

District 6920

Best Practices

For Rotary Clubs

The most successful organizations and businesses search out the “best practices” to inspire their people and to improve their processes. For example, Southwest Airlines went to visit Indy 500 pit crews to get ideas about fast turnaround of equipment – and they applied those best practices to how they operate when a plane arrives at a terminal gate – so now Southwest turns an aircraft at a gate in half the time that it takes Delta to do the same thing; Southwest’s plane is earning money flying while Delta’s plane is sitting on the ground.

District 6920 now has this framework for Club Best Practices. These Best Practices are actually being utilized in one or more clubs in District 6920 but no club can reasonably expect to fully incorporate all of the Best Practices. Hopefully this list will help club leaders and their boards to identify worthwhile opportunities to become more effective and successful. In addition this list can be helpful for the President-Elect to consider during his or her year as President-Elect to develop a focus and priorities for the coming Rotary year.

The practices are grouped into the following categories, which generally match up with committees:

Summary

Leadership: club leaders are identified well in advance of their term so that they can become well prepared to serve their club.

Membership: members are asked for feedback, new members are integrated into the club and recruitment is planned in great detail

Club Meeting Value and Content: club meetings are fun, speakers are carefully selected and meetings are well run

Foundation: EREY is included in the bill, the club learns about Foundation funded programs and donors are recognized and celebrated

Service Project: a “signature” project continues from year to year and is well recognized as a Rotary Club project by the community

Social: clubs have several social gatherings each year to include both spouse/partners and children.

District & Club Data Base: the DaCdb is complete and current for club officers and members and is used to produce the club directory twice a year

District Simplified Grants: DSG is used to support projects where Rotarians are actively involved and the final report is produced on schedule

International Matching Grants: grants are used where Club members have some in-country knowledge and contacts for a project outside of the US

Growing the Next Generation of Rotarians: clubs ask younger members “how can we help you?” and are receptive to their new ideas and approaches

International Relationships: club members build relationships through contact with Group Study Exchange teams and with GRSP students

Fundraisers: fundraisers are refined annually and strengthen relationships among club members and generate recognition for Rotary and the club

Compliance: clubs produce reports and submit dues on schedule

CLUB BEST PRACTICES

A. Leadership

1. Not later than January 1 the club has selected both its President-Elect and President-Nominee.
2. Both the President-Elect and the President-Nominee attend President-Elect training (PETS) funded by the club.
3. The club has a designated position for the President-Elect to perform such as Membership Chair, Secretary, Program Chair or Foundation Chair.
4. The Club President and President-Elect lead by the example that they set.
5. The Past-Presidents of the club have a dinner meeting with the President-Elect prior to his/her taking office on July 1.
6. The President-Elect utilizes the District 6920 Planning/Awards spreadsheet to “score keep” the progress of the club and report the results (cumulative points and projections) at each board meeting.
7. The President-Elect, President-Nominee and immediate Past-President serve as voting member on the Club’s Board of Directors.
8. Following PETS the President-Elect develops specific objectives for the year in consultation with the club’s board and committees and shares these objectives with all club members at the beginning of the Rotary year.
9. Each committee of the Board has a designated leader who, empowered, enabled and encouraged, has set a specific objective for the year..

B. Membership

1. The club conducts an anonymous survey of its members annually in June or July and the board promptly reviews the feedback and reports back to the club members¹.

¹ The Board should review feedback from members who complete a four-question survey form during a club meeting, (which takes only 10 minutes): A. What is good and most valuable about your experience with our club that should be continued? B. What needs to be changed or improved about your experience of our club? C. What advice do you have for the President and officers of our club? D. How would you like to volunteer in support of our Club?

2. The Board develops a list of specific named individuals who would be good potential members and leads an organized campaign to recruit them, which may include inviting all of them to a club social that includes a brief presentation on the club.
3. A part of the induction of new members is a report of which “Rotary area of service” he or she has selected. The club has a “red badge” program that helps new members build relationships with club members.
4. The club distributes a bulletin/newsletter with club, member, district and RI news and photos to all members weekly.
5. The club focuses on the expectations and “customer satisfaction” of members who have been Rotarians under five years because this is the segment where retention is a serious issue.
6. The club provides a document for potential members, which highlights the benefits of membership (access to existing member/leaders), the local service delivered to the community, and the global outreach of Rotary International and its Foundation.
7. The club can articulate its purpose, identity and competitive position (e.g. brand) internally, to the community and to potential members.
8. Club leaders evaluate the existing plans for clubs membership, are well versed in the facts of the club’s membership and retention, and are actively involved in detailed planning and recruitment of specific new members to achieve a net new member goal.

C. Club Meeting Value and Content

1. Every club meeting brings a smile to the faces of the members and allows members the opportunity to share something personal with their fellow members².
2. The quality of program & speaker is enhanced by using the access and knowledge of the most well connected members of the club - to avoid program that promote a business or a non-profit organization (that has little or no Rotarian involvement).
3. Careful attention is given to quality of the meal and the convenience of the location consistent with the targeted membership of the club.
4. The meeting consistently begins and ends on schedule with at least 25 minutes provided for the speaker.
5. The Program Chair communicates with the Program Chair of other clubs in their area (e.g. a one hour drive) and exchanges information on good programs and speakers that other clubs could utilize.

² Fun takes many different forms – the sports commentator during football season, the judge who assesses fines, the quizmaster who fines those who do not know the correct answer; individuals contribute “happy dollars” to share their good news.

D. Foundation

1. Each member's quarterly bill includes a line for the Rotary Foundation Annual Fund in the amount of \$25 per quarter.
2. The club's Foundation Chair is well educated on the mechanics of qualification and recognition for:
 - a. EREY – every member contributes and the average is \$100 or more
 - b. Paul Harris Fellow and Paul Harris Society
 - c. Permanent Fund
 - d. Benefactor and Bequest Society
 - e. Major Donor
3. The club's Foundation Chair utilizes the District Foundation Chair to conduct a club program.
4. The club appropriately celebrates the award of each Paul Harris Fellow, Benefactor and Major Donor and recognizes all in the club directory and bulletin.
5. The club actively participates in programs funded by the Foundation including
 - a. Providing leaders and team members for Group Study Exchange teams
 - b. Participating in District Simplified Grants and International Matching Grants
 - c. Nominating individuals for Ambassadorial Scholarships and Peace Scholarships
6. The club assists a member in participating in a Polio National Immunization Day in India or another country where polio is endemic.

E. Service Projects

1. The project becomes, over a period of years, a "signature" project of the club that is widely recognized as a project of this specific Rotary Club.
2. The project has a physical presence that becomes known in the community and is a point of pride for citizens and displays the Rotary emblem.
3. The project is accomplishment through the active involvement (more than just fund raising) of members who work together outside of club meetings.
4. The club involves Interact and Rotaract Club members in its service projects.
5. Members of the club participate in a METS sort day in Savannah or help collect surplus medical equipment and supplies in their local community for collection by METS.
6. The club is careful about being used as a fundraiser for organizations outside of Rotary.
7. The club tracks its volunteer hours and financial support for each project and produces an annual report shared with club members.

F. Socials

1. The club provides at least two opportunities each year for club members and their spouses/partners to build relationships beyond club meetings.
2. Club socials involve the children of club members.
3. The club organizes a group to attend the annual District Conference.

G. District and Club Database

1. The club is linked on DaCdb to Rotary International using RI Direct so that all updates are immediately sent electronically into the RI database.
2. All club officers including the President-Elect, the President-Nominee, and the Foundation Chair are identified on the DaCdb
3. The club Secretary is experienced in using DaCdb to maintain contact information, update positions held, upload photos, report attendance and produce the membership directory (contact Paula Goodnow for assistance).
4. All new members are entered into DaCdb as soon as they have an RI member number³.
5. Each member's record on DaCdb contains a photo and phone numbers and (with the member's approval) his or her email address.
6. DaCdb is used to produce an electronic membership directory at least twice a year.
7. The club meeting location and meeting schedule is immediately updated for any changes.
8. Phone numbers and email addresses are provided for all club officers.

H. District Simplified Grants

1. The grant provides support for a project in which members of the club have an active, personal, hands-on involvement (much more than just handing over a check to the Ferst Foundation or a box of dictionaries to children).
2. The club obtains receipts for all expenses and receives acknowledgements from beneficiaries as to the benefit of the project.
3. The project is completed on schedule, as planned and all expenditures are documented and any unspent funds are returned to the Foundation.
4. A record of all Rotarian, Interact and Rotaract volunteer hours are accumulated and recorded.
5. Photographs are captured during the project and shared throughout the district (Facebook, website or newsletter) and used in publicity.

³ The Club Secretary can ADD the new member on the RI database via Member Access with MINIMUM information (just enough to get RI to assign them a Number). This is the preferred method of adding new members, and is documented more completely in **FAQ #3** (under the HELP tab in **DaCdb**). Then, using the newly assign RI MemberID, the Club Secretary adds the new member into **DaCdb**, with ALL of their pertinent data. Then, **DaCdb** sends ALL of this information to the RI database, to backfill the "short entry data" used to get the RI Number assigned.

6. The club encourages contributions to the Foundation's Annual Fund by presenting it as the source of funds for District Simplified Grants.

I. International Matching Grants

1. One or more Rotarians originating the project have a personal knowledge of the target area and the conditions present there.
2. The club utilizes district expertise on matching grants early and often to avoid wasted effort and lost time.
3. An experienced in-country Rotarian is identified who can communicate reliably, who can see that the project is executed as planned, and who can produce the report of project completion.
4. The project is in one of the six areas of focus for the Rotary Foundation.
5. The club providing the financial support is especially careful to avoid making any assumptions about the accuracy of their understanding of the needs and capabilities of the area to be served.
6. Club recognizes that from concept to approval of the final report will often cover a two-year period.
7. Before starting work on a project the sponsors first confirm that clubs and/or districts signing the grant application have no past-due reports on prior matching grants in order to get approval of the new grant application (district chair can obtain this data).

J. Growing the Next Generation of Rotarians

1. The club successfully recruits members under the age of 35 and gives them the freedom to innovate and experiment.
2. Club leaders recognize that young members want to have an impact quickly and do not want to be deterred by process (e.g. committees, status quo, traditions, structure).
3. The club asks younger members "what can we do for you?" and then responds to support the member.
4. The club adapts its dues policy and attendance policy to recognize the personal time pressures (young family, two careers, children's busy activities) to help younger members feel comfortable, accepted and respected.
5. The club plans and schedules socials and projects with consideration of the younger members.
6. Recruiting plans include the graduates of the local area leadership development program as a way to identify "emerging leaders".

K. International Relationships

1. The club sponsors or co-sponsors a Georgia Rotary Student or arranges for one of these students to speak at their club meeting.
2. The club engages with the inbound Group Study Exchange Team during their visit to the district.

3. The club nominates candidates for Group Study Exchange team member or team leader.
4. The club receives banners from club members who have done a “makeup” out side of the US.
5. The club encourages contributions to the GRSP Foundation and recognizes Will Watt Fellows.
6. The club arranges for GSE “alumni” (outgoing team members who have completed their trip) to speak to their club about their experience.

L. Internet Technology and Social Media

1. The club has a Facebook page and most members are “friends”; it may also have a club web site linked to the district web site.
2. The club has a live Wi-Fi program at a club meeting devoted to the content of the District Web Site (www.Rotary6920.org), the district Facebook page (www.facebook.com/Rotary6920) and of www.DaCdb.com.
3. The club posts photos of all service projects and major fundraisers on the district Facebook page.
4. Club officers participate in webinars conducted by RI, by the Zone and by the District.
5. The club uses www.DaCdb.com to produce and distribute (Pmail) the club directory twice a year.
6. The club President and President-Elect make frequent use of www.DaCdb.com for contact information and emails to members of the club and have a “short cut” on their computer’s “desk top” to provide one-click access.
7. The club officers with smart phones utilize the available apps including m.dacdb.com and the RI Club Locator.

M. Fundraisers

1. The fundraiser is a labor of love – that brings pride and enthusiasm to its members.
2. The organizers of the fundraiser mentor leaders for the following year utilizing training, checklists, annual plan and a post-event evaluation.
3. Promotion recognizes both Rotary and the event.
4. Volunteers are used extensively to keep costs low and can involve Interact, Rotaract, local military and other community volunteers.
5. Fundraisers are fun and help members to make friends and should especially integrate new members into the event.
6. The fundraiser is an annual event built upon prior year’s experience, success and recognition in the community.
7. The fundraiser generates funds for the club’s community service projects; the positive local benefits to the community are clearly identified in the promotion of the event and solicitation of support.
8. Members of the Club’s Interact and Rotaract Clubs participate in the fundraisers.

N. Compliance

1. The Rotary Club operates in compliance with the RI Manual of Procedure, the Rotary Code of Policy, and its own bylaws.
2. Clubs report monthly attendance to RI through DaCdb by the 5th of each month if they are not on the auto reporting system.
3. The Club submits its semi-annual report of membership on schedule to Rotary International. RI sends the semi-annual report (SAR) with the dues invoice on or around January 1 and July 1 to the Club Secretary of record.
4. The Club submits payment of dues to Rotary International and to the district twice a year as scheduled. District sends the dues invoice to the club on or around January 1 and July 1.
5. The club files an IRS Form 990 by November 15 each year.
6. If a club sponsors a GRSP student, payment is due in August. ⁴

O. Rotary Foundation Areas of Focus - for Grants, GSE, DSG

The six areas of focus for Rotary Foundation Global Grants are:

1. Peace and conflict prevention/resolution
2. Disease prevention and treatment
3. Water and sanitation
4. Maternal and child health
5. Basic education and literacy
6. Economic and community development

⁴ There is an option to split the payment into two parts - due in August and balance due in January.