

MANUALE DELLA COMMISSIONE DI
CLUB PER I PROGETTI HANDBOKEN FÖR
KLUBBKOMMITTÉN FÖR SERVICEPROJEKT
クラブ奉仕プロジェクト委員会の手引き
CLUB SERVICE PROJECTS COMMITTEE
MANUAL 클럽 봉사 프로젝트 위원회
매뉴얼 LA COMMISSION ACTIONS DU CLUB
MANUAL DA COMISSÃO DE PROJETOS DE
PRESTAÇÃO DE SERVIÇO CLUB 奉仕プロ
ジェクト委員会の手引き MANUAL DEL
COMITÉ DE PROYECTOS DE SERVICIO DEL
CLUB HANDBUCH FÜR DEN CLUBAUSSCHUSS
FÜR DIENSTPROJEKTE 클럽 봉사 프로젝트
위원회 매뉴얼 HANDBOKEN FÖR
KLUBBKOMMITTÉN FÖR SERVICEPROJEKT

Club Service Projects Committee Manual

A PART OF THE CLUB OFFICERS' KIT

ROTARY INTERNATIONAL®



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This is the 2012 edition of the *Club Service Projects Committee Manual*. It is intended for use by 2013-14, 2014-15, and 2015-16 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.

Photos: Alyce Henson and Monika Lozinska-Lee

Introduction

The *Club Service Projects Committee Manual* was developed to help Rotary club service projects committees 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.

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 discussion questions to be completed before the district assembly and worksheets that will be used there, so be sure to bring this manual with you.

Each committee has a manual that provides an overview of the committee and its responsibilities (club administration, membership, public relations, service projects, and The Rotary Foundation). Additional copies of this manual can be downloaded at no charge at www.rotary.org. This manual is part of the *Club Officers' Kit (225)*. However, each manual can be purchased separately at shop.rotary.org.

Share chapter 1 with committee members so they are fully aware of the committee's responsibilities.

As you prepare to help lead your club, remember that it is a member of Rotary International. Through this membership, it is linked to more than 34,000 Rotary clubs worldwide and granted access to the organization's services and resources, including publications in nine languages, information at www.rotary.org, grants from The Rotary Foundation, and staff support at world headquarters and the seven international offices.

Comments?

Direct questions or comments about this manual or any of RI's training resources to:

Leadership Education and Training Division

Rotary International

One Rotary Center

1560 Sherman Avenue

Evanston, IL 60201-3698

USA

Email: learn@rotary.org

Phone: +1-847-866-3000

Fax: +1-847-866-9446

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Committee Role and Responsibilities



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

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 committee is to lead the club's service initiatives and to help develop and implement educational, humanitarian, and vocational service projects that benefit the local community and communities in other countries.

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

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

- Develop committee goals to achieve club service project goals for the coming year.
- Conduct service projects that include needs assessments, planning, and evaluation.
- Identify opportunities for signature projects that will increase your club's recognition in the community.
- Work with other organizations, volunteers, and committee members to maximize the impact of your projects.
- Lead efforts to raise funds for projects.

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

- Understand liability issues that affect your club projects and activities.
- Work with the club public relations committee to promote service projects.
- Reach out to clubs locally and internationally for partnership, fellowship, service, and volunteer activities.

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

The following people can provide support in planning and implementing club service projects:

- Rotarians and their families and friends
- Community organizations
- Rotary Foundation alumni and former RI youth program participants
- Interact and Rotaract club members
- Youth Exchange students and RYLA participants
- Rotary Community Corps members
- Members of other Rotary clubs
- Rotarian Action Groups and Rotary Fellowships

Service provides an opportunity for networking and fellowship among club members. Involving all members in service projects will help keep members engaged. For more detailed information about conducting a service project, see [*Communities in Action: A Guide to Effective Projects*](#) (605A).

Conducting Service Projects

The service projects committee is responsible for conducting service projects that ensure the proper use of club funds and Rotarians' time and that benefit those in need. The following systematic approach will help you fulfill those responsibilities.

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 adapt your approach to meet the needs of your club. For a quick checklist of steps, see worksheet 5.

1. Assessing the situation

Successful service projects must address real and current community concerns. Conduct a needs assessment to identify the community needs your club can address.

External assessment. To properly conduct an external assessment, consult with a wide range of community members. They can provide a resource base of experts on local issues, project

strategies, and possible future club service projects. In addition, working with community members helps identify potential new Rotarians.

Club assessment. Also assess your club's ability to carry out 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. Be sure to focus on past project experiences and the lessons learned from them.

2. Choosing a project

The assessment provides information for choosing a service project. This decision is usually based on the relevant community concerns, available resources, and club service interests.

Regardless of how the decision is made, there are common concerns that clubs should consider before choosing a project, including community support and involvement, the club's history of service, time and resources, the project's duration, and its sustainability.

3. Making a plan

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

- Setting goals and objectives
- Developing a work plan
- Developing a budget
- Determining liability and protection

4. Taking action

Clubs should rely on their project plans when implementing projects. Taking action requires raising funds, managing project activities, and promoting the project. Work with your club's public relations committee on a promotion plan.

5. Evaluating success

Evaluation plays an important role in current service projects and future projects. Knowing what worked and what didn't helps you learn and grow. Document your evaluation findings and incorporate them into your club's project planning process. Finally, celebrate your success by recognizing the work, time, and financial contributions of all who were involved.

Rotary's Service Priorities

Develop service projects that address different Rotary priorities. When planning projects, consider the following Rotary priorities:

- Areas of focus
 - Peace and conflict prevention/resolution
 - Disease prevention and treatment
 - Water and sanitation

Rotary's Areas of Focus (965) provides an introduction to the six areas, with examples of service projects for each.

- Maternal and child health
- Basic education and literacy
- Economic and community development
- Avenues of Service: Club, Vocational, Community, International, New Generations
- Presidential Citation
- RI Strategic Plan

Clubs can strengthen their service projects by collaborating with other Rotary clubs locally and internationally, with individuals, organizations, and Rotarian-sponsored groups that are based in the community being served or that have expertise in a particular area of service.

Working with partners can help even small projects achieve a greater impact, and can help established projects become more effective and sustainable. You can find a partner in various ways:

- Contact your district Rotary Foundation committee chair or district programs committee chair.
- Network with fellow Rotarians at district and international meetings.
- Expand your international connections through fellowship visits with other clubs and Rotary Friendship Exchange.
- Connect with fellow Rotarians on social networking sites.
- Explore www.rotary.org.

Rotary Showcase is an online, searchable database of Rotary club projects that can be used as examples of best practices. Any Rotarian can add a project to the showcase, and by signing in through Facebook, share information and photos of the project with friends.

Rotary Service

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. These opportunities help clubs and districts achieve their service goals locally and internationally, fostering fellowship and goodwill in the process.

Community Service — Projects that respond to the needs of local communities

Interact — Service club for young people ages 12-18

International Service — Projects that involve efforts from Rotarians in more than one country

New Generations Service — Programs and activities that engage young people up to age 30 in their community and in service projects and that foster their interest in Rotary

Rotaract — Service club for young men and women ages 18-30 sponsored by a local Rotary club

Rotarian Action Groups — International groups of Rotarians, Rotarian spouses, and Rotaractors who join together to conduct international service projects related to a specific topic

Rotary Community Corps — Service group of non-Rotarian adults sponsored by a local Rotary club

Rotary Fellowships — International groups of Rotarians, Rotarian spouses, and Rotaractors who join together to pursue a common recreational or vocational interest

Rotary Friendship Exchange — International exchange program for Rotarians and their families that promotes relationships that can evolve into international partnerships for service projects

Rotary Peace Centers — International fellowship program that offers a master's degree or professional development certificate in peace and conflict resolution. Qualified candidates have the opportunity to study at one of several established Rotary Peace Centers around the world.

Rotary Youth Exchange — Program that promotes international understanding and peace among students ages 15-19 and young adults ages 18-25

Rotary Youth Leadership Awards (RYLA) — Training program for young people that emphasizes leadership, citizenship, and personal growth

Vocational Service — Activity that encourages Rotarians to model high ethical standards and apply their business knowledge and skills to benefit others

Rotary Foundation Grants — Support for clubs and districts as they undertake humanitarian and educational activities both locally and abroad

PolioPlus — Rotary International and Rotary Foundation corporate program that supports global polio eradication efforts

Fundraising

Fundraising for a specific or future project can be done in a variety of ways. A club can fundraise from outside sources, host events, or use club funds. A successful fundraiser can support projects that make a real difference in people's lives. If your club chooses to organize a fundraiser, consider the following steps:

- 1. Determine fundraising needs.** Define the purpose of the activity and identify the type of event that will meet the club's funding needs.
- 2. Establish a budget.** Evaluate funding available in the club budget, determine expenditures and anticipated revenues.

- 3. Identify the resources required to meet fundraising goals.**
Determine the human resources needed to plan and carry out the fundraiser.
- 4. Figure out logistics.** Choose an appropriate date and venue for the event.
- 5. Organize volunteers.** Determine roles and tasks for volunteers, and involve community members.
- 6. Publicize the event.** Identify the target audiences in the club and the community and plan how you will reach out to them. Involve the media as appropriate.
- 7. Hold the fundraiser.** Encourage volunteers to monitor the event's 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, and deposit funds in an account opened for the event.
- 9. Recognize volunteers, contributors, and sponsors.** Follow up with personalized thank-you notes, photos, and plaques if appropriate.
- 10. Evaluate the effort.** Record lessons learned so they can be applied to future fundraisers.
- 11. Ensure continuity for future fundraising efforts.** Discuss any outstanding issues with the incoming treasurer and new members of the fundraising organizing committee.

If a fundraiser is particularly successful, goals may be exceeded. Place 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 goal, seek financial assistance from other community groups.

Circularizing Rotary clubs. 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 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.

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

- Before requesting cooperation from another club, a Rotary club must first request permission from the appropriate district governor(s) and state the purpose of the contact. A club wishing to contact only one club, however, does not need the governor's permission.

- Before asking for financial aid from any other Rotary club or individual Rotarians other than its own members, a club must first request permission from the RI Board.

Risk Management

As members of the service projects committee, you are in a position to minimize risk and safeguard your club's members, program participants, and assets. Consider three basic questions when planning activities and 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 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. Retain legal documents after the event in case a claim is made.

Clubs are urged to obtain the advice of legal and insurance counsel regarding liability protection. Protection may come through the incorporation of the club (or its activities) or the purchase of liability insurance. Clubs in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged by RI and paid for by all active U.S. clubs through the semiannual dues report. Clubs outside the United States should consider acquiring insurance if they do not already have it. See the [Manual of Procedure](#) (035) for additional information.

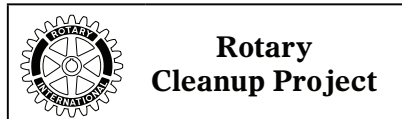
For more information on the use of the Rotary emblem and other marks, see the [RI Visual Identity Guide \(547-EN\)](#), available at www.rotary.org.

Beware of emails 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 email, confirm the sender's identity and the reason for the request via separate email or a phone call.

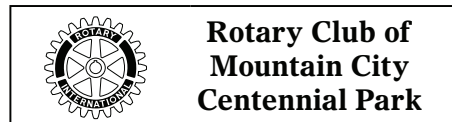
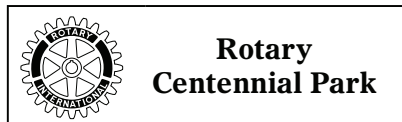
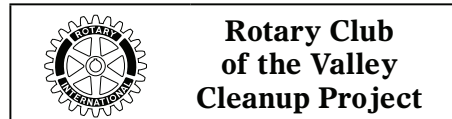
Using Rotary Marks. The Rotary emblem identifies Rotary clubs and their members in every part of the world. All Rotarians should be concerned with protecting the integrity of the emblem.

Clubs are welcome to use the Rotary name in naming their projects, programs, and activities. It is recommended that your club name be used immediately following or preceding the Rotary name. Clubs may use the Rotary emblem in conjunction with such activities, as long as it is correctly reproduced.

INCORRECT



CORRECT



Youth protection. Ensure that planning for any club service project involving young people includes adequate protection, 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. Refer to Appendix 1 for more information about RI's youth protection policy.

2

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. There are several things you should do before you take office to prepare for your role. In addition to attending training sessions at the district assembly, you should

- Meet with the outgoing committee chair
- Review your club's bylaws to become familiar with your club's procedures and regulations
- Review your club's strategic plan and develop annual goals to support it
- Select and prepare your committee members with the president-elect
- Create subcommittees as needed (vocational, community, international, new generations, and fundraising)
- Develop a communication plan for the year
- Determine what additional responsibilities or duties your club has for your committee

Answer the discussion questions at the end of this manual to prepare for the district assembly.

Good preparation will lead to a productive year. Once you take office, you will have the following major responsibilities:

- 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 progress toward your committee goals, and report committee activities and progress to the club president, board of directors, and the full club.

Your Committee

Work with the president-elect to select committee members to fill vacancies and conduct planning meetings before the start of the year. For continuity, committee members should be appointed for three years. Committee members should be enthusiastic about hands-on service projects. When selecting new members, consider the following characteristics:

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

Once your committee is formed, it is your responsibility to prepare members for the coming Rotary year. Determine how to use the skills and interests of your members and delegate tasks accordingly. You can prepare committee members by

- Informing them 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

Goal Setting

As the chair of your committee, you are responsible for ensuring that it sets and achieves its annual goals to support the club's strategic plan. You'll have an opportunity to work on goal setting with your president-elect and other incoming club leaders at the district assembly. RI is developing an online tool to help clubs submit their goals via Member Access.

Effective goals. Be sure that the annual goals reflect committee capabilities and club interests. Goals should be shared, measurable, challenging, achievable, and time specific.

Various planning tools are available to clubs, including *Be a Vibrant Club: Your Club Leadership Plan* and the *Strategic Planning Guide*.

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:

- 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 available and needed from your club, district, and RI to support the goal.
- Decide how you will evaluate success in attaining your goals, and whether baseline data is needed.

Regularly assess your goals to ensure that steady progress is being made toward achieving them, and adjust if necessary.

Motivation. Part of your responsibility is keeping committee members motivated. Common motivators include:

- Assurance that the goal will be beneficial
- Belief that the goal is achievable and will be successful
- Opportunities for fellowship and networking
- Assignments that use each member's 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

Before 1 July, work with the outgoing committee chair and the club treasurer to determine what funds your committee will need and that these funds are included in the club's budget. Be sure to include any planned fundraising activities.

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 action if issues arise.

Communication

Think about how you will communicate with the following club leaders:

- **Committee members.** Committees should meet regularly 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.** The work of one committee affects the work of another. Your committee should work with the following club committees:
 - 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 newsletter or to submit news about 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.
- **Your region.** Your Rotary coordinator is available to help your club with questions. Find the Rotary coordinator in your region at www.rotary.org.

3

Resources



Many resources are available to help your committee fulfill its role. Download resources at www.rotary.org, or order them at shop.rotary.org, by email at shop.rotary@rotary.org, or from your international office.

- www.rotary.org — RI website, aimed at helping club leaders gather information about effective club operations, providing links to club administration, membership, public relations, service projects, and Rotary Foundation information and to club-level resource pages
- Awards — RI and Rotary Foundation awards and recognition programs; see www.rotary.org/awards
- RI programs newsletters — E-newsletters in support of RI structured programs and the Avenues of Service; subscribe at www.rotary.org/newsletters
- *Communities in Action: A Guide to Effective Projects* (605A) — Guide for developing, carrying out, and evaluating a service project
- *Rotary's Areas of Focus* (965) — An introduction to the six areas of focus, with examples of service projects for each
- *Community Assessment Tools* (605C) — Describes tools for identifying effective service projects within the community

- [An Introduction to New Generations Service](#) (735) — Resource to introduce Rotary clubs to Interact, Rotaract, Rotary Youth Exchange, Rotary Youth Leadership Awards, youth protection, and alumni activities
- [An Introduction to Vocational Service](#) (255) — Provides information, resources, and project ideas related to vocational service
- [Interact Handbook](#) (654) — Guide for organizing and administering an Interact club
- [Rotaract Handbook](#) (562) — Guide to organizing and developing a Rotaract club
- [Rotary Community Corps Handbook](#) (770) — Basic steps for organizing an RCC, including tips for identifying potential leaders, case studies, and program ideas
- [Rotary Fellowships Handbook](#) (729) — Guide for organizing and promoting Rotary Fellowships
- [Rotary Friendship Exchange Handbook](#) — Guidelines for hosts and guests, information on arranging exchanges, samples itineraries, and more
- [Rotary Youth Leadership Awards Handbook](#) (694) — Guide to organizing club or district events to develop leadership among young people
- [Youth Exchange Handbook](#) (746) — Guide to operating a Rotary Youth Exchange program
- [Standard Rotary Club Constitution](#) — Constitutional document that provides framework for Rotary club operations
- [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
- [The Rotary Foundation Quick Reference Guide](#) (219) — Compilation of the programs and services of The Rotary Foundation in a quick-reference format

Human Resources

Find contact information in the *Official Directory*, at www.rotary.org, or by consulting your district governor.

- District governor — RI officer responsible for advising on strategies to make your club more effective
- 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.

- Other club committee chairs in your district — 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 who can be assigned to lead committee activities
- Rotaractors in your district — Excellent resources to help plan and implement service projects and to offer another perspective and energy
- Rotary coordinators — Rotarians appointed by the RI president to serve as a resource within a specific region
- Contact Center — A team available to answer questions; can be reached at contact.center@rotary.org or toll-free (within U.S. and Canada) at 866-9-ROTARY (866-976-8279). Rotarians outside North America should continue to contact their international office.

Appendix 1: Risk Management for Youth Programs

A risk management program can provide a basis for understanding the possible risks involved with youth activities, such as injury, illness, and abuse, so that participants may make good choices in dealing with these risks. Though a risk management program cannot guarantee the elimination of all negative occurrences, it can reduce their number and effects. Your club and district should consider the following points when developing a risk management program for working with youth:

- Develop and implement a district youth protection policy that addresses physical, sexual, and emotional abuse or harassment.
- Establish a code of behavior for adult and youth participants to follow during their involvement in the program. These rules should reflect local cultural standards and those of the district or club, as well as best practices for youth protection.
- Review your district's policies to ensure they are in harmony with the specific RI guidelines developed by the Board for each youth program.
- Explore insurance and risk management issues involved in sponsoring a youth program or event. Consider these questions:
 - What happens if someone is injured?
 - What happens if a participant alleges sexual misconduct?
 - What happens if a natural disaster occurs?
- Work to minimize potential losses by
 - Purchasing liability insurance coverage that is adequate for your region
 - Developing an emergency plan and practicing it at least once during the program
 - Teaching participants about safe behavior during the program

Clubs and districts are urged to contact their insurance broker or agent to determine whether their insurance policies provide adequate coverage for their youth programs. Insurance becomes a complex issue when multiple districts or clubs sponsor a program, because each organization may have different coverage.

All participants, including youth and organizers, are urged to verify that their health and life insurance will provide adequate coverage while they participate in the program. Many health insurance policies provide only limited coverage outside a certain area, so this precaution is especially important when traveling or living away from home. In these cases, participants should consider obtaining a travel medical and accident insurance policy that provides the following types of coverage:

- Medical expense reimbursement
- Repatriation of remains
- Emergency evacuation
- Accidental death and dismemberment

It is recommended that a club or district consult its legal counsel before signing an agreement or contract with any organization, contractor, or service provider. These documents may contain waivers, hold-harmless, or indemnification agreements that may attempt to release a party from liability and transfer the risk to the club or district. Be aware that Rotary International is not liable for any illness or injury to persons, including participants and organizers, or for damage to any property.

District Assembly Discussion Questions

When considering these questions, talk to outgoing and incoming club leaders to compare ideas.

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

How will your committee support the club's strategic plan?

What kinds of projects will have the greatest impact on the community?

What fundraisers will ensure appropriate funding for projects?

How can you help committee members do their job?

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

What is your club's signature project?

Is your signature project reflecting your club's vision?

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.

Long-range goal (goal for your club three years from now)
Year 1 annual goal
Year 2 annual goal
Year 3 annual goal

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.

Annual goal

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.				

Resources needed

Worksheet 4: Service Projects Committee Case Studies

Read the case study below and answer the questions. Create a plan using the case study action plan on page 26.

Case Study 1

Your club's signature project has supported a literacy program in your local school district for more than 10 years. Meanwhile, your international service chair has identified a project in South Asia in which the local Rotary club is seeking resources to help establish a computer training lab for teachers in a rural community. Your club doesn't have enough funds to support both projects.

What do you do?

Do you vote on which to support?

Are members likely to embrace the idea of a new initiative or continue with the long-standing local project that your club is known for?

How might taking on a new international project affect your club?

Case Study 2

Your club has sponsored a local Rotaract club for many years. The Rotaractors are primarily university students, so there is regular turnover when they graduate. The goal of their annual fundraiser is to collect money for a health clinic in Ghana, and the success of the fundraiser varies from year to year.

What can your club do to support the Rotaractors as the club's leadership changes every year (e.g., mentoring, partnering)?

What can you teach the Rotaractors?

What can your club learn from them?

Case Study 3

A Rotary club in India has established a twin club relationship with a club in Peru. Through Rotary Friendship Exchange, members of the two clubs discovered a common interest in water and sanitation. They raise money to support a program that trains people to install water wells. Both clubs would like to expand their program to more countries, but they don't know where to start.

What are some ways these two clubs could expand this project?

What partners could they work with to help the project benefit more people?

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?

Resources needed

Worksheet 5: Problem-Solving Guide

Use the Planning Guide for Effective Rotary Clubs and the goals worksheet from session 2 to develop your problem-solving guide. Analyze your club's goals, and think about potential challenges to achieving them. Then, offer solutions to these challenges.

	Goal	Potential Challenge	What resources are available?
Administration			
Membership			
Public Relations			
Service Projects			
Rotary Foundation			
Other			

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One Rotary Center

1560 Sherman Avenue

Evanston, IL 60201-3698 USA

www.rotary.org