

District Committee Manual

An addendum for Future Vision pilot districts
is available at www.rotary.org/en/fvdistrict

ROTARY INTERNATIONAL®



This is the 2010 edition of the *District Committee Manual* (249-EN). It is intended for use by district committees in Rotary years 2011-12, 2012-13, and 2013-14. The information contained in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, the Rotary Code of Policies, and The Rotary Foundation Code of Policies. Please refer to these documents for exact RI policy. Changes to these documents by the triennial Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.

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Rotary Reminder

See appendix 1 for information on the roles and responsibilities of these district committees:

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

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Introduction

Congratulations on your appointment to a district committee. As a committee member, you'll work with district leaders to support specific club and district activities and functions and promote your committee's message. You have received the *District Committee Manual* to help make your term a successful one. This manual provides information about the responsibilities of your position and how you can help clubs function effectively. You'll also receive additional, committee-specific information from Rotary International.

District committee members are part of the district leadership team, which also includes the governor and assistant governors. At the district team training seminar, you will discuss ways to assist clubs in key areas.

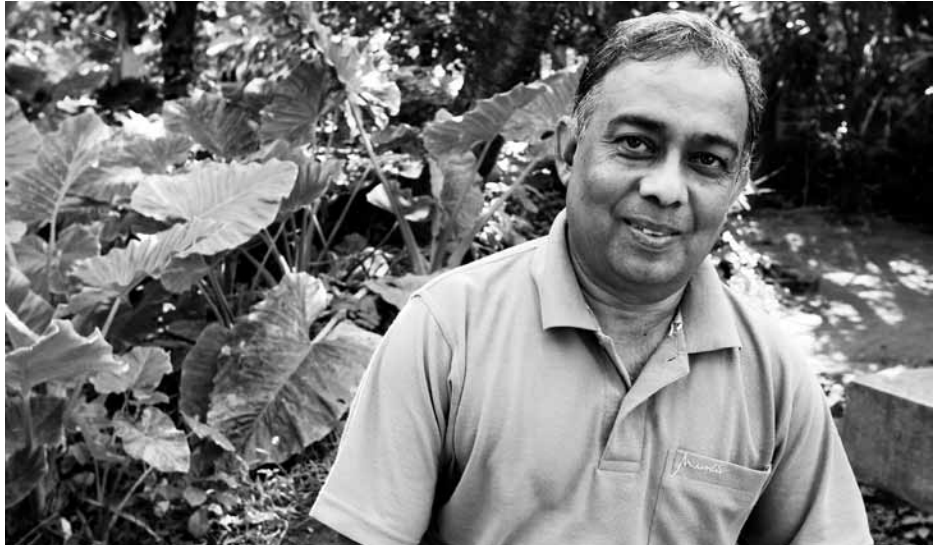
Use this manual to prepare for your term in office. Bring it to the seminar, and review its contents beforehand. Pay particular attention to the questions in appendix 5, which will help you get the most out of the facilitated discussions at the meeting. After you have completed your training, this publication will serve as a resource as you work with club and district leaders to support effective Rotary clubs.

Comments?

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

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Roles and Responsibilities



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Effective clubs are able to

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

A major responsibility of district committees is to work with other Rotary leaders to support specific club and district activities and functions. In doing so, your committee will promote club effectiveness and, in turn, district effectiveness.

Responsibilities

Each district committee has a specific role and specific responsibilities (refer to appendix 1). All district committees share these responsibilities:

- Providing support and guidance to clubs
- Working with RI and Rotary Foundation committees and resource groups
- Collaborating with the governor, governor-elect, and governor-nominee to help establish district goals
- Meeting with district leaders to plan strategies to achieve club and district goals
- Promoting and attending district training meetings and the district conference
- Managing communication between RI and the district about issues within the committee's focus

District Committee Chair

A district committee chair leads a committee, acting chiefly as an organizer and motivator. Committee chairs should

- Serve as a resource for committee members, communicating with them regularly
- Share information from Rotary International and The Rotary Foundation
- Monitor and report committee progress to district leaders
- Ensure committee members have the skills and knowledge to carry out their responsibilities
- Attend the district assembly and other district meetings as needed
- Assist clubs with committee-related activities
- Educate club leaders about district and RI resources
- Identify and recognize outstanding club projects and individual Rotarians
- Coordinate with assistant governors, who have regular contact with clubs

Key Relationships

District committees regularly communicate with both club and district audiences. They work with club presidents, secretaries, and other committees to provide information and support to help clubs achieve their goals. They often collaborate with other district leaders, including the governor, governor-elect, governor-nominee, assistant governors, and members of other district committees.

The district communication plan, which will be discussed at the district team training seminar, will outline how and when you should communicate with clubs, the district governor, assistant governors, and your fellow district committee members. To foster continuity and consistency, your committee should share information with the incoming governor, assistant governor, and committee members at the end of the year.

Your Committee

Members of your committee must communicate with each other to coordinate their efforts and make them as effective as possible. Committees are encouraged to meet regularly to review and identify resources, discuss ongoing projects and new initiatives, and develop strategies to achieve goals.

District Governor

The district governor, an officer of Rotary International, is the district's liaison to the RI president and Board of Directors. The governor is responsible for overseeing all the clubs in the district, advising and motivating them, and encouraging them to adopt strategies that will make them more effective. It's important to update the district governor on your committee's efforts. In return, the governor should provide the committee with any

information relevant to its work. The district's communication plan should outline how and how often the governor communicates with the committee.

District committees work on behalf of the district governor as specialists who focus on particular district and club activities and functions. In working with the governor, district committees may

- Review the goals formulated by the district leaders and, if necessary, develop secondary goals and objectives specific to the committee
- Suggest ways in which issues related to the committee can be addressed at the club and district levels
- Provide current, specialized information and support about the committee's area of expertise

Assistant Governors

Each assistant governor works with specific clubs within the district, assigned by the governor.

Assistant governors have the following responsibilities:

- Meet with assigned club presidents-elect to discuss club goals and viable strategies to achieve them.
- Promote the district's leadership plan and the Club Leadership Plan.
- Visit each club at least once per quarter to discuss progress toward goals and resources to help meet them.
- Work with club leaders to schedule and plan for the governor's official visit.
- Update the governor regularly on clubs' progress and challenges each one faces.
- Encourage clubs to follow through on the governor's recommendations.
- Identify and promote club leadership development.
- Coordinate club-level training with the appropriate district committee.

Working closely with assistant governors can help increase your effectiveness with clubs. Assistant governors can alert your committee to clubs that need help or encourage clubs to support your work. Following the district's communication plan, committee members will work with the assistant governor in

- Promoting district committee initiatives at the club level
- Encouraging club leaders to consult district committees when dealing with issues related to the committee's primary function
- Ensuring that a club's goals complement the objectives developed for the district committee
- Finding examples of successful club projects and programs to share with all clubs in the district and with Rotary International

Other Committees

Committees' work often overlaps. For example, the efforts of the district public relations committee to raise awareness about Rotary may influence the work of the district membership development committee. Committees should communicate regularly to keep each other informed and to coordinate efforts.

Goals

District committees work with the governor-elect and other members of the district leadership team to establish district goals. They may also work with club leadership teams to establish club goals. District goals are developed at the district team training seminar, where assistant governors and district committee members work with the governor-elect. Your goal-setting experience as a past club leader and current district leader will help you work with clubs to ensure they establish meaningful goals that challenge them to new levels of service. Although club and district goals may differ in some respects, they should generally coincide. When working on goals, make sure they are effective. It is important to set goals that are

- Shared
- Measurable
- Challenging
- Achievable
- Time specific

Use these characteristics to evaluate district and club goals. If one aspect is missing, the goal should be further developed and more clearly defined. Once goals are developed, have an action plan to achieve them.



Rotary Reminder

Encourage clubs to use the *Strategic Planning Guide* to create a vision of where they want to be in three years and long-range and annual goals to reach the vision. The *Strategic Planning Guide* is tailored for clubs but can be adapted for the district level. It is an online-only resource found in the Running a Club section of www.rotary.org.

Concluding the Year

Although your term as a district committee member may last only one year, it's important to ensure a sense of continuity with future committees. Consider the following when concluding your year:

- Brief the district governor throughout the year on district committee activities, and at the end of the year, inform the district governor-elect about projects that won't be finished.
- Meet with incoming district committee members about the activities that your committee has participated in. Talk about the challenges and successes that your committee has experienced, as well as the strengths and weaknesses of the clubs you've worked with.
- Pass on files to incoming district committee members to ensure they're fully prepared to continue with the projects your committee has started.

Working with Clubs



Around the World

For samples of different club committee structures, see appendix 2.

District committees should work with their corresponding club committees by serving as a resource and helping clubs achieve their goals.

Club Leadership Plan

The Club Leadership Plan is the recommended administrative structure for Rotary clubs. It is based on the best practices of effective Rotary clubs, with the goal of creating clubs that pursue the Object of Rotary through activities related to each Avenue of Service. Because each Rotary club is unique, the Club Leadership Plan is flexible enough to support clubs' individual needs, and it provides an opportunity for clubs to assess their current operations.

Implementing the Club Leadership Plan

Clubs may already use some of the best practices of effective Rotary clubs outlined in the Club Leadership Plan. These are:

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

A club's long-range goals should cover the next three to five Rotary years and address the Avenues of Service and the elements of an effective club: membership, service projects, The Rotary Foundation, and leadership development. They should also include strategies for promoting a club's successes in each element. As the club's leadership plan evolves, these goals should be updated.

- 2. Set annual goals that are in harmony with the club's long-range goals using the *Planning Guide for Effective Rotary Clubs* (appendix 3).**

Annual goals should address each Avenue of Service and work to help the club pursue the Object of Rotary.
- 3. Encourage club leaders to involve members when planning club assemblies and to keep them informed of Rotary activities.**

Club assemblies allow all members of the club to stay current, discuss decisions that affect the club, and hear committees report on their activities.
- 4. Plan for clear communication between club leaders, club members, and district leaders.**

Work with club leaders to develop a plan for communicating with each other, club members, and district leaders. The plan should specify who will communicate with whom, what method will be used, and when communication will occur.
- 5. Support continuity in club leadership and service projects.**

Because Rotary club leaders change annually, every club needs a continual supply of leaders. Continuity may be achieved by making appointments for multiple years or by having the current club president work closely with the president-elect, president-nominee, and immediate past president. Continuity in project leadership will support service projects that last longer than a year.
- 6. Amend club bylaws to reflect the practices of the club, including committee structure and the roles and responsibilities of club leaders.**

Work with club officers to modify the Recommended Rotary Club Bylaws from RI to reflect each club's operations and to make sure they are current. Ensure that any bylaw changes are in accordance with all applicable local laws.
- 7. Provide opportunities to increase fellowship among club members.**

Members who enjoy Rotary will feel more involved. Strong club fellowship will also support a club's service efforts.
- 8. Ensure that every member is active in a club project or function.**

Club involvement teaches members about Rotary and helps retain them as active members of the club.
- 9. Develop a comprehensive training plan.**

Training is crucial for developing future leaders and ensuring that current club officers are well informed about Rotary and capable of leading the club and providing better Rotary service. A comprehensive training plan ensures that

 - Club leaders attend district training meetings
 - Orientation for new members is provided consistently and regularly
 - Ongoing educational opportunities are available for current members
 - A leadership skills development program is available for all members

Help club leaders analyze how the club's structure relates to the goals they set. The Recommended Rotary Club Bylaws suggest a committee structure (see appendix 2) that clubs can alter to meet their operational needs. For example, committees with overlapping responsibilities can be consolidated or even eliminated. New committees may be needed to perform responsibilities or functions that aren't covered by other club leaders or committees. If necessary, a club should amend its bylaws to better reflect the club's organizational structure. Consider these recommended standing club committees when setting goals:

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

Club Goals

It's also useful to share strategies that have been successful in the past and to encourage club collaboration. The *Planning Guide for Effective Rotary Clubs* helps clubs establish annual goals. You may want to review your clubs' planning guide to better understand the goal-setting process.

As a district committee member, you might work with club leaders to establish goals in your committee's area of concern and to develop strategies to meet those goals. Rotary International offers several tools that help clubs set goals, determine strategies for meeting them, and monitor progress. Using these tools, you can gather information that will help you tailor your committee's message to each club.

Planning Guide for Effective Rotary Clubs

The *Planning Guide for Effective Rotary Clubs* (appendix 3) is an assessment and goal-setting tool. It allows the governor-elect and incoming assistant governors to work with club leaders on establishing goals related to the elements of an effective club and the Club Leadership Plan. The planning guide is first used during the presidents-elect training seminar to establish initial goals, which are further refined at the district assembly and submitted to the district by 1 July. After the Rotary year begins, the guide should be seen as a working document that a club can use to measure progress toward its goals.

Consult each club's planning guide to understand its goals and to determine specific ways your committee can help achieve them.

Memo of Club Visit

The *Memo of Club Visit* helps assistant governors assess a club's progress toward its goals at the end of the year.



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The *Memo of Club Visit* is available for download at www.rotary.org.

Work with the governor or assistant governors to review each club's *Memo of Club Visit* to determine how your committee can help clubs be more effective in the coming year and to identify clubs that have been especially successful. Outstanding club projects, ideas, and initiatives should be shared with other clubs in the district. Weak clubs will need special attention and follow-up by the assistant governor or district governor.

Communicating with Clubs

Before working with clubs, committee members should consult with the governor to ensure that committee strategies and ideas support district goals. The governor can also provide advice on enhancing your committee's work through collaboration with other committees.

For effective communication between district and club committees, consider

- Each club's needs and how to address them
- Successful club projects, initiatives, and activities
- Available resources

Ensure that district and club leaders receive appropriate information, which your committee can communicate through the following:

- District website
- Governor's monthly letter
- District meetings, such as
 - District conference
 - District assembly
 - Presidents-elect training seminar
 - District Rotary Foundation seminar
 - District membership seminar
 - District leadership seminar
 - Leadership development program, if appropriate
- Visits to clubs

Depending on the meeting, committee chairs may be asked to lead a session, give a presentation, or have a resource table on particular RI and Foundation programs. Before PETS and the district assembly, consult with the district trainer on the meeting agenda and your role in it. You can also discuss addressing club-level training needs, including specialized training for club committees, as needed.

In working with clubs, your committee's efforts will be more effective if you know each club's needs and challenges. Use the *Planning Guide for Effective Rotary Clubs* as a reference and consult with assistant governors, who can provide information about each club's characteristics and concerns. Assistant governors can also advise your committee on tailoring information to help clubs achieve their goals.

All work with clubs should begin with the club president. Each district committee should provide the president with as much information as possible about its work, its goals, and the resources it can provide to the club. Seek the club president's permission to work directly with club committees.

As a district committee member, you may learn about particularly successful initiatives, projects, and activities. Share these examples with your Club and District Support representative for possible use in *The Rotarian*, *Rotary Leader*, and other RI publications, or for inclusion in ProjectLINK on the RI website.

Your Committee's Key Message

The more a club understands your committee's function and structure, the more potential you'll have for strengthening club activities and projects. Developing and delivering a concise key message gives clubs a clear vision of the committee's role and helps foster collaboration.

When creating a message, remember that your audience needs to understand how it will benefit from your committee's work. Thus, you need to demonstrate how the knowledge you provide can be used to overcome specific challenges.

Effective messages should

- Be brief and include an example to spark interest.
- Avoid jargon and unnecessary details.
- Conclude with a summary of the main points and specific actions club members may take.

Consider these suggestions for delivering your committee's key message to clubs:

- Make yourself available as a speaker for weekly club programs. Alternatively, work with your committee to develop a presentation about its area of expertise that each club can deliver on its own.
- Meet with club committees that have a function similar to your committee's to ensure they understand your key message.
- Contribute to the governor's monthly letter, club bulletins, and club and district websites.
- Consult with other district leaders to ensure that your committee's key message is included at appropriate district training meetings and the district conference.



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Eight hours of preparation yield one hour of effective presentation. See appendix 4 for more information on developing a key message.

Resources



Clubs and other district leaders may look to you for guidance. Though you may not know all the answers, you should know where to find them. Many resources are available from clubs, districts, and Rotary International to help the district and clubs achieve their objectives.

Club Resources

Some of a club's most important resources lie within the club itself. As you work with clubs, encourage them to use the knowledge and experience of their own members, leaders, and contacts, as well as those in the community.

Also, encourage clubs to develop ties and share effective practices with one another through interclub meetings, joint service projects, and meetings for club presidents in a specific area.

Club Leaders

Club presidents regularly confer with other club leaders to assess progress and gather input. They are your main contact within the clubs and can communicate their club's strengths and weaknesses. Work with them to identify areas that need your support.

Club Committees

Similar to district committees, club committees plan, promote, and implement activities and projects that sustain the club and serve local and international communities. Work with club committees to ensure that their work supports club and district goals.

Club Trainers

Some clubs appoint or elect club trainers. Work with them to ensure all club training needs are met, and if applicable, refer them to the district training committee for further support and ideas. If a club lacks expertise in a given area, put the club trainer in touch with the appropriate district committee member who may be able to provide ideas for training.

Community Members and Organizations

Successful Rotary clubs are involved in their communities. By maintaining close ties to important community members and organizations, clubs can determine what types of service projects are most appropriate for local needs. Regular contact with community members can also generate interest in Rotary, attract new club members, and facilitate cooperative relationships.

District Resources

As part of a district committee, you'll act as an expert on district resources, so it's important to be familiar with all the ways club members can access information. In addition to the district governor, assistant governors, and other district committees, these district resources will help you serve the club.

Governor-elect and Governor-nominee

Before the Rotary year begins, the governor-elect develops district goals, oversees the training of incoming district and club leaders, and may seek your advice on district committee selections. The governor-nominee may also be involved in the planning process, especially if plans extend into the next Rotary year.

The governor-elect and governor-nominee can work with clubs that require long-term attention or that have ongoing service projects to offer guidance and ensure the necessary resources are available. This work, however, should not interfere with the ongoing activities of the current district governor.

Past District Leaders

Past district leaders are often active in district and club affairs. With their leadership experience and knowledge of the clubs in the district, they can provide insightful ideas and successful strategies for reaching goals. Seek their input when planning and implementing goals with clubs.

Other Committees

It's helpful to coordinate with other district committees to avoid duplicating efforts. Remember to communicate regularly, and direct clubs to other committees if they're more qualified to answer certain questions.

Governor's Monthly Letter

The governor's monthly letter is sent from the district governor to club presidents and club secretaries. Its purpose is to inform, inspire, and recognize Rotarians in the district. The monthly letter can be sent to clubs electronically or posted on the district website.

Provide the governor with any information that you feel should be included in the letter, such as successful service projects. Encourage club leaders to refer to the letter for the latest district information.

District Directory

The district directory lists meeting information for the district's clubs, as well as contact information for the governor, governor-elect, assistant governors, district committees, club officers, and other Rotary leaders.

District Website

Many districts have websites that provide news and information about club, district, and RI activities. If your district has a website, use it to stay current on club and district events and to highlight successful club projects. Encourage club leaders to refer to the site for the latest district information.

RI and Rotary Foundation Resources

Rotary International offers many resources on Rotary policies, procedures, programs, and training meetings, as well as information on the projects and activities of Rotarians and clubs around the world. This list will help you support clubs, either by finding the information yourself or directing clubs to the correct resource.

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at www.rotary.org.

RI and Rotary Foundation Appointees

RI committees — The RI Board determines the purpose of international committees, which comprise Rotarians appointed by the RI president. Committees advise the Board on policies affecting Rotary International, districts, and clubs.

RI resource groups — Groups of Rotarians appointed by the RI president to help clubs and districts carry out tasks related to the president's emphases.

RI training leaders — Rotarians appointed annually by the RI president-elect who are trained on facilitation skills to lead group discussion sessions for district governor-elects at the International Assembly.

Rotary coordinators (RCs) — Rotarians appointed to help districts and clubs in all aspects of Rotary (RI programs, effective clubs, membership, public image) in support of the RI Strategic Plan.

Assistant Rotary coordinators — Rotarians appointed to support the RC and provide additional assistance to clubs and districts.

Regional Rotary Foundation coordinators (RRFCs) — Rotarians appointed to help districts and clubs in all aspects of The Rotary Foundation.

Assistant regional Rotary Foundation coordinators — Rotarians appointed to assist RRFCs, districts, and clubs with their annual giving, major gifts, and program participation.

Rotary Foundation alumni coordinators (RFACs) — Rotarians appointed to assist RRFCs, clubs, and districts in reconnecting with Foundation program alumni and involving alumni in Foundation activities.

The Secretariat

The Secretariat of Rotary International acts as the administrative body for Rotary clubs worldwide by gathering, analyzing, translating, and publicizing Rotary information. It includes RI World Headquarters in Evanston, Illinois, USA, and seven international offices. It serves Rotarians, Rotary clubs, and the leaders of the association, helping them attain the Object of Rotary.

Club and District Support representatives are staff members at international offices and RI World Headquarters who can answer many administrative questions and direct other inquiries to appropriate RI and Foundation staff.

General Reference

Club Officers' Kit (225-EN) — Set of manuals outlining responsibilities and general guidelines for club officers. Training discussion questions are provided. Kit contents:

- Club President's Manual* (222-EN)
- Club Secretary's Manual* (229-EN)
- Club Treasurer's Manual* (220-EN)
- Club Administration Committee Manual* (226A-EN)
- Club Membership Committee Manual* (226B-EN)
- Club Public Relations Committee Manual* (226C-EN)
- Club Service Projects Committee Manual* (226D-EN)
- Club Rotary Foundation Committee Manual* (226E-EN)

Manual of Procedure (035-EN) — Contains RI and club constitutional documents as well as policies and procedures of Rotary International and the Foundation established by legislative action, the RI Board of Directors, and the Foundation Trustees. Issued every three years after each Council on Legislation.

Official Directory (007-EN) — Provides contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; a worldwide list of districts and governors; and an alphabetical listing of clubs within districts, including contact information. Issued every year.



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Visit www.rotary.org to download these publications, find additional resources, or order publications from the *RI Catalog* (019-EN).

RI Catalog (019-EN) — List of RI publications, audiovisual programs, forms, and supplies. Updated annually.



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Encourage your clubs to subscribe to *Rotary Leader* at www.rotary.org/rotaryleader.

News Publications

Rotary Leader — Bimonthly electronic publication for Rotary club and district officers, potential officers, and other leaders, available in eight languages. Offers information, guidance, and resources that aid in running a successful club or district.

Weekly Update — Newsletter highlighting the latest Rotary news. It can be used for club and district newsletters and websites.

The Rotarian — RI's official magazine, published monthly. Provides information on club and district projects, RI Board decisions, and RI meetings. In addition to *The Rotarian*, 31 regional magazines in 25 languages serve club members around the world.

Membership

Club Assessment Tools — Online supplement to the *Membership Development Resource Guide* with instructions on how, when, and why to complete club assessment activities.

Membership Development Resource Guide (417-EN) — Outlines steps to help clubs develop a membership development action plan for recruiting and retaining members.

Organizing New Clubs (808-EN) — Resource designed for district governors and their representatives in organizing new clubs.

The Membership Minute — E-mail newsletter that contains membership strategies and tools. Subscribe at www.rotary.org/newsletters.

Service Projects

Abuse and Harassment Prevention Training Manual and Leaders' Guide (775-EN) — Youth protection guidance that can be modified to comply with local laws and situations to create and maintain the safest possible environment for all participants.

Communities in Action/Community Assessment Tools (605-EN) — Comprehensive instructions for planning, conducting, and evaluating a service project and detailed guidelines for conducting effective community assessments.

How to Start a Service Project — E-learning module that guides Rotarians through the first steps in starting a service project.

ProjectLINK — Online database of projects that are seeking assistance and a listing of successful club projects to generate new ideas and model best practices. (English only)



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Get the latest Rotary news at www.rotary.org.

RI Programs

Interact Handbook (654-EN) — Guide for organizing and administering an Interact club, for both sponsor Rotary clubs and Interact club leadership.

Rotaract Handbook (562-EN) — Guide to organizing and developing a Rotaract club and conducting service and professional development projects.

Rotary Community Corps Handbook (770-EN) — Basic steps for organizing a corps, including how to identify potential leaders. Also includes case studies and program ideas.

Rotary Fellowships Handbook (729-EN) — Guide for organizing and promoting a Rotary Fellowship.

Rotary Friendship Exchange Handbook — Online guide for hosts and guests, information on arranging exchanges, and sample itineraries for a Rotary Friendship Exchange.

Rotary Volunteers Handbook (263-EN) — Guide for becoming a Rotary Volunteer and for clubs looking for volunteer assistance with projects.

Rotary Youth Leadership Awards Handbook (694-EN) — Guide to organizing club or district events to develop leadership among young people.

World Community Service: A Guide to Action (742-EN) — Information on how clubs and districts can become involved in international service projects.

Youth Exchange Handbook (746-EN) — Guide to operating a Rotary Youth Exchange program.

The Rotary Foundation

District Rotary Foundation Committee Manual (300-EN) — Information on the committee's program and fundraising responsibilities.

District Rotary Foundation Seminar Manual (438-EN) — Guide to help districts conduct a Foundation seminar for districts and clubs.

Every Rotarian, Every Year Club Success Kit (958-EN) — Brochures, stickers, and instructions to help Rotary clubs promote the Annual Programs Fund.

PolioPlus Brochure (323-EN) — Update on the global polio eradication effort, including recent developments and statistics, a description of the contributions of Rotary and its major partners, and the challenges remaining to achieve a polio-free world.

Rotary's US\$200 Million Challenge DVD (985-EN) — Provides an overview of Rotary's efforts to eradicate polio and fundraising initiative to match the Gates Foundation grant.

The Rotary Foundation Quick Reference Guide (219-EN) — Compilation of the programs and services of The Rotary Foundation in a quick-reference format.



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Visit www.rotary.org to download these publications, find additional resources, or order publications from the *RI Catalog* (019-EN).



Rotary Reminder

Until 1 July 2013, addendums to all training publications are available for clubs and districts in the Future Vision pilot. Visit www.rotary.org/en/fvdistrict for more information.

Future Vision

Rotary E-Learning Center — A number of Future Vision e-learning modules are available for all Rotarians, including:

Member Access: Qualification — Step-by-step guide to the online district qualification process for the district governor, district governor-elect, and district Rotary Foundation committee chair

Member Access: District Grant Application — Step-by-step guide to the online district grant application process

Choosing a Grant — Interactive module in which users pick the grant type appropriate for various project and activity scenarios

Areas of Focus — A series of informational modules about the six areas of focus identified for the new grant structure

Future Vision page of the RI website (www.rotary.org/en/fvdistrict) — Provides an overview of the Future Vision, and includes links to FAQs and related documents.

Public Relations

Effective Public Relations: A Guide for Rotary Clubs (257-EN) — Basic tips and tools to help Rotarians promote club activities.

Humanity in Motion campaign materials — Television, radio, print, billboard, and Internet public service announcements that focus on Rotarians' efforts to address critical community issues.

PolioPlus Headliner Kit — Online polio-related public relations tools that can be tailored to give local media outlets a hometown news angle. Includes a sample news feature, opinion piece, letter to the editor, press releases, photos, and tips on distributing items to newspapers, journals, and trade magazines.

Rotary PR Tips — Biweekly e-mail newsletter featuring ideas for clubs and districts to promote Rotary in their communities. Subscribe at www.rotary.org/newsletters.

Training

District Training Manual (246-EN) — Designed to help the district training committee plan and conduct district training meetings. Includes train-the-trainer session guide and other resources to prepare training leaders.

For Trainers section of RI website — Includes information about planning a training meeting, adult learning principles, training Rotarians, web conferencing, club trainers, and best training practices (click Members → Training → For Trainers).

Leaders' guides — Provide information on planning and organizing a training seminar, session outlines, handouts, evaluation forms, and accompanying slides. Download leaders' guides at www.rotary.org (click Members → Events → For District Leaders).

Rotary Training Talk — A monthly e-mail newsletter that highlights RI's distribution of materials, training events, and includes surveys and training tips. Subscribe at www.rotary.org/newsletters.

RI Website

www.rotary.org — Current information on all aspects of Rotary, including membership, The Rotary Foundation, RI programs, news, events, club and district support, training, and publications, many of which are available online.

Running a District section — Pages to help district leaders carry out their role (click Members → Running a District → District Leaders → District Committees).

Member Access — Members-only section of the website that allows Rotarians to contribute to The Rotary Foundation, manage their RI e-mail subscriptions, register for meetings, and access member benefits. Club and district officers can obtain additional records and reports.

Rotary E-Learning Center — Section of the website designed for the independent study of Rotary information, featuring

Interactive modules on a variety of topics for all Rotarians that can be viewed online

Your Voice, Your Solution, a compilation of best practices and solutions from Rotarians for everyday challenges

Rotary Basics, an online introduction to Rotary club membership

Appendix 1:

Roles and Responsibilities of District Committees

The RI Board of Directors recommends that nine standing committees be appointed within the district to address ongoing administrative functions. (Districts should feel free, however, to add any additional committees as they see fit.) The nine recommended committees are:

- District conference
- District programs (for example, Rotaract, Rotary Youth Exchange, Rotary Youth Leadership Awards, World Community Service)
- Extension
- Finance
- Membership development
- Public relations
- RI Convention promotion
- The Rotary Foundation
- Training

For district committee information not included in this appendix, please refer to the *Manual of Procedure* (035-EN).

District Conference

Under the direction of the governor, this committee plans and promotes the district conference and helps ensure maximum attendance.

Responsibilities

- Select the district conference venue and coordinate all related logistical arrangements.
- Coordinate conference finances to ensure maximum attendance.
- Promote conference attendance with particular emphasis on
 - New Rotarians
 - New clubs
 - Representation from every club in the district
- Promote the district conference to external audiences, such as the media, community leaders, and Rotary program beneficiaries.
- Coordinate, in cooperation with the district trainer, a district leadership seminar to be held in conjunction with the conference.

District Programs

These committees promote and administer an ongoing district activity, project, or RI program, providing support and guidance to clubs in the district. Rotary International provides resources for the following RI programs:

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



Rotary Reminder

Consult the RI and Rotary Foundation Resources section on page 13 for publications on each program.

Responsibilities

- Coordinate districtwide efforts related to the program.
- Promote program participation through regular contact with assistant governors and clubs in the district.
- Present examples of successful programs at district meetings, and promote them among clubs in the district.
- Visit clubs to speak about examples of effective RI programs. (Program participants make excellent club speakers and will encourage clubs to get involved.)
- Assist club committee chairs in carrying out their responsibilities.
- Encourage clubs to identify local needs that a specific program can address.
- Identify areas of potential cooperation between district programs and local, non-Rotary service organizations.
- Contact RI to share success stories and meet program reporting requirements.

Extension

Under the direction of the governor, this committee develops and implements a plan to organize new Rotary clubs within the district.

Responsibilities

- Identify communities without Rotary clubs that have a population capable of meeting the requirements for chartering a new club.
- Identify communities where additional Rotary clubs could be established without detracting from service provided by existing clubs.
- Assist in organizing and establishing new clubs.

Finance

This committee supervises district funds by reviewing and studying the amount of per capita levy and district administration expenses. It also prepares annual reports on the status of the district's finances.

Responsibilities

- Prepare a budget of district expenses in cooperation with the district governor to be submitted to clubs at least four weeks before the district assembly and approved at a meeting of incoming club presidents at the assembly.
- Review and recommend the amount of per capita levy. Any per capita levy must be approved by at least three-fourths of the incoming club presidents at the district assembly, by a majority of the electors present at the district conference, or by a three-fourths majority at the presidents-elect training seminar.
- Ensure that proper income and expense records are kept.
- Prepare a yearly financial report to be presented at the district assembly.
- Ensure that a committee member (preferably the treasurer) and the district governor are the authorized signatories for the district's bank accounts. (Both signatures are necessary for any withdrawal.)
- Ensure that the bank accounts are in the district's name.
- Check with local and national tax codes on what tax forms your district must file. Make sure your district abides by all local and national financial regulations.

Membership Development

This committee identifies, markets, and implements membership development strategies that are appropriate for the district and will result in membership growth.

Responsibilities

- Plan, market, and conduct a district membership seminar in consultation with the governor-elect and district trainer.
- Encourage clubs to strive to represent the demographic composition of the community's business and professional population.
- Ensure that clubs are aware of the membership resources available from RI.
- Work with the district governor and club leaders to ensure that the district achieves its membership goals.
- Coordinate districtwide membership development activities.
- Encourage clubs to participate in RI or presidential membership development recognition programs.
- Maintain communication with other district committees (for example, the extension and public relations committees) to coordinate activities that will aid membership development efforts.
- Inform club membership committee members that your committee can help them with their efforts.

- Encourage clubs to develop and implement a membership recruitment plan.
- Assist club membership committee chairs in carrying out their responsibilities.
- Visit clubs to speak about effective membership development strategies.
- Ensure that each club committee has a copy of the *Membership Development Resource Guide* (417-EN) and is aware of its online companion piece, *Club Assessment Tools*.

Public Relations

This committee promotes Rotary to external audiences and fosters understanding, appreciation, and support for Rotary programs. It also promotes awareness among Rotarians that effective external publicity, favorable public relations, and a positive image are desirable goals for Rotary.

Responsibilities

- Maintain contact with the district governor and key committee chairs to stay informed about district projects and activities that can be promoted.
- Encourage clubs to make public relations a priority.
- Promote Rotary to external audiences, such as the media, community leaders, and program beneficiaries.
- Contact the media with newsworthy stories of district projects and events.
- Share RI public relations materials with clubs.
- Seek opportunities to speak to individual clubs about the importance of club public relations.

RI Convention Promotion

This committee promotes attendance at the annual RI Convention to Rotarians throughout the district.

Responsibilities

- Attend club and district meetings to promote the convention.
- Serve as a local resource for convention materials and information.
- Communicate with and assist the zone-level RI Convention Promotion Committee members assigned to your district.
- Contact potential registrants.
- Translate important convention information into local languages, if necessary.
- Create or expand a district website with links to www.rotary.org.

The Rotary Foundation*

This committee assists the governor in educating, motivating, and inspiring Rotarians to participate in Foundation programs and fundraising activities in the district. It serves as the liaison between The Rotary Foundation and club members. The district governor is an ex officio member of the committee.

Committee Structure

The members of the district Rotary Foundation committee serve as chairs of eight subcommittees:

- Alumni
- Annual giving
- Grants
- Group Study Exchange
- Permanent Fund
- PolioPlus
- Rotary Peace Fellowships
- Scholarships

Responsibilities

- Assist the district governor in presenting a district Rotary Foundation seminar for club presidents, presidents-elect, club Foundation committees, and other Rotarians.
- Help the district training committee in conducting Foundation sessions at the presidents-elect training seminar (PETS) and the district assembly.
- Assist the governor-elect in obtaining input from club Rotarians before establishing district Foundation goals for implementation during his/her term as governor.
- Encourage clubs to conduct at least two programs on the Foundation each year, with special attention in November for Rotary Foundation Month.
- Promote high levels of financial support for Foundation programs by encouraging regular contributions to the Annual Programs Fund and gifts to the Permanent Fund.
- Encourage clubs to contribute toward meeting Rotary's US\$200 Million Challenge to End Polio Now.
- Ensure coordination of all district Foundation fundraising and program participation, including the Annual Programs Fund, Educational Programs, Humanitarian Grants Program, the Permanent Fund, and PolioPlus.
- Decide how to use the District Designated Fund in consultation with the district governor and governor-elect.
- Maintain stewardship and ensure timely submission of final reports to the Foundation on all district-sponsored humanitarian grants and educational program activities.
- Nominate qualified recipients for Foundation service awards to the district governor.

Additional Training Requirement

All members of the district Rotary Foundation committee are expected to attend a regional Rotary Foundation seminar conducted by a regional Rotary Foundation coordinator.



Rotary Reminder

District Rotary Foundation committee members should consult the *District Rotary Foundation Committee Manual* (300-EN) for detailed information about their responsibilities.

* For clubs in Future Vision pilot districts, use the 2010-11 Future Vision Addendum to the District Committee Manual, available at www.rotary.org.

Training

This committee is responsible for supporting the district governor and governor-elect in training club and district leaders and overseeing the district's overall training plan. The district trainer serves as the training committee chair and assigns responsibility for training meetings and functions as necessary.

Responsibilities

- Understand that committee members are responsible to the convener of each meeting.
- Work with the governor-elect on
 - District team training seminar
 - Presidents-elect training seminar
 - District assembly
- Work with the governor on
 - District leadership seminar
 - Leadership development program, as appropriate
 - Club-level training
 - Rotaract leadership training
 - Other training events in the district, as appropriate
- Consult on training issues for the district Rotary Foundation seminar and the district membership seminar. (These meetings are the primary responsibility of other district committees.)
- With the direction of the meeting conveners, address
 - Program content
 - Session facilitation
 - Identification of speakers and other volunteers
 - Training leader preparation
 - Program evaluation
 - Logistics
- Support club trainers as needed.

Appendix 2: Club Committee Structure



Rotary Reminder

The Club Leadership Plan can help clubs increase their ability to meet their goals in each Avenue of Service.

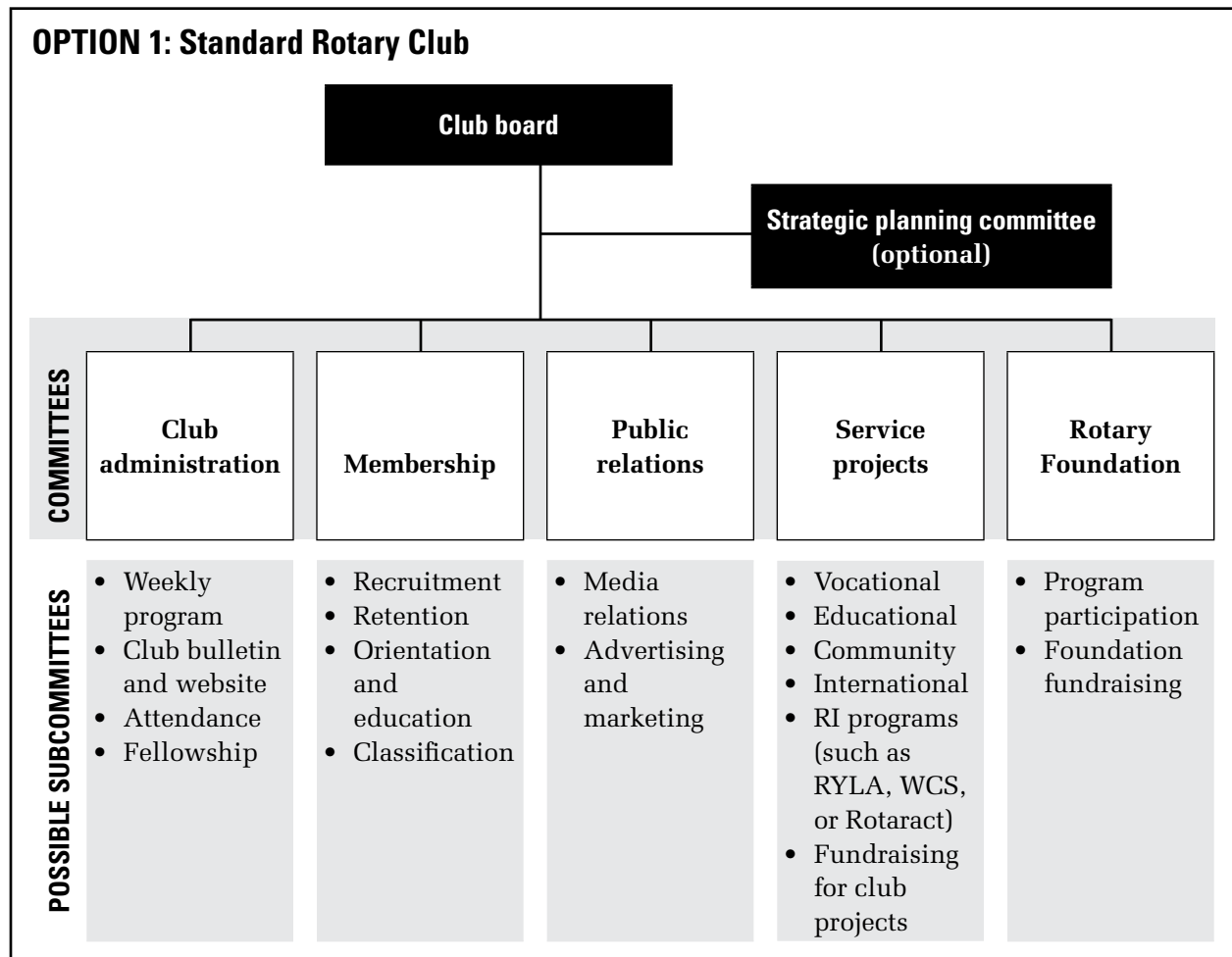


Rotary Reminder

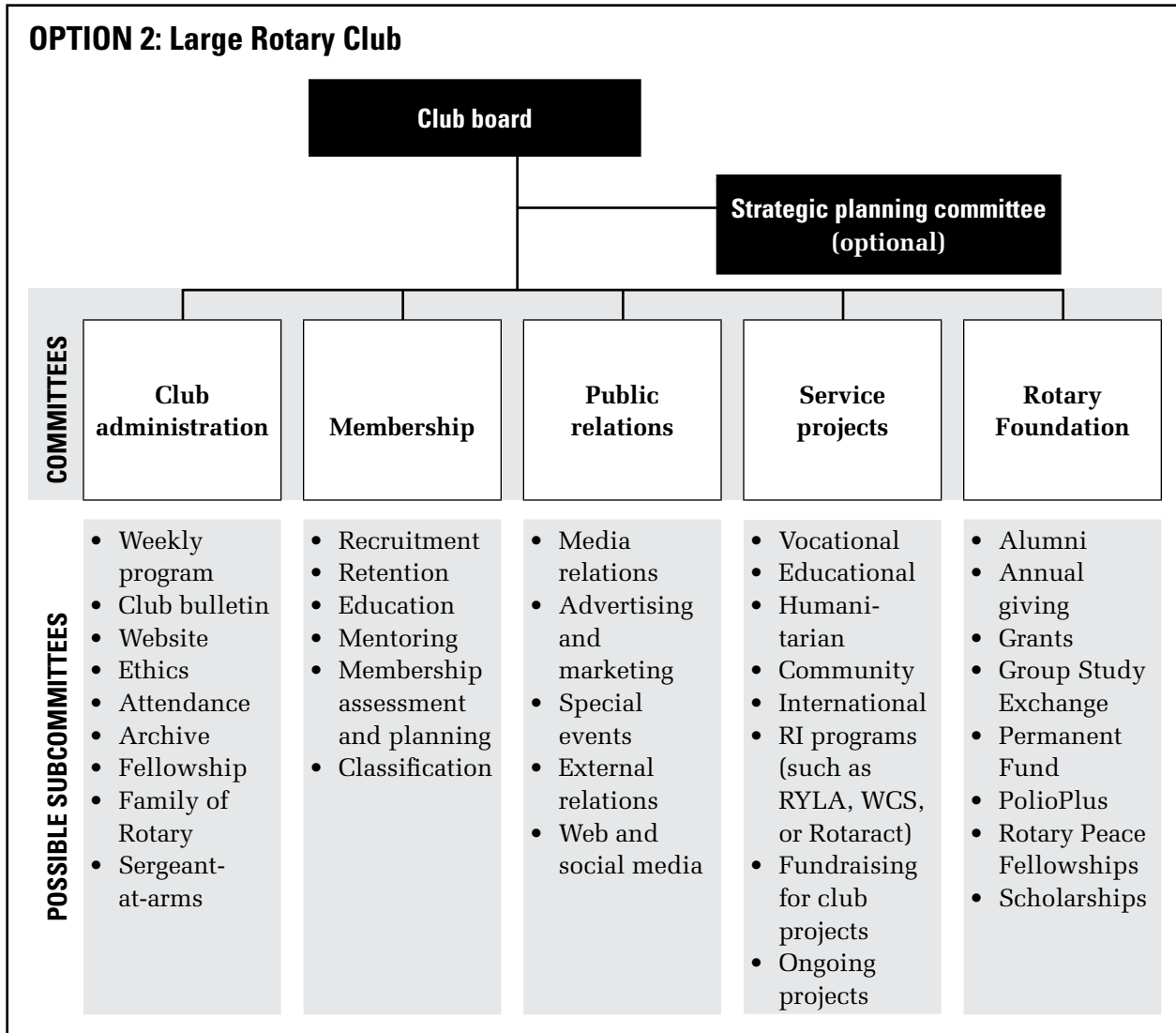
Each Rotary club's committee structure is unique as it is based on the goals and operational needs of the club itself.

Under the Club Leadership Plan, there are five recommended standing committees. Each club can add additional committees or subcommittees to meet the special interests of their club or ongoing projects. Committees and subcommittees can also be eliminated if the club does not participate in that activity.

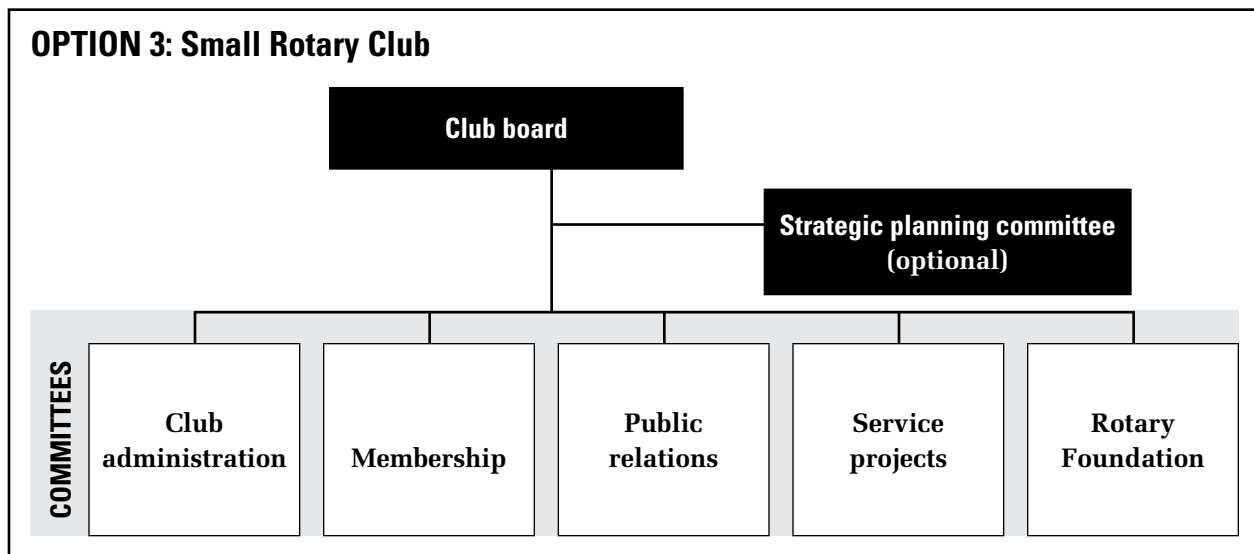
Below are sample subcommittees for each of the standing committees depending on your club's membership size. Choose the structure that meets the needs and goals of your clubs and then add, move, and delete subcommittees as needed or develop your own committee and subcommittee structure with your fellow club leaders. If you need assistance with determining the appropriate subcommittees, contact your assistant governor or district governor.



OPTION 2: Large Rotary Club



OPTION 3: Small Rotary Club



Appendix 3:

Planning Guide for Effective Rotary Clubs

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

Download a Microsoft Word version at www.rotary.org.

Rotary Club of _____ Rotary year of office: _____

Name of president: _____

Mailing address: _____

Phone: _____ Fax: _____ E-mail: _____

MEMBERSHIP

Current State

Current number of members: _____

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

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

Average age of members: _____ Number of Rotary alumni members _____

Number of Rotarians who have been members for 1-3 years: _____ 3-5 years: _____

5-10 years: _____

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

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

Profession Age Gender Ethnicity

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

Describe the club's current new member orientation program.

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

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

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

What makes this club attractive to new members?

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

Future State

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

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

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

- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Ensure the membership committee is aware of effective recruitment techniques
- Develop a recruitment plan to have the club reflect the diversity of the community
- Explain the expectations of membership to potential Rotarians
- Implement an orientation program for new members
- Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- Assign an experienced Rotarian mentor to every new club member
- Recognize those Rotarians who sponsor new members
- Encourage members to join a Rotary Fellowship or Rotarian Action Group
- Participate in the RI membership development award programs
- Sponsor a new club
- Other (please describe):

Action steps:

SERVICE PROJECTS

Current State

Number of Rotary Youth Exchange students: Hosted _____ Sponsored _____

Number of sponsored Interact clubs: _____ Rotaract clubs: _____

Rotary Community Corps: _____

Number of Rotary Youth Leadership Awards (RYLA) events: _____

Number of Rotary Friendship Exchanges: _____

Number of registered Rotary Volunteers: _____

Number of World Community Service (WCS) projects: _____

Number of other current club service projects: _____

Future State

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

For our community:

For communities in other countries:

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

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

Action steps:

THE ROTARY FOUNDATION

Current State

Number of grants awarded:

District Simplified Grants: _____ Matching Grants: _____

Number of Ambassadorial Scholars: Nominated _____ Selected _____ Hosted _____

Number of Group Study Exchange (GSE) team members: Nominated _____ Selected _____ Hosted _____

Number of Rotary World Peace Fellows: Nominated _____ Selected _____ Hosted _____

Current year's contributions to PolioPlus activities: _____

Current year's contributions to Annual Programs Fund: _____

Current year's contributions to Permanent Fund: _____

Number of club members who are

Paul Harris Fellows: _____ Benefactors: _____ Major Donors: _____

Rotary Foundation Sustaining Members: _____ Bequest Society members: _____

Number of Foundation alumni tracked by your club: _____

Future State

Our club has established the following Rotary Foundation goals (as reported on the Fund Development Club Goal Report Form) for the upcoming Rotary year:

Polio fundraising: _____ Annual Programs Fund contributions: _____

Major gifts: _____ Benefactors: _____

Bequest Society members: _____

Our club will participate in the following Rotary Foundation programs:

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

- Ensure the club's Rotary Foundation committee understands the programs of The Rotary Foundation and is committed to promoting financial support of the Foundation
- Help club members understand the relationship between Foundation giving and Foundation programs
- Plan a club program about The Rotary Foundation every quarter, especially in November, Rotary Foundation Month
- Include a brief story about The Rotary Foundation in every club program
- Schedule presentations that inform club members about The Rotary Foundation
- Ensure the club's Rotary Foundation committee chair attends the district Rotary Foundation seminar
- Use Rotary Foundation grants to support the club's international projects
- Recognize club members' financial contributions to The Rotary Foundation and their participation in Foundation programs
- Encourage each club member to contribute to the Foundation every year
- Participate in:
 - Group Study Exchange
 - PolioPlus
 - Matching Grants
 - Ambassadorial Scholarships
 - District Simplified Grants
 - Rotary World Peace Fellowships
- Invite Foundation program participants and alumni to be part of club programs and activities
- Other (please describe): _____

Action steps:

LEADERSHIP DEVELOPMENT

Current State

Number of club leaders who attended

District assembly: _____

District Rotary Foundation seminar: _____

District membership seminar: _____ District leadership seminar: _____

District conference: _____

Number of club members involved at the district level: _____

Number of visits from the assistant governor this Rotary year: _____

Future State

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

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

- Have the president-elect attend the presidents-elect training seminar (PETS) and the district assembly
- Have all committee chairs attend the district assembly
- Encourage interested past presidents to attend the district leadership seminar
- Appoint a club trainer to develop club members' knowledge and skills
- Conduct a leadership development program
- Use the expertise of the club's assistant governor
- Encourage new members to assume leadership positions through participation in club committees
- Ask members to visit other clubs to exchange ideas, and then share what they have learned with the club
- Other (please describe):

Action steps:

PUBLIC RELATIONS

Current State

List club activities covered by the media and the type of media (television, radio, print, Internet, etc.) involved.

Future State

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

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

- Ensure the public relations committee is trained in conducting a multimedia campaign
- Plan public relations efforts around all service projects
- Conduct a public awareness program targeted at the business and professional community that explains what Rotary is and what Rotary does
- Arrange for a public service announcement to be broadcast on a local television channel, aired on a local radio station, or placed in a local newspaper or magazine
- Other (please describe):

Action steps:

CLUB ADMINISTRATION

Current State

Is your club operating under the Club Leadership Plan? Yes No

How often and when does the club board meet? _____

When are club assemblies held? _____

How is the club budget prepared? _____

Is the budget independently reviewed by a qualified accountant? Yes No

Does the club have a strategic plan in place? Yes No

Has the club developed a system for ensuring continuity of leadership on its board, committees, etc.?

Yes No

Has the club developed a system for keeping all members involved? Yes No

Does the club use Member Access at www.rotary.org to update its membership list? Yes No

How often is the club's bulletin published? _____

Describe how weekly club programs are organized. _____

Does the club have its own Web site? Yes No If yes, how often is the site updated? _____

Does the club observe the special months of the Rotary calendar, such as Rotary Foundation Month and Magazine Month? Yes No

How often does your club conduct fellowship activities? _____

How does the club involve the families of Rotarians?

Future State

How does the club carry out the administrative tasks of the club? (check all that apply)

- Regular board meetings have been scheduled.
- The club will review the Club Leadership Plan on the following dates: _____
- The club's strategic and communication plans will be updated on the following dates: _____
- _____ club assemblies have been scheduled on the following dates: _____
(number)
- The club has either adopted the latest version of the Recommended Rotary Club Bylaws or revised its own bylaws (recommended after each Council on Legislation).
- Club elections will be held on _____.
(date)
- At least _____ delegates will be sent to the district conference.
(number)
- A club bulletin will be produced to provide information to club members.

- The club's Web site will be updated _____ times per year.
(number)
- A plan has been developed to ensure interesting and relevant weekly club programs.
- Monthly attendance figures will be reported to the district leadership by the _____ day of the following month.
(number)
- Member Access will be used to maintain club records by 1 June and 1 December to ensure accurate semiannual reports.
- Membership changes will be reported to RI within _____ days.
(number)
- Reports to RI, including the semiannual report, will be completed on a timely basis.
- The following fellowship activities for all club members are planned for the year:

- Other (please describe):

Action steps:

Our club would like assistance from the governor or assistant governor with the following:

Our club would like to discuss the following issues with the governor or assistant governor during a visit to our club:

Club President's Signature

Rotary Year

Assistant Governor's Signature

Date

Date

SUMMARY OF GOALS FOR ROTARY CLUB OF _____ ROTARY YEAR _____

For each goal your club has identified for the upcoming Rotary year, indicate which Avenue of Service it addresses. To ensure a balanced service effort, you should have at least one goal that addresses each Avenue of Service. Most goals will address more than one avenue.

	Club Service	Vocational Service	Community Service	International Service
Membership goal _____ members by 30 June _____ (number) (year)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service goals For our community: For communities in other countries:	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Rotary Foundation goals Our club's PolioPlus contribution goal is _____. Our club's Annual Programs Fund contribution goal is _____. Our club's Permanent Fund contribution goal is _____. Our club will participate in the following Rotary Foundation programs:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Leadership development goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public relations goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club administration goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Appendix 4: Developing a Key Message

A key message that's delivered consistently throughout the district will ensure that clubs understand how your committee can support their efforts. The message should cover the following points:

- Your committee's goals and strategies to achieve them
- Ways your committee and club-level Rotarians can work together
- Examples of how your committee can help clubs reach their goals and improve their operations

In developing a key message, consider these steps:

- Develop a general outline.
- Update the outline to reflect adjustments in policy and conditions in the district.
- Modify your committee's message to appeal to individual clubs.

Review your message before presenting it to district and club leaders. Ask yourself the following questions to help make improvements:

- Does the message provide club members with the information they need to find out more about the committee and its relevance at the club level?
- What main points would a new club member remember about the message?
- What points need to be emphasized or modified?
- Does the presentation provide ideas about increasing involvement in Rotary?
- Does the message outline committee goals and strategies and how to achieve them?
- Does the message give examples of Rotarians in action who are making differences in their clubs, communities, and the world?
- Does the presentation include results from previous projects, plans, and discussions showing the committee's work with clubs?
- Is the presentation too complex or simplified?
 - How can the introduction be improved to encourage interest in the topic?
 - What additional information should be included in the presentation?
 - What information should be removed or modified?
- Could the presentation's sequence be improved?
- Does the message include contact information or additional resources?

Appendix 5:

District Team Training Seminar Discussion Questions

Review the following discussion questions. Thinking about these questions and reviewing this manual before attending the seminar will help you prepare for your training and maximize the effectiveness of your time with fellow district leaders.

Communication within the District

- When and how often should members of the district team communicate with each other?
- What information should be communicated to clubs? What information should be communicated to district leaders?
- How will information be communicated?
- How can you ensure that all parties remain fully informed?

Roles and Responsibilities

- What are your club- and district-level responsibilities?
- How will you collaborate with assistant governors to serve clubs effectively?

Elements of an Effective Club

- What is the district's role in supporting clubs?

Achieving Goals

- How does your committee support the achievement of club and district goals?

Working with Clubs

- How can district committees cooperate to support clubs?
- How can district committees use the Club Leadership Plan in working with clubs?
- If you've already served as a district committee member or chair, what are some ways that you successfully conveyed key committee messages to clubs?

Resources

- What resources are available at the club, district, and community levels?
- What resources are available from Rotary International?

Problem Solving

- How do district leaders determine that a club needs additional support?
- How can you help clubs that need additional support?
- What successful strategies have you used that you'd like to share with your fellow district committee members?

Worksheet 5: District Committee Roles

Review your committee’s role below, and consider the responsibilities of your committee. For specific committee responsibilities, see the *District Committee Manual* (249).

Committee	How will you carry out this role?	What responsibilities will your committee have in your district?
<p>District conference Plan, promote, and implement the district conference to ensure maximum attendance.</p>		
<p>District programs Promote and administer RI programs at the district level, and provide support and guidance to clubs.</p>		
<p>Extension Develop and implement a plan to organize new Rotary clubs within the district.</p>		
<p>Finance Safeguard the assets of the district fund by reviewing and studying the financial transactions of district administration and by preparing an annual report on the status of the district’s finances.</p>		
<p>Membership development Identify, market, and implement appropriate membership development strategies to achieve membership growth within your district.</p>		

To be completed at district team training seminar

Committee	How will you carry out this role?	What responsibilities will your committee have in your district?
<p>Public relations Promote Rotary to external audiences to foster understanding, appreciation, and support for Rotary programs.</p>		
<p>RI Convention promotion Promote attendance at the annual RI Convention to Rotarians throughout the district.</p>		
<p>The Rotary Foundation Promote participation in Foundation programs and fundraising activities in the district. <i>Note: The role for this committee is the same for Future Vision pilot and nonpilot districts.</i></p>		
<p>Training Oversee the overall training plan for club and district leaders.</p>		

Worksheet 6: Committees and Effective Clubs

Match your committee with its corresponding elements of an effective club. For example, the public relations committee could be matched with “sustain and increase membership” and “support The Rotary Foundation.” Then list activities your committee can do to support that area of club effectiveness.

Elements of an effective club	Related committee	Example project or activity
Sustain and increase membership		
Implement successful service projects that address the needs of the local community and communities in other countries		
Support The Rotary Foundation through both program participation and financial contributions		
Develop club leaders capable of serving beyond the club level		

Worksheet 8: Creating a Key Message

Review the following list of ideas, and think about how these points can be incorporated into your district committee's key message presentation to clubs. Develop a brief outline for a two-minute presentation that covers the most relevant information about your committee.

District conference

- The district conference celebrates the achievements of clubs and Rotarians in the district.
- The conference offers clubs an opportunity to share ideas for service projects, programs, and fundraisers.
- Club members can meet fellow Rotarians from other clubs at the district conference.

District programs

- Service projects are how Rotarians demonstrate their commitment to improving their community and the world.
- By supporting Rotary youth programs, Rotarians are developing the future leaders of our world.
- Protecting youth program participants from physical, sexual, and emotional abuse is a critical responsibility of every adult participant, both Rotarians and non-Rotarians.

Extension

- It is important for clubs to look for opportunities to start a new Rotary club.
- A new Rotary club means more service for the community.
- Sponsor clubs have the responsibility of supporting new clubs for at least two years.

Finance

- Clubs are expected to keep in good financial standing with Rotary International and the district.
- Maintaining transparent financial practices ensures accountability.
- Practicing good stewardship of club funds ensures they are used properly.

Membership development

- Recruitment and retention are important to membership development.
- Education and training of new and current club members are vital to informing them about the club, district, and RI.
- Alumni of Rotary International and Rotary Foundation programs can serve as resources for recruiting new club members.

Public relations

- All news is local and should have a local angle — think locally, act locally.
- Club members, as members of the community, know the local media and should use that knowledge and their connections.
- Clubs should take good ideas and make them fit their local needs.

To be completed at district team training seminar

RI Convention promotion

- The RI Convention inspires and informs Rotarians by offering an opportunity to share stories and experiences with fellow Rotarians from around the world.
- The convention allows clubs to learn more about Rotary and Rotary Foundation programs.
- Attending the RI Convention is an unforgettable experience that will renew club members' commitment to Rotary.

The Rotary Foundation

- Every Rotarian, Every Year is a fundraising effort that promotes giving among all Rotarians and identifies those capable of giving major gifts to The Rotary Foundation.
- All Rotarians should participate in the programs of The Rotary Foundation.
- Rotary Foundation seminars and events can help Rotarians learn more about their Foundation.

Training

- District training meetings are an opportunity to prepare for the year and network with other Rotarians in the district.
- Training is an ongoing process for developing club leaders and members.
- Clubs should have a training plan for incoming officers, new club members, existing members, and future leaders conducted by the club trainer.

Worksheet 9: Presentation Questionnaire

Use the following questions to provide feedback on presentations.

1. Did the presentation give you the information necessary to find out more about the committee and how it can help clubs?
2. What points do you think would be most helpful to new club members?
3. Did the presentation give you ideas about how to increase your involvement in Rotary?
4. What did you like best about the presentation?
5. How could the presentation be improved?
6. What is the one thing from the presentation that you are most likely to remember?

Worksheet 11: Resource Search

This exercise focuses on how to find information for clubs during your term. Work in small groups to answer the questions. Some questions may have more than one answer. Consider club, district, and RI resources — publications and online tools, as well as Rotary and community leaders — for each question. Refer to the *Assistant Governor's Training Manual (244-EN)* and the *District Committee Manual (249-EN)* for help completing this exercise.

1. A club president asks for ideas about developing a strategy to recruit new members. What resources can the club use to develop a membership recruiting effort?

2. One of the clubs in your area wants to do a service project. Club leaders are seeking help in both designing and conducting a needs assessment to determine the project's effect on the community. What resources are available to help the club assess the effectiveness of a service project?

3. A club in your district is experiencing challenges in keeping new members; many people leave the club after a few months. You encourage club presidents to establish a membership committee and a retention plan. What resources can help with these initiatives?

To be completed at district team training seminar

4. A club has recently complained to you that its Matching Grant application was returned without being approved. What resources are available to help the club successfully complete the application?

5. A club wishes to change its committee structure. What resources would you suggest the club consult?

6. A club has a wonderful history of doing great projects but does not promote itself well within the community. What resources would you advise this club to use?

7. A club wants to sponsor a public service announcement on a radio station in the community. What resources are available to help the club do this?

To be completed at district team training seminar

8. An enthusiastic member of a club in your area has expressed a desire to combine her strong interest in computers with Rotary. What resources are available to help this Rotarian?

9. A club has expressed an interest in working more closely with young people by starting a Rotaract club. What resources are available to help the club charter a Rotaract club?

10. A club is planning a fundraiser and would like advice on how to conduct it successfully. What resources provide information about planning and conducting an effective fundraiser or guidelines and policies for handling funds?

Worksheet 14: District Planning Guide

February 09

The District Planning Guide, based on the District Leadership Plan, helps districts assess their current state and establish goals for the coming year. Complete this form during your year as governor-elect to develop goals for your year as governor. Work with your district leadership team to set the goals, which should help further your district's strategic plan. Review the goals throughout the year, and revise them as needed. Download a Microsoft Word version of this form at www.rotary.org.

District number: _____ Rotary year of office: _____

Name of governor: _____

Name of immediate past governor: _____

Name of governor-elect: _____

Name of governor-nominee: _____

DISTRICT ADMINISTRATION

Current State

Does the district have a strategic plan in place? YES NO

If so, when was it last reviewed/established? _____

Number of clubs that have implemented the Club Leadership Plan: _____

Does the district have a communication plan in place? YES NO

When does the district's election process start for the following positions?

District governor _____ Council on Legislation representative _____ RI director _____

What is the district's election process?

Nominating committee Ballot at district conference Ballot by mail

Do you use Member Access at www.rotary.org? YES NO

How is the governor's monthly letter distributed? Mail E-mail Web site

How often is the district's Web site updated? _____

How often does your district conduct fellowship activities? _____

How does the district involve the families of Rotarians? _____

Number of clubs that received the Presidential Citation last year: _____

What awards did the district receive last year? _____

List of awards the district gives out: _____

Future State

During my year, the district will focus on the following areas of district administration:

1. _____
2. _____
3. _____

DISTRICT CONFERENCE

Current State

Number of participants: _____

Number of clubs in attendance: _____

Best speakers/program: _____

Have the evaluations been reviewed? YES NO

Future State

During my year, the district will focus on the following areas for the district conference:

1. _____

2. _____

3. _____

DISTRICT PROGRAMS

Current State

Number of Rotary Youth Exchange students: Hosted _____ Sponsored _____

Number of sponsored Interact clubs: _____ Number of Interactors: _____

Number of sponsored Rotaract clubs: _____ Number of Rotaractors: _____

Number of sponsored Rotary Community Corps: _____ Number of participants: _____

Number of Rotary Youth Leadership Awards (RYLA) activities: _____

Number of Rotary Friendship Exchanges: _____

Number of registered Rotary Volunteers: _____

Number of World Community Service (WCS) projects: _____

Number of Rotary Foundation grants received for WCS projects: _____

Number of other local service projects: _____

Number of other vocational service projects: _____

Number of other international service projects: _____

Number of Rotarians in the district participating in

Rotarian Action Groups: _____

Rotary Fellowships: _____

Future State

During my year, the district will focus on the following areas to improve district programs:

1. _____

2. _____

3. _____

To be completed at district team training seminar

EXTENSION

Current State

How many clubs have been chartered in your district over the past two years? _____

Which communities has your district identified as potential locations for new Rotary clubs? _____

How many years does a sponsor club work with a new club? _____

Future State

During my year, the district will focus on the following areas to improve extension:

1. _____

2. _____

3. _____

FINANCE

Current State

How is the district budget prepared? _____

When was the budget approved by a majority of clubs? _____

Is the budget independently reviewed by a qualified accountant? YES NO

How is the district financial statement shared with clubs? _____

Does the district have procedures in place to protect district funds? YES NO

Were appropriate tax documents filed with local government? YES NO

Is the per capita levy sufficient for district needs? YES NO

Future State

During my year, the district will focus on the following areas in finance:

1. _____

2. _____

3. _____

MEMBERSHIP

Current State

Current number of members: _____

Net membership growth in existing clubs during current year: _____

Number of male members: _____ Number of female members: _____ Average age of members: _____

Number of clubs with 20 or fewer members: _____

Describe the district's continuing education programs for both new and established members: _____

To be completed at district team training seminar

Future State

During my year, the district will focus on the following areas of membership:

1. _____

2. _____

3. _____

PUBLIC RELATIONS

Current State

List district activities covered by the media and the type of media coverage (e.g., radio, newspaper, television): _____

Does your district encourage clubs to use RI public relations materials? YES NO

Does your district budget for public relation materials? YES NO

Future State

During my year, the district will focus on the following areas of public relations:

1. _____

2. _____

3. _____

RI CONVENTION PROMOTION

Current State

Is the RI Convention promoted in your district? YES NO

Have RI Convention materials been shared with clubs to promote the upcoming convention?

YES NO

How many Rotarians from your district attended the last RI Convention? _____

Does your district Web site have a link to RI Convention resources? YES NO

Future State

During my year, the district will focus on the following areas of RI Convention promotion:

1. _____

2. _____

3. _____

THE ROTARY FOUNDATION*

Current State

Number of grants awarded:

District Simplified Grants: _____

Matching Grants: _____

Number of Ambassadorial Scholars:

Nominated _____ Selected _____ Hosted _____

To be completed at district team training seminar

Number of Group Study Exchange team members: Nominated _____ Selected _____ Hosted _____

Number of Rotary World Peace Fellowships: Nominated _____ Selected _____ Hosted _____

Number of PolioPlus activities: _____

Amount contributed to Annual Programs Fund last year: _____ Current goal: _____

Amount contributed to Permanent Fund last year: _____ Current goal: _____

Number of Rotarians who are

Rotary Foundation Sustaining Members: _____ Paul Harris Fellows: _____

Paul Harris Society members: _____ Benefactors: _____

Major Donors: _____ Bequest Society members: _____

Arch C. Klumph members: _____

Number of Foundation alumni tracked by your district: _____

Future State

During my year, the district will focus on the following areas for:

Alumni

1. _____

2. _____

Grants

1. _____

2. _____

Group Study Exchange

1. _____

2. _____

PolioPlus

1. _____

2. _____

Rotary World Peace Fellowships

1. _____

2. _____

Other Scholarships

1. _____

2. _____

* One hundred districts will be participating in a pilot of a new grants structure for The Rotary Foundation. If your district is participating, refer to www.rotary.org/futurevision for more information.

To be completed at district team training seminar

Annual Programs Fund

Contribution goal: _____ (Note: This should be the sum of club goals as reported on the Fund Development Club Goal Report Form.)

Permanent Fund

Number of Benefactors: _____

Number of Bequest Society members: _____

Number of Major Donors: _____

TRAINING

Current State

Number of Rotarians who attended

District team training seminar: _____

Presidents-elect training seminar: _____

District assembly: _____

District Rotary Foundation seminar: _____

District membership seminar: _____

District leadership seminar: _____

Club leadership development program: _____

Number of clubs with Rotarians appointed at the district level: _____

How does the district support club trainers? _____

Future State

During my year, the district will focus on the following areas of training and leadership development:

1. _____

2. _____

3. _____

To be completed at district team training seminar

SUMMARY OF GOALS FOR DISTRICT _____

ROTARY YEAR _____

District administration goals

District conference goals

District programs goals

For the local community: _____

For communities in other countries: _____

Extension goals

Finance goals

Membership goals

Public relations goals

RI Convention promotion goals

Rotary Foundation goals

The district will participate in the following Rotary Foundation programs: _____

The district's Annual Programs Fund contribution goal is _____.

The district's Permanent Fund contribution goal is _____.

Training goals

Other goals

Worksheet 15: District Concerns

In this exercise, you will work in small groups to develop strategies to address one or more of the concerns identified by the district leadership team. Consider the following questions:

What are some of the main concerns in your district?

What is the role of assistant governors in addressing these concerns?

What is the role of district committees in addressing these concerns?

What is the role of the governor in addressing these concerns?

How can the district prevent these issues from occurring or work to solve the issues that have already occurred?

THIS YEAR
CLUBS WILL LOOK TO YOU FOR
GUIDANCE
AND **SUPPORT**

RI RESOURCES CAN HELP

- ✓ Club Committee Manuals for Administration, Membership, Public relations, Service projects, and The Rotary Foundation
- ✓ RI and Rotary Foundation Staff
- ✓ www.rotary.org (Click Members)

For additional publications refer to shop.rotary.org.



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