
4 Club Administration

The administration of your Rotary club is ultimately under the supervision of your club's board of directors, which you lead. Your club leadership team, particularly the club administration committee, should assist you with your administrative responsibilities in order to increase the effectiveness of club operations.

The Club Leadership Plan is the recommended administrative structure for Rotary clubs. Under this plan, effective club administration is key to carrying out your club's annual and long-range goals. The Club Leadership Plan begins by having Rotary clubs develop standard procedures for continuity, communication, and Rotarian involvement. Its simple committee structure focuses on the central functions of a club and can be expanded to address club service goals and fellowship.

Responsibilities

As president-elect, you have the following club administration responsibilities:

- Appointing and meeting with your club administration committee to develop an action plan to carry out your club's administrative responsibilities
- Knowing your club's administrative policies and procedures by reviewing its current constitution and bylaws
- Reviewing the most recent versions of the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws (appendixes 37 and 38)
- Understanding the process for amending club bylaws
- Working with club leaders to update your club's constitution and bylaws
- Determining which aspects of the Club Leadership Plan can strengthen your club

As president, you have the following club administration responsibilities:

- Fulfilling district and RI administrative requirements
 - Overseeing the club's reporting requirements
 - Understanding how the information in reports can be used to assess club trends
 - Working closely with the club secretary to ensure that required reports and forms are sent to RI and the district in a timely manner
 - Understanding how to use Member Access and the optional RI club administration software (RI-CAS) to update club records
 - Overseeing the responsible management of club finances, working closely with your club's treasurer
- Encouraging attendance at the district assembly and additional training meetings, as appropriate
- Developing weekly club programs and club assemblies that will interest club members
- Preparing for the district governor's official visit and the quarterly (or more) visits of your assistant governor
- Ensuring the Rotary Marks are used properly

Minimum Standards

The RI Board has adopted standards to ensure that clubs function effectively. Work with your district and assistant governors to comply with the following minimum standards for clubs:

- Pay per capita dues to Rotary International.
- Meet regularly.
- Subscribe to *The Rotarian* or a Rotary regional magazine.
- Implement service projects that address needs in the local community or in communities in other countries.
- Receive the visit of the governor, assistant governor, or any other officer of Rotary International.
- Maintain appropriate general liability insurance.

Plan weekly meetings and activities in observance of Magazine Month (April).

Club Administration Committee

Ensuring effective club administration is a collaborative effort. As club president, you lead this effort while the club administration committee carries out the specific responsibilities. Include the club administration committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

The club administration committee should help carry out your club's annual goals. The club secretary and treasurer should be members of this committee. The chair of this committee, appointed by you, should be part of your club leadership team.

You'll find more information about the club administration committee in the *Club Committee Manual* and the *Club Secretary's Manual*.

Club Administration Committee Responsibilities

Your club administration committee has the following responsibilities:

- Fulfilling all district and RI administrative requirements
- Tracking and reporting attendance
- Making all members aware of current Rotary information by promoting
 - Club bulletin or Web site
 - *The Rotarian* or Rotary regional magazine
 - RI Web site (www.rotary.org)
 - District governor's monthly letter
 - District Web site
- Promoting fellowship among club members
- Organizing programs for regular weekly and special meetings, including club assemblies

Your Club's Constitution and Bylaws

The Standard Rotary Club Constitution must be adopted by all clubs admitted to membership in Rotary International. It provides a model framework for Rotary club operations. Following the Council on Legislation, the Standard Rotary Club Constitution is updated to include council decisions. Be sure that your club is using the correct version of the Standard Rotary Club Constitution (appendix 37).

Your club's bylaws provide additional guidelines, not included in the club constitution, for managing your club. The Recommended Rotary Club Bylaws (appendix 38) are developed in harmony with the Standard Rotary Club Constitution and reflect current Rotary policy. You can adapt them to meet your club's needs, goals, and activities and reflect its unique identity. To prepare for your year as club president, you should review your club's bylaws and work with your club leadership team to amend them to reflect any new practices and procedures as well as the club committee structure and the roles and responsibilities of your club's leaders.

Proposing and Voting on Amendments

Your club may amend its bylaws at any regular meeting, provided the following requirements are met

- A quorum must be present (one-third of the membership constitutes a quorum).
- Two-thirds of all members present must approve.
- All members must be notified of the proposed amendment 10 days before the meeting.
- All amendments must be in harmony with the club constitution and RI Constitution and Bylaws.

RI and Rotary Foundation Reporting Requirements

Every Rotary club is required to submit reports and information to Rotary International on 1 July and 1 January. These reports include:

- Semiannual reports
- Per capita dues
- Other fees and payments, such as:
 - Individual and club subscriptions to *The Rotarian* or Rotary regional magazine
 - Council on Legislation dues (July only)
 - Insurance (USA and its territories only; July only)

Semiannual reports certify the number of club members to RI's Board of Directors. Payment of your per capita dues should be clearly identified with your club number and invoice number. Failure to pay RI dues will result in termination of your club's charter.

To ensure that RI mailings and communications, including semiannual reports, reach the appropriate members of your club, the club secretary must submit *Official Directory* information (names and contact details for incoming club officers) to RI by 31 January. In addition, any changes in current officer information should be sent to RI immediately, and changes in membership or meeting information should be reported regularly.

Reports to The Rotary Foundation include:

- The Rotary Foundation Fund Development Club Goal Report Form
- Project reports for any participation in the Humanitarian Grants Program

Other reporting requirements include:

- Monthly attendance figures to the district governor, no later than 15 days following the last meeting of the month
- Notices to clubs in other localities of any Rotarians relocating to their area

Online Administration Tools

Two tools from RI — Member Access and RI-CAS — can help your club perform administrative tasks more quickly and easily, provide more continuity between years of leadership, and ensure that RI has accurate records.

Member Access

Member Access at www.rotary.org allows Rotarians to perform Rotary business at any time, day or night, from the convenience of their homes, offices, or anywhere they access the Internet. You and your club's secretary have access privileges to the following club administration functions:

- Viewing and changing club membership data
- Paying RI per capita dues and other fees (by credit card only)
- Updating club data (meeting time and place, officer information)

Most RI and Foundation reports can be submitted through Member Access.

You'll find more information about club reporting requirements in the *Club Secretary's Manual*.

- Searching club and district data worldwide
- Viewing reports for club contributions to The Rotary Foundation

You'll also have access to functions available to all Rotarians, including:

- Registering for RI meetings
- Contributing to The Rotary Foundation
- Viewing your personal Rotary Foundation contribution history
- Managing your personal e-mail subscriptions from RI
- Viewing member benefits

RI-CAS

RI club administration software, or RI-CAS, can be downloaded in Member Access. Your club secretary can use it for many administrative tasks, including:

- Managing contacts (club members, non-Rotarians)
- Managing club information (attendance, regular club meetings, membership statistics)
- Making assignments for club committees and other leadership positions in the club
- Tracking club events (committee meetings, fellowship events)
- Sending e-mails to contacts in the database

Finances

Rotary clubs are expected to handle their finances in a businesslike manner. Maintaining and reviewing records and financial statements, developing a balanced club budget, and conducting an annual financial review will help ensure your club's financial well-being.

Responsibilities

As president-elect, you should work with your club leadership team to develop a club budget.

As president, you must work closely with the club's board of directors, secretary, and treasurer to carry out the following responsibilities:

- Monitoring expenditures against the club budget
- Practicing proper accounting for club expenditures throughout the year
- Ensuring that your club's dues structure and policies on fines don't work against your club's financial stability or its membership goals
- Ensuring club per capita dues are sent to RI
- Ensuring that your club's bylaws outline the process for disbursing funds
- Having a thorough annual club financial review prepared by a certified public accountant or other qualified individual
- Submitting a comprehensive financial statement of the club's financial status to the club before the end of the Rotary year

You'll find more information about the club treasurer's responsibilities and role within the club in the treasurer's section of the *Club Secretary's Manual*.

Insurance

Your club must maintain liability insurance for its activities, as appropriate for your geographic region. Contact a local insurance agent or broker for assistance in evaluating and obtaining insurance to protect your club in the event of an accident or claim.

Clubs in the United States and its territories and possessions are provided general liability insurance through a program arranged by RI and paid for by the participating clubs. This mandatory program must be paid annually through the July semiannual dues report. More information on this coverage is available at www.rotary.org.

Rotary Marks

RI owns numerous trademarks and service marks, including the Rotary emblem and the names Rotary, Rotary International, and The Rotary Foundation; collectively, they're known as the Rotary Marks (for a partial list, see appendix 12). Using them properly preserves their identity as symbols of Rotary throughout the world. Clubs and districts are welcome to use these marks to name and promote their projects, programs, and activities so long as the club or district responsible is clearly identified and the marks are correctly reproduced.

Naming Guidelines

As president, review the names of existing and planned club projects and programs to ensure that they're clearly identified by your club's name. For example:

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

When the Rotary emblem appears with the name of a club project or program, make sure that the name is placed near the emblem and given equal prominence. By including your club name, you ensure that your club is recognized in the community for its projects and activities. For assistance with naming guidelines, contact your RI Club and District Support representative.

Reproducing the Rotary Emblem

The Rotary emblem is the organization's most recognizable and reproduced trademark. Make sure that any materials that your club produces with the emblem meet these guidelines:

- The emblem must be reproduced in its complete form.
- When the emblem is printed in more than one color, the gearwheel must appear in its official colors of royal blue and gold (or metallic gold), and "Rotary International" must appear in gold (or metallic gold).

Rotary Emblem PANTONE® Colors

Royal blue
PANTONE® 286

Metallic gold
PANTONE® 871

Gold
PANTONE® 129

PANTONE® is a registered trademark of Pantone Inc.

Be sure to avoid these common mistakes:

- The keyway is missing from the center.

Rotary Club of Port City



- The center of the wheel is filled in.

Rotary Club of Port City



- The emblem is partially covered or modified.

Rotary Club of Port City



Rotary Club of Port City



- The club name is missing.



If you discover an improper reproduction of the Rotary emblem on an item that's already been produced, make a note of it to be sure the problem is corrected the next time the item is reproduced.

The official Rotary emblem and many other Rotary logos are available for download at www.rotary.org.

Merchandise and Licensing

If your club wants to raise funds for a project by selling merchandise that bears the Rotary name, emblem, or other marks, you may do so without a license from Rotary International. However, make sure that your club buys the merchandise from an RI-licensed vendor and that the merchandise bears the club name, project name, and project date(s). For a list of licensed vendors, go to www.rotary.org.

If your club wants to sell merchandise for a long-term fundraising project, you'll need to apply for a license from Rotary International.

Meetings

Club, district, and international meetings allow Rotarians to learn more about Rotary, develop future leaders, and provide an opportunity for fellowship. Throughout your year as club president, you'll need to prepare for many meetings, including:

- Weekly meetings
- Club assemblies

- Board meetings
- Assistant governor visits
- District governor's official visit

You should also promote district and international meetings during weekly meetings, at club assemblies, and in your club's bulletin. Encourage attendance at the following meetings:

- District assembly
- District membership seminar
- District conference
- District leadership seminar
- District Rotary Foundation seminar
- RI Convention

These meetings offer a unique opportunity for Rotarians at the club level to learn about the broader scope of Rotary activities and enhance fellowship. District meetings provide a forum to discuss club and district projects and to develop project partnerships with other clubs in the district and in the Rotary world. For a detailed summary of these district and international meetings, see appendix 13.

Weekly Club Programs

Weekly meetings are the core of most Rotary club activities. As club president, you're responsible for developing weekly club programs that provide club members with the information and motivation necessary to increase their participation in and enthusiasm for activities that serve the club, the community, and the world. See appendix 14 for a sample weekly meeting agenda. To ensure that weekly meetings are effective and well planned:

- Develop an agenda for each regular weekly meeting with time for an address or program as well as fellowship.
- Schedule programs in advance (ideally, before the year begins).
- Relate programs to current club projects, activities, and concerns, when possible.
- Rotate the responsibility of arranging programs with an appropriate committee chair or club member.
- Arrange special observance dates, weeks, and months (listed in appendix 15), such as a program by a former Ambassadorial Scholar during Rotary Foundation Month in November.
- Prepare contingency plans in case scheduled programs are canceled.

Remember that club members are busy individuals whose time is valuable. You should begin and end the meetings punctually. Meetings that are organized and feature interesting, relevant programs will enhance members' personal Rotary knowledge, reinforce the value of continued membership, and make them more aware of and connected to their local and world community.

Special observances on the Rotary calendar are incorporated in the Club President's Monthly Checklist, available from your RI Club and District Support representative.

Club Assemblies

A club assembly is a meeting of all club members, including officers, directors, and committee chairs. The purpose of club assemblies can be to either discuss your club's program and activities or educate members. New members should particularly be encouraged to attend club assemblies to learn more about the workings of your club. Club assemblies help all members stay up-to-date and feel included in club activities. Regular club assemblies that include all members and your assistant governor help to ensure that clear communication takes place between club leaders, club members, and district leaders.

As president, you are responsible for planning and conducting club assemblies. You, or another designated officer, preside at club assemblies.

A club assembly allows for

- Goal setting and developing an action plan
- Coordination of committee activities
- Greater awareness of how your club's action plans are actually implemented
- Informal discussions that stimulate creative solutions and activities
- Ongoing education about Rotary and its programs
- Review of your club's strengths and weaknesses

Relevant topics for discussion include:

- Annual and long-range goals
- Service projects and club activities
- Membership growth and retention strategies
- District conference or other district and RI meetings
- The programs of Rotary
- Any topic raised in an open forum

Assistant governors should visit clubs a minimum of four times a year. Some clubs use these visits as opportunities for club assemblies.

Scheduling

Four to six club assemblies during the year may be the most effective number. Many clubs hold monthly assemblies. The following schedule is suggested.

Time Frame	Purpose
Immediately following the district assembly (before 1 July)	To describe, review, and discuss plans developed and suggested at the district assembly as well as how the club will incorporate the RI theme and emphases (president-elect presides)
After 1 July	To discuss and adopt a plan for the year
Two weeks before the official visit	To prepare for the official visit
During the official visit	To discuss the club's status with the district governor
Midpoint of Rotary year (January/February)	To review the club's progress toward goals and determine the club's plan for the rest of the year
April or May	To provide an opportunity for open discussion (Ideas and suggestions may be implemented to help bring club plans toward completion.)

The Official Visit

The district governor is required by RI to visit each club in the district. The visit can be done with individual or multiple clubs. The purpose of this personal visit is to focus attention on important Rotary issues and motivate the Rotarians in your club to participate in service activities. The official visit is also an opportunity for your club leadership team to ask the governor for guidance with challenges and successes facing your club.

Maximize the impact of the governor's presence by scheduling the official visit to coincide with an important clubwide event (if possible), such as:

- Charter night
- Induction ceremony
- New member orientation program
- Citation or award program
- Rotary Foundation event
- Intercity meeting

Preparing for the Official Visit

The official visit can be an exciting time for your club, providing opportunities to learn about important issues facing Rotary and to discuss possible solutions to pressing club issues. To best ensure that club members participate:

- Announce the visit at weekly club meetings.
- Publish announcements about the visit in the club bulletin.
- Ask club members to make a special effort to attend the official visit.
- Arrange for recognition or awards (for example, Paul Harris Fellow Recognition) to be presented by the governor.

Club leaders should work together to prepare for a thoughtful discussion on important club topics and issues that would benefit from the governor's knowledge and experience. To prepare for the visit:

- Review your club's progress toward the goals established in the *Planning Guide for Effective Rotary Clubs*, and be prepared to discuss it during the visit.
- Make a list of questions, problems, and concerns that can be addressed during the visit.
- Arrange reports of committee plans, activities, and accomplishments.
- Arrange your schedule to allow for as much time with the governor as needed.
- Make appropriate arrangements for the governor's spouse, if necessary.

The purpose of a visit by the district governor or assistant governor is to provide support for your club. Rotary clubs are required to allow these visits.