

# Rotary International

## Knowledge Management in a Volunteer Organization

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### Knowledge Management for Volunteers

Knowledge Management is usually discussed in terms of private firms and public institutions, but it is just as important in volunteer organizations such as Rotary International. Current literature and practice in knowledge management has focused on corporations and, to a lesser extent, public institutions. This chapter will focus on knowledge management in a volunteer organization, Rotary International – specifically the Rotary Club of West Edmonton, District 5370, and Rotary International headquarters in Evanston, Illinois.

Volunteer organizations, like their private and public counterparts, also create new knowledge, organize and codify it, and share it within the organization and between the organization and other funding agencies, governments, local action groups, and their various publics, local, national and international.

### Rotary: Club, District and International

Rotary International (RI) is an organization of business and professional leaders united worldwide, who provide humanitarian service, encourage high ethical standards in all vocations, and help build goodwill and peace in the world. There are approximately 1.2

Rotary International – [www.rotary.org](http://www.rotary.org)



Rotary Club of West Edmonton –  
[www.rotary5370.org/werotary](http://www.rotary5370.org/werotary)

Rotary International District 5370 –  
[www.rotary5370.org](http://www.rotary5370.org)

million Rotarians, members of more than 29,000 Rotary clubs in 161 countries. The principal motto of Rotary is “Service Above Self.”

Each Rotary club is a separate and independent organization which has been chartered by Rotary International and which pays yearly dues to RI and participates in the activities and programs which constitute Rotary.

Rotary International is governed by a Board of Directors and a President, all elected for a period of one year. Rotary’s 530 districts consist of 40 to 100 clubs and are served by District Governors. The District Governor (DG) is the representative of the President of Rotary International who, like all other officers in RI, districts and clubs, is elected for a one year period.

## Rotary International

### Knowledge Management for Rotarians

#### ***A True Web Centre***

Rotary International has full-time staff members who assist clubs with regular activities and provide information on Rotary programs. While Rotary was somewhat slow embracing the internet as an information tool they now have an excellent site – a web centre – which offers members and the public detailed information on Rotary and its activities.

RI uses PDF (Portable Document Format) in its International Download Center to allow members or anyone else to download application forms for programs or conferences, reports, messages from the President, handbooks, brochures and documents relating to all Rotary activities.

PDF downloads, using the free software Acrobat Reader, provide documents with the original fonts, colours and design, regardless of the computer platform used to create or download the document. Now, members can download documents, application



See Rotary International’s website at [www.rotary.org](http://www.rotary.org) for more general information on Rotary.



[www.adobe.com](http://www.adobe.com)

[www.rotary.org/services/download/index.htm](http://www.rotary.org/services/download/index.htm)

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forms or reports from RI instantly rather than ordering them by mail. Even the Manual of Procedure – a large book describing all of Rotary’s procedures – can now be downloaded at no cost.

The Web Centre also includes news releases from RI, an electronic version of the monthly magazine *The Rotarian* and databases on RI projects and locations and times of Rotary club meetings throughout the world.

### ***Training Programs and Conferences***

Rotary International holds an International Institute for all incoming District Governors each year and holds Zone Institutes which also include training programs for incoming District Governors. Past District Governors attend Zone Institutes to assist in the training of incoming District Governors.

The training programs consist of lectures and discussion groups. Each DG is given extensive literature ranging from leadership skills to Rotary procedures.

The President of Rotary International designates current and past Rotary Officers (District Governors, Board Members etc.) to attend District Conferences and share his or her vision of Rotary and its direction.

## **Knowledge Management for Rotarians: District 5370**

### **Knowledge management for District clubs and members**

#### ***What did we do last year?***

Each Rotary District Governor is a volunteer who serves one year in that position, but spends most of the two years preceding his term (July 1 – June 31) attending Institutes and organizing district committees and planning his or her year.

While each DG receives considerable information, training and knowledge from RI about leadership and Rotary procedures there are

no established processes for saving and passing along knowledge about district activities to the incoming DG.

Most Rotary knowledge within District 5370 is transmitted orally. Fortunately, most Rotarians – especially those who have served as DG or in other District roles – stay with the organization and are available to provide advice and assistance. Most DGs pass some oral and written comments on to their successors. Nevertheless, an incoming DG could be left with no recorded information on problems, opportunities, clubs with difficulties or evaluations of committee members and Assistant District Governors since there is no mechanism to do this easily and no direct request to do so.

Similarly, committee chairs and other appointees are not asked to provide written or oral reports on their activities and achievements. There are no written guidelines for any of the committees or appointed positions, and, in most cases, no documentation of activities, concerns and opportunities from incumbents to new appointees.

One of the reasons for the lack of reporting is that there is no policy requiring it – and there is no permanent DG office. Each DG – often a retired business or professional person – operates from his or her home or office. Since each DG serves only one year the business office of the district changes annually as well.

District 5370 has an excellent web centre which has been used to provide District information, news releases, lists of speakers at District clubs and promotions for the District Conference and other activities.

### ***Training and Publications***

Incoming Rotary Club Presidents, Secretaries and Treasurers receive training at a two day training session each spring and at the District Assembly, now held each fall. Similarly, club Directors have a one day training program in June.

The District Directory, a 70 page summary of District activities, committee structures, names and phone numbers of all District



officers and Club presidents, is a comprehensive summary of what Rotary is and does in District 5370. The Directory is sent to each Rotary member in the district.

## **Knowledge Management for Rotarians: Rotary Club of West Edmonton**

### **Knowledge management for club members**

#### ***Reports to the Members***

Rotary clubs elect Officers and Directors for a one-year period. Most club business is dealt with directly by the Board of Directors. However each year the club holds two assemblies, one in the fall and one in the spring, to give direction to the Board and, in the case of the spring meeting, to discuss plans for the next Rotary year.

Board members and the President are expected to report regularly on actions taken at Board meetings. This does not always happen, and members will request strongly that they be kept informed.

#### ***Club Brochure***

The club has developed a new brochure that includes information on the background of the club and its activities. While the brochure was developed for new and prospective members other members have found it to be a useful reference as well.

#### ***Club historian***

There is no official club historian: club records and documents are stored in boxes by one of the members.

## **Roles of Club Officers and Board Members**

Each year Rotary International sends information to the President of each club outlining general duties and responsibilities of Club officers and members of the Board of Directors. However, these are very general guidelines.

The Rotary Club of West Edmonton has an interesting past, but not all of it is known and very little of that history is recorded.

The club, like many other clubs, does not have a manual listing responsibilities for its board members, nor does it have any mechanism or convention for recording and passing on knowledge about activities to the new board (The board changes each July 1, although many board members may stay on, but usually in different roles).

## **Sharing knowledge about Rotary with others, locally, nationally and internationally**

Most people do not know that Rotary International is one of the major forces – perhaps the major force – in the elimination of polio nor do they know that the Ambassadorial Scholar program is the largest scholarship program in the world.

Local communities often do not know about the Rotary's community service projects or the impact that local Rotary clubs have abroad.

## **Recommendations**

### **Knowledge Management for Rotarians**

Rotary has an oral tradition: most of what Rotarians know about their organization has been learned through oral presentations, listening to presentations at conferences, and talking with other Rotarians.

Rotary should continue to use the internet to provide information, press releases, news about Rotary activities throughout the world, and the forms and documents which are needed to

operate Rotary clubs and districts. The RI web centre has been very innovative in their use of PDF, but they could easily go a step further and allow forms to be completed and submitted online. At present they may be downloaded, completed manually and mailed to RI.

The Rotary 5370 site contains current and back issues of the District Governor's newsletter as well as information about the history of the district, district activities, clubs, and club activities and PowerPoint presentations on various subjects. Unfortunately, few of the clubs have their own websites.

District 5370 should continue to develop this excellent website, perhaps using PDF for any new documents that might be needed by clubs and members (e.g. application forms for district awards and youth programs).

### **Using Knowledge Management to tell Rotary's story**

Rotarians are often frustrated by the lack of public knowledge about Rotary and the impact it has on communities here and abroad. RI has worked very hard using its Web Centre and other communication strategies to tell the public, government and the private sector how Rotary's efforts, along with those of other organizations, will soon eradicate polio from the last few countries in which it exists.

While the RI office has experienced, full-time communications staff to get Rotary stories into the press Rotary Districts and Clubs do not have access to permanent, trained staff to write press releases and work with the media. However, some Rotarians who work in the media have been very helpful to the District.

Rotary needs a continued, concerted effort at all levels to get information to the public, especially at the District and Club levels. The RI site contains excellent information on how clubs can conduct PR campaigns, write press releases etc. Clubs can also subscribe to a PR Tips mailing list which provides helpful information on a regular basis.

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"In 1985, Rotary was recognized by the World Health Organization as a non-governmental organization working in the field of international health. In the same year, Rotary set a goal to raise US\$120 million to provide oral polio vaccine to newborns in the developing world. When the campaign ended, Rotary had doubled its goal, collecting more than \$247 million. To date, the PolioPlus program has contributed \$334 million to the protection of more than one billion children. By 2005, Rotary's financial commitment will reach nearly \$500 million."



See Rotary International's site at [www.rotary.org](http://www.rotary.org) for more information on the PolioPlus campaign.

The District and Clubs like West Edmonton need training in public relations, training which can use the excellent material provided by the RI website. Public relations programs assist Rotary through greater public support – and they raise the profile of Rotary so that Clubs can attract more excellent members.

## Summary

Volunteer organizations are very valuable parts of society. Their activities and the impacts they have on society are not well known, even to their own members. Each year volunteer organizations such as Rotary lose valuable knowledge as members retire, move or accept different responsibilities. Knowledge management programs, whereby important information is codified and shared would make Rotary more effective, primarily at the district and club level.

Efforts by Rotary International to keep clubs, members and the general public better informed have become more successful with the advent of the internet.



Rotary International's  
Public Relations Tools site  
[www.rotary.org/club/prtools/index.htm](http://www.rotary.org/club/prtools/index.htm)  
is an excellent summary of PR basics.