impact. Data can be synchronized with Rotary Club Central.	Rotarians and Rotaractors	social@rotary.org
Rotary Club Central	Rotary Club Central allows club leaders to enter and update membership, service, and Foundation giving goals, which district leaders can view and edit. Leaders have access for the years before, during, and after their term. All Rotarians can view their club's goals. Service projects can be imported from the Grant Center and Rotary Showcase.	Club and district leaders	cds@rotary.org
Events	Rotarians and Rotaractors can register for the Rotary Convention and learn about other upcoming events.	RI staff	website@rotary.org
Brand Center	Rotarians can customize and download materials that use the new Rotary voice and visual identity guidelines.	RI staff	graphics@rotary.org
Grant Center	The Grant Center is for district qualification and applying for district and global grants.	Rotarians applying for grants	grants@rotary.org
Learning Center	The Learning Center provides e-learning materials to help Rotarians and others learn new skills, prepare for leadership roles, and use Rotary tools to accomplish their goals.	RI staff	learn@rotary.org

NOTES on Running Your Club

WHERE CAN YOU FIND THE TOOLS YOU NEED TO PROMOTE YOUR CLUB?



BRAND CENTER
PUTS THEM ALL IN ONE PLACE

Rotary

WWW.ROTARY.ORG/MYROTARY

CHAPTER 5

STRENGTHENING YOUR MEMBERSHIP



Plan meetings and activities during Youth Service Month (May) and Membership and New Club Development Month (August).

Engaged and active club members make it possible to serve communities at home and around the world, to support the work of The Rotary Foundation, and to develop future leaders. But most of all, engaged and active members make your club a fun place for all members.

Make certain that your membership reflects the diverse professions and cultures of your community. A diverse membership not only attracts potential candidates, it also promotes innovation and provides the skills and experience your club needs to make positive changes in your community.

MEMBERSHIP DEVELOPMENT RESPONSIBILITIES

If you are sponsoring a new club, the Start a Club page on My Rotary can help.

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint and meet with your membership committee members, make sure they're reported on My Rotary, and encourage them to attend your district membership seminar	Lead by example: Propose a new member and encourage each member to do the same
Assess your club's membership and analyze trends	Modernize your policies and procedures, making them flexible to address the needs of today's professionals
Assess members' satisfaction with the club and work with your leadership team to increase your club's flexibility	Implement new meeting formats to attract and engage members
Set your club's annual membership goal in Rotary Club Central; align your goal with district goals	Coordinate membership committee efforts to develop ways to engage members

AS PRESIDENT-ELECT	AS PRESIDENT
Promote training for members at all stages, including new and current members	Conduct a club assembly on successful strategies to attract new members
Look for opportunities to sponsor a new club in your area	Work toward full representation of your community's diversity in your club
Define a strategy for engaging program alumni in club events and activities	Recognize club members for sponsoring new members
	Recognize members for their contributions to the club
	Manage your online membership leads or delegate the responsibility to someone in your club

CLUB MEMBERSHIP COMMITTEE

If membership committee members cannot attend your district membership seminar, they can take the online membership courses in Rotary's Learning Center instead.

Strengthening membership is a top priority for Rotary. Your club membership committee is responsible for implementing your membership plan, which should address your club's unique strengths and challenges.

The committee's main role is to attract, engage, and educate club members. Your club may amend its bylaws to reflect the specific responsibilities of your membership committee, adding subcommittees as needed. See appendix 1 for sample committee structures.

The membership committee should consist of 5 to 15 club members, or at least 10 percent of your membership, who have strong connections to a cross-section of the community, are interested in improving the membership experience for all your members, enjoy working with people, reflect the diversity of your club and community, and have a thorough knowledge of Rotary. Committee members, especially your membership committee chair, should attend the district membership seminar, where they will learn how to use Rotary's online tools and share ideas for improving membership. See appendixes 2 and 3 for more information.

Subscribe to the Membership Minute e-newsletter and join the Membership Best Practices discussion group on My Rotary.

Check in regularly with your membership committee to learn about any new strategies they will implement to achieve your club's membership goals. Your membership committee has these responsibilities:

- Identify prospective members
- Introduce them to Rotary and your club
- Invite them to join if they're a good match for your club
- Engage new and existing members

See appendix 4: Club Membership Committee Checklist for ideas on how to use these steps.

ASSESSING YOUR CLUB

Before setting membership goals, work closely with your club's membership committee to assess your club. You can start by analyzing your club's membership trends to understand your current challenges. How many new members is your club gaining each year? How many members is it losing? Use membership reports on My Rotary and Rotary Club Central to view your club's membership trends, and consult with your district governor, assistant governor, district membership chair, or Rotary coordinator.

Next complete the Rotary Club Health Check with your club leaders and discuss your results. As a group, determine which areas of your club could improve. To get your members' input, use the Member Satisfaction Survey and include their suggestions in your membership plan.

Register for an upcoming membership webinar or view recordings of past sessions at rotary.org/webinars.

Once you've evaluated your club's membership trends and drafted membership goals, enter them into Rotary Club Central and develop an action plan for achieving them.

The course Is Your Club Healthy? in the Learning Center can help you identify opportunities for growth and sustainability, along with strategies to improve in those areas.

DIVERSITY

A club that embraces and celebrates diverse perspectives is simply more interesting and relevant. A diverse club can draw from a greater pool of experience and knowledge for creating positive change in your community.

Your club's representation of different ages, genders, ethnicities, and professions should be as diverse as your community. Use the member diversity and classification assessments to evaluate your club's diversity. Then take the Building a Diverse Club course in the Learning Center to find out how to diversify your club.

Rotary policy prohibits limitations on membership based on gender, race, color, creed, or national origin. Refer to the Rotary International Bylaws for more information.

ATTRACTING MEMBERS

Celebrate new members by holding a meaningful induction ceremony. Find ideas in Introducing New Members to Rotary: An Orientation Guide.

New members can bring new vitality to your club, fresh ideas and energy, increased capacity to serve your community, and potential future leaders, all of which can help ensure your club's long-term success.

Work with your membership committee to:

- Implement innovative new projects that spark interest or address a pressing need in the community
- Promote club activities using social media, direct marketing, and local media to show your club's impact on the community
- Target members of groups or professions in the community that are not represented in your club

- Reach out to Rotary alumni
- Invite prospective members to participate in events or projects
- Update your club brochure to distribute to guests at your meetings
- Hold prospective member events to help members of your community discover Rotary

The Strategies for Attracting New Members course in the Learning Center offers ideas for connecting with potential new members in your community.

MANAGING MEMBERSHIP LEADS

Rotary receives thousands of membership leads from people around the world interested in joining Rotary. These leads come from potential members who click "join" on Rotary.org and fill out an online form. Rotary assigns each lead to a district. The district then assigns the lead to a club that's likely to meet the person's needs. You, your membership committee chair, and your secretary will receive an email alert when a membership lead is assigned to your club. Access information about the candidates on the Club Administration pages in My Rotary. Decide who will manage your club's membership leads. Be sure to follow up promptly by contacting the prospective member, or by asking the district to reassign the person to another club if your team decides he or she isn't a good fit. Be sure to Create a Positive Experience for Prospective Members, even if they don't ultimately join Rotary.

To better understand membership leads, take the Online Membership Leads course in Rotary's Learning Center.

ENGAGING MEMBERS

Engaging current club members is as crucial as attracting new ones. To engage members, involve them in activities, assign them leadership roles, and communicate with them regularly. To help devise a strategy for maintaining your club's membership, ask former members about their reasons for leaving, and identify your club's strengths and weaknesses using the Retention Assessment and Analysis.

To help get younger members into your club, use the Engaging Younger Professionals toolkit, which includes tips for connecting with younger audiences.

Members who are engaged are dedicated, active, and motivated. Engaged members will make your club activities more fun and effective. They are also more likely to invite prospective members to join.

When members prioritize their Rotary club over other activities, they renew their membership. Learn what your members like and don't like about your club by conducting a Member Satisfaction Survey. Use the results to improve your club experience. Find more ideas for making your club effective, fun, and relevant in Be a Vibrant Club: Your Club Leadership Plan. This guide includes best practices for strengthening clubs, tailored to regions around the world.

Use the Creating Your Club Leadership Plan worksheet to develop your own plan.

Get new members involved as soon as they join. Refer to Connect for Good, which describes a multitude of ways to make a difference in the club, the community, and the Rotary world. Every member of your club should play an active role in introducing and welcoming new members. Find ideas in the course Kick-start Your New Member Orientation in Rotary's Learning Center.

If you have questions, consult your assistant governor, your Rotary coordinator, immediate past president, or Club and District Support representative. The Best Practices for Engaging Members course in the Learning Center can also help.

YOUR ALUMNI CONNECTIONS

Your club has a valuable asset in the thousands of Rotary alumni who've participated in a Rotary program. They are powerful advocates for Rotary as well as potential members and donors. Rotary program alumni include those who have participated in any of the following programs:

Subscribe to the quarterly e-newsletter Reconnect to learn about alumni activities, events, and news.

- Interact
- Rotaract
- Rotary Youth Exchange
- New Generations Service Exchange
- Rotary Youth Leadership Awards
- Rotary Peace Fellowships
- Rotary Scholarships (funded by global grants and district grants)
- Vocational training teams (members and leaders)
- Ambassadorial Scholarships
- Grants for University Teachers
- Group Study Exchange (members and leaders)
- Rotary Volunteers
- Club or district scholarship programs

Club officers can access the Program Participants and Alumni Report, which includes names, program details, and contact information for all former Rotary program participants associated with your district.

Invite alumni to become members. If they're not ready to join, keep them engaged in Rotary by encouraging them to participate in club events and activities. Put their skills to use by recruiting them to advise on projects. Engaged alumni will be more likely to become members in the future. Alumni can help your club:

- Connect with clubs from different countries for service and fellowship
- Promote Rotary by sharing their personal account of Rotary's ability to change lives with club members and the media
- Encourage their peers to get involved in Rotary programs
- Select, prepare, and host program participants

Rotary offers alumni a global network of influencers, including community and business leaders, who can be a tremendous resource throughout their careers. Emphasize the opportunities and advantages of being involved in Rotary when speaking with alumni about their involvement in your club.

DISCUSSION QUESTIONS

How will you engage your members?

How can you help your club become more flexible?

How will you attract new members to your club?

APPENDIX 4

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CLUB MEMBERSHIP COMMITTEE CHECKLIST

The role of the club membership committee is to write and follow an action plan to attract and engage members. An effective committee should be composed of five to 15 motivated members to guide the implementation of your membership plan. The committee's composition should allow for continuity from one year to the next and should represent the full diversity of your club's membership and your community.

1. **Identify:**
   - ☐ Complete the member diversity and classification assessments, found in Membership Assessment Tools, yearly. Identify individuals in the community who fill gaps in the club's membership or exhibit interest in Rotary's ideals.
   - ☐ Ask all members to complete the Identifying Prospective Members Worksheet at least yearly.
   - ☐ Regularly go to the Club Administration area of My Rotary to manage the member leads assigned to your club.
   - ☐ Meet at least monthly to review prospective members and their status in the membership process.
   - ☐ Ask current members who are assigned to each prospective member to move them to the next step of the membership process.

2. **Introduce:**
   - ☐ Select the most appropriate club members to engage prospective members. Keeping each prospective member's particular interests in mind, explain how your club can help them pursue their passions.
   - ☐ Periodically hold events for prospective members to introduce them to Rotary, your club, and our core values.
   - ☐ Invite the people you identified as prospective members to attend a service project or meeting.
   - ☐ Tell qualified prospective members about your club, what to expect at meetings, and the networking, social, and service opportunities your club offers.

3. **Invite:**
   - ☐ Designate the appropriate club member to invite each prospective member to join.
   - ☐ Hold a meaningful ceremony to induct new members. Include their families and involve the entire club.
   - ☐ Give new members a welcome kit that includes club and Rotary resources that they will find useful.
   - ☐ Celebrate the addition of new members to your club. Announce it on your club's website, social media pages, and newsletter.

4. **Engage:**
   - ☐ Welcome new members both through an orientation program and by involving them in the club.
   - ☐ Assign a mentor to each new member to share professional expertise, community knowledge, and Rotary information.
   - ☐ Engage each club member in a service project or club committee.
   - ☐ Check in with all current members using the Member Satisfaction Survey at least yearly.

NOTES on Strengthening Your Membership

CHAPTER 6

PROMOTING ROTARY



Our ability to tackle some of the world's biggest challenges, both locally and globally, comes from the combined strength of our 1.2 million members. Imagine what we could accomplish with even more members and more community support. Your promotion of Rotary and the work your club is doing to improve your community is one way to grow your club and find volunteers and donors to support your service activities.

You're an integral part of Rotary's story. As president you have the opportunity to build relationships with club members, helping to connect their diverse perspectives and vocational expertise to make a positive difference in your community. Tell your story to promote your club, attract new members, and get community support.

PUBLIC IMAGE RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Select and meet with your public image committee	Serve as the club spokesperson when working with the media, or identify a member to serve as spokesperson
Work with your public image committee to develop a communications plan	Provide updates on Rotary's vision and mission and the club's community service efforts to business and civic leaders, young professionals, and other organizations
Review your club's current public image initiatives on Rotary Club Central	Cultivate relationships with local media and other organizations that can provide an opportunity to promote Rotary

AS PRESIDENT-ELECT	AS PRESIDENT
Make sure your club is planning projects and activities that show how your members are people of action who make an impact	Promote Rotary to friends, family, and co-workers
Set your club's public image goals using Rotary Club Central	Promote projects or activities that illustrate how your club is making a difference in your community
	Use social media to stay connected with current and past members and friends of Rotary, and to increase awareness of your club in your community
	Use the resources in the Brand Center to tell your club's People of Action stories

CLUB PUBLIC IMAGE COMMITTEE

The club public image committee develops and carries out a plan to keep the public informed about Rotary and your club's projects and activities. As club president, you can help implement and evaluate your club's public image efforts.

Select members for your public image committee who are articulate, enthusiastic, and knowledgeable about Rotary and your club. If possible, choose a committee chair with professional advertising, marketing, or public relations experience and a working relationship with local media.

Your club public image committee has the following responsibilities:

- Attend the district public image seminar to get ideas and learn strategies for effective public image practices (see appendix 2 for more information)
- Develop a public image plan
- Set and achieve club public image goals for the coming year (see the Public Image section of Rotary Club Central)
- Use the resources in Rotary's Brand Center to promote the club
- Use the People of Action campaign resources in the Brand Center to increase public understanding of Rotary and drive engagement within your community
- Create awareness of club activities among club members, the media, and the general public
- Enhance projects and activities to make them more appealing to the media
- Help create a public image that attracts new members

Enhancing your club's public image requires time, effort, and planning. Before the beginning of the Rotary year, ask the committee to develop an action plan that identifies the audience, strategies, and tools, as well as the projects and activities that they will promote. For more information, see the Club Public Image Committee Basics course in the Learning Center.

Your governor, assistant governor, district public image chair, and Rotary public image coordinator can advise and assist you in public image matters.

ANSWERING QUESTIONS ABOUT ROTARY

As president you're the face of your club. You'll have opportunities to speak to the public at project events, dedications, and other occasions. You should be able to easily answer the basic questions: What is Rotary? What does it do? Who are Rotarians?

Here are some messages to help you develop key points before media interviews and speeches to external audiences.

INTRODUCTORY PRIMARY MESSAGES

- Every day, in our communities and around the world, our neighbors face tough challenges — conflict, disease, and lack of clean water, health care, education, and economic opportunity.

SUPPORTING MESSAGES

- Rotarians have a vision of what's possible for their neighbors. They mobilize other leaders and experts to take action and see it through.

ABOUT ROTARY — PRIMARY MESSAGES

- Rotarians are people of action, driven by a desire to create opportunities, strengthen communities, and find solutions to the tough challenges that affect people around the world.
- Rotary is a community of 1.2 million men and women from all continents, cultures, professions, and experiences who connect through our local clubs.
- Rotary clubs tackle projects of every scale and inspire fellow Rotarians, friends, neighbors, and partners to share their vision, exchange ideas for lasting solutions, and take action to bring those ideas to life.

SUPPORTING MESSAGES

- Together with our partners, neighbors, and friends, we're:
  - Promoting peace, encouraging dialogue to foster understanding within and across cultures
  - Fighting disease, educating and equipping communities to stop the spread of life-threatening or preventable diseases
  - Providing clean water, building local solutions to bring clean water and sanitation services to more people every day
  - Saving mothers and children, expanding access to quality care, so mothers and children can live and grow stronger
  - Supporting education, expanding access to education and empowering educators to inspire more children and adults to learn
  - Growing local economies, creating opportunities for individuals and communities to thrive financially and socially
  - Eradicating polio, uniting the world to end polio, once and for all
- Rotary is a trusted partner and resource. With members and projects in almost every part of the globe, there's no limit to the good we can do.

Rotary's top philanthropic goal is to eradicate polio worldwide.

- Rotary and its partners are close to eradicating polio, having achieved a 99.9 percent reduction in cases since 1988.
- Rotary's chief role is fundraising, advocacy, and mobilizing volunteers.
- Rotary's contributions to the global polio eradication effort will exceed more than $2.2 billion and countless volunteer hours to protect more than 2 billion children in 122 countries from polio.
- Rotary is working to raise an additional $50 million per year through 2020 for polio eradication, to be matched 2-to-1 by the Bill & Melinda Gates Foundation.

Rotary builds peace and international understanding not only through education and humanitarian service, but also by developing young leaders.

- More than 900 graduates of the Rotary Peace Centers master's degree program are in key decision-making positions in governments, corporations, and organizations around the world.
- Rotary's humanitarian projects help prevent the underlying causes of conflict, such as poverty, illiteracy, and lack of clean water.
- Rotary's Youth Exchange program fosters international goodwill by enabling over 8,000 high school students to live and study abroad each year in 115 countries.
- Rotary's Interact and Rotaract programs develop young leaders by promoting volunteer service, leadership, and professional growth.

If you're not sure how to answer questions about Rotary, see the Voice and Visual Identity Guidelines for ways to communicate Rotary's brand essence and values. Remember the key points in the following box:

ROTARY UNITES LEADERS

- Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.
- Rotary brings together leaders who use their combined expertise to tackle some of the toughest challenges facing our communities.
- Rotary harnesses the strength and experience of professional and community leaders from nearly every country around the world.

ROTARY EXCHANGES IDEAS

- At Rotary, we discover and celebrate our diverse perspectives during club meetings, conferences, service projects, and social events.
- Rotary finds a place for your expertise and passion. Whether you want to lead a project or participate in one, Rotary welcomes your involvement.

ROTARY TAKES ACTION

- Rotary creates positive change in communities around the world through our service projects.
- From stocking food pantries to providing clean water and improving maternal health, Rotary clubs join forces to carry out impactful and sustainable projects in communities around the world.

THROUGH ROTARY

- We build lifelong relationships.
- We honor our commitments.
- We connect diverse perspectives.
- We apply our leadership and expertise to address social issues.

As you develop your communications, keep in mind the characteristics of Rotary's voice: smart, compassionate, persevering, and inspiring.

Your answers should be positive, factual, specific, and brief. Avoid using Rotary terms — governor, district, areas of focus, PolioPlus — that the public likely won't understand.

ENGAGING THROUGH SOCIAL MEDIA

On social media, people engage with videos, photos, infographics, and other content that:

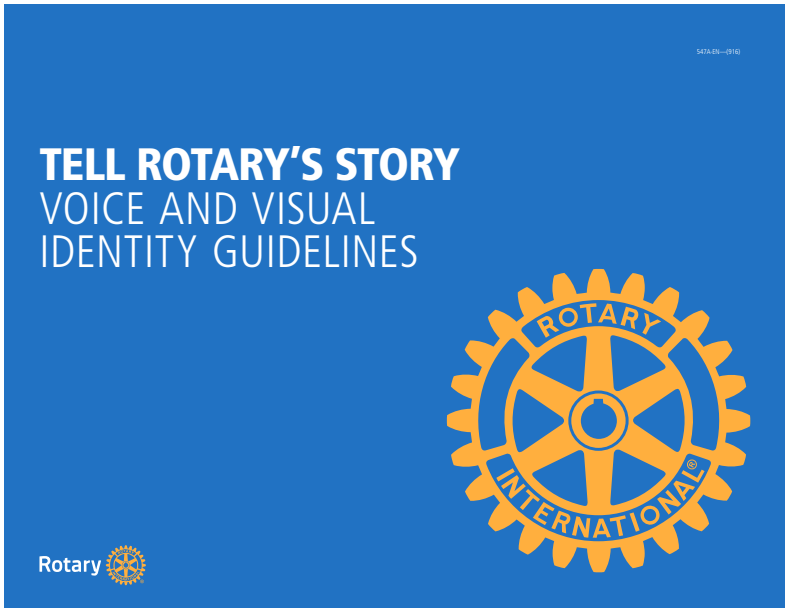
- Connects with their passions
- Gives them ideas and inspiration
- Helps them achieve their goals
- Entertains them

Your club's social media content should show your club in action — getting out in the community, networking, having fun. Keep meeting-focused content to a minimum. Follow local groups on social media to hear about community needs or possible service partners.

USING ROTARY MARKS

Rotary's masterbrand signature (official logo) identifies Rotary and our commitment to improve communities worldwide. Rotary International owns trademarks and service marks (referred to as Rotary Marks and listed in the Voice and Visual Identity Guidelines and the Rotary Code of Policies) for the benefit of Rotarians worldwide.

When you reproduce the Rotary Marks, follow our Voice and Visual Identity Guidelines and the Rotary Code of Policies (article 33). Clubs can download logos for Rotary, Rotaract, and other Rotary programs in the Brand Center.

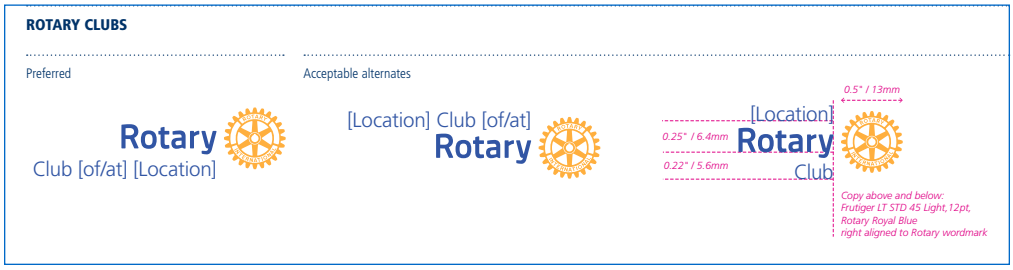


NAMING GUIDELINES

In naming an activity, project, program, website, or publication, the Rotary club or other Rotary Entity must use its name and not just "Rotary" alone. A club can add its name to the name of the project, for instance. Proper naming examples include:

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

The Rotary club signature, which consists of the masterbrand signature plus the club name, should be used on all club communications and materials associated with a club activity, project, and program. For specific guidelines on naming club projects, see the Rotary Code of Policies or contact your Club and District Support representative.



ROTARY MARKS ON FUNDRAISING MERCHANDISE

Nearly 160 licensed vendors are authorized to produce merchandise featuring the Rotary Marks and to offer club management systems and other online tools. See My Rotary for a list of official licensees and Community Marketplace Resources to connect with vendors. Only licensed vendors are permitted to produce and sell merchandise with the Rotary Marks.

If your club wants to raise funds for a project through merchandise sales, you can sell products featuring the Rotary Marks for a limited time as long as you purchase the merchandise from an official Rotary licensee and include this information on the items:

- Your Rotary club name or Rotary club signature
- Your fundraising event or project name
- The project dates

If your club wants to sell merchandise for a long-term fundraising project, you'll need to apply for a license. If your club wants to buy merchandise from an unlicensed vendor, that vendor must receive permission to use the Rotary Marks directly from Rotary International. Send questions about the use of Rotary Marks on merchandise to rilicensingservices@rotary.org.

DISCUSSION QUESTIONS

How will you answer the question, What is Rotary?

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

What innovative public awareness ideas will your club try?

NOTES on Promoting Rotary

PROJECT LIFECYCLE KIT



DISCUSSION GROUPS, ROTARY IDEAS, AND ROTARY SHOWCASE

Rotary

WWW.ROTARY.ORG/MYROTARY

CHAPTER 7

THE ROTARY FOUNDATION



The mission of The Rotary Foundation is to enable Rotary members to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. Your club's support of The Rotary Foundation makes a difference in the lives of people around the globe.

The Rotary Foundation helps fund our humanitarian activities, from local service projects to global initiatives. Your club or district can apply for grants to participate in projects and provide scholarships. The Foundation also leads the charge on worldwide campaigns such as eradicating polio and promoting peace.

Participation in Foundation activities, such as scholarships and vocational training teams, can attract potential members and engage current ones, and inspire them to give.

ROTARY FOUNDATION RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint and meet with your club Rotary Foundation committee	Regularly review your club's financial contribution trends in Rotary Club Central
Review your club's involvement with Foundation programs using Rotary Club Central	Ensure that your club maintains its qualification to apply for Rotary grants
View your club's trends in financial contributions to The Rotary Foundation in Rotary Club Central	Understand and agree to the club memorandum of understanding (MOU) and implement its terms
Work with your president to understand and agree to the club memorandum of understanding (MOU)	Ensure that reports on open grants are submitted on time

AS PRESIDENT-ELECT	AS PRESIDENT
Set your club goals for financial contribution and program participation before the start of your year in Rotary Club Central	
Work with your Foundation committee to make sure your club is qualified to apply for Rotary grants	

Club presidents, secretaries, treasurers, and Rotary Foundation committee chairs can review their club's Foundation contributions on My Rotary.

Your leadership will be very important as your club makes steady progress toward its Foundation goals. Encourage members to participate by:

- Asking them to give to the Foundation, paying extra attention to members who have never given
- Thanking members who give to the Foundation and recognizing those who reach milestones such as Paul Harris Fellow or Major Donor recognition
- Acknowledging contributions and involvement in Rotary grants
- Practicing the proper management of Foundation grant funds
- Leading by example and making a personal contribution

CLUB ROTARY FOUNDATION COMMITTEE

The club Rotary Foundation committee structure is determined by your club's Foundation goals. If your plans include applying for a global grant, your club may want to have a grants subcommittee. Your club can make changes to its bylaws to reflect the specific responsibilities of your Foundation committee, adding subcommittees as needed (appendix 1). Choose committee members with excellent communication skills, and community or international volunteer experience. Former grant participants are also good candidates.

Your Rotary Foundation committee has these responsibilities:

- Conduct inspirational Rotary Foundation programs
- Ask alumni or volunteers to share their Foundation experiences at a club meeting
- Achieve your club's Foundation contribution goals for the year
- Educate club members about the Foundation
- Encourage club members to participate in Rotary grants and activities and to make a contribution
- Communicate the Foundation goals set by the district and the Trustees of The Rotary Foundation
- Ensure proper stewardship of grant funds

Find more information in Club Rotary Foundation Committee Basics course on the Learning Center.

DISTRICT SUPPORT

Members of the district Rotary Foundation and international service committees can put your club in contact with other Rotary clubs working on similar projects. The Rotary Foundation Reference Guide describes how clubs can participate in Foundation programs.

DISTRICT ROTARY FOUNDATION SEMINAR

The district Rotary Foundation seminar is for every Rotary member to learn about The Rotary Foundation's message of achieving world understanding and peace. Club presidents, club Foundation committee members, and other interested club members should attend to learn more about programs, grants, and fundraising.

GRANT MANAGEMENT SEMINAR

At the grant management seminar, club members learn how to successfully manage a Rotary grant, meet the Foundation's stewardship expectations, and implement the club memorandum of understanding. One member of your club must attend this seminar for club qualification. Find more information in A Guide to Global Grants.

STEWARDSHIP AND QUALIFICATION

To show your commitment to the ethical management of Rotary Foundation grant funds, grant sponsors must be qualified by their district. Once the district qualifies your club, you may apply for a global grant. The Foundation has two minimum requirements for club qualification:

- The club president-elect or a club-designated appointee attends the district grant management seminar.
- The club president and president-elect sign the club memorandum of understanding on behalf of their club.

Your district may have additional requirements.

FOUNDATION FUNDING

Contributions to The Rotary Foundation are transformed into grants that improve our world and change lives. The Trustees involve Rotarians worldwide in the decision-making process for Foundation grants and programs.

SHARE AND THE DISTRICT DESIGNATED FUND

At the end of every Rotary year, contributions to the Annual Fund-SHARE from every Rotary club in a district are divided into two funds:

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

The Foundation uses the World Fund portion to pay for the worldwide programs available to all Rotary districts. Your district uses the DDF portion to fund the Foundation grants and programs of its choice. Your district Rotary Foundation committee decides how to use the district's available DDF, in consultation with the clubs in your district.

To ensure that our Foundation has sufficient and reliable resources in the future, a small portion of Endowment earnings, Annual Fund contributions, and cash contributions to global grants will help fund operating expenses and build an operating reserve.

- Five percent of contributions to the Annual Fund will be earmarked and may be used to pay for operating expenses or to build the operating reserve.
- An additional 5 percent for cash contributions to global grants will be used to help cover the costs of processing these gifts.

Learn more about the Foundation's funding model.

CONTRIBUTIONS TO THE ROTARY FOUNDATION

Rotary members and friends of Rotary support the Foundation's work through voluntary contributions. When Rotarians see the extraordinary results of educational and humanitarian activities, they understand why supporting The Rotary Foundation financially is vital to making the world a better place. Among other options, contributions can be directed to the Annual Fund, the Endowment, the PolioPlus Fund, a specific global grant, and the Rotary Peace Centers. Contributions can be made on My Rotary or with The Rotary Foundation Contribution Form or the Multiple Donor Form. In RIBI, contributions to The Rotary Foundation or specific Foundation programs, such as End Polio Now or the Rotary Peace Centers, may be sent in pounds sterling to The Rotary Foundation UK at the RIBI Support Centre in Alcester, England.

As president-elect, you will enter your Foundation fund development club goals in Rotary Club Central.

The sincere acknowledgment of a donor's gift is the first step toward additional financial support. The Rotary Foundation recognizes clubs and donors for financial contributions or commitments for future contributions. Extra acknowledgement from the club president provides a personal touch that can make donors feel good about their decision to support the Foundation and inspire future gifts.

For support on Foundation matters, contact your district Rotary Foundation committee chair, regional Rotary Foundation coordinators, and endowment/major gifts advisers.

To learn more about the Foundation, take the Rotary Foundation Basics course in the Learning Center. Encourage new members to take this course too, and use the content to supplement your presentations on the Foundation.

DISCUSSION QUESTIONS

How will you encourage members to get involved with The Rotary Foundation?

What is your personal goal to support The Rotary Foundation?

NOTES on The Rotary Foundation

CHAPTER 8

YOUR PROJECTS



The top two reasons people join Rotary are to give back to their local community and to connect with friends. A successful service project can do both! By working together, Rotary members and the community develop lasting friendships as your club makes a real difference in the world.

Identify an issue that takes advantage of your members' skills, builds effective networks, and involves community members as partners. When your Rotary club takes action, you'll engage your club's members and show your community how Rotary creates positive change.

SERVICE RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Select and meet with your service projects committee members	Make sure your club follows the steps for a successful project: consulting with experts who can provide guidance early in the planning phase, conducting a needs assessment, further planning and implementation, and evaluation
Assess your club's current projects using Rotary Club Central	Provide support to your club-sponsored organizations: Interact, Rotaract, and Rotary Community Corps (RCC)
Determine service goals using Rotary Club Central	Invite Rotaractors, youth program participants, and local Rotary alumni to help with or collaborate on projects
Work with your committee to determine whether projects in progress will continue into next year	Make sure your members follow all applicable program and youth protection policies (appendix 6)

SERVICE PROJECTS COMMITTEE

The service projects committee's main purpose is to lead your club's humanitarian service initiatives. Projects committee members should know the community and have community volunteer experience.

The service projects committee has these responsibilities:

- Assess the community to identify a need, determine how best to address it, and understand available resources
- Use Rotary Showcase to find service ideas and share completed projects
- Plan projects, both local and international, using club, district, and Rotary resources such as Rotary Ideas and Lifecycle of a Project
- Consult with district community service chairs on project ideas and identify resources
- Collaborate with your district international service chair to connect with local experts for assistance with club-led projects
- Work with the club public image committee to promote projects
- Carry out projects and involve all members
- Evaluate all projects and use the findings to strengthen future projects

Take the Club Service Committee Basics and the Developing and Promoting Your Service Project courses in the Learning Center to learn more.

ROTARY SERVICE OPPORTUNITIES

Rotary offers a broad range of humanitarian, intercultural, and educational programs to help clubs and districts achieve their service goals through five Avenues of Service:

- Club Service
- Vocational Service
- Community Service
- International Service
- Youth Service

For detailed descriptions of Rotary's service options, see appendix 5.

Projects provide an opportunity for members to network, have fun, and learn from the experience. Involve all members in projects, especially the ones that genuinely interest them, to keep everyone invested in your club's success. Increase your club's impact and demonstrate how Rotary takes action in your community by inviting alumni, young leaders, friends, family, community partners, and colleagues to your next project. Also leverage their expertise to help improve your projects.

Need help getting started? The Rotary's Areas of Focus guide provides examples of projects in each area. The Rotary's Areas of Focus course in the Learning Center includes presentations to help educate members about our causes.

Once you settle on a project idea, begin by using the Community Assessment Tools and reviewing the project resources on My Rotary.

ROTARY GRANTS AND PROGRAMS

Rotary offers grants that support a wide variety of projects, scholarships, and vocational training opportunities led by Rotarians around the world.

DISTRICT GRANTS

District grants fund smaller, short-term activities — including humanitarian projects, scholarships, and vocational training teams — that address needs in your community and communities abroad.

GLOBAL GRANTS

Global grants support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. These grants fund humanitarian projects, vocational training teams, and graduate and postgraduate scholarships. To participate in global grants, your club will need to find an international partner. There are lots of ways to find a partner:

- Search Rotary Ideas for clubs looking for a partner.
- Post your project on Rotary Ideas and request a partner.
- Contact your district international service chair.
- Network with Rotary members at district and international meetings.
- Attend a Rotary-sponsored project fair.
- Team up with a Rotaract club that your club sponsors.
- Connect with fellow Rotary members in discussion groups or on social networking sites.

Any club or district that applies for a global grant to support a humanitarian project or vocational training team must first conduct a community assessment. Assessing the strengths, weaknesses, needs, and assets of the community you're helping is an essential first step in planning a project with a meaningful impact. The assessment process builds valuable relationships, involves residents in decisions that will shape their communities, and encourages them to participate in efforts that will make lasting improvements. Most important, projects that are informed by community assessments are more sustainable.

You can use district grant funds to conduct the assessment. Rotary's Community Assessment Tools includes ideas and proven methods for assessing a community's assets and needs, including tips for coordinating community meetings, surveys, interviews, and focus groups.

Take the Building a Global Grant course in the Learning Center to find out more about developing a global grant project. You can apply for a global grant in the Grant Center.

ROTARY PEACE CENTERS

Funding Rotary Peace Fellows is a global effort. The Rotary Foundation provides Rotary Peace Fellowships at six Rotary Peace Centers around the world to people interested in earning either a professional development certificate in peace and conflict studies or a master's degree in a range of disciplines related to peace and development.

The peace fellowship application process is separate from district and global grants. Districts may endorse as many applicants as they deem qualified.

Once you have identified your fellowship candidates, review the goals of the fellowship with them, guide them through the application process, and interview them. Have your candidates submit their applications to the district by 31 May. A district selection committee will interview all applicants and submit endorsed applications to The Rotary Foundation by 1 July. To learn more about this process, see the Rotary Peace Centers Program Guide for Rotarians.

Your club can get involved in several ways:

- Invite current and past Rotary Peace Fellows to share their experiences with your club
- Nominate candidates for district consideration
- Serve as hosts and counselors to fellows if you have a Rotary Peace Center in your area

ROTARY'S PROGRAMS FOR YOUNG LEADERS

Your club can develop leadership skills and instill a passion for service through programs such as Interact, Rotary Youth Exchange, and Rotary Youth Leadership Awards (RYLA). Clubs can also engage university students and young professionals through Rotaract. Rotaract gives young adults the chance to develop as leaders, take action, and serve their communities alongside Rotarians.

Or your club can develop its own projects that address the needs of local youth and young adults. Reach out to youth-serving organizations to understand the issues in your community. Your club may provide a vital service by supporting children's literacy skills, mentoring at-risk youth, or providing vocational service to university students.

When conducting a service project where volunteers will be working directly with youth, review the Rotary Youth Protection Guide for screening and training information. Make sure your club members are familiar with the guidelines on working with youth in appendix 6. Take the Protecting Youth Program Participants course in the Learning Center to learn more.

DISCUSSION QUESTIONS

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

How will you identify and attract Rotarian and Rotary alumni experts who can serve as valuable resources during project planning?

How will you engage Rotaract members, Rotary alumni, and other young professionals in your community to participate in club projects?

How do the club's projects fit into the strategic plan for the club?

APPENDIX 5

ROTARY SERVICE OPTIONS

Consider the following Rotary service options:

PolioPlus	Rotary and Rotary Foundation corporate program that supports global polio eradication efforts
Community Service	Projects that respond to the needs of local communities
Vocational Service	Activity that encourages Rotary members to model high ethical standards and apply their business knowledge and skills to benefit others
International Service	Projects that involve efforts from Rotary members in more than one country
Youth Service	Programs and activities that engage youth and young adults up to age 30 in community and international service
New Generations Service Exchange	Activity for young adults up to age 30 to conduct service or gain professional or vocational training in another country
Interact	Service clubs for young people ages 12-18
Rotary Youth Exchange	Program that promotes international understanding and peace through long- and short-term exchanges for young people ages 15-19
Rotaract	Service clubs for young professionals and university students ages 18-30 sponsored by their local Rotary club
Rotary Youth Leadership Awards (RYLA)	Leadership training for youth, university students, and young adult professionals
Rotary Community Corps (RCC)	Groups of non-Rotarian community members who work with their local Rotary club sponsor to assess communities and plan and implement service projects
Rotary Fellowships	International groups of Rotarians, Rotaractors, family members, program participants, and alumni who share a common hobby or recreational or vocational interest
Rotary Friendship Exchange	Exchange program between international districts that allow Rotarians and non-Rotarians to explore new cultures and customs and build friendships, which often lead to international project partners
Rotarian Action Groups (RAGs)	International groups of Rotarians, Rotaractors, family members, program participants, and alumni who join together to support clubs and districts with international projects related to an area of expertise
Rotary Peace Centers	International educational program that offers a fellowship for a master's degree or professional development certificate in peace and conflict resolution
District and Global Grants	Financial support for clubs and districts to participate in humanitarian and educational activities locally and abroad

APPENDIX 6

RISK MANAGEMENT FOR YOUTH PROGRAMS

It's important to know the risks, such as injury, illness, and abuse, involved in youth activities so that participants can make good choices to deal with these risks. Although awareness alone cannot prevent incidents, it can lead to thoughtful discussions and planning that can reduce incidents and their effects. Consider developing a risk management program for working with youth that includes these steps:

- Develop and implement a district youth protection policy to prevent and address any potential physical, sexual, or emotional abuse or harassment.
- Establish a code of behavior for adults and youth involved in a program. Screen adults before they work with youth. In RIBI, the Disclosure and Barring Service (DBS) certificates may be required for club members working with young people and vulnerable adults. Contact CDS@rotarygbi.org for more information.
- Maintain clear policies for any travel by youth, and have systems to communicate specific information with parents or guardians.
- Obtain the governor's approval for any activities involving minors that occur outside their local community or include overnight stays.
- Review your district's policies to ensure that they align with the Rotary guidelines developed by the Board for each youth program.
- Explore the risks and insurance needs in sponsoring a youth program or event. Consider these questions:
  - What happens if someone is injured?
  - What happens if a natural disaster occurs?
- Work to minimize potential losses by:
  - Buying liability insurance coverage that is adequate for your region
  - Developing an emergency plan and practicing it at least once during the program
  - Teaching participants about safe behavior during the program

While these steps are required for Youth Exchange district certification, they are also recommended for districts that participate in Interact, RYLA, or any other youth activity.

Clubs and districts are urged to contact their insurance brokers or agents to check if their insurance policies provide adequate coverage for their youth programs. Insurance becomes a complex issue when multiple districts or clubs sponsor a program, because each organization's coverage may differ. All participants, including youth and organizers, are urged to verify that their health and life insurance will provide adequate coverage during a program. Many health insurance policies provide only limited coverage outside a certain area, so this precaution is especially important when participants travel or live away from home. In these cases, participants must obtain a travel medical and accident insurance policy that provides these types of coverage:

- Medical expense reimbursement
- Repatriation of remains
- Emergency evacuation
- Accidental death and dismemberment

Consult legal counsel before signing an agreement or contract with any organization, contractor, or service provider. These documents may contain waivers or an indemnity and hold harmless agreement that might try to release a party from liability and transfer the risk to the club or district. Rotary International is not liable for any illness or injury to people, including participants, volunteers, and organizers, or for damage to any property.

NOTES on Your Projects

Rotary

CREATE.
SHARE.
CONNECT.



Create your own promotional cards to showcase your youth activities.
Available now in Rotary's Brand Center.

Rotary

WANT A MORE EFFECTIVE WAY TO SET CLUB GOALS?



ROTARY CLUB CENTRAL POINTS THE WAY

Rotary

GET STARTED AT ROTARY.ORG/MYROTARY

Rotary

One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Rotary.org

222-EN—(518)