



SERVICE Above Self

New Member Handbook

**Rotary Club of
Bailey's Crossroads**

April 2010

Foreward

The Essentials for New Members

The objective of the New Member Orientation is to communicate to you, the newest members of our club, basic information about Rotary, regarding the benefits, responsibilities, and opportunities for service related to Rotary membership.

The benefits of Rotary membership include:

- Participating in activities that have a positive impact on our local community as well as communities in other countries
- Meeting individuals in different professional capacities
- Associating with a group with high standards of character and integrity.

However, being a Rotarian requires a considerable commitment of time and resources.

The responsibilities of Rotary membership include:

- Following the club's attendance requirements
- Paying dues to the club and Rotary International
- Participating in club projects, programs, and activities
- Proposing qualified individuals for membership
- Accepting Club leadership assignments
- Contributing annually to the Rotary Foundation

With responsibility comes opportunity. Based in thousands of communities around the world, Rotary is often in an ideal position to affect positive change – improving the lives of countless people and giving its members many opportunities for service.

Potential opportunities for Rotary service:

- Club members can develop and conduct their own service projects with Board approval.
- Rotary offers the chance to serve both locally and globally.
- The Rotary Foundation offers the chance to participate in a wide variety of educational and humanitarian programs.
- Club members can make a difference by contributing funds to the Rotary Foundation.

In summary, you may think of this New Member Orientation as Rotary 101. And as with any introductory course, you are sure to have many questions. You are urged to ask them. At least one of us today should be able to answer.

1 History of Rotary

A Brief History

The world's first service club, the Rotary Club of Chicago, Illinois, USA, was formed on February 23, 1905, by Paul P. Harris, an attorney who wished to recapture in a professional club the same friendly spirit he had felt in the small towns of his youth. The name "Rotary" derived from the early practice of rotating meetings among members' offices.

Rotary's International Growth

Rotary's popularity spread throughout the United States in the decade that followed; clubs were chartered from San Francisco to New York. By 1921, Rotary clubs had been formed on six continents, and the organization adopted the name Rotary International a year later.

Emphasis on Community Service

As Rotary grew, its mission expanded beyond serving the professional and social interests of club members. Rotarians began pooling their resources and contributing their talents to help serve communities in need. The organization's dedication to this ideal is best expressed in its principal motto: Service Above Self. Rotary also later embraced a code of ethics, called the 4-Way Test, which has been translated into hundreds of languages.

Working for Peace

During and after World War II, Rotarians became increasingly involved in promoting international understanding. In 1945, 49 Rotary members served in 29 delegations to the United Nations Charter Conference. Rotary still actively participates in UN conferences by sending observers to major meetings and promoting the United Nations in Rotary publications. Rotary International's relationship with the United Nations Educational, Scientific, and Cultural Organization (UNESCO) dates back to a 1943 London Rotary conference that promoted international cultural and educational exchanges. Attended by ministers of education and observers from around the world, and chaired by a past president of RI, the conference was an impetus to the establishment of UNESCO in 1946.

The Rotary Foundation

An endowment fund, set up by Rotarians in 1917 "for doing good in the world," became a not-for-profit corporation known as The Rotary Foundation in 1928. Upon the death of Paul Harris in 1947, an outpouring of Rotarian donations made in his honor, totaling US\$2 million launched the Foundation's first program — graduate fellowships, now called Ambassadorial Scholarships. Today, contributions to The Rotary Foundation total more than US\$80 million annually and support a wide range of humanitarian grants and educational programs that enable Rotarians to bring hope and promote international understanding throughout the world.

Polio Eradication

In 1985, Rotary made a historic commitment to immunize all of the world's children against polio. Working in partnership with nongovernmental organizations and national governments through its PolioPlus program, Rotary is the largest private-sector contributor to the global polio eradication campaign. Rotarians have mobilized hundreds of thousands of PolioPlus volunteers and have immunized more than one billion children worldwide. Rotary has contributed more than US\$650 million to the polio eradication activities in 122 countries.

Rotary Today

As it approached the dawn of the 21st century, Rotary worked to meet the changing needs of society, expanding its service effort to address such pressing issues as environmental degradation, illiteracy, world hunger, and children at risk. The organization admitted women for the first time (worldwide) in 1989 and claims more than 145,000 women in its ranks today. Following the collapse of the Berlin Wall and the dissolution of the Soviet Union, Rotary clubs were formed or re-established throughout Central and Eastern Europe. Today, 1.2 million Rotarians belong to some 33,000 Rotary clubs in more than 200 countries and geographical areas.

Rotary Milestones

- 1905** First Rotary club organized in Chicago, Illinois, USA
- 1908** Second club formed in San Francisco, California, USA
- 1910** First Rotary convention held in Chicago, Illinois, USA
- 1912** The Rotary Club of Winnipeg, Manitoba, Canada, becomes the first club outside the United States to be officially chartered. (The club was formed in 1910.)
- 1917** Endowment fund, forerunner of The Rotary Foundation, established
- 1932** 4-Way Test formulated by Chicago Rotarian Herbert J. Taylor
- 1945** Forty-nine Rotarians help draft United Nations Charter in San Francisco
- 1947** Rotary founder Paul Harris dies; first 18 Rotary Foundation scholarships granted
- 1962** First Interact club formed in Melbourne, Florida, USA
- 1965** Rotary Foundation launches Matching Grants and Group Study Exchange programs
- 1985** Rotary announces PolioPlus program to immunize all the children of the world against polio

- 1989** Council on Legislation opens Rotary membership to women worldwide; Rotary clubs chartered in Budapest, Hungary, and Warsaw, Poland, for first time in almost 50 years
- 1990** Rotary Club of Moscow chartered first club in Soviet Union
- 1990-91** Preserve Planet Earth program inspires some 2,000 Rotary-sponsored environmental projects
- 1994** Western Hemisphere declared polio-free
- 1999** Rotary Centers for International Studies in Peace and Conflict Resolution established
- 2000** Western Pacific declared polio-free
- 2001** 30,000th Rotary club chartered
- 2002** Europe declared polio-free; first class of 70 Rotary Peace Scholars begin study
- 2003** Rotarians raise more than US\$118 million to support the final stages of polio eradication
- 2004** RI's largest convention with 45,381 attendees, held in Osaka, Japan
- 2005** Rotary Celebrates centennial in Chicago, Illinois, USA
- 2006-07** Rotary recognizes the millionth Paul Harris Fellow
- 2007-08** Rotary receives US \$100M grant from the Gates Foundation to help eradicate polio

2 The Organization of Rotary

Rotary is essentially a grassroots organization, with most of its service efforts being carried out at the club level. The district and international structure is designed to support the clubs and help them provide more service in their communities and abroad.

Clubs – Rotarians are members of their clubs, and the clubs are members of the global association known as Rotary International. Each club elects its own officers and enjoys considerable autonomy within the framework of the standard constitution and the constitution and bylaws of Rotary International.

Districts – Clubs are grouped into 530 Rotary districts, each led by a district governor who is an officer of Rotary International and represents the RI board of directors in the field. The District administration, including assistant district governors and various committees, guides and supports the clubs. Though selected by the clubs of the district, a governor is elected by all of the clubs' worldwide meeting at the RI convention.

RI Board – Traditionally, the RI president, who is elected annually, develops a theme and emphasis for the year. The 19-member RI board of directors, which includes the RI president and president-elect, administers Rotary International. These officers are also elected at the convention; the selection process for choosing directors and the nominating committee for president are based on zones, each of which comprises approximately 15 districts. The board meets quarterly to establish policies.

The Secretariat – Rotary International is headquartered in the Chicago suburb of Evanston, Illinois, USA, with seven international offices in Argentina, Australia, Brazil, India, Japan, Korea, and Switzerland. The RI in Great Britain and Ireland (RIBI) office, located in England, serves clubs and districts in that region. The Secretariat's active managing officer is the RI general secretary, who heads a 650-member staff working to serve Rotarians worldwide.

3 History of the Rotary Club of Bailey's Crossroads

The Rotary Club of Bailey's Crossroads was sponsored by the Falls Church Rotary Club and was chartered by Rotary International on February 15, 1977 with our Charter Dinner on March 12, 1977. There were 27 members in this initial phase of the Club. Known as "The Early Birds", the name was selected because of the 7:30 A.M. meeting time. Charter president Carl Neuberg designed the Club banner to depict the Club as the Early Birds of Northern Virginia, a Southern state.

The original meeting place was in Bailey's Crossroads at the old Marriott HotShoppes Restaurant where Best Buy is presently located. With continued growth in membership, the Club began a series of moves to Bob's Big Boy, Chi Chi's, the Radisson Mark Plaza Hotel, The Hamburger Hamlet, The Sizzler Athens Restaurant and many other locations. The Club currently meets at the Goodwin House Bailey's Crossroads, a few hundred yards from the Arlington County line.

When Rotary International approved membership for women, the Club led the way and was among the first to induct a woman into Rotary. The Club currently has **XX** women members and is always looking for more "quality" members, both women AND men.

The Club truly supports Rotary by providing outstanding Rotarians to serve in positions above the Club level. Two of its members have served as District Governor, Bernard Zeavin (1984-1985) and Jack Kenyon (1992-1993). Five members have served as Assistant Governors, and several members have served or presently serve as chairs or members of District 7610 committees, and beyond.

The Club has consistently been a leader in the number of members who are Paul Harris Fellows. Since its Charter in 1977, members have contributed over \$375,000 to the Rotary Foundation.

The Club has received numerous awards including Outstanding Club in the District. Its primary accomplishments have been, and continue to be, the emphasis of the Club and its members on the Four Avenues of Service, both in the local community and internationally. Some of these activities include sponsorship of an Interact Club at JEB Stuart High School; delivery of Thanksgiving food baskets to the needy; support of Toys for Tots and purchase of gifts for the elderly during the Holiday Season; food and clothing drives to assist the needy; consistent support for matching grants projects; support of the GSE program; good Club attendance at District Conferences and the RI Conventions; and many others.

The principal financial support for the Club's charitable activities comes from an annual raffle of a classic Ford Mustang. This activity, started in 1986 by member Robert Metzger, a classic car enthusiast, has been an outstanding success and provided and continues to provide

the funds for much of the Club's community and international service. The raffle has also increased awareness of the Bailey's Crossroads Rotary Club, of Rotary and its many activities and services within the local community and worldwide.

The Bailey's Club is known throughout the District as the "Can Do Club". Under the outstanding leadership of its Past Presidents that reputation has continued to grow. The future is bright for Rotary International, District 7610, and for The Bailey's Crossroads Rotary Club.

4 Object, Mission and Vision of Rotary

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

- The development of acquaintance as an opportunity for service;
- High ethical standards in business and professions, the recognition of the worthiness of all useful occupations, and the dignifying of each Rotarian's occupation as an opportunity to serve society;
- The application of the ideal of service in each Rotarian's personal, business, and community life;
- The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

The mission of Rotary International is to support its member clubs in fulfilling the Object of Rotary by:

- Fostering unity among member clubs;
- Strengthening and expanding Rotary around the world;
- Communicating worldwide the work of Rotary; and,
- Providing a system of international administration.

The vision statement of Rotary:

- Rotary will be recognized for its leadership and success in the eradication of polio
- Rotary will have a strong and visible presence worldwide.
- Rotary will achieve enhanced capacity for friendship and service through a strong organization with increased and diverse membership.
- Rotary will advance its ideals of high ethical standards, international understanding, goodwill, and peace through a membership united in service.

5 Five Avenues of Service

Based on the Object of Rotary, the Four Avenues of Service are Rotary's philosophical cornerstone and the foundation on which club activity is based:

1. **Club Service** focuses on strengthening fellowship and ensuring the effective functioning of the club.
2. **Vocational Service** encourages Rotarians to serve others through their vocations and to practice high ethical standards
3. **Community Service** covers the projects and activities the club undertakes to improve life in its community.
4. **International Service** encompasses actions taken to expand Rotary's humanitarian reach around the globe and to promote world understanding and peace
5. **New Generations**

6 Declaration of Rotarians in Businesses and Professions

The Declaration of Rotarians in Businesses and Professions was adopted by the Rotary International Council on Legislation in 1989 to provide more specific guidelines for the high ethical standards called for in the Object of Rotary:

As a Rotarian engaged in a business or profession, I am expected to:

- Consider my vocation to be another opportunity to serve;
- Be faithful to the letter and to the spirit of the ethical codes of my vocation, to the laws of my country, and to the moral standards of my community;
- Do all in my power to dignify my vocation and to promote the highest ethical standards in my chosen vocation;
- Be fair to my employer, employees, associates, competitors, customers, the public, and all those with whom I have a business or professional relationship;
- Recognize the honor and respect due to all occupations which are useful to society;
- Offer my vocational talents: to provide opportunities for young people, to work for the relief of the special needs of others, and to improve the quality of life in my community;
- Adhere to honesty in my advertising and in all representations to the public concerning my business or profession;
- Neither seek from nor grant to a fellow Rotarian a privilege or advantage not normally accorded others in a business or professional relationship.

7 The Four Way Test

From the earliest days of the organization, Rotarians were concerned with promoting high ethical standards in their professional lives. One of the world's most widely printed and quoted statements of business ethics is The Four-Way Test, which was created in 1932 by Rotarian Herbert J. Taylor (who later served as RI president) when he was asked to take charge of a company that was facing bankruptcy.

This 24-word test for employees to follow in their business and professional lives became the guide for sales, production, advertising, and all relations with dealers and customers, and the survival of the company is credited to this simple philosophy. Adopted by Rotary in 1943, The Four-Way Test has been translated into more than a hundred languages and published in thousands of ways. It asks the following four questions:

Of the things we think, say or do:

1. Is it the TRUTH?
2. Is it FAIR to all concerned?
3. Will it build GOODWILL and BETTER FRIENDSHIPS?
4. Will it be BENEFICIAL to all concerned?

8 Classifications

Did you ever wonder why Rotary has classifications? What are classifications supposed to represent? Who and what factors determine what classifications a club may have? Here are answers to some of the most frequently asked questions that arise regarding classifications, taken from the most authoritative, written sources available from Rotary International.

Why does Rotary have a classification system?

Rotary uses a classification system to establish and maintain a vibrant cross-section or representation of the community's business, vocational, and professional interests among members and to develop a pool of resources and expertise to successfully implement service projects. This system is based on the founders' paradigm of choosing cross-representation of each business, profession, and institution within a community. A classification describes either the principal business or the professional service of the organization that the Rotarian works for or the Rotarian's own activity within the organization.

(Source: www.rotary.org/membership/prospective/becoming.html)

Does Rotary International maintain a list of classifications?

RI does not maintain a general list of classifications. Due to the ever-changing landscape of professional work and the unique commercial environments in which Rotary clubs are located, Rotary no longer keeps a standard list of classifications on file. Clubs are encouraged to create their own classification lists by using their local Yellow Pages, chamber of commerce, or other business directories. Classifications aren't rigid and can reflect the many different types of professions and positions that exist in industries. One example would be the classification of lawyer/barrister; this standard classification can be broken down into criminal law, tax law, or intellectual property law.

(Sources: Rotary International Code of Policies, Article 4; Rotary International 2007 Manual of Procedures, p. 11; www.rotary.org/membership/development/faqs.html#20)

What are the occupational codes, and how do they differ from classifications?

Rotary International's occupational codes were created some years ago in the event that Rotary found reason to research the industries represented in its membership. These industries are also used when determining the makeup of RI committees. These broad industry titles should in no way be confused with classifications. Rotary International no longer tracks occupational codes.

(Source: www.rotary.org/membership/development/faqs.html#20)

Should a club deny membership to a transferring or former Rotary based on a classification limitation?

The classification of a transferring or former member of a club shall not preclude election to active membership even if the election results in club membership temporarily exceeding the classification limits.

(Sources: Rotary International 2007 Manual of Procedures, p. 11; Rotary International Bylaws, Section 4.030; 2007 Standard Rotary Club Constitution, Article 5, section 2 (b))

What limitations, if any, exist on the election of a member to a classification that is already held by another member?

The club shall not elect a person to active membership from a classification if the club already has five or more members from that classification, unless the club has more than 50 members, in which case the club may elect a person to active membership in a classification so long as it will not result in the classification making up more than 10 percent of the club's active membership.

(Source: Rotary International Constitution, Article 5, section 2(b), Rotary International 2007 Manual of Procedure, p. 178; 2007 Standard Rotary Club Constitution, Article 5, section 2 (b), Rotary International 2007 Manual of Procedure, p. 254)

What classification does a retired person hold?

Retired persons inducted into active membership in a Rotary club shall use their former profession as their classification, but this will not be counted towards the club's limit of members in a single classification. Club classification rosters shall not include retired Rotarians.

(Source: Standard Rotary Club Constitution, Article 5 section 2 (b); "Highlights of Actions Taken by the Board of Directors of Rotary International: October 2003"; Decision 62, October 2003 Meeting of the Rotary International Board of Directors; November 2006 Rotary International Code of Policies, Chapter 4, section 4.050.2; www.rotary.org/support/board/0310.html)

Do Honorary Members hold classifications?

Honorary members do not hold classifications, but shall be entitled to attend all meetings and enjoy all the other privileges of the club.

(Sources: Standard Rotary Club Constitution, Rotary International 2007 Manual of Procedures, p. 17)

How broadly are clubs encouraged to interpret classifications?

While adherence to the classification system is desirable, the Rotary International Board of Directors has agreed that each Rotary club should consider carefully the classification practice and broaden the interpretation of classifications where necessary to meet the modern business and professional environment.

(Sources: Rotary International 2007 Manual of Procedures, p. 11; November 2006 Rotary International Code of Policies, Article 4, section 4.050; May-June 1966 Meeting of the Rotary International Board of Directors, Decision 297; November 1995 Meeting of the Rotary International Board of Directors, Decision 84, as amended by the November 2004 Meeting of the Rotary International Board of Directors, Decision 59)

What is a classification survey, and how can I find out what classifications are "open" in the club?

A systematically prepared list of classifications is the logical basis for club growth. RI does not maintain a general list of classifications. To identify relevant business and professional practices within a community, clubs are encouraged to conduct a thorough classification survey. Surveys act as a basis for developing and aggressively undertaking specific, ongoing plans for building and strengthening club membership in order to serve more effectively in all areas of activity. The classification committee of the club is responsible for developing and maintaining an up-to-date classification survey of the community in which the Rotary club is located. Clubs should maintain and use up-to-date classification surveys to develop and strengthen club membership by identifying and recruiting qualified members to classifications that are open. While the club's classification committee compiles the classification survey, it is the club's membership committee and board that reviews and determines the classification of all prospective members.

(Sources: Rotary International 2007 Manual of Procedures, P. 12; Rotary International Code of Policies, Article 4, section 4.050.1; May-June 1969 Meeting of the Board of Directors of Rotary International, Decision 52, as amended by the November 2004 Meeting of the Board of Directors of Rotary International, Decision 59; November 2006 Rotary International Code of Policies, Article 4, section 4.050.1; Bylaws of the Rotary Club of McLean, Inc., as amended June 20, 2006, Article XI, Section 1)

What should the classification survey and the membership of the club reflect?

A club should have in its membership a representative of every recognized business or professional activity in the community insofar as it is possible to obtain such representation in conformity with the principles laid down in the RI constitution, article 5 and the standard Rotary club constitution, article 6. Clubs are encouraged to review the demographics of an

area to verify that all respective segments of the population are represented within its membership.

(Sources: Rotary International 2007 Manual of Procedures, p. 12; Rotary International Constitution, Article 5; Standard Rotary Club Constitution, Article 8)

9 Fellowship and Attendance

One of the many benefits of Rotary Club membership is the luxury of being able to travel the world and never miss the fellowship of a weekly meeting. Club members are welcome and encouraged to visit clubs while traveling to make-up the meeting missed back home.

Rotary International provides an online service to locate clubs and meeting times and places worldwide at www.rotary.org. Click on the “club locator” link at the top of the home page. Rotary District 7610 also maintains a list of club meeting times and places on its web page at http://www.rotary7610.org/club_meetings.html.

But Rotarians often ask what options exist if there is not a club in the area of travel, or if the member is home but an emergency causes him or her to miss a meeting.

One option is to attend a regular meeting of a local Rotaract or Interact club, Rotary Community Corps, or Rotary Fellowship. According to the Standard Rotary Club Constitution, attending one of these meetings counts as a make-up.

Another option is to spend time participating in an interactive activity on a Rotary e-club Web site. Rotary International has approved the request for a limited number of clubs to form with virtual or electronic locations. A visit to one of these e-clubs satisfies a club member's make-up requirement.

Additionally, members may make-up by attending a meeting of the board of directors of their club, or by attending a District meeting, such as District Conference, District Assembly/Club Leadership Training Seminar, Presidents Elect Training Seminar, Foundation Seminar, Membership Seminar, or District Installation. Attendance at a Rotary International meeting, such as the International Conference, also counts for make-up credit.

For extended absences and for good cause, a member may request a leave of absence from the club's board of directors. Members whose combined age and years in Rotary total 85 or more, referred to as the “Rule of 85,” may request an exemption from attendance from the club's board of directors. Rule of 85 members are not charged meals for the meetings they do not attend.

Each Active Member not on a leave of absence or whose attendance is not excused is required to attend or make up at least sixty percent of club's regular meetings in each half of the Rotary year (July 1 to June 30), of which half must be at the member's home club's meetings. Members should avoid missing more than three consecutive absences without a make up.

10 Service Above Self

Rotarians are business and professional leaders who take an active role in their communities while greatly enriching their personal and professional lives. A Rotary club contains a diverse group of professional leaders from the community that the club serves.

Membership in a Rotary club offers a number of benefits, including:

- Effecting change within the community.
- Developing leadership skills.
- Gaining an understanding of — and having an impact on — international humanitarian issues.
- Developing relationships with community and business leaders.

Through Rotary's service programs, a Rotary club can have a significant effect on the quality of life in its community. Programs of The Rotary Foundation offer opportunities to form international partnerships that help people in need worldwide. More than 1.2 million Rotarians make significant contributions to the quality of life at home and around the globe. This ideal is embodied in Rotary's motto, Service Above Self.

11 The Rotary Foundation

About The Rotary Foundation

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education, and the alleviation of poverty. The Rotary Foundation is a not-for-profit corporation that is supported solely by voluntary contributions from Rotarians and friends of the Foundation who share its vision of a better world.

The Foundation was created in 1917 by Rotary International's sixth president, Arch C. Klumph, as an endowment fund for Rotary "to do good in the world." It has grown from an initial contribution of US\$26.50 to more than US\$117.9 million contributed in 2004-05. Its event-filled history is a story of Rotarians learning the value of service to humanity. The Foundation's Humanitarian Programs fund international Rotary club and district projects to improve the quality of life, providing health care, clean water, food, education, and other essential needs primarily in the developing world. One of the major Humanitarian Programs is PolioPlus, which seeks to eradicate the poliovirus worldwide. Through its Educational Programs, the Foundation provides funding for some 1,200 students to study abroad each year. Grants are also awarded to university teachers to teach in developing countries and for exchanges of business and professional people. Former participants in the Foundation's programs have the opportunity to continue their affiliation with Rotary as Foundation Alumni.

History of The Rotary Foundation

In 1917, Arch C. Klumph, Rotary's sixth president, proposed to the Rotary International Convention in Atlanta, Georgia, USA, the creation of an "endowment fund for Rotary . . . for the purpose of doing good in the world in charitable, educational, and other avenues of community service." A few months later, the endowment received its first contribution of \$26.50 from the Rotary Club of Kansas City, Missouri, USA.

In 1928, when the endowment fund had grown to more than US\$5,000, the fund was renamed The Rotary Foundation, and it became a distinct entity within Rotary International. Five Trustees, including Klumph, were appointed to "hold, invest, manage, and administer all of its property as a single trust, for the furtherance of the purposes of RI." Two years later, the Foundation made its first grant of US\$500 to the International Society for Crippled Children. The ISCC — created by Rotarian Edgar F. "Daddy" Allen — later grew into the

Easter Seals organization. The Great Depression and World War II both impeded significant growth for the Foundation, but the need for promoting a lasting world peace generated great post-war interest in developing the Foundation.

After Rotary founder Paul P. Harris died in 1947, contributions began pouring into Rotary International, and the Paul Harris Memorial Fund was created for the purpose of building the Foundation. That same year, the first Foundation program — the forerunner of the Rotary Ambassadorial Scholarships program — was established. Then in 1965-66, three new programs were launched Group Study Exchange, Awards for Technical Training, and Grants for Activities in Keeping with the Objective of The Rotary Foundation, which was later called Matching Grants.

The Health, Hunger and Humanity (3-H) program was launched in 1978, with the Rotary Volunteers program being created as a part of 3-H in 1980. The PolioPlus program was announced in 1984-85, and the following year saw the introduction of Rotary Grants for University Teachers. The first Peace Forums were held in 1987-88, leading to the establishment of Rotary Peace Programs. Then in 1989, 1963-64 RI President Carl P. Miller and his wife, Ruth, donated US\$1 million to establish the Discovery Grants program. Throughout this time, support of the Foundation grew tremendously. Since that first \$26.50 donation in 1917, the Foundation has received contributions totaling more than US\$2.395 billion. More than US\$223.8 million was contributed in 2008-2009 alone. To date, some 1,188,782 individuals have been recognized as Paul Harris Fellows — that is, someone who has contributed US\$1000 or has had that amount contributed in his or her name. Such strong support and involvement of Rotarians worldwide ensures a secure future for The Rotary Foundation as it continues its vital work for international understanding and world peace.

Recognition of Contributions to the Rotary Foundation

The Rotary Foundation welcomes a number of opportunities to show its appreciation to individuals and clubs for personal outright contributions supporting its humanitarian and educational programs.

Individual Recognition Programs

ROTARY FOUNDATION SUSTAINING MEMBER

A Rotary Foundation Sustaining Member (RFSM) is an individual who personally contributes US\$100 or more each year to the Annual Programs Fund. These contributions also count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition. Contact a member of the BXRC Rotary Foundation Committee to obtain the annual RFSM badge sticker in appreciation of RFSM achievement.

PAUL HARRIS FELLOW

Paul Harris Fellow (PHF) recognition is given in appreciation to anyone who contributes, outright or cumulatively—or in whose name is contributed—a gift of US\$1,000 or more to

the Annual Programs Fund, PolioPlus, PolioPlus Partners, or the Humanitarian Grants program. The recognition consists of a certificate, pin, and medallion.

CERTIFICATE OF APPRECIATION

Occasionally, a donor contributes US\$1,000 and wishes to recognize a business or organization. In these instances, since Paul Harris Fellow recognition can only be presented to individuals, a *Certificate of Appreciate* is given instead.

MULTIPLE PAUL HARRIS FELLOW

Multiple Paul Harris Fellow recognition is extended at subsequent \$1,000 levels (e.g., \$2,000, \$3,000). Recognition consists of a pin with additional stones corresponding to the recipient's recognition amount level.

US \$2,000-2,999.99—one sapphire

\$3,000-3,999.99—two sapphires

\$4,000-\$4,999.99—three sapphires

\$5,000-\$5,999.99—four sapphires

\$6,000-\$6,999.99—five sapphires

\$7,000-\$7,999.99—one ruby

\$8,000-\$8,999.99—two rubies

\$9,000-9,999.99—three rubies

PAUL HARRIS SOCIETY

The *Paul Harris Society* is a district-administered recognition for those who elect to personally contribute US\$1,000 or more each year to the Annual Programs Fund. District 7610 administers the program for the Rotary Club of McLean, which has more Paul Harris Society members than any other club in the District. Paul Harris Society contributions are eligible for Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, and Major Donor Recognition.

MAJOR DONOR

The Rotary Foundation recognizes those individuals or couples whose combined personal giving has reached US\$10,000, regardless of the gift designation. *Major Donors* may elect to receive a crystal recognition piece and pin(s) commemorating the gift at each new recognition level.

US\$10,000-24,999.99—Level One

\$25,000-49,999.99—Level Two

\$50,000-99,999.99—Level Three

\$100,000-499,999.99—Level Four

\$500,000-999,999.99—Level Five

\$1,000,000 or greater—Level Six

ARCH C. KLUMPH SOCIETY

Donors who contribute US\$250,000 or more may have their portraits displayed in the Arch C. Klumph Gallery at Rotary International's World Headquarters in Evanston, Illinois. Donors receive a certificate signed by the President of Rotary International and the Chairman of The Rotary Foundation, and they are invited to a special event at annual RI Conventions. The society is named in honor of The Rotary Foundation's founder, Arch C. Klumph.

BENEFACTOR

A *Benefactor* is someone who informs The Rotary Foundation in writing that he or she has made a provision in his/her estate plans for The Rotary Foundation or by making an outright gift of US\$1,000 or more to the Permanent Fund. Benefactor recognition consists of a certificate and insignia to be worn with a Rotary pin.

BEQUEST SOCIETY

The Rotary Foundation recognizes those couples or individuals who have made commitments in their estate plans totaling US\$10,000 or more. Donors may elect to receive an engraved crystal recognition piece and a Diamond Circle pin commemorating the commitment at each new recognition level.

US \$10,000 to 24,999.99 – Level One

25,000 to 49,999.99 – Level Two

50,000 to 99,999.99 – Level Three

100,000 to 499,999.99 – Level Four

500,000 to 999,999.99 – Level Five

1,000,000 or greater – Level Six

12 The Bailey's Crossroads Rotary Club Foundation

Background

Established on October 23, 1997, the Bailey's Crossroads Rotary Club Foundation is a Virginia Corporation. Under the federal tax code, it is a 501(c)(3), a non-profit organization, established for charitable and/or educational purposes. For the remainder of this fact sheet, the Bailey's Crossroads Rotary Club Foundation will be referred to as the "Foundation." The purpose of the Foundation is to recognize and promote Community, Vocational, and International Service consistent with Rotary International's Object, Ideals, and Avenues of Service. The Foundation was formed in order to improve the ability of the Rotary Club of Bailey's Crossroads (BXRC) to accept donations, which are then tax-deductible for the donor. The Foundation has its own Board of Directors, elected by the Club from among the Club members.

Membership and Leadership

Members in good standing of the BXRC are also members of the Foundation. The Foundation is subject to its own by-laws and is governed by a board of directors. Board members are members of the BXRC who serve for two-year periods on a rotating basis. There are four Foundation Directors; two are selected each Rotary year, if possible, for the purpose of maintaining continuity.

Foundation Directors are chosen by the BXRC Board of Directors between January 1 and March 31 of each year. Subject to re-election by the BXRC Board of Directors, Foundation Directors can serve up to two consecutive two-year terms. In addition to the four voting Directors, there is a non-voting member of the Foundation Board; the BXRC President is an ex-officio member of the Foundation Board.

Once the Foundation Board is seated, it chooses its officers for the Rotary year in which it serves. The officers are: Chairman, Secretary, and Treasurer.

Purpose

The Foundation plays simple yet significant roles in support of the BXRC. Although the BXRC participates in many worthwhile projects locally and internationally, contributions made to the BXRC are not tax deductible as charitable contributions. Because the

Foundation is a 501(c)(3) non-profit corporation, contributions made to the Foundation may be tax deductible as charitable contributions (under standards defined by the I.R.S.)

Funds

There are three types of funds held and managed by the Foundation: Endowment, Current, and Designated. The collection, retention and use of each fund are the keys to differentiating among them.

The **Endowment Fund** is an “accumulation and hold” fund. Contributions to the endowment fund are likely to come primarily from the BXRC and general membership, but may also come from individuals or organizations outside the BXRC. Each dollar contributed to the Endowment is invested into the corpus, or the principal of the fund. The Foundation Board oversees the investments of the Foundation, or may form an Investment Committee for that purpose. The primary goal is to safeguard the principal with the secondary goal of responsibly maximizing earnings to be used for current or future projects.

Although funds can be distributed from the corpus, it would be considered an exceptional event subject first to approval of the Foundation and BXRC Boards, then by 2/3 of the Club membership. The Endowment fund is intended to grow in order to provide a stable base for charitable contributions today and into the future.

Current Funds are solicited and collected by the Foundation to be used at the request of the BXRC Board of Directors for purposes that further the vocational, international, and community avenues of service of the club, such as scholarships, Polio Plus, and support for domestic and international disaster relief efforts.

Designated Funds are solicited and collected by the BXRC. At the request of the Board of Directors, the Foundation holds the funds until the collections have been completed and then, at the direction of the Board of Directors, the funds are “designated” for payment to a specific project or organization. Examples of designated funds include the Jack S. Kenyon Memorial Fund, the John Mathias Fund, and funds for the proposed Community Center.

Summary

Established in 1997, the Bailey’s Crossroads Rotary Club Foundation (the “Foundation”) is a 501(c)(3) non-profit organization, established for charitable and/or educational purposes. The purpose of the Foundation is to recognize and promote Community, Vocational, and International Service consistent with Rotary International’s Object, Ideals, and Avenues of Service. The Foundation was formed in order to improve the ability of the Rotary Club of Bailey's Crossroads to accept donations that are tax deductible for the donor. The Foundation has its own Board of Directors, elected by the Club from among the Club members. The Foundation exists to support the good works of the Club.

13 Financial Obligations of Rotary Club Membership

Each active member of the Rotary Club of Bailey’s Crossroads is responsible for payment of annual club dues and meal charges. Annual dues are currently \$275. Annual dues can be paid semiannually, or quarterly. Meal charges are \$8.00 per meal (or \$10.00 per meal if paid at the door). Meal charges not only cover the member’s meal, but also help to cover the meals of program speakers and guests of the club.

The annual club dues also cover the District 7610 annual assessment of \$32.50 per member and the Rotary International dues assessment of approximately \$65.00. The RI dues assessment includes: \$49.00 for annual dues, (which may be assessed on a pro-rata basis for new members), \$12.00 for a subscription to the *Rotarian* magazine, \$1.00 for the annual Council on Legislation assessment, and \$2.71 annually for club insurance through Rotary International.

In addition to dues and meal charges, each member is *encouraged* to maintain Rotary Foundation Sustaining Member status (i.e., donating **\$100** or more to The Rotary Foundation of Rotary International’s Annual Programs Fund) and become a Paul Harris Fellow in their first year as a Rotarian, to support the club’s goal of being a 100% Every Rotarian Every Year (EREY) Club, a 100% Sustaining Member Club and a 100% Paul Harris Club.

Annually the club holds several Fellowship and Family of Rotary social events that vary in cost for tickets or admission. All Active members are encouraged but not required to attend the Fellowship and social events.

In summary: A new member can expect the following financial obligations:

<u>One-time Initiation Fee</u>	\$100.00
<u>Annual Contribution to The Rotary Foundation</u>	\$100.00
<u>Annual Dues</u>	\$275.00
<u>Breakfast (\$8.00 per meal X 52 weeks</u>	\$416.00

14 Club Communications and Internet Websites

Three separate websites and member databases serve the members of the Rotary Club of Bailey's Crossroads. Each member of the club has access to each of the following Web sites:

- www.rotary.org - the official web site of Rotary International and The Rotary Foundation
- www.rotary7610.org - the official web site of Rotary International District 7610
- www.bxrrotary.org - the official web site of the Rotary Club of Bailey's Crossroads

Members seeking to access the members-only sections of www.rotary.org must complete the online registration before obtaining a username and password. The registration will require the member to provide the member's RI Membership Number (which appears on the mailing address label of the Rotarian magazine, or which may be obtained from the club president or secretary or club website administrator), club number (5788), and district number (7610).

Your RI Membership and Rotary Foundation Donor Identification Number is _____

15 Club Officers, Directors, and Committee Chairs

A current list and email contact link for each officer, director, and committee chair of the club is maintained on the club's website www.bxrrotary.org.

16 Club Bylaws and Rotary Policies

The Bylaws of the Rotary Club of Bailey's Crossroads were revised in June 2003. A copy of the bylaws is available from the Club President or Club Secretary.

An electronic version of the Standard Rotary Club Constitution, under which all clubs are governed, is available in the appendix of the Rotary International Manual of Procedure. Electronic copies of the Rotary International Manual of Procedure, the Rotary International Code of Policies, and The Rotary Foundation Code of Policies are available at:

<http://www.rotary.org/newsroom/downloadcenter/support/code.html> (for RI and TRF Codes of Policies) and at <http://www.rotary.org/newsroom/downloadcenter/support/mop.html>.

The Manual of Procedure is updated every three years, following the triennial Council on Legislation. The Codes of Policies of RI and of TRF are updated monthly following each board meeting of the two organizations.