



LEGENDARY CLUBS PACKAGE

Friends of Rotary

Club implementation guide and editable template pack

REVIEW STATUS

Private District 9510 working draft. Clubs must obtain local board approval and confirm current District, insurance, privacy, safety and youth-protection requirements before use.

Review edition 1.0 | Australian English | 9 August 2026

Prepared for Rotary clubs across District 9510. Designed for flexible, respectful participation without implying Rotary membership.



START HERE

A participation pathway that earns trust

Friends of Rotary gives people a clear way to help with worthwhile local activity without being presented as Rotary members or pressured to become members. The model works only when clubs offer meaningful roles, responsible supervision, safe participation and respectful follow-up.

NON-NEGOTIABLE

In this District model, Friend of Rotary is a local participant or supporter description. It does not automatically make someone an active member, honorary member or Rotarian; create voting, office-holding or governance rights; or replace a club's formal admission process.

What best practice looks like

- Every invitation describes a real, current opportunity - not a generic prospect list.
- A named club contact owns the experience from first reply through follow-up.
- The Friend knows the purpose, task, time, place, support, costs and safety requirements before saying yes.
- Access, inclusion, family and caring responsibilities are considered in the opportunity design.
- Only the minimum information needed for the next step is collected, with a clear collection notice.
- Youth protection, screening, supervision and partner requirements are resolved before placement.
- Recognition and feedback are built in; membership is an optional conversation, never the success measure.

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SECTION 1

Model and status

Rotary clubs have flexibility in how they operate and in the membership types documented in their bylaws. That flexibility does not remove the need to describe people's status accurately. A club should decide, minute and communicate its local Friends model before inviting participants.

Status	What it means	What it does not mean
Friend of Rotary - this pathway	A local participant or supporter who opts in to suitable activities and communications.	Not automatically a member, Rotarian, voter, office-holder or person reported as club membership.
Active Rotary member	Formally admitted and reported in accordance with club and Rotary requirements; member rights, responsibilities and dues apply.	Not a label that can be implied through volunteering or attendance.
Honorary member	A separate formal recognition determined by the club under current governing documents.	Not automatically created by joining a Friends list or activity.
Guest or one-off volunteer	A person invited to a specific meeting, event or activity.	Does not need to be enrolled as a Friend unless they choose ongoing contact.

CLUB DECISION

Use the Friends pathway for participation and relationship-building. If the club wants an alternative active membership type, document it separately in the bylaws and follow current Rotary requirements.

The participant-facing promise

A Friend should be able to say yes to one opportunity without agreeing to a wider commitment. The club can invite further involvement only through transparent, optional follow-up.

Friends can expect	Friends agree to
A meaningful, accurately described role	Choose only activities they are comfortable undertaking
A named contact and timely practical information	Follow reasonable instructions and ask when unsure
A safe, respectful and inclusive environment	Treat participants, members, partners and communities respectfully
Support, induction and equipment appropriate to the task	Use equipment and information responsibly
Clear handling of personal information and photographs	Protect confidential or beneficiary information they encounter
Freedom to decline, pause or withdraw	Tell the contact when they cannot attend or need support



SECTION 2

The club quality standard

The following local standard translates contemporary Australian volunteer-involvement practice into a Rotary club setting. It is a practical review framework, not a replacement for legal, insurance, District or Rotary policy advice.

Quality gate	Minimum evidence before launch
1. Leadership and governance	Board decision; named accountable lead; approved local model; annual review date.
2. Meaningful opportunity	Written opportunity brief connected to community purpose; no filler roles.
3. Transparent invitation	Accurate task, time, place, contact, costs, access and requirements.
4. Fair and inclusive access	Reasonable participation options; barriers considered; no covert member screening.
5. Support and capability	Induction, instructions, supervision and equipment match the task.
6. Safety and wellbeing	Risk owner; incident route; screening and safeguarding resolved before participation.
7. Recognition and voice	Thank-you, check-in and a safe way to provide feedback or raise a concern.
8. Quality management	Small set of experience measures; documented improvements; unnecessary records deleted.

Eight launch gates

- [] The board has approved the model, boundaries and accountable owner.
- [] At least two genuine opportunities have complete opportunity briefs.
- [] The club has confirmed current District, insurance and partner requirements.
- [] The youth-protection decision is recorded for every relevant activity.
- [] The collection notice, retention period and access controls are approved.
- [] The coordinator and backup have practiced the response, invitation and follow-up scripts.
- [] The website and invitation copy describe Friend status accurately.
- [] A pilot review date is in the calendar before the first invitation is issued.

Recommended club roles

Role	Accountability
Board sponsor	Approves model and resources; resolves escalated governance, safety or reputation issues.
Friends coordinator	Owns enquiries, fit checks, invitations, records, follow-up and withdrawal requests.
Opportunity owner	Writes the brief; provides induction, supervision, safety controls and activity close-out.
Safeguarding contact	Confirms screening, supervision, youth-protection and reporting requirements.



Role	Accountability
Privacy/data owner	Approves collection notice, access, retention, deletion and incident handling.
Backup contact	Maintains continuity when the coordinator is unavailable.

SECTION 3

Design opportunities people can trust

A strong Friends pathway starts with opportunity design, not promotion. Do not invite people until the activity owner can answer every field below.

Opportunity field	What the invitation must make clear
Purpose	The community outcome and why the task matters.
Contribution	Specific activities, boundaries and what is out of scope.
Commitment	Date, start/finish time, preparation, frequency and ability to leave early.
Place and access	Venue, transport/parking, physical access, online option, amenities and weather plan.
People and support	Named contact, supervisor, team size, induction and who to ask for help.
Skills and equipment	What is provided; what to bring; training; protective equipment; lifting or travel.
Safety and safeguarding	Risk controls, screening, youth/vulnerable-person arrangements and incident route.
Costs and cover	Any expense, reimbursement method and the activity owner's explanation of applicable insurance/limitations.
Information and images	What is collected, who sees it, retention, photo/video choice and confidentiality.
After the activity	Thank-you, feedback, next-step options and how to stop communications.

The seven-stage participant journey

1. Interest: collect only contact preference, broad interests, availability and location needed for a human match.
2. Fit check: a person confirms that a current opportunity genuinely suits; do not promise a named match automatically.
3. Invitation: send the complete opportunity brief and collection notice; allow questions and a no-pressure decline.
4. Readiness: confirm access, support, screening, consent, equipment and emergency arrangements only as needed for that activity.
5. Participation: welcome by name, orient to the task, introduce the supervisor, check wellbeing and close the activity clearly.
6. Follow-up: thank the Friend, ask two or three experience questions, close any issue and honour communication choices.
7. Next step: offer another activity, ongoing Friend contact, Find Your Rotary or no further contact - all equally valid outcomes.



MEASURE THE EXPERIENCE

Do not set conversion to membership as the programme's primary target. Track whether people receive timely, meaningful, safe and welcoming opportunities; membership interest is an optional self-selected outcome.

SECTION 4

Safety, safeguarding, privacy and practical controls

Safety and insurance

- Nominate the person responsible for each activity and complete the club's normal risk process before inviting Friends.
- Provide information, instruction, supervision and equipment appropriate to the task and participants.
- Explain emergency, incident and concern-reporting routes at induction.
- Confirm the position on insurance and exclusions with the appropriate District/club adviser or insurer; never promise blanket cover from this toolkit.
- Disclose costs and reimbursement arrangements before the Friend accepts.

Youth and vulnerable-person participation

- Treat youth safety and wellbeing as a pre-placement gate, not a form field to resolve later.
- Apply current Rotary youth-protection requirements, District procedures and applicable law.
- Confirm screening, vetting, training, supervision and partner-organisation controls before assigning any role involving young people.
- Avoid significant unsupervised one-to-one adult/youth contact unless an approved policy expressly manages it.
- Use the current reporting route for concerns; do not investigate informally through the Friends programme.

Privacy and data minimisation

Stage	Collect	Do not collect by default
Expression of interest	Name, contact method, town/community, broad interest and availability.	Health details, IDs, screening documents, beneficiary data or detailed personal history.
Specific opportunity	Only information required for access, safety, consent, screening or delivery, with a clear purpose.	Reusable 'just in case' sensitive profiles.
After participation	Attendance/feedback only when needed; communication preference; issue record if required.	Indefinite notes, private opinions or hidden member-potential scores.



COLLECTION NOTICE

At or before collection, identify the club or District team, explain the purpose, usual disclosures, consequences of not providing information, privacy contact, retention approach and how the person can access, correct or withdraw their details. Obtain local privacy advice on applicability and wording.

SECTION 5

Measure, learn and improve

Use a small review dashboard that supports service quality without turning Friends into a sales funnel. Report categories and trends; restrict identifiable records to people who need them for follow-up or safety.

Measure	Why it matters	Guardrail
Time to first human response	Shows whether interest receives attention.	Set a target only after an owner and monitored channel are confirmed.
Time to suitable opportunity	Reveals whether the club has a real opportunity pipeline.	Close the loop honestly when no current fit exists.
Opportunity briefs complete	Tests whether invitations are ready and governed.	A missing safety/access field blocks release.
Friend experience pulse	Measures clarity, welcome, usefulness and support.	Short, optional and accessible; avoid coercive feedback.
Repeat participation opt-in	Shows whether people choose to stay connected.	Do not infer consent from attendance.
Issues and improvements	Supports learning and safer delivery.	Restrict identifiable incident details and follow formal processes.
Membership information requested	Shows self-selected interest.	Never use as a quota or score individual Friends.

Three-question Friend pulse

1. Did you know what to expect and who to ask for help?
2. Did your contribution feel useful, safe and welcomed?
3. What should we keep, change or follow up? (optional)

90-day decision

- Continue: quality gates are met and Friends report a strong experience.
- Improve: the model is sound but named controls or opportunity design need correction.
- Pause: safety, safeguarding, privacy, ownership or follow-up is not reliable.
- Close: the club cannot sustain meaningful opportunities; thank participants and honour deletion/communication choices.



EDITABLE TEMPLATE 1

Club model decision and approval record

PURPOSE

Use before any public invitation. It records the local model, boundaries, accountable roles and release gates.

Club	[Club name]
Model purpose	[Why the club is creating a Friends pathway]
Who may participate	[Adults / families / youth - only after requirements are resolved]
Friend status	[Local participant/supporter; not automatically a Rotary member]
Contact channel	[Monitored role email / phone]
Data location	[Approved system and access roles]
Retention	[Approved period and deletion trigger]
Pilot period	[Start date to review date]

Board resolution template

PROPOSED MINUTE

That the Rotary Club of [name] approve a [length]-day Friends of Rotary pilot as a participation and supporter pathway; adopt the boundaries and controls in this record; appoint the named accountable roles; require activity-specific safety, safeguarding, privacy and insurance checks; and review the pilot on [date] before continuation or public expansion.

Release gate

- [] Two complete opportunity briefs are attached.
- [] District and insurer questions are resolved and recorded.
- [] Youth/safeguarding decision recorded for each pilot activity.
- [] Collection notice and retention/deletion settings approved.
- [] Coordinator and backup are ready to respond and follow up.
- [] Website/invitation wording accurately distinguishes Friends and members.

Prepared by	[Name and role]
Reviewed by	[Board / responsible officer]
Approved on	[Date]



Review due	[Date]
Document owner	[Role - use a role, not a person, for portability]

EDITABLE TEMPLATE 2

Friend opportunity brief

PURPOSE

Complete one brief for every activity before it is offered. Send the relevant information to the Friend before they accept.

Opportunity title	[Plain-language title]
Community purpose	[Outcome and why it matters]
Contribution	[Specific tasks and boundaries]
Date and time	[Arrival, start, finish and flexibility]
Place and access	[Address / online link / transport / accessibility / amenities]
Named contact	[Name, role, mobile/email for the day]
Support	[Induction, supervision, buddy, training]
Bring / provided	[Clothing, equipment, PPE, refreshments]
Costs / reimbursement	[State none or explain exactly]
Safety	[Main risks, controls, emergency and incident route]
Screening / safeguarding	[None / resolved requirement and evidence owner]
Information / images	[Collection notice and photo choice]
Afterwards	[Thank-you, feedback and next-step options]

Owner readiness check

- ☐ The activity owner has reviewed the brief for accuracy.
- ☐ The role is meaningful and not replacing paid work inappropriately.
- ☐ Access and inclusion questions can be handled respectfully.
- ☐ Safety, safeguarding and partner requirements are closed.
- ☐ The Friend can decline without pressure or disadvantage.



EDITABLE TEMPLATE 3

Expression of interest and collection notice

PURPOSE

Use a minimum-data first contact. Do not collect screening, identity or sensitive information until a specific activity requires it.

Minimum interest fields

Name	[Name]
Preferred contact	[Email / phone / either]
Email	[Email]
Phone	[Only if a call is preferred]
Town / community	[Broad location]
How I would like to help	[One-off / occasional / skills / cause / social / unsure]
Broad interests	[Category only]
General availability	[Category only]
Membership information later	[Yes / maybe / no - optional and no pressure]

Short collection notice template

NOTICE

The Rotary Club of [name] collects the details above to respond to your Friends of Rotary interest and identify suitable current activities. [Role/team] can access the information and may share only what is needed with the responsible activity owner. We keep the record for [period/trigger], then delete or de-identify it unless another requirement applies. You can ask to access, correct or withdraw your details by contacting [privacy/contact role]. Providing information is voluntary, but we need a way to contact you and a broad location to identify opportunities. See [privacy policy link] for more information.

- ☐ I have read the collection notice.
- ☐ I choose to receive contact about suitable Friends opportunities.
- ☐ I understand that I can withdraw from communications at any time.



EDITABLE TEMPLATE 4

Invitation, welcome and reminder messages

PURPOSE

Replace every bracketed field. Send only after a person has checked that the opportunity genuinely fits.

Opportunity invitation

SUBJECT: A Friends of Rotary opportunity - [activity]

Hello [name], thank you for telling us how you would like to help. We have a current activity that may suit: [one-sentence purpose]. It is on [date/time] at [place/online]. The contribution is [task], supported by [contact/role]. Before deciding, please review the attached opportunity brief, including access, safety, screening, costs and what to bring. You are welcome to ask questions or decline - there is no expectation to join Rotary or accept another activity. If you would like to take part, reply [simple response] by [date].

Welcome confirmation

SUBJECT: Confirmed - [activity]

Hello [name], you are confirmed for [activity]. Please arrive at [time/place] and ask for [contact]. We will begin with a short welcome and safety briefing. Bring [items]; we provide [items]. If access or practical support would make participation easier, contact [role] and share only what is useful for this activity. If plans change, reply or call [number]. We look forward to doing something useful together.

24-48 hour reminder

SUBJECT: Reminder - [activity]

A quick reminder that [activity] is on [date/time] at [place]. Your contact is [name/phone]. Current weather/transport/change information: [details]. Please do not attend if [specific safety instruction approved by activity owner]. Reply if you need to withdraw; there is no penalty.



EDITABLE TEMPLATE 5

Activity induction and safety check

PURPOSE

Use as a short spoken welcome plus an owner checklist. Do not replace the club's formal risk or incident process.

Coordinator checklist before participants arrive

- ☐ Opportunity brief and attendance list are current and accessible only to those who need them.
- ☐ Named supervisor, backup and first-aid/emergency route are confirmed.
- ☐ Equipment, PPE, amenities, access and weather/venue controls are ready.
- ☐ Screening, youth protection and partner requirements are verified.
- ☐ Photography choice and confidentiality boundaries are clear.
- ☐ A safe withdrawal/early-departure process is available.

Two-minute spoken welcome

WELCOME SCRIPT

Welcome, and thank you for contributing. Today's purpose is [purpose], and your role is [task/boundary]. [Name] is the activity owner and [name] is the backup. Before we start: [main safety controls], [amenities/access], [photo/privacy choice], and [how to raise a concern or stop]. Ask at any time if instructions are unclear or you need support. We will finish at [time] and check out together.

Close-out

- ☐ All Friends are accounted for and know the activity has closed.
- ☐ Equipment and personal information are returned or secured.
- ☐ Any incident, concern or near miss entered through the approved route.
- ☐ Activity owner records only necessary follow-up actions.
- ☐ Thank-you and feedback message scheduled.



EDITABLE TEMPLATE 6

Thank-you, feedback and concern follow-up

PURPOSE

Close the loop promptly. Make feedback optional and provide a separate route for safety, conduct or privacy concerns.

Thank-you message

SUBJECT: Thank you for helping with [activity]

Hello [name], thank you for helping with [activity]. Your contribution [specific, truthful impact without exaggeration]. If you would like, reply to three short questions: Did you know what to expect and who to ask for help? Did your contribution feel useful, safe and welcomed? What should we keep, change or follow up? You can also choose: hear about another suitable activity; stay connected without regular messages; explore Rotary membership information; or receive no further contact. Every option is welcome.

Concern acknowledgement

ACKNOWLEDGEMENT

Thank you for raising this. We have recorded only the information needed to route the concern. [Role] will manage the next step under [applicable process]. We will not ask you to investigate or resolve it yourself. If there is immediate danger, use emergency services. For youth-protection, serious safety, conduct or privacy matters, follow the approved District/club reporting route without delay.

Communication choice record

Friend	[Name / approved identifier]
Choice	[Another activity / occasional updates / membership information / no further contact]
Recorded by	[Role]
Date	[Date]
Action due	[Next step or deletion/stop confirmation]



EDITABLE TEMPLATE 7

Optional membership conversation and withdrawal

PURPOSE

Membership is offered only when the Friend asks or clearly opts in. Withdrawal is simple, acknowledged and respected.

Permission-based membership conversation

SCRIPT

You have mentioned that you may like information about Rotary membership. Would you like a short, no-obligation explanation of the options and what membership involves? It is completely fine to remain a Friend, take part occasionally or stop here. If yes, I can connect you with [human contact / Find Your Rotary] and you can decide in your own time.

What to explain

- Membership is a separate formal club decision and should never be implied by volunteering.
- Explain real expectations, dues/costs, participation style, meetings, service and rights transparently.
- Offer more than one pathway when available; do not force a single club match.
- Record only the person's chosen next step, not an internal judgement of their membership potential.

Stop-contact / withdrawal response

SUBJECT: Your Friends of Rotary preference is updated

Hello [name], we have updated your preference to [stop messages / pause / withdraw from activity]. You do not need to provide a reason. We will [delete or retain only what is required, with the approved basis and period]. If you believe you receive another message in error, contact [role]. Thank you for the contribution and interest you have shared.



EDITABLE TEMPLATE 8

30/60/90-day pilot review

PURPOSE

Use category-level evidence to decide whether to continue, improve, pause or close. Do not publish identifiable participant details.

Review point	Question	Evidence / action
Day 30	Are ownership, opportunity briefs and response handling working?	[Evidence, issue, owner, due date]
Day 30	Are safety, safeguarding, privacy and insurance gates genuinely closed?	[Evidence, issue, owner, due date]
Day 60	Are Friends receiving timely, meaningful and welcoming opportunities?	[Category-level pulse and improvements]
Day 60	Are coordinators supported and records controlled?	[Workload, backup, access and deletion check]
Day 90	What should continue, change, pause or close?	[Decision and rationale]
Day 90	What will be reported and to whom?	[Aggregate outcomes, issues and next review date]

Decision record

Decision	[Continue / improve / pause / close]
Strengths	[Evidence]
Corrections	[Action, owner and due date]
Participant commitments	[Follow-up and communication choices honoured]
Data action	[Retain / delete / de-identify under approved rule]
Next review	[Date]

Prepared by	[Name and role]
Reviewed by	[Board / responsible officer]
Approved on	[Date]
Review due	[Date]
Document owner	[Role - use a role, not a person, for portability]



SOURCE NOTES

Primary guidance used

These sources informed the quality controls in this review pack. They do not endorse this local model and do not replace current Rotary governing documents, District procedures, insurer advice or applicable law.

[Rotary International - Club flexibility FAQ](#) - status, active/honorary membership and flexible club options.

[Rotary International - Youth protection](#) - safeguarding, screening, training and reporting expectations.

[Volunteering Australia - National Standards for Volunteer Involvement](#) - contemporary best-practice framework for meaningful, safe and inclusive participation.

[Office of the Australian Information Commissioner - APP 3](#) - necessary, lawful and fair collection.

[Office of the Australian Information Commissioner - APP 5](#) - collection notice and timing.

[Safe Work Australia - Volunteer WHS duties](#) - organisational and volunteer health and safety responsibilities where applicable.

Sources checked 9 August 2026. Local legal and policy applicability must be confirmed before release.

Document control

Status	REVIEW - NOT RELEASED
Version	1.0
Prepared	9 August 2026
Product home	Join Rotary /friends; club toolkit future home: Membership Hub
Review owner	District 9510 Membership Team - role to be confirmed
Portability	Replace District identity, contacts, policy links and retention settings through controlled configuration before redistricting or reuse.