

ROTARY FELLOWSHIPS HANDBOOK



CONTENTS

- INTRODUCTION TO ROTARY FELLOWSHIPS 1
- ORGANIZING A NEW ROTARY FELLOWSHIP 3
 - Applying for Official Recognition
 - Completing the Application
 - Other Considerations
- KEY ELEMENTS OF A SUCCESSFUL ROTARY FELLOWSHIP 8
 - Communication
 - Meetings and Events
- DISTRICT ROTARY FELLOWSHIPS CHAIRS 12
- ROTARY FELLOWSHIPS SUPPORT 14
 - The Secretariat
 - Rotary Fellowships Committee
 - Rotary Fellowships Administrators and Officers
- ROTARY FELLOWSHIPS RESOURCE LIST 15

INTRODUCTION TO ROTARY FELLOWSHIPS

Rotary was founded on fellowship, a concept that has been expanded internationally through the Rotary Fellowships, groups that bring together members from different countries and cultures to enjoy a shared interest. In addition to fostering lifelong friendships, Rotary Fellowships keep members active in Rotary, sustaining their interest and further inspiring commitment.

The nearly one hundred Rotary Fellowships encompass a variety of vocations and avocations, ranging from sports and hobbies to professional interests — all of which serve as a way to extend international fellowship, friendship, and service. In addition to offering members an opportunity to share their passion for a particular interest with like-minded Rotarians, many individual fellowship groups enable members to use their hobbies or skills to serve others. For example, the Fellowship of Canoeing Rotarians has organized cleanups of polluted rivers, and



members of the International Computer Users Fellowship of Rotarians conduct training sessions for Rotarians and other people in their community on how to use electronic media. Members of the International Fellowship of Rotarians with Repaired Hearts — or the “Zipper Club,” as they call themselves — have provided life-saving surgeries to disadvantaged children with severe heart defects.

Rotary Fellowships began informally in 1928 when Rotarians with a shared interest in Esperanto joined together. In 1947, a group of Rotarian boating enthusiasts began flying the Rotary flag from their crafts, calling themselves the International Yachting Fellowship of Rotarians; this fellowship now boasts the longest continuous existence. The scope of Rotary Fellowships has changed much over the years, but today their common purpose is still to unite Rotarians in friendship and provide venues for enjoying their favorite recreational or professional activities.



Rotary International has established specific policies for forming a Rotary Fellowship. The RI Board of Directors evaluates and approves each new group before it receives formal recognition as a Rotary Fellowship. Each fellowship operates independently of RI, with its own rules, dues requirements, and administrative structure. Membership is open to Rotarians and, in some fellowships, to spouses and Rotaractors as well.

There are several ways to join a fellowship:

- Contact the fellowship directly. Check the RI Web site (www.rotary.org), the *Official Directory*, or the annually revised group directory (available online) for contact information for the chair or membership officer.
- Join online. Many fellowships operate Web sites that include interactive or downloadable application forms for potential members to complete.
- Fill out an interest coupon found in the group directory, online and, occasionally, in *The Rotarian*, and return it to RI World Headquarters. Secretariat staff will then distribute it to the relevant fellowship(s).
- Contact your district Rotary Fellowships chair. Many districts appoint Rotary Fellowships chairs to help promote and support the Rotary Fellowships program. This person will be able to help you find a fellowship that interests you.



ORGANIZING A NEW ROTARY FELLOWSHIP

Even with a diverse selection of fellowships to choose from, you might not find a group that interests you. If so, consider forming a new fellowship. Although organizing a new fellowship is a great challenge and requires considerable commitment, Rotarians who have done so consider it time and energy well spent. To begin, assess the need for the potential fellowship and determine whether such a group would complement and enhance opportunities already available through Rotary International, The Rotary Foundation, an existing fellowship, or even districts and clubs. To ensure greater success, confer with experienced leaders of current fellowships about the basic administrative structure and recommendations for daily operation.

Consider the following list of questions as a preliminary checklist before proceeding with a new fellowship proposal. If you can answer yes to each of them, your proposed group may be an excellent candidate for admission to the family of Rotary Fellowships.

- Are you interested in building new and lasting relationships with Rotarians in various parts of the world?
- Is the furtherance of fellowship among Rotarians the primary goal of your group?
- Does your group have additional goals that are well defined and attainable?
- Are your group's goals consistent with Rotary ideals?

- Will the focus of your group appeal to Rotarians from many different countries and cultural backgrounds and be respectful of all cultural, political, and religious differences?
- Is the focus of your group unique to the Rotary Fellowships?
- Do you have a workable plan for organizing meetings, events, or other forums of communication that will promote fellowship across regional and national borders?
- Are the leaders of your group comfortable using electronic forms of communication (e-mail and the Internet) to coordinate with fellow Rotarians?
- Are you enthusiastic about communicating your group's activities and goals with members, prospective members, and RI staff?



- Can you recruit a sufficient support base of fellowship officers who are willing to work to maintain the mechanisms of group interaction?
- Do you, as a group leader, have enough time and energy to initiate group activity and communication if other members grow apathetic or unresponsive?

Finding qualified potential members from other countries who are interested in being part of the fellowship may seem daunting. Some fellowships have overcome this obstacle by first organizing a group at the district level and then working with the fellowships chairs of districts in other countries. Other ways to identify members include contacting your club's international service partners or registering the proposed fellowship at www.rotaryfellowships.org, a Web site operated by Rotarians under the direction of the Rotary Fellowships Committee. You may also consider posting a message on the Rotary Fellowship Discussion Forum (<http://forums.rotary.org>) to invite Rotarians to join your group.

Applying for Official Recognition

All fellowships seeking recognition from RI must demonstrate support of the Object of Rotary and compliance with Rotary Fellowships criteria and other relevant RI policies. They must also receive approval from the RI Board through an application process that includes review by the general secretary and the Rotary Fellowships Committee.

A formal request for recognition must include:

- Completed application form (available from RI)
- Copy of the proposed bylaws or constitution
- List of proposed officers and their responsibilities
- Roster of potential members, representing at least three different countries

Organizers may also send additional materials, such as a list of proposed activities, proposed newsletter content, or proposed logo designs.

Once the application is received at the Secretariat, RI staff will advise the prospective chair of the dates of the Board meeting at which the application will be considered. Following that meeting, RI staff will inform the chair of the Board's decision.

Completing the Application

The application is especially important because groups that are denied recognition by the Board must wait two years to reapply. An application that pays careful attention to the following items indicates to the RI Board that a fellowship is ready for recognition.



Criteria for Recognition as a Rotary Fellowship

Applications for recognition as a Rotary Fellowship must show that the group meets the following criteria:

- The fellowship is organized internationally and has a membership base from at least three countries.
- Recognition of the fellowship does not imply any obligation on the part of RI or Rotary clubs and districts.
- The fellowship does not act on behalf of RI or imply that it has authority to do so.
- The fellowship uses the Rotary marks (the Rotary emblem and other registered trademarks of Rotary International) in accordance with RI policy.
- The fellowship is neutral with respect to religion and politics.
- The fellowship does not promote other organizations.
- Fellowship operations are financially and administratively self-sustaining.
- The fellowship complies with the laws of the countries in which it operates.
- The fellowship responds to all communications, particularly those from the Secretariat, in a timely manner.
- The fellowship supports its members by publishing a newsletter at least once per Rotary year and holds an annual forum that allows members to meet and interact.
- The fellowship agrees to submit an annual report of activities, including a financial statement, to its members with a copy to the general secretary by 1 October of each year.
- The fellowship agrees to notify the general secretary in advance of any plans to either approach other organizations for funds in excess of US\$25,000 or form other cooperative relationships.



- The fellowship agrees to obtain advance approval from the appropriate district governor(s) to request any type of cooperation from Rotarians outside the group's membership.

RI policies governing Rotary Fellowships are listed in their entirety in the *Rotary Code of Policies* (016-EN). Please refer to them when preparing your application.

Fellowship Name

While a general reference to Rotary is encouraged, certain guidelines for the use of the names Rotary and Rotary International and the initials RI must be observed.* RI encourages fellowship applicants to include the word *fellowship* in their group's name. In general, fellowships use "Rotarian(s)" at the beginning of the fellowship name or "of Rotarians" at the end (for example, International Curling Fellowship of Rotarians, Rotarian Fellowship of Quilters and Fiber Artists).

* These guidelines, outlined in the *Manual of Procedure* (035-EN), are intended to preserve Rotary's identity and integrity; please contact RI staff if you have additional questions about them.

Statement of Purpose

Clearly, a fellowship of lawyers will pursue vocational projects, while cricket-loving Rotarians will focus on recreation. However, when the fellowship's interests are less explicit, such as the Internet or convention goers groups, the group will have to decide on its focus. Specific goals and objectives should be included to keep the focus from becoming too broad. The purpose of the fellowship should not duplicate that of other Rotary International or Rotary Foundation programs or other Rotary Fellowships.

Fellowship Organization

Each fellowship establishes its own administrative structure, which may be as formal or informal as the membership wishes, provided that the basic program criteria are met. Establishing constitutional procedures from the beginning ensures an orderly change of officers.

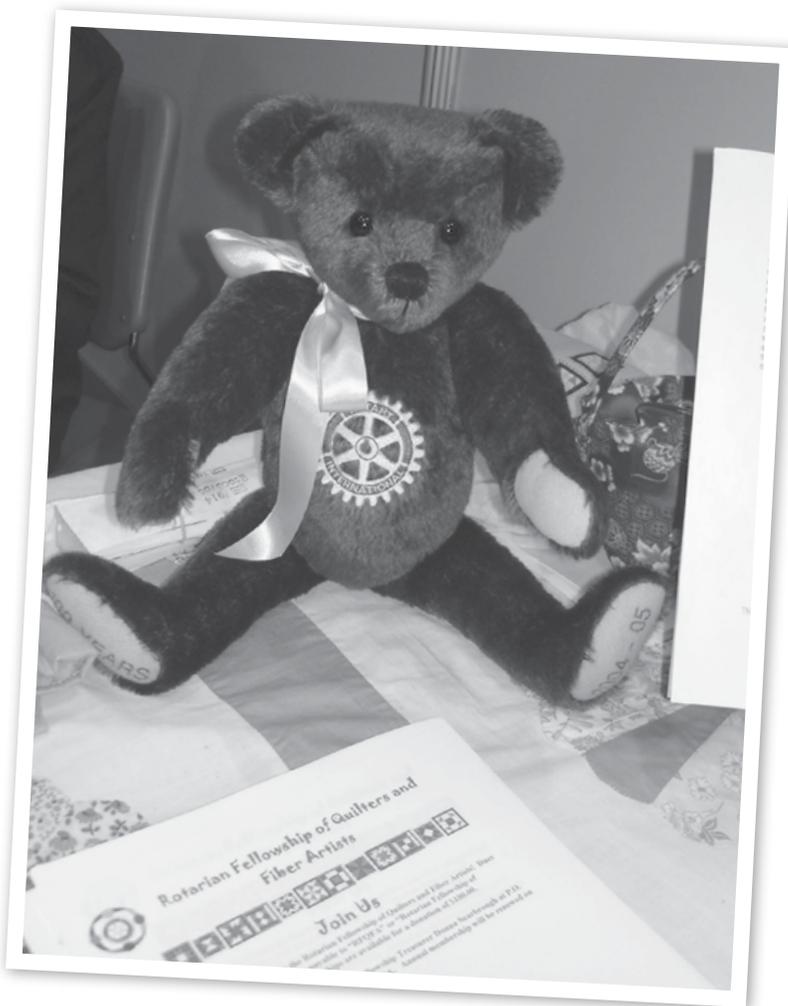
A fellowship must have a governing document, such as bylaws or a constitution, that is consistent with RI policy. This document should include:

- Statement of purpose
- Responsibilities of each officer
- Procedures for electing officers
- Membership requirements
- Dues policies

Some fellowships choose to incorporate. Policy considerations for undertaking that process are included in the *Rotary Code of Policies* (016-EN). Fellowships should *not* incorporate before being recognized by the Board and must submit proposed articles of incorporation to the general secretary in advance of such action.

Officer Responsibilities

While the administrative responsibilities depend on a fellowship's activities, the most common slate of officers includes a chair, treasurer, and membership secretary. Most fellowships select additional regional officers. The responsibilities for each officer should be balanced. Placing too much authority on a single officer could exhaust the leadership and seriously jeopardize the fellowship's success. Similarly, diffusing responsibilities among too many officers may hamper clear communication. The leadership structure should be designed to help the group remain viable for years to come.



Dues Structure

Certain costs are involved in running a fellowship, including membership communication, program promotion, and projects. Rotary International requires fellowships to be financially self-sustaining. Unless the fellowship officers bear all expenses, dues will be necessary. New fellowships generally set annual dues at \$20 or less. Established fellowships may charge a higher annual rate but offer a discount on multiyear or lifetime membership fees. Setting dues too high could discourage people from joining the fellowship and impede recruiting efforts. On the other hand, members willing to pay at least minimal dues are likely to stay involved in the fellowship.

New fellowships may wish to increase the scope and number of their activities as the membership and resulting revenues grow. The governing documents should provide a schedule for the review of the dues structure and the means to change it.

Other Considerations

In addition to determining the purpose and structure of the proposed fellowship, organizers need to consider other practical matters.

Insurance Concerns

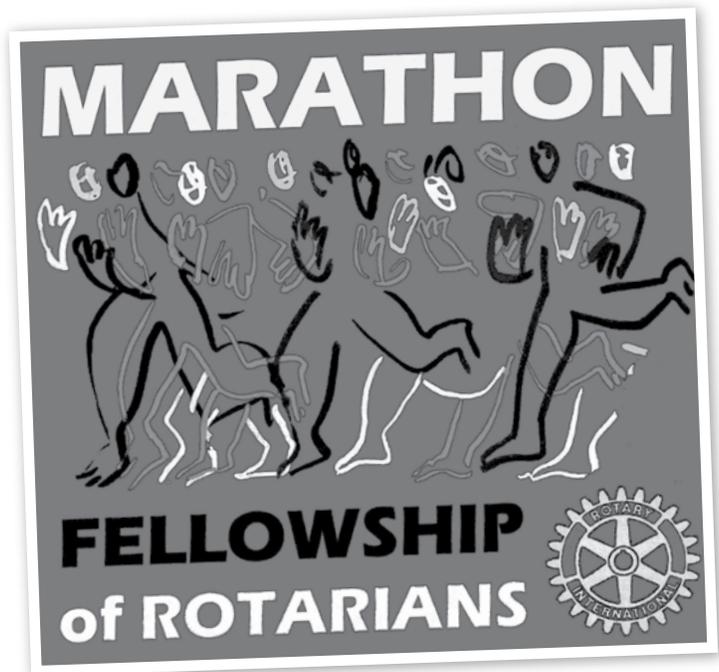
One serious consideration for individual fellowships is the matter of liability insurance. Many planned activities carry some level of risk and involve participants who aren't members of the fellowship. To avoid legal action, each fellowship must evaluate the risk of its activities against its insurance protection.

Logos and Merchandise

A fellowship logo creates a group identity and enhances awareness of the overall Rotary Fellowships program. Each fellowship is encouraged to create a logo that represents the spirit and activities of its group.

Fellowships should forward a copy of their logo to RI World Headquarters for review, to ensure that the design complies with RI guidelines, especially those governing the use of the Rotary emblem. For information on the use of the Rotary marks, refer to the *Manual of Procedure* (035-EN).

Members will likely want to display their fellowship's logo wherever possible. Hats, T-shirts, pins, banners, and stationery are just a few of the items that bear fellowship logos and are sold by fellowship officers at fellowship events. The Rotary Fellowships do not need to be licensed by RI for the sale of such merchandise, but they must follow the policies outlined in the *Rotary Code of Policies* (016-EN) when selling such items at the RI Convention and other RI events.



KEY ELEMENTS OF A SUCCESSFUL ROTARY FELLOWSHIP

Starting a fellowship is one thing, maintaining it another. To remain viable, a fellowship should have a long-term plan that addresses recruitment, activity coordination, and periodic appointment of new leaders. Two key elements for success are effective communication and meetings that bring members together.

Communication

Communication among members — whether face-to-face, through a monthly newsletter, or in online chat sessions — is central to the success of any fellowship. Effective communication helps fellowship members stay involved, which improves membership retention in Rotary as well as the fellowship itself. Communication with nonfellowship members is also essential because it helps to attract new members.



To maintain recognition, RI requires each fellowship to publish a newsletter for its current members at least once during the Rotary year. The newsletter and other important fellowship communications and documents must also be filed with the general secretary.

Technology has increased and improved possible methods of communication. Many fellowships use e-mail as the primary method of information exchange. In addition, many have created Web sites to enhance their fellowship, keep current members informed, and provide information to interested Rotarians.

Newsletter

The newsletter provides a forum for members to share information and ideas on the interest that brought them together. Circulating information among members ensures both the fellowship's productivity and membership retention. RI recommends that fellowships publish a newsletter quarterly or, at minimum, annually. The newsletter can be converted into a downloadable file and posted on a fellowship Web site, attached to an e-mail message, or mailed to members.

Publishing and distributing newsletters regionally instead of internationally is an excellent cost-saving alternative, provided that all members receive regular communication from the fellowship. As a bonus, regional newsletters may be available in various languages.

Tips for Success

- Choose a format and size that is right for your fellowship. The newsletter may be as simple as a two-page letter circulated among your membership. The key requirement is that it provides an effective forum for members to share information regularly.
- Consider rotating the responsibility for the newsletter among the officers. Compiling and distributing a newsletter is time consuming; circulating the responsibility can allow for more timely, frequent publication.
- Remember that the membership is international and includes women and men. When writing newsletter items, avoid idiomatic expressions, gender-specific language, or humor that may perplex or offend.
- Include a “Meet the Members” section. Allow space for Rotarians to write about why they joined the fellowship or fellowship activities they have especially enjoyed. This is an excellent way to foster friendships around the globe.

Send a copy of each newsletter to RI World Headquarters. This information is shared with appropriate areas of the Secretariat and with Rotarians who contact RI to learn more about the Rotary Fellowships.

Web Site

The ease of international communication provided by technologies such as the Internet and e-mail brings increased opportunities for fellowship and service. Although creating a Web site requires technical knowledge, at least one Rotarian among your membership probably has the requisite skills.

The RI Web site will link to Rotary Fellowships Web sites, provided the fellowship and its Web page are in full compliance with Rotary policy. A copy of RI’s “Guidelines for the Use of Electronic Communications” is posted on the RI Web site (www.rotary.org/support/board/epolicy.html).

Tips for Success

- Provide some general information about Rotary International and the Rotary Fellowships program to promote Rotary and its mission to the many people who surf the Internet, as well as those who are looking for specific information on the fellowship.
- Include notices of upcoming fellowship events.
- Supply a summary of your fellowship’s purpose and activities.



- Publish your fellowship newsletter online with photographs of past events illustrating how much fun Rotary fellowship can be.
- Provide a membership application, either as an interactive or downloadable form. When publishing an application online, request the applicant to provide the name of his or her Rotary club (or Rotaract club, if applicable) so that you may verify membership.
- Ensure the fellowship members' privacy. Do not post contact information or other personal information without written consent from the individuals concerned.

For more ideas, explore the existing Rotary Fellowships Web sites.

Online Discussion Forum

The RI Web site features an online discussion forum for the Rotary Fellowships program (<http://forums.rotary.org>).

This forum provides a convenient way for fellowship members and prospective members to communicate with their counterparts around the world. It is also a useful tool for coordinating the membership of new fellowships.



Meetings and Events

To optimize your group's membership growth, plan local, national/regional, and international activities. Most fellowships arrange to hold a meeting during the RI Convention.

RI Convention

Rotary International provides fellowship groups with exhibition booth space at the annual RI Convention. Fellowships are encouraged to display materials that promote their group and inform convention goers about their activities for prospective members. Since each RI Convention offers different amenities depending, in part, on the country and region of the host city, the Secretariat contacts fellowships chairs annually with details on how to request space.

Fellowships Events

Fellowships gatherings reflect the nature of the group. Sporting fellowships such as curling, golf, and cricket hold regional matches and world tournaments. Cycling, horseback riding, caravanning, and other mobile fellowships plan trips. And vocational fellowships often congregate at professional conferences and seminars.

Fellowships are also encouraged to support district activities related to their fellowship's purpose. In addition, Rotary Fellowships may "sponsor" a district-initiated event, such as a golf tournament or a vocational training project. (Such sponsorship would not necessarily involve financial backing.) Both the fellowship and the district benefit from such joint ventures.

Tips for Success

- Elect coordinators and secretaries for each large fellowship event. These officers serve as the primary contacts for assisting members in arranging local, regional, and international events.
- Notify members far enough in advance of events to ensure high participation, especially for international interfellowship events.
- Provide the host district's Rotary Fellowships chair with information for distribution within the district — a helpful tool for recruiting new members.
- Schedule events during June, Rotary Fellowships Month on the RI calendar, or other appropriate Rotary-designated months to highlight the fellowship's activities.

DISTRICT ROTARY FELLOWSHIPS CHAIRS

District Rotary Fellowships chairs are appointed by district governors to facilitate communication between the Rotary Fellowships and the Rotary clubs within the district and to spread the word about the benefits of participating in fellowships. The district Rotary Fellowships chair also works with Rotarians in the district to prepare applications for recognition.

Suggestions for District Rotary Fellowships Chairs

- Visit clubs and give a presentation on the Rotary Fellowships. Ask fellowship members in the audience to speak briefly about specific fellowship activities and upcoming events. Take this opportunity to distribute a handout and sign up new members on the spot.

- Publicize Rotary Fellowships events taking place in your district.
- Create a district fellowship award to be given to the Rotary club with the most Rotary Fellowships activity. Emphasize that in addition to building friendships, participation in the Rotary Fellowships program helps clubs retain members.
- Confer with chairs of the district membership development committee to bring new, internationally minded members into Rotary. Notify the chair of the public relations committee about interesting or unusual fellowships activities planned for the district.
- Request that Rotary Fellowships events occurring in the district be promoted in the governor's monthly letter or on the district Web site.
- Offer assistance in recruiting new members to those fellowships in your district with low membership.
- Request booth space or time on the district conference program for the Rotary Fellowships program or facilitate participation by fellowship groups at the conference (some district governors allow up to half an hour for various fellowships at the district assembly or district conference).
- Seek out Rotarians who are outstanding in their professions, enthusiastic about a hobby, or involved in service projects, and direct them to corresponding fellowships.



- Inform individual fellowships of appropriate service activities. For example, if a Rotary club is holding a community health fair, contact fitness- or health-related fellowships.

District and Regional Fellowships Activities

Districts are encouraged to collaborate on a regional basis to promote fellowship among Rotarians. Although these partnerships aren't officially recognized by the RI Board, they are operated as district or multidistrict activities under the direction of district governors. Some examples of such groups include clubs that focus on a hobby or interest (dinner clubs, fair-trade tea, coffee clubs, book clubs), sports or tournaments, and vocational networks.



ROTARY FELLOWSHIPS SUPPORT

The following resources are available for fellowship organizers and leaders who need information about policies, promotional tools, and best practices related to the Rotary Fellowships program.

The Secretariat

RI staff can field general inquiries about the Rotary Fellowships program and refer interested Rotarians to specific fellowships, often by means of the Rotary Fellowships interest coupon. This one-page form, found at the back of the group directory, on the RI Web site, and in occasional issues of *The Rotarian*, lists all active fellowships. Interested Rotarians indicate which fellowships they'd like to learn more about or join and return the coupon to RI World Headquarters for distribution to the appropriate fellowship(s). The coupon is circulated throughout the Rotary world and is the program's most widely used promotional tool.

In addition, the Secretariat e-mails fellowship officers periodically with current news about the program. Some updates will be distributed in the form of an e-mail newsletter. These may include comments from fellowship officers and members and may offer advice on issues such as promotion, recruitment, and event planning.

June is designated as Rotary Fellowships Month to focus attention on the Rotary Fellowships program throughout the Rotary world. During this month, feature stories promoting fellowship activities usually ap-

pear in the Rotary World Magazine Press and on the RI Web site.

The Rotarian and *Rotary World* occasionally include articles featuring individual Rotary Fellowships. Fellowships are encouraged to submit articles and photographs of their activities. Stories with a timely or unique angle and photographs that show members in action are more likely to be featured.

Rotary Fellowships Committee

The RI president traditionally appoints a group of Rotarians who have been involved with fellowships to the Rotary Fellowships Committee to support the development of the program, provide advice to the RI Board, and review applications for new fellowships. Most committee members are actively involved in one or more fellowships and are happy to share their experiences. Consult the *Official Directory* (007-EN) on file in your club secretary's office for a list of members and their contact information.

Rotary Fellowships Administrators and Officers

The officers of fellowships can provide a wealth of advice. Some fellowships have been in operation for more than 60 years, and their leaders are knowledgeable about the best ways to promote the fellowship and resolve problems. Consult the group directory for a list of officers and contact information.

ROTARY FELLOWSHIPS RESOURCE LIST

Publications and materials can be ordered from RI Publications Order Services or the international office serving your area; consult the *RI Catalog* (019-EN) for prices for the following items. Materials may also be ordered online by clicking the Shop button at www.rotary.org.

Note: Publication codes appear in parentheses. An asterisk (*) indicates a print publication that is also available online.

Communities in Action: A Guide to Effective Projects* (605A-EN)

This booklet offers step by-step instructions on how to develop, carry out, and evaluate a service project, including information on conducting a community-needs assessment and working with other organizations.

A Menu of Service Opportunities* (605B-EN)

This packet of information on recommended types of service projects for clubs and districts is a companion piece to *Communities in Action: A Guide to Effective Projects*. It provides an overview of each of the nine suggested service areas and gives examples of successful club projects in each area.

Manual of Procedure* (035-EN)

Updated every three years, this publication lists the policies and procedures established by legislative action, the RI Board of Directors, and the Trustees of The Rotary Foundation. The *Manual of Procedure* is an excellent reference for every Rotarian. It includes issues relevant to fellowships, such as the proper use of the Rotary marks and merchandising.

Rotary Code of Policies* (016-EN)

Revised annually, the Rotary Code of Policies is a compilation of Rotary International policies, as determined by RI Board decisions, and is available on compact disc.

Global Networking Groups Directory

This publication lists all of the officers and contact information for each Rotary Fellowship and Rotarian Action Group. It is available for download at www.rotary.org.

List of district Rotary Fellowships chairs

An annually revised list of district Rotary Fellowships chairs appointed by district governors is available to Rotary Fellowships officers, district chairs, and district governors. To request a copy, contact RI staff (e-mail: rotaryfellowships@rotary.org; telephone: 847-866-4494).

www.rotary.org

The official RI Web site provides information about the Rotary Fellowships program in the RI Programs section of the site. The Rotary Fellowships Web page features links to individual fellowship sites.

www.rotaryfellowships.org

This Rotarian-administered Web site, which operates under the guidance of the Rotary Fellowships Committee, is an excellent resource for promoting existing fellowships as well as the overall Rotary Fellowships program. The site also maintains a list of fellowships under formation to help build interest and potential membership as the group prepares to apply for RI Board recognition.



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