

# CLUB SERVICE PROJECTS COMMITTEE MANUAL



ROTARY INTERNATIONAL®

This is the 2006 edition of the *Club Service Projects Committee Manual*. It is intended for use by 2007-08, 2008-09, and 2009-10 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. Changes to these documents, by the 2007 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 you establish goals and understand your responsibilities related to increasing club effectiveness. An effective Rotary club is able to:

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

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

Each committee has a manual which provides an overview of the committee and its responsibilities as well as available resources, specific committee duties, and other relevant materials to support you and your committee members. Copy related sections of the *Club Service Projects Committee Manual* and distribute to committee members. Additional copies of this manual can be downloaded for free at [www.rotary.org](http://www.rotary.org). The *Club Officers' Kit* (225-EN), including this manual, can be purchased through the *RI Catalog*.

## **Club Service Projects Committee Chair**

Before the district assembly, review this manual in order to understand your role and responsibilities. Bring it to your district assembly to use as a reference.

At the district assembly, club leaders, including the club president-elect and the incoming secretary, treasurer, and committee chairs, will discuss their role and responsibilities, work on annual goals, and develop their working relationship for the coming year.

Complete the following discussion questions in advance to fully participate in the discussions at the district assembly:

What is the role of the service projects committee?

What are your responsibilities in this role?

What successful service projects has your club done in the past and why were they successful?

What should you keep in mind when planning service projects for the year?

How can you help committee members serve effectively?

What are your long-range and annual goals?

**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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# Role and Responsibilities

Service Above Self is Rotary's principal motto. Every Rotarian is responsible for finding ways to improve the quality of life in his or her community and communities around the world through service projects.

A successful service project is one that

- Has specific goals with measurable results
- Has realistic and achievable goals
- Responds to identified needs
- Incorporates the abilities of those who are served
- Recognizes all participants' contributions as important
- Uses available resources effectively
- Builds working networks for future service projects

## Role

The service projects committee develops and implements educational, humanitarian, and vocational service projects that help your community and communities in other countries.

## Responsibilities

The service projects committee has the following responsibilities, which are explained in this manual:

- Achieving club service project goals for the coming year (see Service Projects Section of the *Planning Guide for Effective Rotary Clubs*)
- Conducting a needs assessment of the community and the club (see Service Projects Guidelines, A Balanced Program of Service, and Fundraising)
- Planning service projects using club, district, and RI resources and ensuring that promotion is planned (see Service Projects Guidelines)
- Implementing service projects and involving all club members (see Service Projects Guidelines)
- Evaluating all service projects and using the findings to strengthen future service projects (see Service Projects Guidelines)

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Plan weekly meetings and activities in observance of Vocational Service Month (October) and Rotary Fellowships Month (June).

## Working with Club Committees

The service projects committee should work with the following club committees to meet service projects 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 submit successful projects to *The Rotarian* or your Rotary regional magazine)

### **Working with Volunteers**

Conducting a successful service project requires the collaborative efforts of many people, so being able to coordinate and motivate volunteers is essential. Volunteers for service project efforts can be found within the club as well as in the community. The following people can provide support in implementing club service projects:

- Rotarians and their families and friends
- Members of other community organizations and other interested citizens
- Rotary Foundation alumni
- Youth Exchange students and RYLA participants
- Partners in service (Rotaractors, Interactors, Rotary Community Corps)
- Other Rotary clubs

### **Working with Other Organizations**

Clubs may support and cooperate with other organizations on projects and activities as long as Rotarians are actively involved. If your committee wishes to do so to achieve club goals, consult your board before making a commitment. All cooperative relationships should be reviewed annually.

### **Subcommittees**

Depending on the goals of your committee, it may have the following subcommittees:

- Community Service
- Human development
- Community development
- Preserve Planet Earth
- International Service
- Partners in service
- Fundraising
- Rotary Volunteers
- Vocational Service
- World Community Service
- Youth

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Copy and distribute these materials to committee members as needed.

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## Service Projects Resources

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### Informational Resources

Order publications through the *RI Catalog* (019-EN), or download them at [www.rotary.org](http://www.rotary.org).



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

***A Menu of Service Opportunities (605B-EN)*** — Companion piece to *Communities in Action: A Guide to Effective Projects* that provides an overview of the RI Board-recommended service areas for clubs and districts, examples of successful club projects, and useful resources.

- *Planning Guide for Effective Rotary Clubs* — Club assessment and goal-setting tool used to plan service projects goals (see pages 12-13).
- *Rotary Community Corps Handbook (770-EN)* — Basic steps for organizing a corps, including how to identify potential leaders; also includes case studies and project ideas.
- *The Rotarian* (or Rotary regional magazine) — RI's official monthly magazine, which reports club and district projects, RI Board decisions, and RI meetings. In addition, 30 Rotary regional magazines in 23 languages serve Rotarians around the world.
- *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 Handbook: A Guide to Action (742-EN)* — Information on the program, including overviews of donations-in-kind projects and the Rotary Volunteers program, as well as Rotary Foundation grant programs that can assist the projects.

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

The RI Web site provides online resources and up-to-date information on all aspects of Rotary. You can download free publications, shop the online catalog, and locate the meeting time and place of any Rotary club.

Click on:

- RI Programs ([www.rotary.org/programs](http://www.rotary.org/programs)) — Current RI programs information including project ideas and opportunities to partner with clubs in other countries. Many publications are available for free download.
- The Rotary Foundation ([www.rotary.org/foundation](http://www.rotary.org/foundation)) — Current information on Rotary Foundation programs including grant information to address different service needs and funding options. Many publications are available for free download.

Keyword searches:

- Recognition programs — RI and Rotary Foundation awards and recognition programs, including Best Cooperative Projects Award and the Significant Achievement Award.
- Community Projects Database — Listing of successful club projects to generate new project ideas and model best project practices.
- Global Networking Groups Directory — Listing of all Global Networking Groups, their purpose, and contact information.

- PolioPlus Partners Open Projects List — Primary source of information for PolioPlus Partners projects. Rotarians can choose to support a specific project or ask that donations be applied to the highest priority.
- RI Programs newsletters — E-mail newsletters on individual RI Structured Programs. Check specific program pages at [www.rotary.org/programs](http://www.rotary.org/programs) for sign-up information.
- Rotary Volunteers International Site Database — Information on Rotary and Rotaract service projects that are requesting volunteers.
- Rotary Volunteers Database — Listing of Rotarians, Rotaractors, Rotary Foundation alumni, and non-Rotarians who are willing to serve abroad.
- WCS Projects Exchange — Listing of club World Community Service projects that are seeking assistance with examples of successful projects.

### **Human Resources**

Unless otherwise noted, contact information is available from your district.

- 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.
- RI Programs staff — Staff members at RI World Headquarters available to answer questions related to the RI Structured Programs.

## Club Service Projects Committee Chair

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As the chair of your committee, you're responsible for ensuring your committee achieves committee and club goals.

### Responsibilities

Before taking office, you have the following responsibilities:

- Reviewing your committee's manual
- Attending the district assembly
- Reviewing your club's bylaws, which should contain information on your committee's purpose
- Working with the president-elect to recruit committee members based on their professional abilities and personal interests, and preparing them for the year
- Reviewing and establishing club long-range and annual goals with the president-elect using the *Planning Guide for Effective Rotary Clubs*
- Developing an action plan for your committee to achieve annual goals

During your year as committee chair, you have the following responsibilities:

- Planning and conducting regular committee meetings and activities
- Holding members accountable for the responsibilities they've accepted
- Reporting committee activities and progress to the club president and board of directors and the full club
- Cooperating with the appropriate district committee on multiclub activities or initiatives
- Recognizing committee members' work and efforts

### Committee Members

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 know the socioeconomic conditions of the community. Other important characteristics to consider include:

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

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

To prepare committee members:

- Supply newer members with information on the committee and its activities.
- Pair new committee members with more experienced ones.
- Encourage networking with counterparts in other clubs (use the district directory).
- Know the resources available to your committee.
- Give members a list of district activities and meetings.

## Goal Setting

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 also provides strategies that committees can use to achieve their goals. Each recommended club committee has a section in the planning guide. You'll have an opportunity to work on the planning guide with your club president-elect and other incoming club leaders during the district assembly. 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.

**Establishing effective goals.** To ensure that the goals established accurately reflect committee capabilities and club interests, committee 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.

**Developing an 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.

Ensure steady progress is being made toward achievement of goals as envisioned.

**Motivating committee members to follow the action plan.** Because Rotarians are volunteers, what motivates them in their profession may not motivate them in Rotary. Consider the motivational needs of each committee member. 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 are challenging 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 encourages continued participation in club activities.

## Budget

Before 1 July, work with your committee and the incoming 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

Before the start of the year, develop a communication plan with other club leaders that outlines with whom, when, and how you'll 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. For example, the public relations committee's work to raise community awareness of Rotary may influence the membership committee's recruitment efforts. Effective communication will help committees work together to coordinate projects and initiatives.
- **Your district.** If your committee needs guidance or information, contact your district counterpart or your assistant governor.

## Additional Resources

In addition to your committee's resources, the following resources can help you fulfill your responsibilities and answer committee members' questions:

### *Informational Resources*

Order publications from the *RI Catalog* (019-EN), or download them at [www.rotary.org](http://www.rotary.org).

- District directory — Listing of district leaders and activities (if your district produces a directory).
- *Manual of Procedure* (035-EN) — RI and Rotary Foundation policies and procedures established by legislative action, the RI Board of Directors, and the Trustees of The Rotary Foundation, issued every three years following the Council on Legislation. Contains the RI constitutional documents.
- Recommended Rotary Club Bylaws — A legal document that expands on club operations guidelines in the club constitution.
- 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.
- Standard Rotary Club Constitution — A constitutional document that is a framework for Rotary club operations.

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

The RI Web site provides online resources and up-to-date information on all aspects of Rotary. You can download free publications, shop the online catalog, and locate the meeting time and place of any Rotary club.

Click on:

- Club-District Support ([www.rotary.org/support](http://www.rotary.org/support)) — Resources for club and district officers, including the most up-to-date versions of the Recommended Rotary Club Bylaws and Standard Rotary Club Constitution.

#### *Financial Resources*

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

#### *Human Resources*

Unless otherwise noted, contact information is available from your district.

- 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.
- Other club committee chairs in your district — Club leaders who can serve as a resource to help support your club's projects and initiatives.
- District governor — RI officer responsible for advising your club on strategies to make your club more effective. (Find contact information in the *Official Directory*.)
- 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 and Rotary Foundation resource groups/task forces — Groups of Rotarians appointed by the RI president to assist Rotary clubs and districts with the presidential emphases. (Find contact information in the *Official Directory*.)

# PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

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 this section are common ways clubs might choose to pursue service projects goals. Clubs are encouraged to develop alternative strategies to achieve their service projects goals when appropriate.

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 RYLA (Rotary Youth Leadership Awards) activities: \_\_\_\_

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 local 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
- Review the club's current and ongoing service projects to confirm that they meet a need and are of interest to club 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
- Conduct or obtain a needs assessment of the community or communities in other countries
- Recognize club members who participate in and provide leadership to the club's service projects
- Identify a partner club with which to carry out an international service project
- Participate in:
  - Interact
  - Rotaract
  - Rotary Community Corps
  - Rotary Friendship Exchange
  - Rotary Volunteers
  - RYLA (Rotary Youth Leadership Awards)
  - World Community Service
  - Rotary Youth Exchange

- Use a grant from The Rotary Foundation to support a club project
- Other (please describe):

**Action steps:**

## Service Projects Guidelines

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For more information about working with your club and community to develop a service project, refer to *Communities in Action: A Guide to Effective Projects*.

Using a systematic approach to planning and implementing a service project will ensure the proper use of club funds and Rotarian time and will result in a service project that benefits those in need.

Proper stewardship for service projects includes detailed and committed project planning, submission of complete and accurate applications with documentation, direct Rotarian involvement in the implementation of the project, transparency in all financial transactions, and efficient and effective reporting.

For each of the steps outlined below, develop a timeline, determine which committee member is responsible for implementing each step, 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.

### 1. Conduct an external assessment to identify community needs.

Successful service projects must be relevant and address real and current community concerns. A project doesn't need to be expensive or elaborate, just necessary. Conduct a needs assessment to determine which needs of the community your Rotary club can address.

To determine key areas of concern in a community, examine these aspects:

- Economic situation
- Geographical setting
- Educational strengths and weaknesses
- Demographic profile
- Political conditions

An external assessment, or community evaluation, will also help your club identify community resources and determine what other community organizations your club could collaborate with.

To properly conduct an external assessment, consult with a wide range of community leaders to learn their perspective on community issues, project strategies, and existing service projects. Working with community members to develop and carry out service projects may also help identify potential new Rotarians.

### 2. Conduct an internal assessment.

Consider whether a particular project fits your club members' skills and interests. An internal assessment should focus on the following:

- Number of members willing to participate in service projects
- International contacts (either of club members or district)
- Diversity of skills
- Level of member interest in potential projects
- Club resources and funds available
- Past project experiences and the lessons learned from them

Evaluating these factors will help define the types of service projects best suited to your club. To increase the likelihood of success, identify a project that takes advantage of the widest array of member skills and interests.

### **3. Identify Rotary International and Rotary Foundation resources.**

To ensure the success of a service project, your club needs financial, human, and informational resources. Consider RI and Rotary Foundation programs when planning your projects. For service project ideas, information, and funding, see A Balanced Program of Service (pages 16-17).

### **4. Consider funding resources available to your club.**

Many clubs hold fundraisers to support service projects. Other financial resources include funds raised from individual donors and local businesses, grants from other foundations, and Rotary Foundation grants. See Fundraising (pages 18-20) for more information.

All funds received from The Rotary Foundation must display a commitment to stewardship, which reflects The Four-Way Test and responsible fiscal oversight.

### **5. Select a project and begin planning.**

Planning can minimize delays and failures of service projects. Appoint a project organizing committee, set project goals, develop a budget and timeline, and begin implementation. Ensure you have answered the following questions before implementing a project:

- Which projects are club members currently involved in?
- What will be the goal of the project?
- Who in the club and community will be involved?
- How will your club work with members of the community benefiting from the project?
- When will the project occur?
- Where will the project occur, and how will volunteers get there?
- Why is your club undertaking the project?
- What resources are needed to complete the project?
- How will the club ensure proper use of resources?
- How will your club promote the project?

Answers to these questions will result in a project action plan. During the project's implementation, keep all club members involved and continuously monitor activities to ensure that the action plan is being carried out.

### **6. Conduct an evaluation**

Evaluation plays an important role in your club's current service projects and its future projects. When evaluating a completed service project, consider these key questions:

- Did the project meet the community needs revealed in the needs assessment?  
If not, why?
- Did all club and community members have an opportunity to participate?
- Was there a balance between financial assistance and hands-on assistance?
- Was there adequate media coverage of the project?
- Was your club able to meet the financial demands of the project?

Ask all club members who participated in the project to write a brief evaluation report. Insights gained from the evaluation should be applied to other service projects and shared with incoming club leaders and committee members, as applicable, as they begin to develop goals. Also, submit your evaluation report to RI Programs staff or list it on the Community Projects Database at [www.rotary.org](http://www.rotary.org), so that clubs around the world can access examples of successful projects.

## A Balanced Program of Service

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Service projects that address each Avenue of Service will ensure your club is pursuing the Object of Rotary. Rotary International and The Rotary Foundation provide resources to help your club select service projects and achieve service goals. Rotary's Menu of Service Opportunities lists issues and concerns that RI has identified as recommended service project priorities. Develop a project that addresses one of the following areas of concern:

- Children at risk
- Disabled persons
- Health care
- International understanding and goodwill
- Literacy and numeracy
- Population issues
- Poverty and hunger
- Preserve Planet Earth
- Urban concerns

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Find more information about service opportunities in *A Menu of Service Opportunities* or by searching [www.rotary.org](http://www.rotary.org).

### 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, Menu of Service Opportunities, and 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.

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.

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** — groups of individual Rotarians focusing on shared topics of interest on an international basis, including Rotarian Action Groups and Rotary Fellowships

**Rotary Friendship Exchange** — program that promotes building international relationships that can evolve into international partnerships for service projects

**Rotary Volunteers** — program that provides opportunities for Rotarians and other skilled professionals to offer their services and expertise to projects in need of assistance

**Rotary Youth Exchange** — program that 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

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

Rotary Foundation programs include the following:

**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 and PolioPlus Partners** — support 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. The WCS Projects Exchange 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. Consider the Foundation's Humanitarian Grants Program to enhance and increase the impact of WCS projects.

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

- Explore the WCS Projects Exchange Database at [www.rotary.org](http://www.rotary.org).
- Speak with your district's World Community Service 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.

## Fundraising

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A successful fundraiser can support projects that make a real difference in people's lives. Club fundraisers are a collaborative effort that involve club leaders, the club secretary or treasurer, and often several club committees. The following list outlines the steps necessary to conduct a successful fundraiser. Determine which club member is responsible for implementing each step. You may need to change the order of the list when adapting it for use in your club.

**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 businesslike 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 disposition of the funds raised.

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

- Publicly recognize volunteers' 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.

### **Falling Short of a Funding Goal**

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 can't secure additional funding, change the scope of your project as needed.

### **Exceeding Expectations**

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
- Contributing funds to The Rotary Foundation

### **Liability Protection: Insurance and Incorporation**

Clubs are urged to obtain advice of legal or liability counsel about the need for protection against liability for any club project or activity. Depending on local laws, the club may wish to incorporate itself or an activity of the club. If a club chooses to incorporate itself or an activity, the articles of incorporation must include a phrase stating its allegiance to and submission of the club to the RI Constitution and Bylaws, as it now exists and as may hereafter be amended. The articles of incorporation should be submitted to RI through your Club and District Support representative. Contact your representative for further information on incorporation in your area.

Clubs in the United States and its territories and possessions automatically participate in a general liability insurance program administered by RI. Clubs outside the United States should contact their international office for specific information about their area.

### **Commercialization and Circularization**

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. No organization may circularize (conduct a mass mailing requesting financial or volunteer support) Rotary clubs. 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.

### **Rotary Marks**

Clubs are welcome to use the Rotary Marks (including the Rotary emblem and the names Rotary, Rotary International, and The Rotary Foundation) to name and promote their projects, programs, and activities so long as the club responsible is clearly identified and the marks are correctly reproduced.

Incorrect:	Correct:
Rotary Cleanup Project	Rotary Club of the Valley Cleanup Project
Rotary Centennial Park	Rotary Club of Mountain City Centennial Park

For more information, see the *Club President's Manual* or the *Visual Identity Style Manual*.

## Fundraising Worksheet

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











**Maximize your club's potential.**

**Use the *Planning Guide*  
for *Effective Rotary Clubs*  
to take control of its future.**

Find it in the *Club Service Projects Committee Manual* or at [www.rotary.org](http://www.rotary.org).



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