



District 9810 Quality Club Framework

27 August 2010

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1. The framework is essentially a checklist of benchmarks that can be used by Rotary club leaders as a guide for best practice.
2. Clubs are encouraged to meet these standards to ensure that they are a financially viable and effective entity within the Rotary International network.
3. The benchmarks extend and develop items identified or listed in the Planning Guide for Effective Rotary Clubs and other planning tools.
4. The benchmarks are designed to help clubs improve the way they operate to become more attractive to potential new members, existing members, partners and project partners.

District 9810 Quality Club Framework

1. Organisation

- A. By-Laws and Rules
- B. Board structure
- C. Committees
- D. Job Descriptions
- E. Club Processes
- F. Annual Reports
- G. Risk Analysis

2. Planning

- A. Strategic Plan
- B. "Our Club Our Future"
- C. Club Leadership Plan
- D. Succession Planning

3. Meetings and events

- A. Meeting organisation
- B. Guest speakers
- C. Special events

4. Finances

- A. Budgets
- B. Reporting
- C. Auditing

5. Projects

- A. Development and management
- B. Sustainability
- C. Budgets
- D. Accountability
- E. Fundraising
- F. Scaling up with Clusters/District/Districts/partners
- G. Project partners/Project beneficiaries

6. The Rotary Foundation

- A. Annual Giving
- B. Polio Plus and other special programs
- C. Matching Grants
- D. Simplified Grants
- E. Group Study Exchange
- F. Scholarships

7. Membership and Marketing

- A. Recruitment
- B. Retention
- C. Extension

District 9810 Quality Club Framework (continued)

8. Communications and PR

- A. Bulletin
- B. Website
- C. Promotion and Publicity
- D. Club information/projects
- E. Club database
- F. Project Partner database

9. Training and Development

- A. Presidents Training – Presidents Elect Training Seminar (PETS)
- B. Potential Rotary Leaders seminar (PRLS)
- C. Rotary Leadership Institute (RLI)
- D. Personal Development – members Training on Rotary
- E. Personal development - Ethics

10. Internal Relationships

11. Annual Review

- A. Club Health Check
- B. Quality Club Framework review
- C. Strategic Plan review

District 9810 Quality Club Framework

1. Organisation

A. By-Laws and Rules

Does the club have copies of the latest versions of its By-Laws and Rules?

When did the club last modify its By-Laws and Rules?

B. Board Structure

Has the club documented its Board structure and communicated this to members?

C. Committees

Has the club documented the committee structure and communicated this to members?

D. Job Descriptions

Has the club documented job descriptions and communicated this to members?

E. Club Processes

Has the club documented its processes and procedures and communicated this to members?

F. Annual Reports

Has the club produced an Annual Report and audited accounts in the past Rotary year?

Did the club have its Annual general Meeting by 30th November of the previous Rotary year?

G. Risk Analysis

Has the club undertaken a risk analysis of all its activities?

2. Planning

A. Strategic Plan

Does your Club have a Strategic Plan?

Is the strategic plan based on a club visioning process, e.g. 'Our Club – Our Future'?

Does it cover every one of the Quality Club Benchmarks?

Does it cover the strategic direction for the club for the next 3 years?

Do you update the strategic plan every year to ensure a continuing three-year strategic planning period?

Have you used any of the Planning Guides published by RI?

B. 'Our club – Our Future'

Do you have a clear, documented, agreed and shared vision for the future of your Rotary Club?

Has your club adopted the 'Our Club – Our Future' process?

Has the future vision been adopted and embraced by all club members?

C. Club Leadership Plan

Has your club followed the guidelines in the Club Leadership Plan (as published by RI) to develop your clubs administrative procedures?

Does your club leadership plan cover all five avenues of service?

Is your club leadership plan based on your strategic plan?

Is your club leadership plan consistent with your club visioning process?

D. Succession Planning

Do you have a President Elect and a President Nominee nominated and agreed at least 21 months and 33 months ahead of their presidential year?

Do you have a succession plan for each board position?

Do you have a succession plan for all club officers?

3. Meetings and events

A. Meeting Organisation

Do you consider your meeting venue easy to find and suitable for conducting your meetings?

Do you consider your venue a suitable and attractive meeting place for potential new members?

Does your club have a duty roster responsible for the setting up and presentation of the meeting venue?

Does your club have an interesting agenda for your weekly meetings?

Does your meeting start and finish on time?

Are name badges available and worn by members and guests?

Are all visitors properly greeted and made to feel welcome?

Does your club consider a structured sergeants session an important part of your club meeting?

Does your club consider the occasional variation to its meeting time and or venue?

B. Guest Speakers

How does your club obtain the services of guest speakers?

Does your club have a balanced mix of Rotary and non Rotary speakers?

Does your Chairperson liaise with the guest speakers prior to the meeting, informing them of the time frame etc. for their segment?

Do you send a follow-up note to your guest speakers, thanking them for their time?

Do you use the Monthly Rotary themes to develop your program?

C. Special events

(District Governor's official visit, Club Changeover, Membership Meetings etc.)

Does your club have a structured procedure in place to ensure the success of these events?

4. Finances

Does your club account for Fundraising and Administration separately?

A. Budgets

Do you have your Budgets prepared and approved at your club's June Board Meeting?

Do you set your members annual fees in June and raise invoices payable by 30 June each year?

Has your club prepared a Fund Raising and Projects Budget for the upcoming year?

B. Reporting

Is there monthly reporting on Actual vs. Budget for the Board?

Do you provide financial reports to your club members on at least a quarterly basis?

What financial reports do you prepare?

What process does the club have in place to address variances beyond, say 10%?

C. Auditing

Are your Annual Financial Statements audited by an independent auditor in accordance with Incorporation requirements?

Has your club lodged its Annual Return each year?

5. Projects

A. Development and Management

Has the club developed a process for the analysis and development of new projects?

Has the club completed a current Community Needs Analysis?

B. Sustainability

Has the club developed a policy and commitment to sustainable projects locally and internationally?

C. Budgets

Has the club developed detailed budgets before projects proceed?

D. Fundraising

Has the club developed fundraising targets to ensure projects are appropriately funded?

E. Scaling up projects by combining with other clubs, cluster/s and District/s

Is the club agreeable to combining with other clubs, cluster/s, District/s on Rotary projects or Matching Grants?

F. Project partners and beneficiaries

Has the club developed a policy for the interaction with project partners and project beneficiaries?

6. The Rotary Foundation

A. Annual Giving

Has your club set its goal for contributions to Annual Giving of The Rotary Foundation in line with the recommended level of minimum of US\$100 per member?

Does the club encourage members and friends of club to contribute to The Centurion Fund?

B. Polio Plus and other special programs

Has your club a special fundraiser for the Polio Eradication Program?

Have you had a feature speaker or program on the Polio Eradication Program?

Do you regularly publish up-to-date results on Polio for club members?

C. Matching Grants

Has your club initiated a Matching Grant in the past three years?

Does your club have a current Matching Grant?

Have you partnered with another club in a Matching Grant last year or this year?

Does your Matching Grant/s provide the opportunity for your members to be involved in a hands-on way?

D. Simplified Grants

Has your club initiated a Simplified Grant in the past three years?

Have you partnered with another club in a Simplified Grant last year or this year?

Does your simplified Grant/s provide the opportunity for your members to be involved in a hands-on way?

E. Group Study Exchange

Has the club nominated at least one candidate for team membership of the District Group Study Exchange team this year?

Has a member of the club nominated for the role of Team Leader?

Will the club offer to host the Inbound GSE Team during its visit this year and provide an innovative and exciting day?

Is your club proactive in encouraging members to home host the inbound team?

6. The Rotary Foundation (continued)

E. Group Study Exchange (continued)

Do you utilise your Vocational linkages to assist with Vocational Placements for the inbound GSE Team?

Will you host the inbound and / or outbound team at your club meeting?

F. Scholarships

Has your club nominated an applicant for a Rotary Foundation Scholarship – either Ambassadorial or Peace Scholar?

Have you offered to the Scholarships Committee for members in your club to be a counsellor for scholars?

Do you regularly invite Scholars to present at your club?

7. Membership and Marketing

A. Recruitment

Has your club appointed a marketing and membership committee?

Would the structure of your club attract quality new members?

Does your club have plans in place for the recruitment of new members?

Are all members of your club aware of their responsibility to recruit new members?

Does your club have a strategy for making potential new members welcome?

B. Retention

Does your club appoint a mentor for the purpose of educating, involving and new members?

Are all members actively involved in club programs and projects?

Has your club a nominated Fellowship Committee for the purpose of arranging social; functions and fun activities?

Does your venue allow you the opportunity to promote fellowship amongst members prior to the meeting?

Does your club acknowledge member's efforts for a job well-done?

C. Extension

Is your club strategically placed to effectively service your local community?

Do you consider that there is an opportunity to develop a new Rotary Club in your adjoining area?

Do you need to contact your Assistant Governor to establish the structure required in chartering a new Rotary Club?

8. Communications and PR

A. Bulletin

Does your club produce a weekly bulletin and distribute it by email to all club members, honorary members, the Assistant Governor and District Governor?

B. Website

Does your club maintain a website that includes club projects, meeting location and time and contact details?

Is the website updated weekly?

Does the website have restricted access to confidential data?

C. Promotion and Publicity

Has your club an up-to-date brochure on its activities?

Do you use print or electronic media to promote your club's activities and events?

Do you promote your club at community events with signage and displays?

8. Communications and PR (continued)

D. Club information/projects

Does your club produce summaries of projects and activities for distribution to prospective members and potential project partners?

E. Club and Rotary Partner database

Does your club maintain a database with the contact details of members and partners, honorary members and “Friends of Rotary”?

F. Project Partner database

Does your club maintain a database of project partners and potential project partners?

9. Training and Development

A. Presidents Training - Presidents Elects Training Seminar (PETS)

Has your club President Elect attended the Incoming Presidents Training Program including Pre-PETS, PETS and District Assembly?

Do you provide support for your Incoming President to broaden their Rotary knowledge through the RLI Program and Personal Skills through PRLS?

B. Potential Rotary Leaders Seminar (PRLS)

Has your club sponsored at least one member to attend Basic PRLS this year?

C. Rotary Leadership Institute

Has your club sponsored at least one member to attend RLI this year?

D. Personal Development - Members Training on Rotary

Has your club developed a Training Program for the club and its members for the upcoming year?

E. Personal Development - Ethics

Does your club conduct its activities in an ethical manner?

Do you ensure that your club is above reproach in all that you do?

Do you encourage the “Four Way Test” in your club activities?

10. Internal Relationships

Do ALL members feel welcome when attending weekly meetings?

Do members feel involved in decisions?

Are conversations open, honest and respectful?

Do members speak openly about issues and concerns?

Do all members encourage and engage with visitors?

Does it feel good to be a member of your Rotary Club?

Do visitors enjoy the experience and ask to return?

11. Review and Measurement

A. Club Health Check

B. Quality Club Framework review

C. Strategic Plan review