

# Club Service Projects Committee Manual

A part of the *Club Officers' Kit*

ROTARY INTERNATIONAL®



This is the 2009 edition of the *Club Service Projects Committee Manual*. It is intended for use by 2010-11, 2011-12, and 2012-13 club committees. The information in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, and the Rotary Code of Policies. Please refer to those resources for exact guidelines. Changes to these documents, by the Council on Legislation or the RI Board, override policy as stated in this publication.

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# Introduction

The *Club Service Projects Committee Manual* was developed to help Rotary club service projects committees worldwide establish goals and understand their responsibilities related to increasing club effectiveness. Because committee responsibilities vary according to area laws, cultural practices, and established club procedures, you should adapt the suggestions in this publication to fit your club's needs. Throughout the manual, cultural differences in Rotary clubs are highlighted in Around the World boxes, while general tips are offered in the Rotary Reminder boxes.

This publication includes three chapters. The first describes the major responsibilities of your committee. The second describes responsibilities specific to you as the chair of the committee. The third contains resources that may be useful for you and committee members. Following the third chapter are the appendixes, including the club service projects section of the *Planning Guide for Effective Rotary Clubs* and a list of discussion questions, as well as the worksheets that will be used at the district assembly.

You should use this manual to prepare for your role as service projects committee chair. Bring it with you to the district assembly, and review its contents beforehand. Pay particular attention to the questions in appendix 2, 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 your fellow club officers and members.

Under the Club Leadership Plan, the recommended administrative structure of Rotary clubs has the following five standing committees:

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



## **Rotary Reminder**

Committee chairs should make copies of chapter 1 and distribute to committee members so they are fully aware of the committee's responsibilities.

Each committee has a manual which provides an overview of the committee and its responsibilities, as well as resources available to support you and your committee members. Information pertinent to your committee members should be distributed or communicated to them. Additional copies of this manual can be downloaded for free at [www.rotary.org](http://www.rotary.org). This manual is part of the *Club Officers' Kit* (225-EN). However, each manual can be purchased separately through the *RI Catalog*.

As you prepare to help lead your club, remember that your Rotary club is a member of Rotary International. Through this membership, it is linked to more than 33,000 Rotary clubs worldwide and granted access to the organization's services and resources, including publications in nine languages, information at [www.rotary.org](http://www.rotary.org), grants from The Rotary Foundation, and staff support at world headquarters and the seven international offices.

### **Comments?**

If you have questions or comments about this manual or any of RI's training resources, please direct them to:

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# Committee Role and Responsibilities



## Rotary Reminder

The club service projects committee's work will address the Community, Vocational, and International Avenues of Service.



Service Above Self is Rotary's principal motto, which means that every Rotarian is responsible for finding ways to improve the quality of life in his or her community and in those around the world through service.

The role of the club service projects committee is to help develop and implement educational, humanitarian, and vocational service projects that help your community and communities in other countries.

The responsibilities of the club service projects committee summarized below are explained further in this chapter:

- Develop committee goals to achieve club service project goals for the coming year.
- Conduct service projects that include assessments, planning, and evaluation.
- Create a balanced program of service.
- Work with other organizations, volunteers, and committee members to maximize the impact of your projects.
- Lead fundraising efforts to fund projects.
- Understand liability issues that affect your club projects and activities.

As you read more about these responsibilities below, think about your committee goals, what your action plan will be, and what resources you will need for your year.



## Rotary Reminder

Subcommittees can be created to manage the committee's various responsibilities, especially if you have a large club.



### **Rotary Reminder**

For more detailed information about conducting a service project, see *Communities in Action: A Guide to Effective Projects* (605).

## **Conducting Service Projects**

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The service projects committee is responsible for conducting service projects that ensure the proper use of club funds and Rotarian time and that benefit those in need. A systematic approach has been developed to help you achieve such service projects.

For each step outlined below, determine which committee member is responsible for its implementation, develop a timeline, establish criteria for measuring progress, and consider the resources and tools available to support you. You may need to change the order of the list when adapting it to use in your club. For a quick checklist of steps, see worksheet 5.

### **1. Assessing the situation**

Successful service projects must be relevant and address real and current community concerns. Conduct a needs assessment to determine which community needs your Rotary club can address.

Take a positive approach to assessing the community's situation, examining resources and solutions that can help facilitate your project. Many assessments tend to focus only on the community's deficits, which can draw attention away from its assets. Consider what projects have worked well in the past and why they succeeded.

Also assess your club's ability to achieve a project. Talk to members about the time they are willing to commit, the resources they are willing to contribute, their interests, and their skills.

### **2. Choosing a project**

The assessment provides information that clubs should use to choose a service project. There are some potential concerns that clubs should consider before choosing a project, including the club's history of service, time and resources, your community's support and involvement, your project's duration and sustainability, and your partners in service.

### **3. Making a plan**

Once your club has chosen a project, it's time to start planning. The service projects committee oversees all of the club's service efforts and is responsible for appointing subcommittees or coordinators for each of the various tasks:

- Setting goals and objectives
- Developing a work plan
- Developing a budget
- Liability and protection

### **4. Taking action**

Clubs should rely on their project plans when implementing the project. Taking action requires raising funds for the project, managing its activities, and promoting it. Work with your club's public relations committee to promote your project.

## 5. Evaluating success

Evaluation plays an important role in your club's current service projects and its future projects. Knowing what worked and what didn't helps you learn and grow from the experience. After evaluation, you will need to write a report. Finally, don't forget to celebrate your success to recognize the hard work, time, and financial contributions of all involved.



### **Rotary Reminder**

Rotary International provides resources to implement all of its programs. Visit [www.rotary.org](http://www.rotary.org) for more information.

## Creating a Balanced Program of Service

Rotary International and The Rotary Foundation provide resources to help your club select service projects and achieve service goals. When developing service projects, consider the following:

- The Avenues of Service: Club, Community, Vocational, and International
- Presidential citation program and emphases
- RI Strategic Plan and specific service areas identified by the RI Board
- The mission of The Rotary Foundation and its associated areas of focus
- Community needs assessments

**RI and Rotary Foundation programs.** Rotary International offers a broad range of humanitarian, intercultural, and educational programs and activities designed to improve the human condition and advance the organization's ultimate goal of world understanding and peace. The RI Structured Programs and the Global Networking Groups help clubs and districts achieve their service goals in their own communities and those abroad, fostering fellowship and goodwill in the process.

Rotary International programs include the following:

- **Interact** — Service club for young people ages 14-18
- **Rotaract** — Service club for young men and women ages 18-30 sponsored by their local Rotary club
- **Rotary Community Corps (RCC)** — Service group of non-Rotarian adults sponsored by their local Rotary club
- **Global Networking Groups** — Individual Rotarians organized internationally in groups, either Rotarian Action Groups or Rotary Fellowships, that focus on shared topics of interest
- **Rotary Friendship Exchange** — Promotes building international relationships that can evolve into international partnerships for service projects
- **Rotary Volunteers** — Provides opportunities for Rotarians and other skilled professionals to offer their services and expertise to projects in need of assistance
- **Rotary Youth Exchange** — Promotes international understanding and peace among students ages 15-19
- **Rotary Youth Leadership Awards (RYLA)** — Training program for young people, emphasizing leadership, citizenship, and personal growth



### Rotary Reminder

Rotary International provides resources to implement all of its programs. Visit [www.rotary.org](http://www.rotary.org) for more information.



### Rotary Reminder

For approximately 100 Rotary districts and their clubs, Rotary will be using a new grants structure as part of the Future Vision Pilot. For more information, see [www.rotary.org/futurevision](http://www.rotary.org/futurevision).

- **World Community Service (WCS)** — Joint community service project of Rotary clubs from two or more countries

The Rotary Foundation also offers local, national, and international humanitarian, educational, and cultural programs.\* These programs provide access to resources that can significantly improve your club's service projects:

- **Humanitarian Grants Program** — Supports clubs and districts as they undertake humanitarian service projects
- **Educational Programs** — Foster peace by building understanding through person-to-person contact, friendship, study, and cross-cultural exchange
- **PolioPlus** — Supports global polio eradication efforts

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

The basic strategies for carrying out local service projects can be applied to international service projects. However, because at least two clubs in different countries must work together, communication is even more critical to a project's success.

World Community Service (WCS) is an excellent way for clubs to participate in projects internationally. ProjectLINK, a searchable database at [www.rotary.org](http://www.rotary.org), is available for both Rotary clubs with local community service projects seeking an international partner and clubs interested in supporting an international project. Many projects can qualify for funding from The Rotary Foundation.

To participate in an international project, clubs need to find an international partner. You can approach this in various ways:

- Explore ProjectLINK at [www.rotary.org](http://www.rotary.org).
- Speak with your district's WCS committee chair.
- Contact your district Rotary Foundation committee chair, and explore the Foundation's Humanitarian Grants Program.
- Network with fellow Rotarians at district and international meetings.
- Observe what other organizations are doing around the world.
- Reach out to fellow Rotarians on the Internet.

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\*See the *Future Vision Addendum to the Club Officers' Kit* to see how your committee is affected if your club is in a pilot district.



### **Rotary Reminder**

Sources for funds for projects include:

- Donors
- Rotary Foundation
- ProjectLINK
- District

## **Fundraising**

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A successful fundraiser can support projects that make a real difference in people's lives. Without the appropriate funds, your project will not be effective. Use your project budget to determine the funds needed. Your club may choose to organize a fundraiser, or you may need to turn to outside funding sources. To raise the necessary funds for your project, create a fundraising plan. Use worksheet 6 to plan your fundraising efforts for the year.

Club fundraisers are a collaborative effort that involves club leaders, the club secretary or treasurer, and often several club committees. Most successful fundraisers involve the following steps:

### **1. Determine fundraising needs.**

- Define the purpose of the possible fundraising activity.
- Decide the type of event appropriate to meet the club's funding needs.

### **2. Establish a budget.**

- Evaluate funding available in the club budget.
- Determine expenditures required to conduct the fundraiser.
- Estimate anticipated revenues.
- Set a fundraising goal.

### **3. Identify available resources and the resources required to meet fundraising goals.**

- Determine the human resources needed to plan and implement the fundraiser.
- List donated goods and services for the fundraising effort.

### **4. Figure out logistics.**

- Choose an appropriate date and venue for the event.
- Make necessary reservations and arrangements.
- Establish a timetable for each step involved.
- Ensure compliance with local and national laws.

### **5. Organize volunteers.**

- Determine roles and tasks for volunteers.
- Involve community members.
- Involve friends, family, and business associates.

### **6. Publicize the event.**

- Develop promotional strategies.
- Determine the most effective way to publicize the event.
- Identify the target audiences in both the club and in the community.
- Consider seeking the attention of the local media.

### **7. Conduct the fundraiser.**

- Follow the detailed event timeline.
- Encourage volunteers to monitor progress, noting successes and challenges to be discussed during evaluation.

### **8. Manage funds in a professional manner.**

- Set up a tracking procedure before collecting any funds.
- Deposit funds in an account opened for the event.
- Account for all contributions and expenditures.
- Issue a report on the allocation of the funds raised.

### **9. Recognize volunteers and contributors.**

- Publicly recognize volunteer efforts during club meetings and at the event itself.
- Follow up with personalized thank-you notes, photos, or plaques, if appropriate. You may wish to thank sponsors via the media.

### **10. Evaluate the effort.**

- Discuss the event with the fundraising organizing committee, club president, and other club leaders.
- Record lessons learned so they can be applied to future fundraisers.
- Share ideas and experiences with other clubs and Rotary International.

### **11. Ensure continuity for future fundraising efforts.**

- Review club fundraising records with incoming club leaders or the club treasurer.
- Turn over any funds, books of account, records of club property, or electronic files to appropriate club members.
- Discuss any outstanding issues with the incoming treasurer and new members of the fundraising organizing committee.

If a fundraiser is particularly successful, funding goals may be exceeded. Make sure you have a contingency plan, such as placing funds in an account for future community service projects, expanding ongoing projects, funding new projects, or contributing funds to The Rotary Foundation. If the fundraiser doesn't achieve its funding goal, consider seeking financial assistance from other groups in the community that may support the project goal. If you cannot secure additional funding, consider changing the scope of your project.

**Commercialization and circulation.** Rotarians are prohibited from using the *Official Directory* of Rotary International as a commercial mailing list or making it available to anyone for commercial purposes. The *Official Directory* is copyright protected. No organization may circularize (conduct a mass mailing requesting financial or volunteer support) to Rotary clubs. Please ensure that you share this information with members of your club to avoid any abuse of the policy.



### **Rotary Reminder**

Beware of e-mails that use Rotary language and ask for passport or other personal identifying information. They are often fraudulent and should be disregarded. Before providing any personal information in response to an e-mail, confirm the sender's identity and the reason for the request via separate e-mail or a phone call.

Under limited circumstances, it is permissible to circularize other clubs about matters that do not affect business interests, with these stipulations:

- A Rotary club that wants to request cooperation from another club in connection with any matter whatsoever must first request permission from the governor(s) to contact the clubs and state the purpose of the contact. A club wishing to contact only one club, however, does not need the governor's permission.
- Before requesting financial aid from any other Rotary club or individual Rotarians other than its own members, a Rotary club must first request permission from the RI Board.
- Requests from clubs for cooperation and assistance with World Community Service activity are not subject to these rules about circularization when they are only contacting one or a limited number of districts or clubs.

## **Risk Management**

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Risk management is the process of planning, organizing, leading, and controlling an organization's activities to minimize the adverse effects of accidental losses. As members of the service projects committee, you are in a position to minimize risk and safeguard your club's members and assets. Liability issues and potential penalties are geographically specific, and it is your responsibility to learn the laws regarding financial practices and to make sure your club abides by them. Limit your personal liability and that of your club by answering three basic questions when planning service projects:

- What can go wrong?
- If something goes wrong, how will I or the club respond?
- How will any losses be paid for?

If there is a significant possibility that something will go wrong, you can reduce risk by

- Not conducting the activity or event
- Modifying the activity or event to lessen the risk
- Preparing a plan to address any potential problems
- Finding another organization that will agree to participate and share the risk

Though conducting business through handshakes or verbal agreements may be common, RI strongly recommends that your club use written and signed contracts. A contract attempts to clearly define the roles and responsibilities of each party and can include provisions to limit risk. When negotiating a contract, read it thoroughly to understand what you are agreeing to, and seek legal counsel if necessary. Retain legal documents after the event in case a claim is made.

**Insurance and incorporation.** Clubs are urged to obtain the advice of legal and insurance counsel regarding liability protection, which may come through the incorporation of the club or its activities or through the purchase of liability insurance. If a club chooses to incorporate itself or an activity, the articles of incorporation must include certain general provisions approved by the RI Board of Directors; these provisions are listed in the *Manual of Procedure* (2007 edition, page 9). The articles of incorporation should be submitted to RI through your Club and District Support representative. Contact your representative for more information on incorporation in your area.

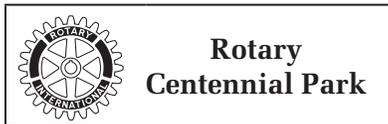
**Rotary Marks.** Clubs are welcome to use the Rotary name in the name of their projects, programs, and activities as long as your club name is used immediately following or preceding the Rotary name. Clubs may use the Rotary emblem in conjunction with such activities, as long as the club identifier is used in close proximity to the emblem, given equal prominence, and is correctly reproduced.



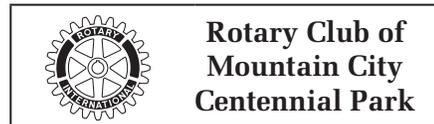
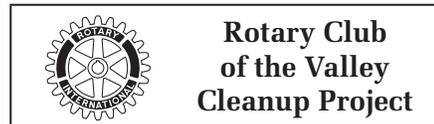
**Rotary Reminder**

For more information on the use of the Rotary emblem and other marks, see the *Club President's Manual* or the *RI Visual Identity Guide*, available at [www.rotary.org](http://www.rotary.org).

**INCORRECT**



**CORRECT**



Work with the public relations committee in your promotional efforts.

**Youth protection.** Ensure that planning for any club service project involving young people includes adequate youth protection elements, such as volunteer screening, selection, and training. Refer to specific youth protection policies for the Rotary Youth Exchange program and for any project that involves travel for minors.

# Club Service Projects Committee Chair



To prepare for your term as committee chair, learn what will be expected of you and your committee by the club's board of directors and members, your district, and Rotary International. It is recommended that you assist the outgoing club service projects chair before taking office to better understand your role. Ask questions such as:

- What is your role as committee chair?
- What kinds of projects can be conducted that have a maximum impact on the community?
- What fundraisers can we hold to ensure appropriate funding for projects?
- How can you help committee members do their job?
- What are your committee's long-range and annual goals?



### **Rotary Reminder**

Answer discussion questions in appendix 2, and discuss them with your peers from other clubs at the district assembly.

As chair of your committee, you are responsible for ensuring that your committee does its job well. There are several things you should do before you take office to prepare for your role. In addition to attending your training sessions at the district assembly, you should

- Review this entire manual.
- Review your club's bylaws to become familiar with your club's procedures and regulations.
- Select your committee members with the president-elect.
- Prepare your committee members for the coming year.

- Create subcommittees if needed.
- Develop committee goals to achieve club's service projects goals.
- Develop a communication plan for the year.
- Review and establish club long-range and annual goals with the president-elect.

Good preparation will lead to a productive year. Once you have taken office, you will have the following major responsibilities as committee chair:

- Manage your committee's budget.
- Work with other committees in your club and your district committee on multiclub activities or initiatives.
- Plan and conduct regular committee meetings and activities.
- Monitor status toward your committee goals, and report committee activities and progress to the club president, board of directors, and the full club.

Consult the outgoing club service projects committee chair for duties that may be specific to your club. Developing your own list of regular duties will help keep you and your committee organized and on task. The major responsibilities listed above are described below.



#### **Rotary Reminder**

The club president serves as an ex officio member of all club committees.

## **Your Committee**

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Work with the president-elect to select committee members to fill vacancies and conduct planning meetings before the start of the year. When feasible, committee members should be appointed to the same committee for three years for continuity. Committee members should be enthusiastic about hands-on service projects. Committee membership should be balanced among members who know the socioeconomic conditions of the community, who excel at project management, and who have specialized knowledge in the specific service area. Consider involving new members on this committee, because it provides an opportunity to experience what Rotary is all about and increase retention in your club. When selecting new members, consider the following important characteristics:

- Profession related to service
- International study or travel experience
- Community volunteer experience

Once your committee is formed, it is your responsibility to prepare it for the coming Rotary year. You can prepare committee members by

- Informing new members of the committee's ongoing activities and plans related to the club's strategic plan
- Pairing new committee members with more experienced ones
- Encouraging communication with counterparts in other clubs using the district directory
- Sharing the resources available to your committee
- Giving members a list of district activities and meetings



### **Around the World**

Clubs vary in size and goals and can structure their committees accordingly.



### **Rotary Reminder**

Various planning tools are available to clubs, including the *Club Leadership Plan*, the *Strategic Planning Guide*, and the *Planning Guide for Effective Rotary Clubs*.

## **Subcommittees**

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Depending on the size and goals of your club, the service projects committee can be divided into subcommittees such as those listed below or others as determined by your club:

- Vocational
- Educational
- Community
- International
- RI programs (such as RYLA, WCS, or Rotaract)
- Fundraising for club projects

Determine how to best utilize the skills and interests of your members and assign tasks accordingly. Hold committee members accountable for the responsibilities they have assumed, and recognize them for their hard work.

## **Goal Setting**

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As the chair of your committee, you are responsible for ensuring your committee sets and achieves its goals. Committee goals should be based on the long-range and annual goals of your club. Think about your club's strategic plan, and what your committee can do to help it achieve its vision.

The *Planning Guide for Effective Rotary Clubs* is a goal-setting tool that helps the club president-elect work with club committees to assess the current state of the club and establish annual goals that support the club's long-range goals for the year. The planning guide has a section for each of the recommended club committees that you should bring to the district assembly, where you'll have an opportunity to work on it with your club president-elect and other incoming club leaders. The *Planning Guide for Effective Rotary Clubs* can be used throughout the year to help measure progress toward established goals. It should be reviewed periodically and updated as needed.

**Effective goals.** To ensure that the goals established are effective, be sure that they accurately reflect committee capabilities and club interests. Goals should be

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it. Consult with club leaders, club members, and district leaders in setting a goal.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available. Compare goals to previous goals achieved by the committee and the club.
- **Time specific.** A goal should have a deadline or timeline.

**Action plan.** Work with club leaders and committee members to develop an action plan that outlines the steps needed to achieve each goal. The following steps can help you develop an action plan:

- Establish a time frame for each step.
- Determine who is responsible for implementing each step.
- Establish the criteria for measuring progress and success for each step.
- Consider the resources and tools available from your club, district, and RI to support the goal.
- Secure human, informational, and financial resources before taking action.
- Evaluate the success of previous goals and your current plan, making modifications as necessary.

Regularly evaluate your goals to ensure steady progress is being made toward achieving goals as envisioned, and adjust if necessary.

**Motivation.** It is important to remember that Rotarians are volunteers, and their involvement is dependent on personal motivation. Part of your responsibility as committee chair is keeping committee members motivated. Common motivators include:

- Belief that the goal will benefit the community and their club, district, and Rotary
- Opportunities for fellowship
- Opportunities for networking
- Belief that the goal is achievable and they will be successful
- Assignments that challenge or use their expertise
- Recognition of efforts and time spent working toward committee goals

Using these motivating factors can help maintain member commitment to Rotary and encourage continued participation in club activities.

## **Budget**

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Before 1 July, work with your committee and the club treasurer to determine what funds your committee will need to achieve its goals. Also include any planned fundraising activities. Ensure your committee's financial needs are included in the club budget.

Provide oversight of committee funds, transactions, and reports, and be aware of the financial condition of your committee's budget at all times. By meeting regularly with your club's treasurer, you can take early corrective measures if issues arise.

## Communication

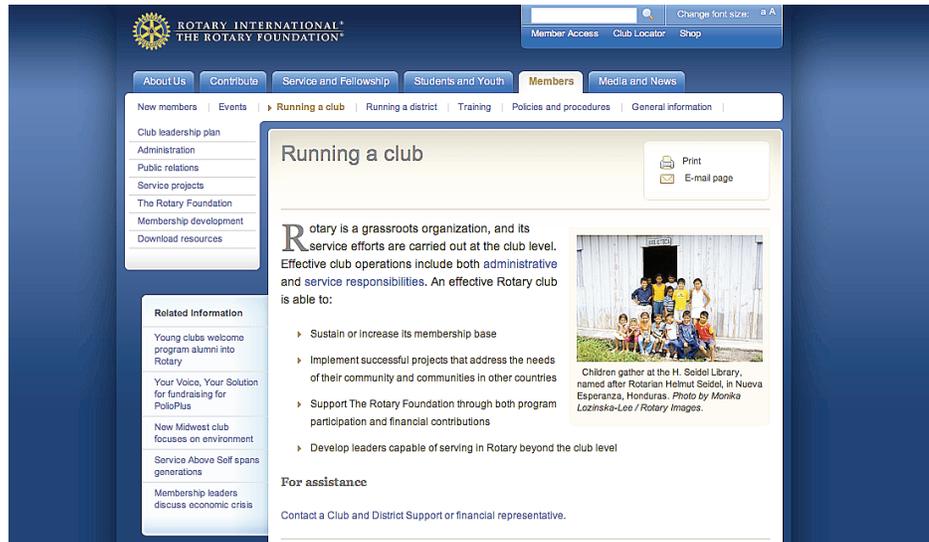
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Before the start of the year, develop a communication plan with other club leaders that outlines with whom, when, and how you will communicate, including communications with:

- **Committee members.** Committees should meet regularly to review and identify available resources, discuss ongoing projects and new initiatives, and develop strategies to achieve committee and club goals.
- **Your club.** Report your committee's activities, including action plans and progress toward goals, to your club's president, board, and all club members.
- **Other committees.** Often, the work of one committee affects the work of another. Effective communication will help committees work together to coordinate projects and initiatives. The club service projects committee should work with the following club committees to meet club service project goals:
  - Rotary Foundation committee (to identify how the Foundation can serve as a resource to achieve service goals)
  - Public relations committee (to ensure timely promotion of club service projects and member participation)
  - Membership committee (to ensure that all members are involved, especially new members)
  - Club administration committee (to highlight service projects in the club bulletin or to submit successful projects to *The Rotarian* or your Rotary regional magazine)
- **Your district.** If your committee needs guidance or information, contact your district counterpart or your assistant governor.



# Resources



There are many resources available to help your committee fulfill its role. Take advantage of the informational resources produced by Rotary International, the information on the RI Web site, and from fellow Rotarians and RI staff who may be able to answer your questions.



### Rotary Reminder

Download publications at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

## Informational Resources



**Communities in Action: A Guide to Effective Projects** (605-EN) — Guide for planning, conducting, and evaluating a service project.

**Community Assessment Tools** (Web only) — Excellent resource for identifying effective service projects within the community.

- District directory — Listing of district leaders and activities (if your district produces a directory).
- *Interact Handbook* (654-EN) — Guide for organizing and administering an Interact club.
- *Planning Guide for Effective Rotary Clubs* — Club assessment and goal-setting tool used to plan service projects goals.
- *Rotaract Handbook* (562-EN) — Guide to organizing and developing a Rotaract club.

- *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* (Web only) — Guide to arranging 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.
- Standard Rotary Club Constitution — Constitutional document that is a framework for Rotary club operations.
- *The Rotary Foundation Quick Reference Guide* (219-EN) — Compilation of the programs and services of The Rotary Foundation in a quick reference format.
- *World Community Service: A Guide to Action* (742-EN) — Information on the program, including overviews of donations-in-kind projects and Rotary Volunteers, as well as Rotary Foundation grant programs.
- *Youth Exchange Handbook* (746-EN) — Guide to operating a Rotary Youth Exchange program.



### Rotary Reminder

The RI Web site provides online resources and current information on all aspects of Rotary. Download free publications, shop the online catalog, or locate the meeting time and place of any Rotary club.

## www.rotary.org

The Service and Fellowship section of the RI Web site is your first stop for resources to support service projects. It is organized around three primary activities: starting a project, finding project resources, and funding a project:



**ProjectLINK** — Searchable database that lists Rotary club and district community service projects in need of funding, volunteers, donated goods, or partners for a Rotary Foundation Matching Grant, as well as completed projects that can be used as examples of best practices.

- Global Networking Groups Directory — Listing of all Rotary Fellowships and Rotarian Action Groups, their purpose, and contact information.
- Rotary Code of Policies and Rotary Foundation Code of Policies — Policies and procedures established by the RI Board of Directors and the Trustees of The Rotary Foundation in support of the RI Constitution and Bylaws, revised following each Board or Trustees meeting.
- Rotary Volunteers Database — Listing of Rotarians, Rotaractors, Rotary Foundation alumni, and non-Rotarians who are willing to serve abroad.
- The Rotary Foundation (click the About Us tab) — Current information on Rotary Foundation programs including grant information to address different service needs and funding options. Many publications are available for free download.

Additional information to support service projects can also be found in the following sections:

- Awards section — RI and Rotary Foundation awards and recognition programs, including Best Cooperative Projects Award and the Significant Achievement Award.
- RI Programs publications — Click the RI Programs link at [shop.rotary.org](http://shop.rotary.org) to find all current publications. Most are available for free download.
- RI Programs newsletters — E-mail newsletters in support of RI structured programs and the Avenues of Service. Check the Newsletters tab under Media and News for subscription information.
- Running a Club (click the Members tab) — Aimed at helping club leaders gather information about effective club operations, including links to club administration, membership, public relations, service projects, and Rotary Foundation information and to club-level resource pages.

## Human Resources

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Find contact information in the *Official Directory*, at [www.rotary.org](http://www.rotary.org), or from your district governor.

- Assistant governor — Rotarian appointed to assist the governor with the administration of designated clubs. Your assistant governor will visit your club quarterly (or more often) and is available to answer questions or provide advice.
- District programs committee — Rotarians appointed to support clubs as the primary service projects resource for your district. Direct specific service project questions to this committee.
- District governor — RI officer responsible for advising your club on strategies to make your club more effective.
- Other club committee chairs in your district — Club leaders who can serve as a resource to help support your club's projects and initiatives.
- Past club committee chairs and leaders — Knowledgeable Rotarians who can advise you as you plan your year and can be assigned to lead committee activities.
- RI Programs and Foundation staff — Staff members at RI World Headquarters available to answer questions related to the RI Structured Programs and Global Networking Groups.
- RI resource groups — Groups of Rotarians appointed by the RI president to assist Rotary clubs and districts with the presidential emphases.

## Financial Resources

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- Club fundraisers
- Funds from individual donors or local businesses
- Grants from other foundations
- Rotary Foundation grants for club and district humanitarian projects

# Appendix 1: Club Service Projects Section of the *Planning Guide for Effective Rotary Clubs*

August 2009

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](http://www.rotary.org).

## 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:**

# Appendix 2: District Assembly Discussion Questions

Reviewing this manual before you attend the district assembly will help you prepare for your training, which will include facilitated discussion sessions that address the questions below. When considering the questions, refer to earlier sections in this manual, and talk to outgoing and incoming club leaders to compare thoughts.

What are the responsibilities of the club service projects committee and what are your responsibilities as chair of this committee?

What kinds of projects can be conducted that maximize impact on the community?

What fundraisers can we hold to ensure appropriate funding for projects?

How can you help committee members do their job?

What are your committee's long-range and annual goals?



# Worksheet 2: Goals

Use this worksheet to draft a long-range goal and annual goals for three years to reach the long-range goal. Ensure that your goals are:

**Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.

**Measurable.** A goal should provide a tangible point to pursue.

**Challenging.** A goal should be ambitious enough to go beyond what your club has accomplished in the past.

**Achievable.** Rotarians should be able to accomplish the goal with the resources available.

**Time specific.** A goal should have a deadline or timeline.

You will continue working on these preliminary goals with your club teams, using the *Planning Guide for Effective Rotary Clubs* in session 4.

<ul style="list-style-type: none"><li>• <b>Long-range goal</b> (goal for your club three years from now):</li></ul>
<ul style="list-style-type: none"><li>• <b>Year 1 annual goal:</b></li></ul>
<ul style="list-style-type: none"><li>• <b>Year 2 annual goal:</b></li></ul>
<ul style="list-style-type: none"><li>• <b>Year 3 annual goal:</b></li></ul>

# Worksheet 3: Action Plan

In the space below, write one annual goal from your goals worksheet. Then, determine the action steps that need to be taken to meet this goal, noting for each step the person responsible, the time frame, the signs of progress, and the necessary resources.

<b>Annual goal:</b>
---------------------

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

<b>Resources needed:</b>
--------------------------

# Worksheet 4: Service Projects Committee

## Case Study

Read the case study below, then create a step-by-step plan for conducting successful service projects for the Rotary Club of Queen's Park using the case study action plan on the next page. Consider the questions listed as you develop your plan.

The Rotary Club of Queen's Park is located in a city of 300,000 and has 65 members. The rapidly growing city is expanding into the surrounding countryside, which serves as a habitat for several indigenous, endangered plants and animals. Though parts of the city are prosperous, about 20 percent of residents are economically and educationally disadvantaged.

The club's weekly meetings are well attended by club members, who participate in a variety of fellowship activities. Nevertheless, membership has declined over the past five years. During this time, the club has lost 25 percent of its members and has had difficulty keeping newer ones. On the Resigning Member Questionnaire, most former members complained that their expectations of hands-on participation in community service projects had not been met.

The club's recent service projects were limited in their effectiveness and scope. The two most successful ones consisted of contributing money to an organization that renovated benches in a city park and making an unsolicited donation of playground equipment to a school in the neighborhood where several club members live.

How can the club learn from past service projects?

How can the club determine the needs of the community?

## To be completed at district assembly

What are some service projects that would address the disadvantaged population?

How can club leaders combine fellowship and service in the projects they develop?

How can the club work with other organizations or service clubs in the area?

**Case Study Action Plan**

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

What did you learn that you can apply to your club?

# Worksheet 5: Service Projects Checklist

Planning and conducting a service project can be a daunting task. Use the checklist below to make sure you have considered the different ways to address each step described in this manual. This checklist is not exhaustive. It is intended for use as a source of ideas or a reference during the process of planning a service project. For a more detailed description of choosing and planning a service project, see *Community Assessment Tools* and *Communities in Action: A Guide to Effective Service Projects*.

## 1. Assess the Situation

- Community Assessment
  - Identified community strengths and assets
  - Identified the needs and priorities of people in the community
  - Talked to people in the community about its opportunities
- Club Assessment
  - Identified club member interests
  - Identified club member strengths, skills, and abilities
  - Identified available time and resources members can commit

## 2. Choose the Project

- Presented a list of possible projects that meet assessments, including the estimated duration and resources needed
- Chose project that is achievable, that meets needs, interests, and resources of club and community, and that supports one or more of the following:
  - Avenues of Service
  - Presidential citation program and emphases
  - RI Strategic Plan
  - Mission of The Rotary Foundation

## 3. Make a Plan

- Set goals and objectives
- Developed a work plan
- Developed a budget
- Considered liability and protection issues
- Appointed coordinators for various aspects of the project

## 4. Take Action

- Conducted fundraiser(s)
- Planned promotion of project
- Followed implementation plan

## 5. Evaluate the Project

- Discussed with project beneficiaries and club members what went well
- Discussed with project beneficiaries and club what should be changed
- Reported results to community, club, district, and RI
- Celebrated with all involved

# Worksheet 6: Raising Funds

<b>Fundraiser will support</b> (please list each item below)	<b>Amount needed</b>
<hr/>	<hr/>
<b>1. Total funding needed</b>	<hr/>
<p><b>Amount needed to conduct the fundraiser</b></p> <p>Promotion (T-shirts, community/media outreach, etc.)</p> <p>Materials (invitations, tickets, decorations, etc.)</p> <p>Volunteer expenses (transport, meals, etc.)</p> <p>Other (please specify)</p>	<hr/> <hr/> <hr/> <hr/> <hr/>
<b>2. Total support amount needed</b>	<hr/>
<b>3. Add items 1 and 2 for total needed</b>	<hr/>
<b>4. Total provided for in club budget</b>	<hr/>
<b>5. Subtract item 4 from 3 for fundraising goal</b>	<hr/> <hr/>





# Plan your club's future using these guides

**Club Leadership Plan  
Strategic Planning Guide  
Planning Guide for Effective Rotary Clubs**

**Guides are designed to work together. Download at [www.rotary.org](http://www.rotary.org).**



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