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New Club and New Officer Onboarding Toolkit



Rotary District 6840
New Club & New Officer Onboarding Toolkit

A Practical Guide for Leadership, Timing, and Confidence

Rotary Year: July 1 – June 30

SECTION 1. Welcome to Rotary

Thank you for choosing Service Above Self! Starting a new Rotary Club can be a daunting task – but you have access to others who can help – remember We Are Better Together! There is no “right” way to get started – every Club is different and unique.

Rotary International is a global network of neighbors, leaders, and problem-solvers who see a need and act. Rotary clubs combine fellowship, service, leadership development, and global impact. In your journey, feel free to visit other Clubs in our area, through the nation, and around the globe as we all learn and grow together.

Your club is supported by:

- **Rotary International** for strategy, training, global grants, and branding
- **Rotary Zone 30 & 31** for targeted regional training, emerging leader training, large-scale collaborative networks, regional project resources, and district support
- **Rotary District 6840** for leadership support, training, speakers, events, district grants, and guidance

This toolkit exists to remove confusion and speed up success. It answers three core questions every new club and new officer asks:

- Where do I find things?
- Who is responsible for what?
- When does everything happen?

If Rotary ever feels overwhelming, start here.

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SECTION 2. The Rotary Ecosystem

Rotary International

Sets global priorities, maintains technology platforms, oversees global grants, and protects the Rotary brand worldwide.

Key RI platforms:

- MyRotary
- Rotary Club Central
- Brand Center
- Learning Center

Rotary District 6840

Supports clubs through:

- Assistant Governors
- Training and leadership development*
- District grants
- Speakers and subject-matter experts
- District events and communications

Your Club

Delivers Rotary's mission locally through:

- Service projects
- Fellowship
- Community partnerships
- Member engagement

Think of Rotary like this:

Rotary International sets direction.

The District provides guidance.

Clubs create impact!

*The main leadership training opportunity for District 6840 clubs is [Old Man River President Elect Learning Seminar, or PEELS](#), offered in March. If possible, officers of newly chartered clubs can attend prior to the start of regular club meetings to get a jump on organization and focus areas. It's also a great motivational experience!

SECTION 3. Similarities and Differences

All Rotary Clubs have commonalities. They are:

- All Rotary clubs operate under the mission of *service to others, promoting integrity, and advancing world understanding, goodwill, and peace* [Rotary International](#). They uphold Rotary's core values — service, friendship, diversity, integrity, and leadership — and apply the **Four-Way Test** to guide their actions.
- Each club must adopt the standard Rotary club Constitution and Code of Ethics.
- Each club has officers (president, secretary, treasurer) and committees to manage operations.
- Regardless of location, clubs address both local and international issues.
- Clubs provide a platform to meet people from diverse backgrounds, fostering lifelong friendships and professional connections.
- Clubs often engage in Rotary International programs such as the Rotary Peace Centers, The Rotary Foundation initiatives, and youth programs like Rotaract and Interact.
- Clubs follow the RI timeline for the election of new officers.

Each Rotary Club is different. Here are some ways in which they are different:

- Although each club meets regularly, how they meet (in person or online) is different, as well as the number of times per month they meet and the time of day.
- Each Club has a Board of Directors; however, each club determines who serves on the Board and how many serve.
- Clubs develop their own bylaws that align with the RI Constitution. A guide for bylaws is available [here](#).
- Clubs have various committees; however, each club can determine the types of committees they have.
- Each club has at least one service project; however, clubs determine the projects they support.

SECTION 4. Leadership Timeline

November – December

Leadership identification and mentoring

- Identify potential officers
- Begin nominating committee work

By January 1

All officer nominations finalized

- President-Elect
- Secretary
- Treasurer
- Board members

February

Start preparing for your new roles. Officers entered into MyRotary and Rotary Club Central. This step ensures officers receive training invitations.

March – April

President Elect Learning Seminar (PELS) (sometimes referred to as PETS, President Elect Training Seminar) and leadership trainings.

Goal setting and budget planning begins.

May

Membership roster review

Member dues communicated

District dues preparation begins.

June

Member dues collected

Leadership transition meetings completed

Membership finalized as of June 30.

July 1

New Rotary year begins

New officers assume roles with goals already entered.

SECTION 5. Officer Role Descriptions

President

Leads the club during the Rotary year. Presides over club and board meetings, guides club priorities, supports committee chairs, represents the club at district events, and serves as the primary liaison with the Assistant Governor and district leadership.

President-Elect

Prepares to lead the club the following Rotary year. Attends required president-elect training, collaborates with the current President to ensure continuity, helps set goals, and begins planning committee assignments, budget priorities, and club direction for the coming year.

President-Nominee

Prepares to serve after the President-Elect, depending on the club's succession plan and bylaws. Supports the President and President-Elect, learns club operations, and helps maintain leadership continuity.

Immediate Past President

Provides guidance and continuity for the current President and board. Shares historical perspective, supports leadership transition, and assists with mentoring newer club leaders.

Secretary

Maintains official records and reporting.

Responsibilities include:

- Membership updates
- Officer reporting
- Meeting minutes
- Club records and correspondence
- Attendance reporting, if tracked by the club
- Updates to My Rotary and any district-approved club management system

Critical deadlines include January elections, February officer entry, and June 30 roster accuracy.

Treasurer

Manages the club's finances.

Responsibilities include:

- Collecting club dues
 - Paying district and Rotary International obligations
 - Maintaining accurate financial records
 - Preparing financial reports for the board
 - Supporting the annual budget process
 - Ensuring proper handling of club and charitable funds

Critical deadlines include May preparation, June dues collection, and July payments.

Board Members

Provide governance and leadership for the club. Board members approve budgets, review major decisions, support committees, monitor club health, and help ensure the club remains active, welcoming, financially responsible, and service-focused.

Other Possible Club Officers/Committees

Membership Chair – Leads efforts to attract, welcome, engage, and retain club members.

Service Chair – Leads the planning and organization of meaningful service projects.

Rotary Foundation Chair – Encourages giving to The Rotary Foundation, educates members about Foundation programs, and supports club participation in Foundation-related service opportunities.

Public Image Chair – Promotes the club's activities, service projects, events, and community impact through appropriate media, social media, newsletters, and public relations efforts.

Club Administration Chair – Helps coordinate club meetings, programs, calendars, internal communications, venue details, and the overall member meeting experience.

Vocational Service Chair – Promotes vocational service through member classification talks, ethics programs, career mentoring, business visits, and other activities that highlight professional service.

District Grant Coordinator – Identifies service projects that may qualify for district grant funding, completes required grant training, submits grant applications, tracks expenses, and assists with final reporting.

Youth Service Chair – Supports youth-focused service opportunities, including Interact, RYLA, scholarships, youth leadership activities, and other district-approved youth programs.

Fundraising Chair – Leads club fundraising efforts to support service projects, charitable giving, and approved club initiatives.

Program Chair / Speaker Coordinator – Schedules speakers and programs that are interesting, mission-aligned, and valuable to members and guests.

Sergeant-at-Arms / Meeting Host – Helps welcome members and guests, supports meeting logistics, and assists the President in keeping meetings organized and on time.

SECTION 6. First 30–60–90 Days

First 30 Days

Focus: Foundation and structure

Action Item	Responsible Rotarian(s)
Create MyRotary accounts for all officers and members at https://my.rotary.org	Each Member creates their own profile upon Rotary approval.
Assign officer and board roles and enter into MyRotary	Secretary (If position is not filled, other board member with RI permissions can do this.)
Review this toolkit as a leadership team	Board
Establish meeting cadence and format (RI requires 2 meetings per month but 1 can be a service project or a club social)	Board
Establish dues structure, including amount and billing frequency (Each Club must cover dues for each member to the District and to Rotary International.)	Board
Draft or adopt club bylaws using Rotary's recommended template	Board drafts and approved in accordance with bylaws.

Outcome: Everyone has access, clarity, and defined roles.

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Days 31–60

Focus: Planning and alignment

Action Item	Responsible Rotarian(s)
Enter preliminary goals in Rotary Club Central https://my.rotary.org/en/club-central	President (with Board engagement or potentially with help from the Assistant Governor).
Review the District 6840 calendar and upcoming deadlines Home Page District 6840	President or Secretary
Schedule a district speaker for a club meeting	Rotarian in charge of speakers/program

Outcome: The club moves from setup to action.

Days 61–90

Focus: Engagement and service

Action Item	Responsible Rotarian(s)
Attend district or regional training opportunities	President-Elect/President Nominee (PELS) Club Leadership – Board and Chairs (Club Leadership Learning Seminar - CLLS) President and Interested Members (District Conference)
Determine (perhaps through a club survey) and plan the club's first service project	Club Service Chair
Review Rotary Foundation basics and giving options	Club Foundation Chair

Outcome: The club builds momentum without burnout.

SECTION 7. Where to Find Things

MyRotary

<https://my.rotary.org>

Used for:

- Member profiles
- Officer reporting
- Training
- Grants
- Foundation giving
- Locating other clubs

Rotary Club Central

<https://my.rotary.org/en/club-central>

Used for:

- Annual goals
- Membership data
- Service hours
- Foundation tracking

Brand Center

<https://brandcenter.rotary.org>

Used for:

- Logos
- Flyers
- Social media graphics
- Branding guidelines

Learning Center

<https://learn.rotary.org>

Used for:

- Officer training
- Leadership development
- Membership and Foundation education

District 6840 Website

<https://rotary6840.org>

Used for:

- District calendar
- Events and registration
- Newsletters
- District contacts

Rule of thumb:

If it is Rotary-wide, start with MyRotary.

If it's local, start with the district website.

SECTION 8. Who to Call When

Membership issues → Assistant Governor

Grant questions → District Foundation Chair

Club conflict → Assistant Governor

Public image or marketing → Public Image Chair

Youth programs → Youth Services Chair

Leadership or governance issues → District Governor

Start with your Assistant Governor. They will route issues appropriately. This link will provide a District organization chart, with contact information for each officer: [District Organization Chart | District 6840](#).

SECTION 9. Dues and Financial Flow

Typical flow:

- RI Member dues are invoiced to clubs on July 1 and January 1. Invoices from RI are emailed to the President and Treasurer. Clubs are invoiced for the number of members in My Rotary and Club Central on June 30 and December 31. Dues structure is approved every three years.
- District dues are approved annually and invoiced after July 1. Invoices are emailed to the President and Treasurer. Payment should be based on the member count as of June 30.

Accurate membership reporting prevents billing errors and confusion.

SECTION 10. Club Supplies

Official Rotary supplies may be purchased through any Rotary International licensed vendor.

[Approved Vendors](#)

Available items include:

- Club banners and flags
- Pins and recognition items
- Apparel and event materials
- Gifts for speakers and members

These items support visibility, tradition, and club pride.

SECTION 11. Fillable Checklists

New Club 30-Day Checklist

(Complete within the first 30 days after charter or officer transition)

- ☐ All officers created MyRotary accounts
 - MyRotary username confirmed for each officer and member
 - Date completed: _____
 - ☐ Club officers and board roles assigned
 - President
 - President-Elect
 - Secretary
 - Treasurer
 - Board Members
 - Date completed: _____
 - ☐ Club bylaws drafted or adopted
 - Template used: ☐ Rotary recommended ☐ Custom
 - Date approved by board: _____
 - ☐ District 6840 calendar reviewed
 - Key dates noted: _____
 - ☐ Assistant Governor identified and contacted
 - Name: _____
 - Date of contact: _____
-

60-Day Planning Checklist

- ☐ Goals entered in Rotary Club Central
 - Membership goal: _____
 - Service goal: _____
 - Foundation goal: _____
 - Date entered: _____
 - ☐ District speaker scheduled
 - Topic: _____
 - Date of meeting: _____
 - ☐ Officers enrolled in required or recommended training
 - President-Elect registered for PELS/PETS ☐
 - Secretary reviewed MyRotary reporting ☐
 - Treasurer reviewed dues and billing ☐
 - ☐ Preliminary club budget drafted
 - Date drafted: _____
 - Treasurer initials: _____
-

90-Day Action Checklist

- ☐ First service project identified
 - Project name or description: _____
 - Planned date: _____
 - ☐ Rotary Foundation basics reviewed by board
 - Discussion date: _____
 - ☐ District or regional training attended
 - Event name: _____
 - Date: _____
 - ☐ Club communication plan established
 - Newsletter ☐
 - Website ☐
 - Social media ☐
-

Annual Leadership Timeline Checklist

(For clubs using January 1 nominations)

- ☐ Nominating Committee appointed (Nov–Dec)
- ☐ Officer nominations completed by January 1
- ☐ Officer elections held in January
- ☐ Officers entered into MyRotary by February 1
- ☐ PELS/PETS completed (Spring)
- ☐ Membership roster reviewed in May
- ☐ Member dues collected by mid-June
- ☐ Membership finalized June 30
- ☐ New officers assume roles July 1

SECTION 12. Officer-Specific Fillable Checklists

Secretary Annual Checklist

- ☐ Officer elections recorded in meeting minutes (January)
- ☐ Incoming officers entered in MyRotary (February)
- ☐ Membership updates entered monthly
- ☐ Attendance records maintained
- ☐ Final membership count verified June 30

Notes:

Treasurer Annual Checklist

- ☐ Club budget approved
- ☐ Member dues communicated by May
- ☐ Member dues collected by June
- ☐ District dues paid on time
- ☐ Rotary International obligations paid
- ☐ Financial report provided to board regularly

SECTION 13. Common Pitfalls

Here are common mistakes young clubs make:

- Finalizing member information in MyRotary and Rotary Club Central by June 30 – results in being invoiced for incorrect amounts.
- Not using Brand Central for logos, color schemes, and presentation materials – results in confusion over Rotary brand.
- Officers not attending training opportunities – results in not being updated on RI procedures, district procedures, and new initiatives.
- Forgetting to reference and communicate goals initiated in Rotary Club Central – results in not achieving goals set at the beginning of the year.
- Failing to establish a consistent meeting schedule and communication rhythm – results in members feeling disconnected or unsure about expectations.
- Not creating a simple onboarding process for new members – results in confusion about Rotary basics, club culture, service opportunities, and member responsibilities.
- Taking on too many projects too quickly – results in volunteer burnout and unfinished commitments.
- Not maintaining accurate financial records and budget oversight – results in confusion, mistrust, or difficulty planning future activities.
- Depending on one or two highly active members to do most of the work – results in burnout and weak leadership development.
- Neglecting public image and community visibility – results in missed opportunities to attract members, partners, sponsors, and service project support.
- Forgetting to celebrate early wins and recognize member contributions – results in lower morale and reduced enthusiasm.
- Not building relationships with the Assistant Governor, district leaders, and nearby clubs – results in missed guidance, resources, collaboration, and support.

Notes:

Appendix: Rotary International Requirements for Starting a New Club

The guidelines that Rotary provides to those wishing to start a new club begin on the next page.