



Rotary Bengaluru Heritage North Member Handbook

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Preface

Rotary International has existed for over 120 years and has a rich tradition that has sustained it over this long period. However, Rotary has not been static and it has evolved over time, geography, changing cultures and mores giving rise to a myriad variations of how it's essential work is conducted. Every Rotary club has evolved its own ways that work for itself .

Rotary Bengaluru Heritage North is no exception and as it completes a decade of service to society and embarks on bright new decade ready to embrace new challenges and welcome new members there is a need to create a handbook for itself and its members. This handbook is intended to help the club, and it's future leaders, bring greater structure as well as clarity but most importantly to help its members become quickly familiar with how they can participate, engage and contribute to its activities.

This handbook is the very first attempt and we have no doubt that this will need to get updated regularly, perhaps annually, to keep it relevant and useful. A handbook can be stifling or liberating, depending on how we adopt it. Is it a straitjacket forcing us to do things in a certain way or a ready-to-use manual of processes that will simplify many of the most routine and repeating activities and take away guesswork from them? Only time will tell and it is the fond hope of this committee that it will be the latter.

We dedicate this handbook to the current and past Presidents, office bearers, and members of our club who have overcome enormous challenges to successfully complete our first decade and create a fantastic foundation for the future.

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Team 2025-26

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Table of Contents

1	<u>ROTARY BENGALURU HERITAGE NORTH</u>	<u>6</u>
1.1	ABOUT	6
1.2	PAST PRESIDENTS AND SECRETARIES	6
1.3	KEY PROJECTS FROM THE CLUB	6
1.4	ABOUT THIS HANDBOOK	7
2	<u>CLUB MEETINGS</u>	<u>7</u>
2.1	DEFAULT CLUB MEETING AGENDA	7
2.2	HYBRID/ONLINE MEETING SETUP & ETIQUETTE	8
2.3	GUEST SPEAKER PROTOCOL & ENGAGEMENT.....	9
2.4	ATTENDANCE TRACKING & ENGAGEMENT MONITORING.....	9
2.5	NETWORKING & FELLOWSHIP OPPORTUNITIES DURING MEETINGS	10
2.6	MEMBER SPOTLIGHT & SHARING.....	10
3	<u>MEMBERSHIP MANAGEMENT</u>	<u>11</u>
3.1	PROSPECT MANAGEMENT & ENGAGEMENT.....	11
3.2	2.2 ONBOARDING NEW MEMBERS: FROM INTEREST TO INDUCTION	11
3.3	INDUCTION CEREMONY	12
3.4	HANDLING RESIGNATIONS.....	12
3.5	DATA MANAGEMENT.....	13
3.6	MEMBER ENGAGEMENT & RETENTION STRATEGIES	13
3.7	MENTORSHIP PROGRAM FOR NEW MEMBERS	14
3.8	MEMBER CLASSIFICATION & DIVERSITY	14
4	<u>FINANCIAL & BANKING OPERATIONS</u>	<u>15</u>
4.1	BANK ACCOUNT MANAGEMENT	15
4.2	EXPENSE APPROVAL.....	15
4.3	BUDGET PLANNING.....	16
4.4	AUDIT & REPORTING	16
4.5	FUNDRAISING HANDLING	17
4.6	FINANCIAL STATUS & MEMBER CONTRIBUTIONS	18
5	<u>CLUB ADMINISTRATION</u>	<u>18</u>
5.1	BOARD TRANSITION	18
5.2	MEMBER RECORDS.....	19
5.3	DATA MANAGEMENT.....	19
5.4	OFFICER NOMINATION/ELECTION SCHEDULE	20
6	<u>PROJECT LIFECYCLE MANAGEMENT (SERVICE & COMMUNITY PROJECTS)</u>	<u>20</u>



6.1	PROJECT PROPOSAL	20
6.2	PROCUREMENT	21
6.3	EXECUTION	22
6.4	REPORTING	22
6.5	CLOSURE	23
<u>7</u>	<u>PUBLIC IMAGE & COMMUNICATION.....</u>	<u>23</u>
7.1	EVENT COVERAGE	23
7.2	SOCIAL MEDIA SOP	24
7.3	NEWSLETTER	24
7.4	WEBSITE	25
7.5	BULLETIN	25
7.6	MEDIA RELATIONS & PRESS RELEASES.....	26
7.7	MEMBER-GENERATED CONTENT & SHARING.....	26
<u>8</u>	<u>RBHN TRUST COORDINATION</u>	<u>27</u>
8.1	FUNDING REQUEST	27
8.2	REPORTING	27
8.3	FEES.....	28
<u>9</u>	<u>ROTARY DISTRICT & RI COORDINATION.....</u>	<u>28</u>
9.1	RI DUES	28
9.2	DISTRICT EVENTS	28
9.3	GRANTS	29
9.4	DISTRICT & RI PROGRAMS: HOW MEMBERS CAN ENGAGE	29
9.5	ATTENDING DISTRICT CONFERENCES & INTERNATIONAL CONVENTION	30
<u>10</u>	<u>EVENTS & CELEBRATIONS</u>	<u>30</u>
10.1	INSTALLATION CEREMONY.....	30
10.2	AWARDS & RECOGNITION PROGRAM.....	31
10.2.1	AWARDS.....	31
10.2.2	CELEBRATIONS	32
10.3	FELLOWSHIPS	33
10.4	CELEBRATING CLUB ANNIVERSARIES & MILESTONES.....	33
10.5	SPECIAL EVENTS & FUNDRAISERS	34
<u>11</u>	<u>MEMBER WELLNESS & SUPPORT.....</u>	<u>34</u>
11.1	CODE OF CONDUCT & ETHICAL GUIDELINES.....	34
11.2	CONFLICT RESOLUTION & GRIEVANCE PROCEDURES	35
11.3	MEMBER WELL-BEING & SUPPORT INITIATIVES	36
<u>12</u>	<u>TECHNOLOGY & TOOLS</u>	<u>36</u>



12.1	CLUB MANAGEMENT SOFTWARE USAGE (E.G., ROTARY CLUB CENTRAL, MY ROTARY) ..	36
12.2	COMMUNICATION PLATFORMS (WHATSAPP, EMAIL GROUPS)	37
12.3	VIRTUAL MEETING TOOLS (ZOOM, GOOGLE MEET) & BEST PRACTICES.....	37
13	<u>GLOBAL & LOCAL IMPACT</u>	<u>38</u>
13.1	UNDERSTANDING ROTARY'S AREAS OF FOCUS	38
13.2	CONNECTING LOCAL PROJECTS TO GLOBAL INITIATIVES	38
13.3	ROTARY INTERNATIONAL FOUNDATION & GIVING.....	39



1 Rotary Bengaluru Heritage North

1.1 About

Rotary Bengaluru Heritage North (or RBHN as it is commonly referred to) was chartered on 8th Oct 2015 as Rotary Bengaluru Heritage NCC with K C Saluja as the Charter President. The club was initiated by T S Gulhati, a long time Rotarian and he played the role of Governor's Special Representative and mentor of the club during its formative years.

The original Heritage NCC name reflected its charter membership – residents of the Heritage Estate and NCC Nagarjuna Meadows communities in Yelahanka, Bengaluru. It's membership reflected the cosmopolitan nature of the city and the rapidly expanding township of Yelahanka.

It was renamed to Heritage North in 2023 to reflect the wider mix of members, beyond the two original communities.

1.2 Past Presidents and Secretaries

Our club has had an illustrious first decade and has been led by many Presidents and officer bearers who have left a stamp of their own personality on the club.

#	Year	President	Secretary
1	2015-16	Rtn Kailash Saluja	
2	2016-17	Rtn Narender Kumar	Rtn Rashmi Tanksali
3	2017-18	Rtn Uttang Padhiar	
4	2018-19	Rtn Rashmi Tanksali	
5	2019-20	Rtn Arun Gopal	
6	2020-21	Rtn Manoj Phagothra	
7	2021-22	Rtn Mukesh Agarwal	
8	2022-23	Rtn Prateek Choudhary	
9	2023-24	Rtn Jayanta Kumar Chatterjee	
10	2024-25	Rtn Jayanta Kumar Chatterjee	Rtn Prateek Chaudhary

1.3 Key Projects from the Club

Our club has done many notable projects over the years and this handbook may be inadequate to list all of them. A few notable projects are mentioned here, to give members a flavor of past activities.

- Rotary Dispensary
- Happy School projects
- WASH program for schools
- Anganwadi restoration
- Numerous blood donation drives
- Numerous health camps – eyecare, dental, general checkup, mammography, mental health and more
- Supporting orphanages, old age homes and need communities

- Significant support for the needy during the COVID pandemic
- Support for neighborhood PHCs for the annual Polio vaccination campaign
- Anti-tobacco campaigns,
- Cloth, toys, books, ,... collection and donation drives
- Support for heart surgeries, other expensive treatments
- ...
- ...
- (to add more)

1.4 About this handbook

This handbook is in sections with each covering a small set of activities that are considered essential to the healthy functioning of our club. These can be referenced in any order, as needed, and are not intended to be read like a book. A quick run through of the different sections, at first, might help the reader familiarize themselves with what's present and where to look for what they need.

2 Club Meetings

Club meetings happen, in general, twice a month. The nature and frequency of the club meetings may change from month to month to accommodate member's preferences and other activities. Project meetings open to all members can be considered club meetings as well.

Each club meeting follows a usual agenda, but can be overridden for specific meetings where there is a need.

2.1 Default Club Meeting Agenda

- **Guideline:** Club meetings are held twice a month to foster fellowship, conduct club business, provide educational content, and plan service activities.
Punctuality is key to respecting everyone's time.
- **Process:** The **Club Secretary**, in coordination with the **President**, prepares and manages the agenda. In the absence of a specific agenda being published for a meeting, this agenda will hold.
- The club meeting will be chaired by the President and in absentia the following can stand in, by order of precedence:
 1. Vice President
 2. President Elect
 3. Secretary
 4. Immediate Past President
 5. Other designated member
- **Agenda**
 1. **Meet and Greet / Fellowship** (all members): up to 30 minutes prior to the start of the formal business
 2. **Welcome & Call to Order** (President): Prompt start of meeting.

3. **Invocation / A minute of silence** (Designated Member): As per tradition.
 4. **Introduction of Guests & Visiting Rotarians** (Secretary or Designated Member): Brief and welcoming. Includes prospective members who may be present.
 5. **President's Remarks** (President): Updates, announcements, appreciation.
 6. **Announcements of member special days** (Secretary / Membership Director)
 7. **Secretary's Report** (Secretary): Important communications.
 8. **Treasurer's Update** (Treasurer): Key financial highlights, appeals for dues/contributions (if any).
 9. **Committee Reports (Committee Chairs)**: Brief updates on ongoing projects/initiatives.
 10. **Guest Speaker/Program (Program Chair)**: Introduction, presentation, Q&A, vote of thanks. This includes the classification briefing by new or existing members.
 11. **Announcements & Future Events (Secretary/President/Members)**: Key dates, upcoming activities..
 12. **National Anthem (All Members)**:
 13. **Adjournment (President)**: Timely conclusion.
- **Roles: President, Secretary, Treasurer, Program Chair, Committee Chairs, All Members.**

2.2 Hybrid/Online Meeting Setup & Etiquette

- **Guideline:** RBHN strives for inclusive meetings. Hybrid/online setups ensure participation for all members regardless of location.
- **Process:** The **Secretary** (or a designated tech lead) manages the setup, while all members are responsible for adhering to online etiquette.
- **Steps (Setup):**
 1. **Platform Selection** (Secretary/Tech Lead): Select platform for the year (e.g., Zoom, Google Meet).
 2. **Meeting Link Distribution** (Secretary): Share link in advance via email/WhatsApp.
 3. **Audio/Visual Check (Technology/Communications Committee)**: Test equipment (microphone, camera, screen sharing) before the meeting.
 4. **In-Person Setup (Sergeant-at-Arms/Volunteers)**: Ensure clear audio/visual feed for online participants from the physical venue.
 5. **Virtual Waiting Room Management (Sergeant-at-Arms/Designated)**: Admit participants.
- **Meeting Etiquette:**
 1. **Mute When Not Speaking (All Members)**: Minimize background noise.
 2. **Video On (Encouraged for All Members)**: Fosters engagement, where possible.
 3. **Use Chat for Questions/Comments (All Members)**: For structured interaction.
 4. **Raise Hand Feature (All Members)**: For speaking turns.

5. **Be Present & Engaged (All Members):** Avoid multitasking.
6. **Dress Code:** Smart casual, as for in-person meetings.
- **Roles:** Tech Lead, Secretary, Sergeant-at-Arms, All Members.

2.3 Guest Speaker Protocol & Engagement

- **Guideline:** Guest speakers enrich club meetings. A smooth protocol ensures a professional and engaging experience for them and members.
- **Process:** Any member can propose a Guest Speaker to be invited to the club meeting.
- **Steps:**
 1. **Speaker Identification** (All members): Based on club interests and upcoming themes.
 2. **Speaker Session Approval** (President / Secretary / Club Services Director): Based on member interest and other planned activities
 3. **Invitation & Confirmation** (Club Services Director): Formal invitation to speaker, confirming date, time, topic, and technical requirements.
 4. **Agenda Update** (Secretary): Update the meeting agenda to include the guest speaker session
 5. **Announcement** (Club Services Director / Secretary): Prepare and circulate an announcement detailing the topic, speaker and any relevant details of the session
 6. **Additional Invitees** (Secretary / Club Services Director): Consider if additional invitees (prospective members, friends of Rotary) can / should be invited to attend the session
 7. **Speaker Briefing** (Club Services Director): Share club profile, audience demographics, desired presentation length, Q&A format. Request bio and high-resolution photo.
 8. **Pre-Meeting Coordination** (Club Services Director): Ensure technical setup is ready (if online/hybrid). Reconfirm speaker availability.
 9. **Introduction** (Proposer / Designated Member): Concise, engaging introduction using provided bio.
 10. **Moderation** (Proposer / Designated Member): Manage Q&A session respectfully.
 11. **Vote of Thanks & Memento** (Designated member / Club Services Director): Express gratitude, present token of appreciation (if applicable).
 12. **Post-Meeting Follow-up** (Club Services Director): Thank you note/email, share any relevant feedback.
- **Roles:** Club Services Director, President, Sergeant-at-Arms (for logistics), All Members (for respectful engagement).

2.4 Attendance Tracking & Engagement Monitoring

- **Guideline:** Regular attendance is a Rotary tradition and helps gauge member engagement.
- **Process:** The **Club Secretary** is responsible for accurate attendance records.
- **Steps:**

1. **Roll Call/Sign-in (Secretary/Sergeant-at-Arms):** During each meeting, record present members (physical and online).
 2. **Make-ups (Members):** Members attending other Rotary club meetings or qualified Rotary events should inform the Secretary with proof (e.g., photo, signed register).
 3. **Record Keeping (Secretary):** Maintain a digital log of attendance.
 4. **Reporting (Secretary):** Provide attendance reports to the Board regularly, and to RI via Rotary Club Central.
 5. **Engagement Monitoring (Membership Director/Secretary):** Identify members with declining attendance for gentle follow-up and support.
- **Roles: Secretary, Sergeant-at-Arms, Membership Director, All Members** (for informing make-ups).

2.5 Networking & Fellowship Opportunities during Meetings

- **Guideline:** Meetings are primary avenues for building strong bonds and professional connections within the club.
- **Process:** The **Sergeant-at-Arms** and **Club Services Committee** actively facilitate these opportunities.
- **Steps:**
 1. **Pre-Meeting Mingling (Sergeant-at-Arms):** Encourage early arrival for informal conversations.
 2. **Dedicated Fellowship Time (Sergeant-at-Arms):** Allocate specific time in the agenda for informal interaction or "happy moments."
 3. **Guest Introductions (Sergeant-at-Arms):** Facilitate interactions between guests and members.
 4. **Table/Group Rotations (Sergeant-at-Arms):** Periodically suggest changing seats to interact with different members.
 5. **Post-Meeting Socializing (All Members):** Encourage members to stay back for informal chats.
- **Roles: Sergeant-at-Arms, Club Services Committee, All Members.**

2.6 Member Spotlight & Sharing

- **Guideline:** Highlighting individual members fosters understanding, appreciation, and strengthens club identity.
- **Process:** The **Membership Committee** coordinates this initiative, with the **President's** approval.
- **Steps:**
 1. **Schedule Creation (Membership Committee):** Develop a calendar for member spotlights.
 2. **Member Selection (Membership Committee):** Invite members to share, ensuring diverse representation.
 3. **Briefing (Membership Committee):** Provide guidelines on content (e.g., professional journey, Rotary journey, hobbies, family, aspirations). Time limit: 5-7 minutes.
 4. **Presentation (Designated Member):** Member shares their story during a meeting.
 5. **Q&A (All Members):** Facilitate brief Q&A.

6. **Recording/Sharing (Public Image Committee):** With member's permission, consider recording/summarizing for the club bulletin or social media.
- **Roles: Membership Committee, President, All Members.**

3 Membership Management

3.1 Prospect Management & Engagement

- **Guideline:** A structured approach ensures potential members are nurtured and feel welcome.
- **Process:** The **Membership Committee** leads this, supported by all club members.
- **Steps:**
 1. **Identification** (All Members): Any member can identify potential candidates and inform the Membership Committee.
 2. **Initial Contact** (Sponsor/Membership Committee): Informal outreach, inviting to a club meeting or social event.
 3. **Guest Experience** (Sergeant-at-Arms/Host Member): Ensure guests feel welcomed, are introduced to key members, and understand Rotary's mission.
 4. **Information Sharing** (Membership Committee): Provide Rotary introductory materials (digital/print), explain membership benefits and obligations.
 5. **Expression of Interest** (Prospective Member): Candidate formally expresses interest.
 6. **Informal Interview/Chat** (Membership Director/President): Understand their motivations and expectations.
 7. **Application Form** (Membership Committee): Provide membership application form and explain the process.
- **Roles: Membership Committee, All Members** (as sponsors), **Sergeant-at-Arms, President.**

3.2 2.2 Onboarding New Members: From Interest to Induction

- **Guideline:** A smooth onboarding process integrates new members effectively and provides them with essential information.
- **Process:** The **Membership Committee**, in coordination with the **Secretary** and **President**, manages onboarding.
- **Steps:**
 1. **Application Review (Membership Committee/Board):** Review application, conduct due diligence (if required).
 2. **Board Approval (Club Board):** Board votes on the new member's application.
 3. **Communication of Approval (Secretary/Membership Director):** Inform the new member of their acceptance.

4. **Dues Payment (Treasurer/New Member):** Facilitate first-time dues payment.
 5. **Induction Ceremony Preparation (Membership Director/Secretary):** Schedule ceremony, prepare materials (pin, certificate, handbook).
 6. **Welcome Packet (Membership Committee):** Provide a digital/physical welcome packet including the club handbook, Rotary basics, and key contacts.
 7. **Assign Mentor (Membership Committee):** Pair new member with an experienced Rotarian (see 3.7).
- **Roles: Membership Committee, Club Board, Secretary, Treasurer, Sergeant-at-Arms, President.**

3.3 Induction Ceremony

- **Guideline:** A formal ceremony to welcome new members and educate them on Rotary's values.
- **Process:** Conducted during a regular club meeting or special meeting (Installation, GOV), led by the **President**.
- **Preparation:** The welcome kit for the new member, including the Rotary pin, should be kept ready
- **Steps:**
 1. **Setting the Stage (Sergeant-at-Arms):** Ensure new member and sponsor are ready.
 2. **Introduction (Sponsor):** Introduce the new member and their sponsor, highlighting their background.
 3. **Rotary's Four-Way Test (President):** Briefly explain its significance.
 4. **Pinning & Certificate (President/Sponsor):** President presents the Rotary pin, sponsor helps pin it on. Secretary presents the certificate.
 5. **Welcome Remarks (President):** Official welcome on behalf of the club.
 6. **Brief Remarks from New Member (Optional):** Allow the new member to briefly express their thoughts.
 7. **Photo Opportunity (Public Image Committee/Designated):** Capture the moment.
 8. **Fellowship (All Members):** All members congratulate and interact with the new member.
- **Roles: President, Secretary, Sergeant-at-Arms, Sponsor, New Member, Public Image Committee, All Members.**

3.4 Handling Resignations

- **Guideline:** Manage member resignations professionally and with respect, understanding the reasons.
- **Process:** The **Secretary**, in coordination with the **Membership Director**, manages the process.
- **Steps:**
 1. **Notification (Resigning Member):** Member formally informs the club (ideally via email to Secretary/President).

2. **Outreach & Understanding (Membership Director/President):** Conduct an exit interview (informal chat) to understand reasons for resignation, offer solutions if possible.
 3. **Board Notification (Secretary):** Inform the Board of the resignation.
 4. **Dues Reconciliation (Treasurer):** Check for any outstanding dues or refunds (as per club policy).
 5. **Removal from Rosters (Secretary):** Update club and RI membership records (Rotary Club Central).
 6. **Return of Club Property (Resigning Member):** If any club property was issued.
 7. **Acknowledgement (Secretary):** Send a polite acknowledgement of resignation, wishing them well.
 8. **Maintain Connection (Membership Director):** Keep them informed of key club events as an 'alumni' if mutually agreeable.
- **Roles: Secretary, Membership Director, President, Treasurer, Resigning Member.**

3.5 Data Management

- **Guideline:** Accurate and timely data synchronization ensures club records align with Rotary International (RI) and District records.
- **Process:** The **Club Secretary** is the primary custodian of member data.
- **Steps:**
 1. **Primary Data Source (Secretary):** Maintain a primary, up-to-date club roster (e.g., Google Sheet, club management software).
 2. **Rotary Club Central Updates (Secretary):** Regularly (e.g., monthly, or as changes occur) update member details, attendance, and leadership roles on Rotary Club Central.
 3. **District Database Updates (Secretary):** Ensure alignment with District database, if separate.
 4. **Data Security (Secretary/Tech Lead):** Ensure secure storage and access to member data.
- **Roles: Secretary, Tech Lead Committee.**

3.6 Member Engagement & Retention Strategies

- **Guideline:** Proactive strategies are essential to keep members active, fulfilled, and committed to Rotary.
- **Process:** The **Membership Committee**, supported by the entire **Board**, leads retention efforts.
- **Steps:**
 1. **Regular Needs Assessment (Membership Committee):** Periodically survey members to understand their interests, satisfaction levels, and preferred engagement methods.
 2. **Diverse Program Content (Program Chair/Committee Chairs):** Ensure meetings and projects cater to varied interests (e.g., professional development, community service, social).
 3. **Committee Involvement (Membership Director):** Encourage members to join committees that align with their skills and passions.



4. **Recognition & Appreciation (Awards Committee/President):** Regularly acknowledge member contributions (e.g., through awards, shout-outs, thank you notes).
 5. **Fellowship Events (Fellowship Committee):** Organize regular social gatherings outside of formal meetings.
 6. **Mentorship Program (Membership Committee):** Pair new members with experienced Rotarians (see 2.7).
 7. **Addressing Concerns (President/Membership Director):** Create an open channel for members to voice concerns and address them promptly.
 8. **Exit Interviews (Membership Director):** For members considering leaving, conduct informal interviews to understand reasons and potentially address them.
- **Roles: Membership Committee, President, Program Chair, Fellowship Committee, Awards Committee, All Members.**

3.7 Mentorship Program for New Members

- **Guideline:** A structured mentorship program facilitates integration, knowledge transfer, and stronger bonds for new members.
- **Process:** The **Membership Committee** establishes and oversees the program.
- **Steps:**
 1. **Mentor Pool (Membership Committee):** Identify experienced, engaged, and willing Rotarians to serve as mentors.
 2. **Mentee-Mentor Matching (Membership Committee):** Thoughtfully pair new members with mentors, considering interests, professions, and personalities.
 3. **Mentor Briefing (Membership Committee):** Provide mentors with guidelines on their role, expected frequency of interaction, and key topics to cover (e.g., Rotary structure, club history, project involvement, dues).
 4. **Initial Meeting (Mentor/Mentee):** Facilitate a formal introduction and initial meeting.
 5. **Ongoing Support (Mentor/Mentee):** Encourage regular communication (e.g., monthly check-ins, joint attendance at meetings/events).
 6. **Feedback & Review (Membership Committee):** Periodically check in with both mentors and mentees for feedback on the program's effectiveness.
- **Roles: Membership Committee, Mentors, Mentees** (New Members).

3.8 Member Classification & Diversity

- **Guideline:** Rotary values diverse classifications to ensure a broad representation of professions and perspectives. RBHN embraces diversity in all its forms.
- **Process:** The **Membership Committee** considers classifications during the recruitment process.

- **Steps:**
 1. **Understanding Classification (Membership Committee):** Educate members on the Rotary classification system (unique to each profession/business).
 2. **Filling Gaps (Membership Committee):** Identify under-represented classifications within the club to guide recruitment efforts.
 3. **Promoting Diversity (Membership Committee/Board):** Actively seek members from diverse backgrounds, ages, genders, and skill sets, going beyond just professional classification.
 4. **Review (Board):** Periodically review the club's diversity metrics and classification balance.
- **Roles: Membership Committee, Club Board, All Members** (in identifying diverse prospects).

4 Financial & Banking Operations

4.1 Bank Account Management

- **Guideline:** Transparent and secure management of club bank accounts is paramount for financial integrity.
- **Process:** The **Treasurer** is responsible for bank account operations, with oversight from the **Board**.
- **Steps:**
 1. **Account Signatories (Treasurer/President/Secretary):** Ensure authorized signatories are updated annually upon Board transition. Typically, Treasurer and President are primary, with Secretary as a backup.
 2. **Regular Reconciliation (Treasurer):** Reconcile bank statements with club records at least monthly.
 3. **Online Banking Security (Treasurer):** Ensure strong passwords, two-factor authentication, and secure access.
 4. **Transaction Monitoring (Treasurer):** Review all transactions for accuracy and legitimacy.
 5. **Separate Accounts (Treasurer):** Maintain separate bank accounts for Club Administration (dues, operational expenses) and Service Projects/Trust (funds for community service), as applicable, for clarity and compliance.
- **Roles: Treasurer, President, Secretary, Club Board.**

4.2 Expense Approval

- **Guideline:** A clear expense approval process ensures responsible spending and accountability.
- **Process:** All expenses require prior approval based on defined limits.
- **Steps:**
 1. **Expense Request (Member/Committee Chair):** Submit a detailed request form (digital preferred) with purpose, amount, and justification.

2. **Approval Authority (Treasurer/President/Board):**
 - **Up to INR 5000:** Committee Chair/Treasurer, where a previously approved budget for the committee exists and the expense is within that budget
 - **INR 5001 to INR 25000:** President/Treasurer
 - **Above INR 25001:** Club Board approval required
 - In all cases, these approval limits are applicable if club funds are being used or are sourced from sponsors, whether external or within the club. If the funds to be used are from their own source, there are no approvals involved but such expenditure needs to be reported to the Board.
 3. **Proof of Expense (Member/Committee Chair):** Submit original receipts/invoices promptly after incurring the expense.
 4. **Reimbursement (Treasurer):** Process approved reimbursements via bank transfer. The planned time-to-reimburse should be as soon as practically possible, but not later than 30 days.
- **Roles: Treasurer, President, Committee Chairs, Club Board, All Members** (for submitting requests).

4.3 Budget Planning

- **Guideline:** An annual budget provides a roadmap for financial operations and responsible resource allocation.
- **Process:** The **Treasurer** leads the budget preparation, with input from committees and Board approval.
- **Steps:**
 1. **Call for Committee Budgets (Treasurer):** Request annual budget proposals from all committee chairs for their planned activities.
 2. **Draft Budget Preparation (Treasurer):** Compile all proposals, prepare a consolidated draft budget for administrative and service accounts. Include projected income (dues, fundraising).
 3. **Board Review & Feedback (Club Board):** Present the draft budget to the Board for review, discussion, and adjustments.
 4. **Final Approval (Club Board):** The Board formally approves the annual budget at the beginning of the Rotary year.
 5. **Communication (Treasurer/Secretary):** Share key budget highlights with members.
 6. **Monitoring (Treasurer):** Regularly monitor actual expenses against the budget throughout the year.
- **Roles: Treasurer, Committee Chairs, Club Board, President.**

4.4 Audit & Reporting

- **Guideline:** Regular audits ensure financial transparency and compliance. Comprehensive reporting keeps members informed.
- **Process:** An independent auditor (or a designated audit committee) conducts the audit. The **Treasurer** handles reporting.
- **Steps (Audit):**

1. **Auditor Appointment (Club Board):** Appoint an independent auditor or an audit committee (non-Board members) at the end of the Rotary year.
 2. **Documentation Provision (Treasurer):** Provide all financial records, bank statements, receipts, and ledgers to the auditor.
 3. **Audit Conduct (Auditor):** Auditor reviews all financial transactions, internal controls, and reports findings.
 4. **Audit Report Submission (Auditor):** Auditor submits a formal report to the Board.
 5. **Board Review (Club Board):** Board reviews the audit report and addresses any recommendations.
- **Steps (Reporting):**
 1. **Monthly Financial Snapshot (Treasurer):** Provide a brief financial update at club meetings.
 2. **Quarterly Financial Report (Treasurer):** Detailed report to the Board.
 3. **Annual Financial Report (Treasurer):** Comprehensive report to all members during the Annual General Meeting, incorporating audit findings.
 - **Roles: Treasurer, Club Board, Auditor/Audit Committee, All Members** (receiving reports).

4.5 Fundraising Handling

- **Guideline:** All fundraising activities must be conducted with integrity, transparency, and clear accountability for funds.
- **Process:** The **Fundraising Committee**, in coordination with the **Treasurer**, manages fundraising.
- **Steps:**
 1. **Project Alignment (Fundraising Committee/Project Chair):** Fundraising purpose must align with approved service projects.
 2. **Approval (Club Board):** All major fundraising initiatives require Board approval.
 3. **Campaign Planning (Fundraising Committee):** Develop a clear plan including targets, methods, timelines, and responsibilities.
 4. **Collection & Recording (Fundraising Committee/Treasurer):** Establish secure methods for collecting funds. All donations must be immediately recorded.
 5. **Acknowledgement (Fundraising Committee/Treasurer):** Promptly issue receipts for donations. Acknowledge major donors appropriately.
 6. **Fund Segregation (Treasurer):** Funds raised for specific projects must be deposited into the designated Service Projects/Trust account and tracked separately.
 7. **Reporting (Fundraising Committee/Treasurer):** Report on fundraising progress and final collection amounts to the Board and members.
- **Roles: Fundraising Committee, Treasurer, Project Chairs, Club Board, All Members** (for participation).

4.6 Financial Status & Member Contributions

- **Guideline:** Members should have a clear understanding of the club's financial health and their contribution responsibilities.
- **Process:** The **Treasurer** provides regular updates and manages dues collection. Such updates will be, at a minimum, quarterly to the members and monthly to the board.
- **Steps:**
 1. **Transparency (Treasurer):** Regularly communicate the club's financial position, highlighting income and expenditure categories.
 2. **Annual Dues Notification (Treasurer/Secretary):** Annually inform members of their club, district, and RI dues, and payment deadlines.
 3. **Payment Methods (Treasurer):** Provide clear instructions for various payment options (e.g., bank transfer, UPI).
 4. **Follow-up (Treasurer):** Gently follow up with members on outstanding dues.
 5. **Paul Harris Fellow Recognition (Treasurer/Foundation Chair):** Educate members on the Rotary Foundation and encourage contributions, recognizing Paul Harris Fellows.
- **Roles: Treasurer, Secretary, Rotary Foundation Chair, All Members.**

5 Club Administration

5.1 Board Transition

- **Guideline:** A smooth transition ensures continuity of leadership and efficient handover of responsibilities.
- **Process:** The outgoing and incoming **Boards**, supported by the **Secretary**, manage the transition.
- **Steps:**
 1. **Planning Meeting (Outgoing President/Incoming President):** Schedule joint meetings between outgoing and incoming Board members well in advance of the new Rotary year (e.g., April/May).
 2. **Handover Documents (Outgoing Officers):** Each outgoing officer prepares a comprehensive handover note/document including:
 - List of ongoing tasks/projects.
 - Key contacts.
 - Access details (e.g., login credentials for software, social media accounts – securely transferred).
 - Financial records (for Treasurer).
 - Historical files/documents.
 - Lessons learned and recommendations.
 3. **Joint Meetings (Outgoing & Incoming Officers):** Conduct one-on-one meetings for detailed discussions and knowledge transfer.
 4. **Financial Handover (Outgoing Treasurer/Incoming Treasurer):** Formal handover of bank accounts, checkbooks, and financial records.

5. **Signature Updates (Secretary/Incoming President/Treasurer):** Update bank signatories, official registrations.
 6. **RI & District Updates (Secretary):** Update officer details in Rotary Club Central and District database.
- **Roles: Outgoing President, Incoming President, All Outgoing Board Officers, All Incoming Board Officers, Secretary, Treasurer.**

5.2 Member Records

- **Guideline:** Accurate and confidential member records are vital for effective club operations and communication.
- **Process:** The **Club Secretary** is the primary custodian of member records.
- **Steps:**
 1. **Central Database (Secretary):** Maintain a secure, up-to-date digital database of all member information (contact details, date of joining, classification, Paul Harris Fellow status, etc.).
 2. **Regular Updates (Secretary/Members):** Members are responsible for informing the Secretary of any changes to their contact information. Secretary updates records promptly.
 3. **Privacy & Confidentiality (Secretary):** Ensure member data is handled in accordance with privacy policies and is not shared without consent.
 4. **Archiving (Secretary):** Maintain historical records of past members for continuity.
 5. **Access Control (Secretary):** Limit access to sensitive member data to authorized Board members only.
- **Roles: Secretary, All Members** (for updating their info), **Club Board.**

5.3 Data Management

- **Guideline:** Effective data management ensures information is accessible, accurate, and secure across all club operations.
- **Process:** The **Secretary** oversees overall data management, supported by the **Technology/Communications Committee**.
- **Steps:**
 1. **Centralized Storage (Secretary/Tech Lead):** Utilize cloud-based platforms (e.g., Google Drive, dedicated club management software) for storing all club documents, templates, and historical data.
 2. **Folder Structure & Naming Conventions (Secretary/Tech Lead):** Implement clear, consistent folder structures and file naming conventions for easy retrieval.
 3. **Regular Backups (Tech Lead):** Ensure critical data is regularly backed up.
 4. **Access Permissions (Secretary/Tech Lead):** Define and manage access levels for different club members and committees to various documents.
 5. **Data Retention Policy (Board):** Establish guidelines for how long different types of data should be retained.



6. **Data Cleanup (Secretary):** Periodically review and archive/delete obsolete data.
- **Roles: Secretary, Technology/Communications Committee, Club Board, All Committee Chairs** (for their specific data).

5.4 Officer Nomination/Election Schedule

- **Guideline:** A transparent and timely process for officer nominations and elections ensures democratic leadership selection.
- **Process:** The **Immediate Past President** chairs the **Nominating Committee** and, if unavailable, a Past President can play this role.
- **Steps:**
 1. **Nominating Committee Formation (President/IPP):** President appoints a Nominating Committee (typically chaired by IPP, with other seasoned members) as per club bylaws, usually in [e.g., October/November].
 2. **Call for Nominations (Nominating Committee):** Committee invites members to submit nominations for President-Elect, Secretary, Treasurer, and other Board positions for the upcoming Rotary year. Clearly define eligibility criteria.
 3. **Candidate Vetting (Nominating Committee):** Committee reviews nominations, confirms willingness and eligibility of candidates.
 4. **Slate Presentation (Nominating Committee):** Present the proposed slate of officers to the club members (e.g., at a December/January meeting).
 5. **Elections (if contested) (Nominating Committee/Secretary):** If there are multiple nominations for a position, conduct a democratic election (e.g., secret ballot, online poll).
 6. **Declaration of Officers (President):** Announce the incoming Board for the new Rotary year.
 7. **RI & District Reporting (Secretary):** Submit incoming officer details to Rotary International and the District in a timely manner.
- **Roles: Immediate Past President (IPP - as Nominating Committee Chair), President, Secretary, Nominating Committee Members, All Members** (for nominations/voting).

6 Project Lifecycle Management (Service & Community Projects)

6.1 Project Proposal

- **Guideline:** A clear proposal process ensures projects align with Rotary's mission, club goals, and available resources.
- **Process:** Any member or committee can propose a project. The **Service Projects Committee** reviews and presents to the **Board**.
- **Steps:**

1. **Idea Generation (All Members/Committees):** Identify community needs or opportunities for service.
 2. **Concept Note (Proposing Member/Committee):** Develop a brief concept outlining the problem, proposed solution, target beneficiaries, and estimated scope.
 3. **Formal Proposal Submission (Proposing Member/Committee):** Complete a standardized "Project Proposal Form" including:
 - Project Title & Description
 - Alignment with Rotary's Areas of Focus
 - Beneficiaries & Impact
 - Key Activities
 - Estimated Budget (with breakdown)
 - Sources of funding (with breakdown)
 - Required Volunteers/Resources
 - Proposed Timeline
 - Sustainability Plan (if applicable)
 - Potential Partners
 4. **Service Projects Committee Review (Service Projects Committee):** Evaluate feasibility, alignment, budget, and resource needs. Provide feedback to the proposer.
 5. **Board Presentation & Approval (Service Projects Committee/Proposer to Board):** Present the refined proposal to the Club Board for discussion and formal approval. Board may request revisions.
 6. A **Project Chair** is identified to lead the project. If no specific chair is identified, then the Chair/Director of the committee under which this project falls will be the default Project Chair.
- **Roles: All Members, Service Projects Committee, Club Board, President.**

6.2 Procurement

- **Guideline:** Procurement for projects must be transparent, cost-effective, and adhere to ethical standards.
- **Process:** The **Project Chair**, in coordination with the **Treasurer**, manages procurement.
- **Steps:**
 1. **Needs Assessment (Project Chair/Team):** Clearly define items/services required for the project.
 2. **Vendor Identification & Quotations (Project Chair/Team):** Identify potential vendors/suppliers. It is preferable to get quotes from multiple vendors, where possible.
 3. **Comparative Analysis (Project Chair/Team):** Evaluate quotes, if applicable, based on price, quality, delivery time, and vendor reputation.
 4. **Approval (Project Chair/Treasurer/Board):** Obtain necessary approvals based on the expense approval matrix. For large procurements, Board approval is essential.
 5. **Purchase Order/Agreement (Project Chair):** Issue a formal purchase order or agreement, specifying terms and conditions.

6. **Receiving & Verification (Project Chair/Designated Member):** Verify received goods/services against the order for quality and quantity.
 7. **Payment Processing (Treasurer):** Process payments against approved invoices and verified delivery.
- **Roles: Project Chair, Project Team, Treasurer, Club Board.**

6.3 Execution

- **Guideline:** Efficient execution involves clear roles, effective communication, and adaptive management.
- **Process:** The **Project Chair** leads the execution, with support from the project team and volunteers.
- **Steps:**
 1. **Team Mobilization (Project Chair):** Assign roles and responsibilities to project team members and volunteers.
 2. **Kick-off Meeting (Project Chair):** Brief the team on objectives, tasks, timeline, and safety protocols.
 3. **Resource Allocation (Project Chair):** Ensure necessary materials, equipment, and volunteers are available.
 4. **Activity Implementation (Project Team/Volunteers):** Carry out planned activities as per the project plan.
 5. **Monitoring & Troubleshooting (Project Chair):** Regularly monitor progress, identify potential issues, and implement solutions.
 6. **Communication (Project Chair):** Maintain regular communication within the project team, with beneficiaries, and with the Service Projects Committee.
 7. **Safety First (Project Chair/All Volunteers):** Adhere to all safety guidelines and protocols.
- **Roles: Project Chair, Project Team, All Volunteers, Service Projects Committee.**

6.4 Reporting

- **Guideline:** Regular and accurate reporting demonstrates accountability and allows for monitoring project progress and impact.
- **Process:** The **Project Chair** is responsible for project reporting.
- **Steps:**
 1. **Internal Progress Reports (Project Chair):** Provide brief updates to the Service Projects Committee and Board on a regular basis (e.g., bi-weekly or monthly).
 2. **Financial Reporting (Project Chair/Treasurer):** Track project expenditures against the budget and provide updates.
 3. **Impact Reporting (Project Chair):** Document key achievements, beneficiaries reached, and qualitative/quantitative impact.
 4. **Photo/Video Documentation (Public Image Committee/Project Team):** Capture high-quality visuals of the project in action.
 5. **Final Project Report (Project Chair):** Submit a comprehensive final report to the Service Projects Committee and Board upon project completion, including lessons learned.

6. **Rotary Club Central Updates (Secretary/Project Chair):** Ensure project details and impact are accurately updated in Rotary Club Central for RI reporting.
- **Roles: Project Chair, Treasurer, Public Image Committee, Secretary, Service Projects Committee, Club Board.**

6.5 Closure

- **Guideline:** Proper project closure ensures all loose ends are tied, learning is captured, and recognition is given.
- **Process:** The **Project Chair** oversees the closure process.
- **Steps:**
 1. **Final Financial Reconciliation (Project Chair/Treasurer):** Ensure all invoices are paid, and funds are accounted for.
 2. **Resource Return/Disposal (Project Chair):** Return borrowed equipment or properly dispose of waste.
 3. **Beneficiary Feedback (Project Chair):** Gather feedback from beneficiaries to assess satisfaction and identify areas for improvement.
 4. **Project Debrief (Project Chair/Service Projects Committee):** Hold a meeting with the project team and relevant stakeholders to review what went well, what could be improved, and capture key learnings.
 5. **Formal Acknowledgement (President/Project Chair):** Thank all volunteers, partners, and donors.
 6. **Archiving (Project Chair/Secretary):** Archive all project documentation, photos, and reports for future reference.
- **Roles: Project Chair, Treasurer, Service Projects Committee, President, Secretary, All Volunteers.**

7 Public Image & Communication

7.1 Event Coverage

- **Guideline:** Effective event coverage showcases the club's activities and impact, enhancing its public image.
- **Process:** The **Public Image Committee** leads event coverage.
- **Steps:**
 1. **Pre-Event Briefing (Public Image Committee/Project Chair):** Understand event objectives, key moments, and desired messages.
 2. **Designated Photographers/Videographers (Public Image Committee):** Assign members or professional photographers/videographers for high-quality capture.
 3. **Consent (Public Image Committee):** Obtain consent for photos/videos, especially for minors or sensitive beneficiaries.
 4. **Live Updates (Public Image Committee):** Post real-time updates on social media during the event (where appropriate).
 5. **Post-Event Content Curation (Public Image Committee):** Select best photos/videos, write compelling captions/narratives.

6. **Share with Media (Public Image Committee):** Send press releases to local media if the event is significant.
7. **Internal Sharing (Public Image Committee):** Share content with club members for their personal networks.
- **Roles: Public Image Committee, Project Chair, All Members** (for sharing content).

7.2 Social Media SOP

- **Guideline:** Consistent and professional social media presence enhances visibility and engagement.
- **Process:** The **Public Image Committee** manages club social media accounts.
- **Steps:**
 1. **Platform Management (Public Image Committee):** Maintain official club accounts on relevant platforms (e.g., Facebook, Instagram, LinkedIn, X).
 2. **Content Strategy (Public Image Committee):** Plan types of content (event photos, project updates, member highlights, Rotary facts, calls to action).
 3. **Brand Guidelines (Public Image Committee):** Adhere to RBHN and Rotary International brand guidelines for logos, colors, and messaging.
 4. **Posting Schedule (Public Image Committee):** Maintain a regular and consistent posting schedule.
 5. **Engagement & Monitoring (Public Image Committee):** Respond to comments/messages promptly. Monitor mentions and trends.
 6. **Crisis Communication (Public Image Committee/President):** Establish a protocol for handling negative comments or unforeseen issues.
 7. **Member Contribution (All Members):** Encourage members to share club content and tag the official accounts.
- **Roles: Public Image Committee, All Members** (for sharing).

7.3 Newsletter

- **Guideline:** A regular, monthly, brief newsletter keeps members and stakeholders informed about club activities and impact.
- **Process:** The **Public Image Committee** (or a dedicated Newsletter Editor) is responsible for production.
- **Steps:**
 1. **Content Collection (Public Image Committee/All Committees):** Request updates, stories, photos from all committees and members by a set deadline.
 2. **Editorial Review (Public Image Committee):** Edit and curate content for clarity, conciseness, and tone.
 3. **Design & Layout (Public Image Committee):** Use a consistent template for professional appearance.
 4. **Distribution List (Public Image Committee):** Maintain an updated email list for members, past presidents, district officials, and partners.

5. **Distribution List (Public Image Committee/Membership Committee):** Friends of Rotary, Club Alumni, Sponsors/Partners, associated organizations are all lists maintained by these 2 committees and the newsletter is distributed to these lists too.
 6. **Distribution (Public Image Committee):** Send out the newsletter electronically on a regular schedule (e.g., monthly/quarterly).
 7. **Archiving (Public Image Committee):** Maintain an archive of all published newsletters on the club website.
- **Roles: Public Image Committee, All Committee Chairs, Secretary.**

7.4 Website

- **Guideline:** The club website serves as a central hub for information, public image, and member resources.
- **Process:** The **Public Image Committee** and **Technology/Communications Committee** manage the website.
- **Steps:**
 1. **Content Updates (Public Image Committee/All Committees):** Regularly update news, events, projects, photo galleries, and member directory (password protected).
 2. **Technical Maintenance (Technology/Communications Committee):** Ensure website functionality, security, and hosting.
 3. **Search Engine Optimization (Public Image Committee/Tech Lead):** Optimize content for better visibility online.
 4. **Mobile Responsiveness (Technology/Communications Committee):** Ensure the website is easily viewable on all devices.
 5. **Accessibility (Technology/Communications Committee):** Strive for accessibility compliance.
 6. **Resource Hub (Public Image Committee/Secretary):** Host the club handbook, important forms, and Rotary resources.
- **Roles: Public Image Committee, Technology/Communications Committee, Secretary, All Committee Chairs** (providing content).

7.5 Bulletin

- **Guideline:** A concise quarterly bulletin keeps members informed of immediate club affairs and upcoming events.
- **Process:** The **Club Secretary**, often with support from the **Public Image Committee**, produces the bulletin.
- **Steps:**
 1. **Content Gathering (Secretary/Committee Chairs):** Collect agenda for the upcoming meeting, brief summaries of past meeting highlights, quick announcements, upcoming event reminders, happy moments.
 2. **Drafting (Secretary):** Compile and draft the bulletin content.
 3. **Review (President/Secretary):** President reviews for accuracy and key messages.
 4. **Distribution (Secretary):** Distribute electronically (email/WhatsApp group) to all members before the meeting.
 5. **Print (Optional):** A few copies can be printed for the meeting.

- **Roles:** Secretary, President, Committee Chairs, Public Image Committee.

7.6 Media Relations & Press Releases

- **Guideline:** Strategic engagement with local media enhances public awareness of Rotary's impact.
- **Process:** The **Public Image Committee** manages media relations.
- **Steps:**
 1. **Identify Newsworthy Events (Public Image Committee/Project Chairs):** Determine which club activities warrant media attention (e.g., major projects, significant donations, special events).
 2. **Draft Press Release (Public Image Committee):** Prepare a concise, newsworthy press release with key facts, quotes, and contact information.
 3. **Approval (President/Board):** Obtain President's and/or Board approval before releasing to media.
 4. **Media List (Public Image Committee):** Maintain an updated list of local journalists and media outlets.
 5. **Distribution (Public Image Committee):** Send press releases to relevant media contacts.
 6. **Follow-up (Public Image Committee):** Follow up with media for coverage.
 7. **Media Interview Protocol (Public Image Committee):** Designate spokespersons (typically President or Project Chair) and brief them on key messages for interviews.
- **Roles:** Public Image Committee, President, Project Chairs, Club Board.

7.7 Member-Generated Content & Sharing

- **Guideline:** Encouraging members to share club content amplifies reach and personalizes the Rotary story.
- **Process:** The **Public Image Committee** facilitates and encourages this.
- **Steps:**
 1. **Content Source (Public Image Committee):** Regularly share official club photos, videos, and news updates with members.
 2. **Guidance on Sharing (Public Image Committee):** Provide simple guidelines on how members can share on their personal social media (e.g., tag official club accounts, use relevant hashtags, briefly describe the activity).
 3. **Encouragement (President/Public Image Committee):** Regularly remind and encourage members to share the club's positive stories.
 4. **Respect Privacy (All Members):** Remind members to be mindful of privacy when sharing photos/videos of others.
- **Roles:** Public Image Committee, All Members.

8 RBHN Trust Coordination

8.1 Funding Request

- **Guideline:** A clear process for requesting funds from the RBHN Trust ensures proper justification and allocation.
- **Process:** **Project Chairs** submit requests to the Trust via the **Club Board**.
- **Steps:**
 1. **Project Proposal Approval (Club Board):** Ensure the service project itself has been approved by the RBHN Board (see 5.1).
 2. **Trust Funding Request Form (Project Chair):** Complete a specific Trust funding request form, detailing:
 - Project name and description.
 - Amount requested from the Trust.
 - Detailed budget breakdown for the requested amount.
 - Expected impact and beneficiaries.
 - Justification for Trust funding (e.g., project aligns with Trust's objectives).
 - Other funding sources secured/planned.
 3. **Club Board Endorsement (Club Board):** The Club Board reviews and endorses the funding request, ensuring it aligns with club priorities.
 4. **Submission to Trust (President/Treasurer):** The President or Treasurer formally submits the endorsed request to the RBHN Trust.
 5. **Trust Review & Approval (RBHN Trust):** The Trust reviews the request as per its own policies and communicates its decision.
- **Roles:** **Project Chair, Club Board, President, Treasurer, RBHN Trust.**

8.2 Reporting

- **Guideline:** Transparent reporting to the RBHN Trust on fund utilization and project impact is essential for accountability.
- **Process:** The **Project Chair**, in coordination with the **Treasurer**, prepares reports for the Trust.
- **Steps:**
 1. **Interim Reports (Project Chair/Treasurer):** For ongoing projects, provide interim progress and financial utilization reports to the Trust as required.
 2. **Final Project Report (Project Chair):** Upon project completion, submit a comprehensive final report to the Trust including:
 - Detailed financial statement of fund utilization (with receipts/invoices).
 - Achieved outcomes and impact.
 - Beneficiary testimonials/feedback.
 - Photos/videos of the project.
 - Lessons learned.
 3. **Annual Summary (Treasurer/President):** Provide an annual summary of all Trust-funded projects and overall financial utilization to the Trust.
- **Roles:** **Project Chair, Treasurer, President, RBHN Trust.**

8.3 Fees

- **Guideline:** Any administrative fees or charges associated with the Trust's operations will be clearly communicated and adhered to.
- **Process:** The **Treasurer** manages any fee payments to/from the Trust.
- **Steps:**
 1. **Understanding Structure (Treasurer/President):** Familiarize with the RBHN Trust's operational structure, including any applicable administrative fees, if specified in the Trust Deed or operating procedures.
 2. **Payment Schedule (Treasurer):** Ensure any agreed-upon fees are paid promptly according to the schedule.
 3. **Budgeting (Treasurer):** Account for any Trust-related fees in the club's annual administrative budget.
- **Roles:** **Treasurer, President, RBHN Trust.**

9 Rotary District & RI Coordination

9.1 RI Dues

- **Guideline:** Timely payment of Rotary International (RI) dues is crucial for maintaining active club status.
- **Process:** The **Treasurer** manages the collection and remittance of RI dues.
- **Steps:**
 1. **Invoice from RI (Secretary/Treasurer):** RI issues semi-annual invoices for club dues based on member count.
 2. **Member Dues Collection (Treasurer):** Collect the RI portion of dues from members as part of their annual club fees.
 3. **Remittance to RI (Treasurer):** Remit collected RI dues to Rotary International through Rotary Club Central or designated channels by the stipulated deadlines (typically July and January).
 4. **Reporting (Secretary/Treasurer):** Ensure member data in Rotary Club Central is accurate to prevent discrepancies in dues invoicing.
- **Roles:** **Treasurer, Secretary.**

9.2 District Events

- **Guideline:** Participation in District events fosters inter-club fellowship, knowledge sharing, and Rotary engagement beyond the club level.
- **Process:** The **Club Secretary** informs members, and the **President** encourages participation.
- **Steps:**
 1. **Information Dissemination (Secretary):** Regularly share information on upcoming District conferences, seminars, training events, and fellowships via club communication channels.

2. **Encouragement to Attend (President/Board):** Encourage members to attend District events relevant to their interests or roles.
 3. **Registration Support (Secretary/Treasurer):** Provide guidance on registration processes and facilitate payment for club-sponsored attendees.
 4. **Club Representation (All Members):** Members attending represent RBHN and should uphold its values.
 5. **Reporting Back (Attending Members):** Members who attend District events are encouraged to share key takeaways with the club.
- **Roles: Secretary, President, Treasurer, All Members.**

9.3 Grants

- **Guideline:** Leveraging Rotary Foundation grants amplifies the club's impact on local and international service projects.
- **Process:** The **Rotary Foundation Chair** leads the grant application and management process.
- **Steps:**
 1. **Grant Seminar Participation (Rotary Foundation Chair/Board):** Attend District grant management seminars for updates and training.
 2. **Project Identification (Service Projects Committee/Rotary Foundation Chair):** Identify suitable club projects that align with Rotary Foundation grant criteria (Areas of Focus).
 3. **Partner Club Identification (Rotary Foundation Chair):** For Global Grants, identify international partner clubs.
 4. **Grant Application Preparation (Rotary Foundation Chair/Project Chair):** Prepare a detailed grant application, ensuring all requirements are met and documentation is complete.
 5. **District/RI Approval (Rotary Foundation Chair):** Submit the application to the District and/or Rotary International for approval.
 6. **Fund Management (Treasurer/Project Chair):** Manage grant funds according to Rotary Foundation guidelines, ensuring separate accounting.
 7. **Reporting (Rotary Foundation Chair/Project Chair):** Submit timely progress and final reports, including financial reconciliation, to the District and RI.
 8. **Stewardship (Rotary Foundation Chair):** Ensure proper stewardship of grant funds and ethical use.
- **Roles: Rotary Foundation Chair, Service Projects Committee, Project Chair, Treasurer, Club Board.**

9.4 District & RI Programs: How Members Can Engage

- **Guideline:** Members are encouraged to explore and participate in various Rotary programs beyond the club level.
- **Process:** The **Secretary** and **President** highlight these opportunities.
- **Steps:**
 1. **Information Dissemination (Secretary):** Share details about programs like Youth Exchange, RYLA (Rotary Youth Leadership

Awards), Rotaract/Interact, Vocational Training Teams, Peace Fellowships.

2. **Encouragement (President/Relevant Chairs):** Encourage members to serve as hosts for exchange students, mentors for RYLA participants, or apply for fellowships.
 3. **Support for Applicants (Club Board/Relevant Chairs):** Provide club endorsement and support for members or candidates applying for District/RI programs.
 4. **Ambassadorship (Participants):** Members who participate are encouraged to share their experiences with the club.
 5. **Sharing Learnings (Attendees):** Encourage attendees to present a brief summary of their experience and learnings to the club upon return.
- **Roles: Secretary, President, Youth Services Chair, Vocational Services Chair, Rotary Foundation Chair, All Members.**

9.5 Attending District Conferences & International Convention

- **Guideline:** These events offer unparalleled opportunities for learning, fellowship, and networking within the broader Rotary world.
- **Process:** The **Secretary** disseminates information, and members are encouraged to register independently.
- **Steps:**
 1. **Information Sharing (Secretary):** Share dates, venues, and registration details for District Conferences, Inter-City General Forum (ICGF) and the Rotary International Convention.
 2. **Benefits Communication (President/Past Attendees):** Highlight the benefits of attending (networking, inspirational speakers, project ideas, global perspective).
 3. **Logistics Assistance (Optional - Secretary):** Offer basic guidance on travel and accommodation if a group plans to attend.
 4. **Representing RBHN (Attendees):** Attendee members represent the club and should embody Rotary values.
- **Roles: Secretary, President, All Members** (as attendees).

10 Events & Celebrations

10.1 Installation Ceremony

- **Guideline:** The annual Installation Ceremony formally recognizes the incoming Board and sets the tone for the new Rotary year.
- **Process:** A dedicated **Installation Committee** plans and executes the event.
- **Steps:**
 1. **Committee Formation (Incoming President):** Form an Installation Committee well in advance.
 2. **Date & Venue Selection (Installation Committee):** Secure a suitable date and venue.

3. **Budgeting (Installation Committee/Treasurer):** Develop a detailed budget for the event.
 4. **Guest List & Invitations (Installation Committee/Secretary):** Prepare guest list including District Governor, past presidents, other club presidents, family, and friends. Send out invitations.
 5. **Program Planning (Installation Committee):** Outline the event flow, including speeches, oath-taking, felicitation, entertainment, and dinner.
 6. **Oath Administration (District Governor/Senior Rotarian):** The incoming Board takes the oath of office.
 7. **Publicity (Public Image Committee):** Promote the event and capture coverage.
- **Roles: Installation Committee, Incoming President, Outgoing President, Treasurer, Secretary, Public Image Committee, District Governor.**

10.2 Awards & Recognition Program

10.2.1 Awards

Guideline: Recognizing member contributions and achievements fosters motivation, appreciation, and a culture of excellence.

- **Process:** The **Awards Committee** manages the program.
- **Purpose of Awards & Recognition:**
 - To formally acknowledge outstanding contributions to the club, Rotary, and the community.
 - To encourage active participation, dedication, and service above self.
 - To foster fellowship and celebrate individual and collective achievements.
- **Types of Club Awards:**
 - **Rotarian of the Year:** Recognizes overall outstanding service and leadership.
 - **President's Citation/Award:** Given at the President's discretion for exceptional support during their tenure.
 - **Most Engaged Member:** For consistent attendance, participation in projects, and club activities.
 - **Project Impact Award:** Recognizes significant contribution to a successful service project.
 - **Perfect Attendance Award:** For members achieving 100% meeting attendance (including make-ups).
 - **Committee Star Award:** For exceptional contribution within a specific committee.
 - **New Rotarian Award:** For outstanding engagement by a new member.
 - **Paul Harris Fellow (PHF):** Recognition for contributions to The Rotary Foundation (managed by Treasurer/Foundation Chair, not typically a club 'award' but a recognition).
- **Nomination Process for Club Awards:**

- **Call for Nominations (Awards Committee):** Annually, the Awards Committee issues a call for nominations to all members, typically one month before the Installation Ceremony or Annual General Meeting.
- **Eligibility Criteria (Awards Committee):** Clearly define criteria for each award.
- **Submission Method (Awards Committee):** Members submit nominations via a designated form (digital or print) outlining reasons for their nomination.
- **Deadline (Awards Committee):** Strict deadline for submissions.
- **Selection Committee & Decision Process:**
- **Committee Formation (Awards Committee):** The Awards Committee reviews all nominations. For major awards, a small, impartial sub-committee (e.g., Past Presidents, current President-Elect, and Awards Chair) may be formed.
- **Evaluation (Awards Committee):** Nominees are evaluated against the defined criteria. Discussions are confidential.
- **Final Decision (Awards Committee/Board):** The Awards Committee recommends winners to the Board for final approval.
- **Award Presentation Protocol:**
 - **Timing:** Awards are typically presented at the Annual Installation Ceremony or a special club meeting.
 - **Presenter:** The President, District Governor, or a distinguished guest.
 - **Speech:** A brief citation highlighting the awardee's achievements.
 - **Photography:** Ensure good photographs are taken for club records and public image.
 - **District & Rotary International Awards:**
 - **Information Dissemination (Awards Committee/Secretary):** Inform members about various District and RI awards (e.g., District Governor's Citations, RI Presidential Citation, Avenues of Service Awards).
 - **Nomination Support (Awards Committee/President):** Assist in preparing and submitting nominations for members or the club for these higher-level awards, gathering necessary documentation and endorsements.

10.2.2 Celebrations

- **Celebrating Member Milestones:**
 - **Birthdays/Wedding Anniversaries (Sergeant-at-Arms/Fellowship Committee):** Simple acknowledgments during meetings to foster camaraderie.
 - **Paul Harris Fellow Recognition (Rotary Foundation Chair/Treasurer):** Publicly acknowledge and present PHF pins/certificates for contributions to The Rotary Foundation.
- **Roles: Awards Committee, President, Secretary, Rotary Foundation Chair, Treasurer, Sergeant-at-Arms, All Members** (for nominations).

10.3 Fellowships

- **Guideline:** Regular fellowship events strengthen bonds, encourage informal interaction, and enhance member satisfaction.
- **Process:** The **Fellowship or the Club Services Committee** plans and organizes social events.
- **Steps:**
 1. **Annual Calendar (Fellowship Committee):** Plan a diverse calendar of social events for the year (e.g., family picnics, dinners, outings, cultural events).
 2. **Event Planning (Fellowship Committee):** Determine logistics, budget, and responsibilities for each event.
 3. **Communication (Fellowship Committee/Secretary):** Communicate event details (date, time, venue, cost, RSVP deadline) to all members well in advance.
 4. **Encourage Participation (All Members):** All members are encouraged to attend and bring family/friends where appropriate.
 5. **Post-Event Feedback (Fellowship Committee):** Gather feedback to improve future events.
- **Roles:** Fellowship Committee, Secretary, All Members.

10.4 Celebrating Club Anniversaries & Milestones

- **Guideline:** Commemorating significant club anniversaries and milestones reinforces club history and pride.
- **Process:** The **Club Services Committee**, in coordination with the **Board**, plans these celebrations.
- **Steps:**
 1. **Early Planning (Designated Committee/Board):** For major milestones (e.g., 10th, 25th anniversary), begin planning well over a year in advance.
 2. **Theme & Objectives (Committee):** Define the theme and objectives for the celebration.
 3. **Budget & Fundraising (Committee/Treasurer):** Secure dedicated budget or fundraising for the event.
 4. **Guest List (Committee/Secretary):** Invite past members, charter members, District dignitaries, partner organizations.
 5. **Special Program (Committee):** Plan a memorable program including reflections, historical displays, special recognitions.
 6. **Commemorative Items (Committee):** Consider creating commemorative souvenirs or publications.
 7. **Publicity (Public Image Committee):** Maximize media coverage and internal communication.
- **Roles:** Designated Special Committee, Club Board, President, Secretary, Treasurer, Public Image Committee.

10.5 Special Events & Fundraisers

- **Guideline:** These events serve dual purposes: raising funds for service projects and enhancing club visibility.
- **Process:** A specific committee for each event, or the **Fundraising Committee**, leads planning.
- **Steps:**
 1. **Objective Definition (Committee):** Clearly define the primary objective (fundraising goal, public awareness).
 2. **Feasibility Study (Committee):** Assess resources, potential challenges, and expected returns.
 3. **Board Approval (Club Board):** Secure formal approval for the event and its budget.
 4. **Event Committee Formation (Committee):** Assign specific roles for logistics, marketing, sponsorship, ticket sales, etc.
 5. **Sponsorship/Partnership (Committee/Fundraising Committee):** Identify and secure sponsors.
 6. **Marketing & Sales (Public Image Committee/Committee):** Promote the event widely.
 7. **Execution (Committee/Volunteers):** Manage all aspects of the event day.
 8. **Post-Event Reporting (Committee/Treasurer):** Report on funds raised, attendance, and overall success.
- **Roles:** **Designated Event Committee, Fundraising Committee, Club Board, President, Treasurer, Public Image Committee, All Members** (for participation/volunteering).

11 Member Wellness & Support

11.1 Code of Conduct & Ethical Guidelines

- **Guideline:** RBHN expects all members to uphold the highest ethical standards and conduct themselves in a manner that reflects positively on Rotary.
- **Process:** All members are expected to be familiar with and adhere to the Code of Conduct. The **President** addresses breaches.
- **Key Principles:**
 - **The Four-Way Test:** Is it the TRUTH? Is it FAIR to all concerned? Will it build GOODWILL and BETTER FRIENDSHIPS? Will it be BENEFICIAL to all concerned?
 - **Respect & Inclusivity:** Treat all members, guests, and community members with respect, dignity, and without discrimination.
 - **Integrity:** Act with honesty and transparency in all Rotary dealings.
 - **Accountability:** Be accountable for actions and decisions.
 - **Professionalism:** Maintain professional standards in club activities and representations.

- **Confidentiality:** Respect the privacy of members and confidential club information.
- **No Harassment:** Zero tolerance for any form of harassment (physical, verbal, emotional, sexual).
- **Financial Prudence:** Handle club funds and resources responsibly and ethically.
- **Addressing Breaches:**
 1. **Report (Member):** Any member witnessing or experiencing a breach should report it confidentially to the President or a senior Board member.
 2. **Investigation (President/Designated Committee):** The President, possibly with a small ad-hoc committee, will investigate the matter discreetly and fairly.
 3. **Resolution (President/Board):** Appropriate action, ranging from a warning to suspension or termination of membership, will be taken by the Board based on the severity of the breach, following due process.
- **Roles: All Members, President, Club Board.**

11.2 Conflict Resolution & Grievance Procedures

- **Guideline:** A fair and timely process for resolving disputes and addressing grievances ensures a harmonious club environment.
- **Process:** Conflicts should ideally be resolved informally first; formal procedures are available if needed.
- **Steps (Informal Resolution):**
 1. **Direct Communication (Involved Members):** Members are encouraged to first try to resolve minor issues directly and respectfully.
 2. **Mediation (Sergeant-at-Arms/Past President):** If direct resolution fails, seek informal mediation from a neutral, respected senior member (e.g., Sergeant-at-Arms, a Past President).
- **Steps (Formal Grievance):**
 1. **Written Complaint (Aggrieved Member):** Submit a written grievance to the Club President, detailing the issue, parties involved, and desired resolution.
 2. **Acknowledgement (President):** President acknowledges receipt within [e.g., 3 days].
 3. **Investigation (President/Designated Committee):** President may form a small, impartial committee (e.g., 3 Board members not involved in the dispute) to investigate, gathering facts from all parties. Confidentiality is paramount.
 4. **Recommendation (Committee):** The committee submits findings and recommendations to the Board.
 5. **Board Decision (Club Board):** The Board reviews the recommendations and makes a final decision, communicating it to all involved parties in writing.
 6. **Appeal (Optional):** Club bylaws may allow for an appeal to the District Governor for unresolved issues.
- **Roles: All Members, President, Sergeant-at-Arms, Past Presidents, Club Board.**

11.3 Member Well-being & Support Initiatives

- **Guideline:** RBHN cares for its members beyond Rotary activities, fostering a supportive community.
- **Process:** The **Fellowship Committee** and individual members drive these initiatives.
- **Steps:**
 1. **Check-ins (Fellowship Committee/Individual Members):** Encourage members to periodically check in on fellow Rotarians, especially those who may be less active or going through personal challenges.
 2. **Support Network (Fellowship Committee):** Establish a discreet network for members to offer or request support (e.g., during illness, bereavement, professional challenges).
 3. **Celebration of Life Events (Fellowship Committee/Secretary):** Acknowledge significant personal milestones (e.g., births, significant anniversaries) in the bulletin or at meetings.
 4. **Professional Networking (Vocational Services Committee):** Facilitate opportunities for members to support each other professionally.
 5. **Health & Wellness Awareness (Community Service Committee/Guest Speakers):** Occasionally feature speakers or resources on mental health, physical wellness.
- **Roles:** **Fellowship Committee, Vocational Services Committee, Community Service Committee, Secretary, All Members.**

12 Technology & Tools

12.1 Club Management Software Usage (e.g., Rotary Club Central, My Rotary)

- **Guideline:** Efficient use of Rotary International's online tools streamlines club administration and reporting. The tools used may vary from year to year, depending on the District's decisions.
- **Process:** The **Secretary** is the primary user and trainer for these platforms.
- **Steps:**
 1. **Account Access (Secretary/President/Treasurer):** Ensure all relevant officers have login credentials for Rotary Club Central and My Rotary.
 2. **Member Data Management (Secretary):** Keep member contact details, classifications, and roles updated in Rotary Club Central.
 3. **Attendance & Dues Reporting (Secretary/Treasurer):** Regularly input meeting attendance and process RI dues payments through the platform.
 4. **Goal Setting & Tracking (President/Board):** Utilize Rotary Club Central to set and track club goals for membership, service projects, and Foundation giving.

5. **Resource Utilization (All Members):** Encourage members to explore My Rotary for learning resources, Rotary news, and networking opportunities.
6. **Training (Secretary/Tech Lead):** Provide basic training to new officers on how to navigate and use these platforms.
- **Roles: Secretary, Treasurer, President, Technology/Communications Committee, All Members.**

12.2 Communication Platforms (WhatsApp, Email Groups)

- **Guideline:** Effective communication platforms ensure timely and relevant information flow to members.
- **Process:** The **Secretary** manages official communication groups.
- **Steps:**
 1. **Official Channels (Secretary):** Designate primary official communication channels (e.g., WhatsApp group for quick updates, email for formal announcements/documents).
 2. **Group Management (Secretary):** Maintain updated member lists for all communication groups.
 3. **Content Guidelines (Secretary):** Establish guidelines for posting content (e.g., only Rotary-related, no spam, professional tone).
 4. **Emergency Communication (President/Secretary):** Define a protocol for urgent messages.
 5. **Information Overload Prevention (Secretary):** Encourage concise messages and discourage excessive "forwards."
- **Roles: Secretary, President, All Members.**

12.3 Virtual Meeting Tools (Zoom, Google Meet) & Best Practices

- **Guideline:** Maximize the effectiveness of virtual and hybrid meetings through best practices for chosen platforms.
- **Process:** The **Technology/Communications Committee** supports setup; all members follow etiquette.
- **Steps (Technical):**
 1. **Platform Choice (Technology/Communications Committee):** Use the club's designated virtual meeting platform.
 2. **Account Management (Technology/Communications Committee):** Manage club accounts (e.g., Pro licenses for longer meetings).
 3. **Host Responsibilities (Meeting Host):** Familiarize with host controls (muting, screen sharing, recording, breakout rooms).
 4. **Troubleshooting Guide (Technology/Communications Committee):** Provide a simple guide for common technical issues.
- **Steps (Best Practices/Etiquette - already covered in 1.2, can cross-reference):**
 1. **Mute When Not Speaking.**
 2. **Video On (Encouraged).**
 3. **Use Chat for Questions.**
 4. **Raise Hand Feature.**



5. **Be Present & Engaged.**
6. **Proper Background & Lighting.**
- **Roles: Technology/Communications Committee, Meeting Host** (Sergeant-at-Arms or designated), **All Members.**

13 Global & Local Impact

13.1 Understanding Rotary's Areas of Focus

- **Guideline:** All club activities should align with Rotary International's six Areas of Focus to maximize global impact.
- **Process:** The **Service Projects Committee** ensures project alignment; the **President** educates members.
- **Areas of Focus (Brief Description):**
 - **Peacebuilding and conflict prevention**
 - **Disease prevention and treatment**
 - **Water, sanitation, and hygiene**
 - **Maternal and child health**
 - **Basic education and literacy**
 - **Community economic development**
 - **Environment** (Recently added 7th focus area)
- **Steps:**
 1. **Education (President/Service Projects Chair):** Regularly remind members about the Areas of Focus through meetings, bulletin, and new member orientation.
 2. **Project Alignment (Service Projects Committee):** When evaluating project proposals, explicitly check alignment with one or more Areas of Focus.
 3. **Reporting (Secretary/Project Chair):** Ensure project reporting to RI (Rotary Club Central) accurately reflects the relevant Area(s) of Focus.
- **Roles: President, Service Projects Committee, Project Chairs, Secretary, All Members.**

13.2 Connecting Local Projects to Global Initiatives

- **Guideline:** Highlighting how local projects contribute to Rotary's global impact inspires members and demonstrates broader reach.
- **Process:** The **Public Image Committee** and **Service Projects Committee** emphasize this connection.
- **Steps:**
 1. **Storytelling (Public Image Committee):** When communicating about local projects, frame them within the context of Rotary's global efforts (e.g., "Our local hygiene project contributes to Rotary's global mission for Water, Sanitation, and Hygiene").
 2. **District/RI Examples (President/Service Projects Chair):** Share examples of how other clubs' local projects have scaled up or contributed to global grants.

3. **Rotary Foundation Link (Rotary Foundation Chair):** Explain how contributions to The Rotary Foundation enable global grants that fund large-scale projects worldwide.
- **Roles: Public Image Committee, Service Projects Committee, Rotary Foundation Chair, President.**

13.3 Rotary International Foundation & Giving

- **Guideline:** Encourage member support for The Rotary Foundation, the charitable arm of Rotary, which funds much of its humanitarian work.
- **Process:** The **Rotary Foundation Chair** leads awareness and fundraising efforts.
- **Steps:**
 1. **Education (Rotary Foundation Chair):** Regularly educate members about the purpose and impact of The Rotary Foundation (TRF), including the Annual Fund, PolioPlus, and Endowment Fund.
 2. **Recognition (Rotary Foundation Chair/Treasurer):** Publicly acknowledge and appreciate members who contribute to TRF, including Paul Harris Fellows and Sustaining Members.
 3. **Encourage Giving (Rotary Foundation Chair):** Encourage members to make personal contributions to TRF, emphasizing "Every Rotarian, Every Year" giving.
 4. **Matching Gifts (Rotary Foundation Chair):** Inform members about corporate matching gift programs that can amplify their contributions.
 5. **Reporting (Rotary Foundation Chair/Treasurer):** Report club contributions to TRF accurately to the District and RI.
- **Roles: Rotary Foundation Chair, Treasurer, President, All Members.**