



# **Developing Alumni**

# **Handbook**

## Developing Alumni in District 1010

### SUMMARY

- The Alumni Development material has been created specifically for use within District 1010.
- The format and content of the Handbook have been designed to enable Alumni development to take place at Club and District level.
- The material offers each Club an opportunity to develop its own Alumni Network and to participate in the formation of a District Alumni structure.
  
- A Club Alumni Network can be developed in two parts.
- Each Club can create and maintain a confidential Alumni Data Base.
- The second part will enable Clubs to develop ways of sharing information about Rotary with individuals in the Club Alumni Network and inviting their participation in and /or support for activities and projects.
  
- A District Network will also be developed in two parts.
- The District Alumni Co-ordinator will create and maintain a confidential Data Base.
- It will consist of individuals, identified by Clubs and elsewhere in 1010, who have consented to receive information from District concerning District projects and the wider Rotary community.
- The second part of the District Network will consist of a Good Practice Forum.
- It will encourage 1010 Rotarians and Clubs to identify to the District Alumni Co-ordinator examples of Alumni practice and development, within District and elsewhere.
- The Information will then be collated and placed in the Alumni section of District website.
  
- The Handbook consists of two Sections.
- The first part is concerned with the process of developing the concept of Rotary Alumni in 1010.
- It consists of narrative and diagrams which seek to encourage and enable Clubs to plan, implement and develop a Club Alumni Network.
  
- The second part of the Handbook is in the format of an Appendix which contains a number of pro-formas.
- These have been created specifically to enable Clubs to have a starting point for how they can collate information and begin to create a Club Alumni framework.
- A Data Protection Consent Form is included to enable Clubs to obtain explicit, written consent for names and contact details of non-Rotarians to be held by Rotary.
- The Consent Form allows individuals to be included in a named Club's Data Base and /or in the District Alumni Data Base.
- The specific purposes of each Data Base are identified explicitly in the Consent Form.
- To ensure adherence to District 1010's current data protection procedures, it is recommended that the format and content of the Consent Form and Data Protection Principles are used by all Clubs.

## **THE CONCEPT OF ROTARY ALUMNI**

Within Rotary, the concept of Alumni is used as an umbrella term to describe the existence and development of networks of relationships and contacts with non-Rotarians. For other groups and organisations, the concept of Alumni mainly identifies individuals who have been previously part of the group or organisation concerned.

While the concept of Rotary Alumni includes offering to maintain contact with former Rotarians, the majority of individuals identified as potential members of an Alumni Network will not have been previously part of the Rotary movement.

They will tend to vary in their understanding and experience of Rotary and be unlikely to consider themselves as being Rotary Alumni.

It is recommended, therefore, that the concept of Alumni is used primarily within Rotary itself and that, within a Rotary Alumni Network, communication is worded in terms of an opportunity to receive information concerning Rotary activities, events and projects.

The Data Protection Consent Form reflects this emphasis and intentionally excludes the term Alumni.

## **CREATING & DEVELOPING AN ALUMNI NETWORK**

In inviting Clubs to consider the value and benefits of creating and developing an Alumni Network, it is recognised that each Rotary Club has its own history and unique identity. The Developing Alumni material has been designed to be drawn upon and used to complement the diversity which characterises the life of each Club and offers ways in which the concept of an Alumni Network can be considered and developed.

Throughout the material, the narrative and diagrams are offered by way of illustration and are not intended to be prescriptive. The material offers Clubs an opportunity to review their existing networks of contacts and seeks to enable Clubs to consider how to create and develop an Alumni Network.

- Rotarians are familiar with the concept of the Family of Rotary.
- The Concept of Alumni is less well known and often unclear.
- Many Clubs will have parts of a potential Alumni Network already in place.
- The existing parts can be collated and become the basis of a Club Data Base.
- It becomes possible then to create and develop an Alumni Network.
  
- The process of development can begin by identifying two central, related concepts.
- Rotary's Extended Family.
- Widening the Network.
- The consideration of these concepts can lead to the implementation and development of an Alumni Network.
- With each Club being at the centre of its own Network.
- The process is equally applicable to contacts and networks at Area and District levels.

### **Key Elements of Developing an Alumni Network**

- Rotary's Extended Family
- Widening the Network
- Creating, Maintaining and Developing Relationships
- Identifying and Sharing Best Alumni Practice
- An Integral Part of Club & Membership Development
- An Ongoing Process

### **The Extended Rotary Family**

- Associate Members
- Honorary Members
- Former Members
- Rotaract
- Friends of Rotary

### **Widening the Network**

- Youth Project Participants
- Beneficiaries of Club Sponsorship
- Beneficiaries of District Sponsorship
- Recipients of Other Club Support
- Recipients of Other District Support
- Other Recipients of RIBI & RI support
- Non-Rotarian Paul Harris Fellows

### **THE EXTENDED ROTARY FAMILY & WIDENING THE NETWORK**

The examples identified under the headings above are included in the diagrams on the following pages. The examples are offered by way of illustration.

Clubs already maintain and develop relationships with individuals who have or have had some degree of contact with Rotary. Further examples are school communities, programme speakers and others who may be interested in being kept informed about Rotary projects and events.

In the Appendix, pro-formas are included to enable Clubs to collate and compile information concerning existing and past contacts with individuals who may be identified as potential Rotary Alumni.

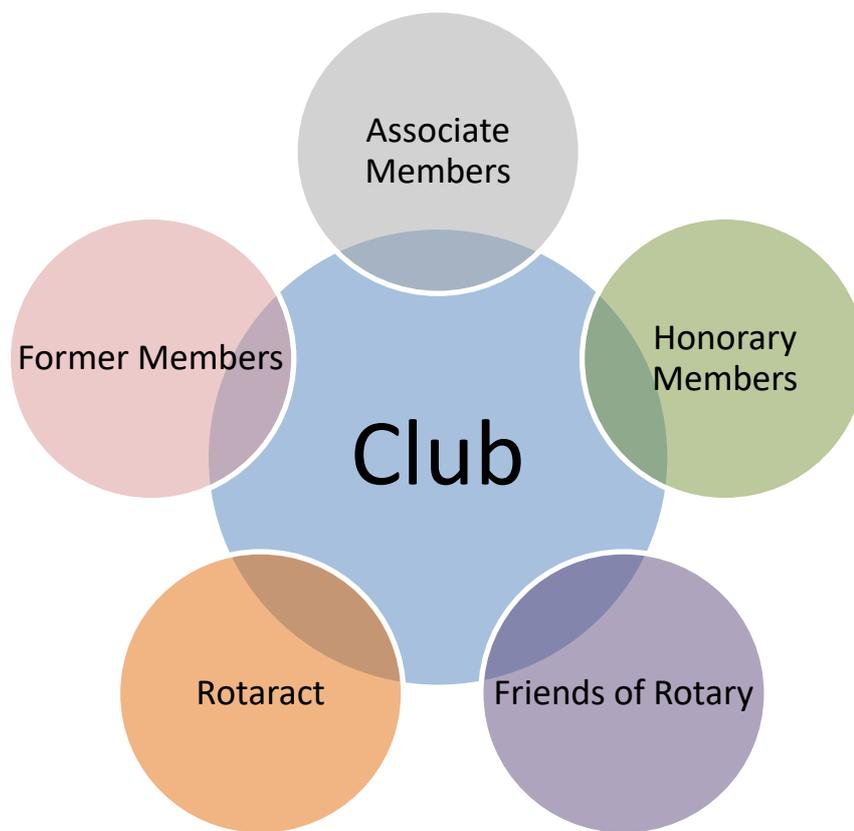
A 'Widening the Network' diagram is included as an aid to helping Clubs to envisage the membership of an initial Club Network.

The material in the Appendix is designed also to enable any Club to consider a more planned and structured way of retaining information concerning non-Rotarians.

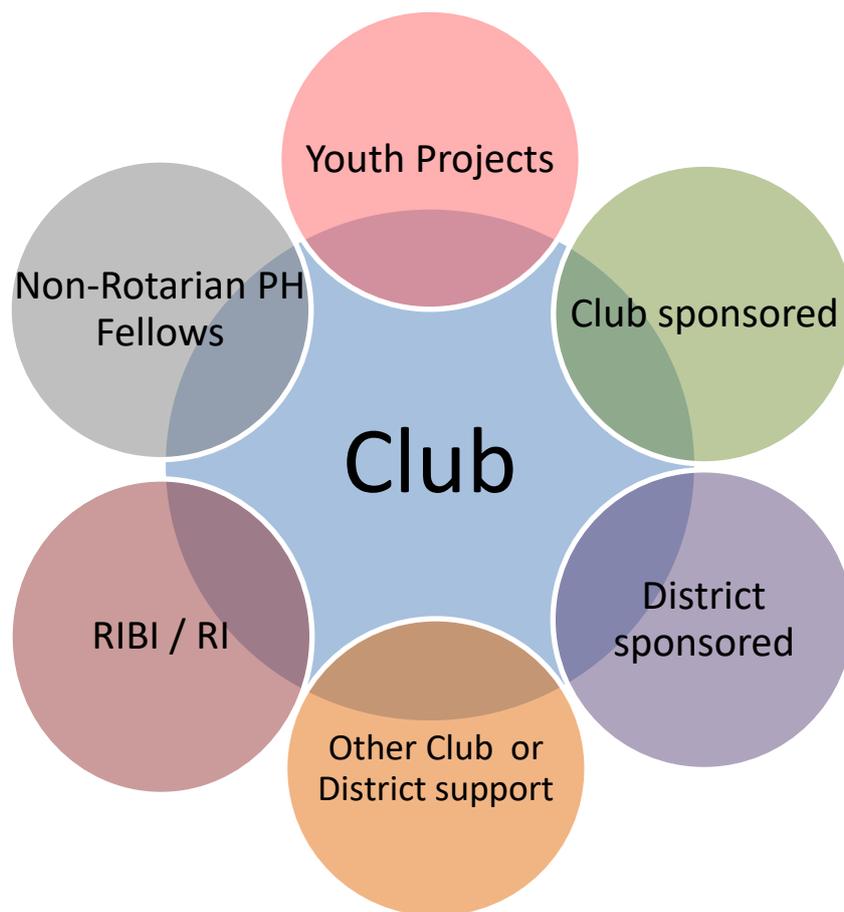
The inclusion of the Data Consent Form & Information for Recipients is intended to encourage all Clubs to review the ways in which they obtain and hold information concerning non-Rotarians. For ease of reference by Clubs, the Appendix concludes with District 1010's approved Data Protection Checklist.



## The Extended Rotary Family



## Widening the Network



## **Creating a Club Alumni Development Plan & Alumni Register**

Clubs may find it helpful initially to compile an Alumni Development Plan which can identify what needs to take place in order to create an Alumni Register.

### **Development Plan**

- Collate existing information concerning past and present contacts made with individuals and groups through Club activities, events, youth and other Club projects.
- The 'Development of Alumni Network' pro-forma contained in the Appendix can be used or modified for this purpose.
- Some existing contacts, for example the widows and widowers of past Rotarians, may have been in place for several years.
- For past contacts, a previous period, such as 3 to 5 years, may be appropriate.
- Clubs may have other informal ways of keeping in touch with individuals which can be built upon.
- Begin to identify potential Rotary Alumni.

### **Creating a Club Alumni Register**

- Send out an enquiry to identified individuals.
- Clubs may wish to make an informal enquiry first before sending out the Data Protection Consent Form & Data Protection Information for Recipients.
  1. Enquire as to whether the person is interested in being kept informed about Club activities, events and projects
  2. Establish if willing to give consent for the person's contact details to be retained in the Club's confidential data base
  3. Enquire as to whether the person is willing to give consent for individual contact details to be included in a District, confidential data base
- The knowledge of the Club and the nature of existing contacts is likely to indicate whether the enquiry takes place in one or two stages.

### **Means & Methods of Communication**

- Identify ways in which communication can take place with potential Alumni.
- Send out information about Club activities and projects that potential Alumni may be interested to attend and/or to participate in during the Rotary year.
- If appropriate, circulate Club Newsletter / E-Bulletin or an edited version.
- Distribute the annual District Magazine, Rotaryfirst.
- The means and methods identified are illustrative and will reflect existing Club initiatives.
- Consider possible contributions to the District Alumni Good Practice Forum.

## NOTES

The material contained in the Handbook is intended to assist Clubs to review their existing network of contacts and to enable them to consider the value and benefits of creating and developing a Club Alumni Network.

The material has also been designed to assist Clubs to review the ways in which they hold information concerning non-Rotarians and to consider how to retain such information in a more structured and consistent way.

The different sections in the Handbook have been compiled to allow updates to be made as and when required.

The District Alumni Co-ordinator can be contacted to discuss any queries regarding the concept and development of Alumni and the material contained in the Handbook.

Rotarians are invited also to identify and share examples of good practice, both within and outwith 1010.

The work undertaken by the District Alumni Co-ordinator is one part of the remit of the District Membership Team.

For ease of reference, the roles of the Team Members and their contact details have been included.

**John Milne**

**Alumni Co-ordinator**

Johnmilne243@btinternet.com

alumni@rotary1010.org

**February 2018**



## DISTRICT MEMBERSHIP TEAM

*"The District Membership Team is available to offer information, guidance and support to all Rotarians and Clubs regarding any aspect of club and membership development."*

### **CHAIR**

**Eleanor Macalister**

01358 761402

macal1ster@aol.com

### **CLUB VISIONING**

**Gary Macalister**

01358 761402

garymacalister@aol.com

**Jim Houston**

01592 712261

houston.jim@gmail.com

### **NEW CLUB FORMATION**

**Ken McLennan**

07766 528631

krmcl@hotmail.com

**Martin Forster**

01358 720372

mlforster1@gmail.com

### **ALUMNI CO-ORDINATOR**

**John Milne**

01224 590488

johnmilne243@btinternet.com



# **Alumni Handbook**

## **Appendix**



ROTARY CLUB of \_\_\_\_\_

DEVELOPMENT OF ALUMNI NETWORK

**EXISTING CONTACTS THROUGH CURRENT MEMBERS [1]**

**CONTACTS THROUGH CLUB PROJECTS [2]**

**CONTACTS THROUGH AREA & DISTRICT PROJECTS [3]**



ROTARY CLUB of \_\_\_\_\_

**DEVELOPMENT OF ALUMNI NETWORK**

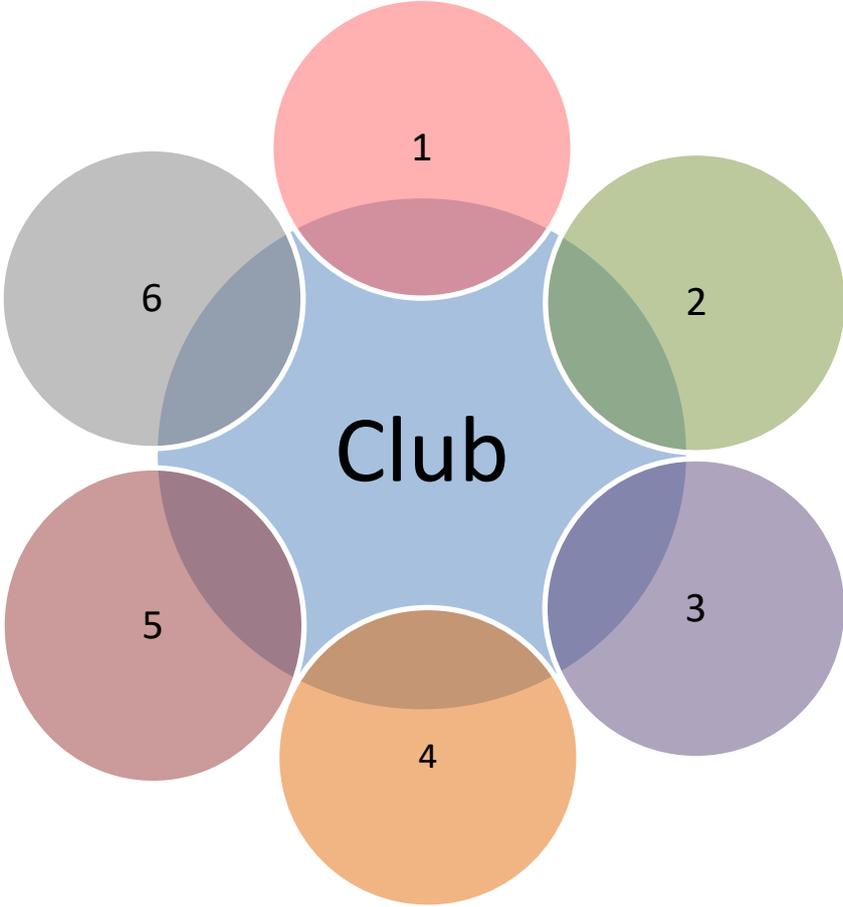
**EXISTING CONTACTS THROUGH COMMUNITY INVOLVEMENT [4]**

**PAST CONTACTS THROUGH CLUB PROJECTS [5]**

**PAST CONTACTS THROUGH AREA & DISTRICT PROJECTS [6]**



# Widening the Network





**DATA PROTECTION CONSENT FORM**

Please complete Part 1 and / or Part 2 and provide contact details in Part 3.

**PART 1**

I confirm that I have received a copy of Rotary's Data Protection Principles. In accordance with the principles and procedures, I give consent for my contact details to be held by the Rotary Club of \_\_\_\_\_

The information I have provided will be held specifically to advise me of activities, events and projects organised by, or supported by, the Rotary Club of \_\_\_\_\_

Name (Please print) \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**PART 2**

I confirm that I have received a copy of Rotary's Data Protection Principles. In accordance with the principles and procedures, I give consent for my contact details to be held by the Alumni Co-ordinator in Rotary District 1010.\*

The information I have provided will be held specifically for two purposes.

- 1) To enable the District Alumni Co-ordinator to create and maintain a confidential data base of individuals interested in being informed about the nature and work of Rotary.
- 2) To offer me opportunities to support or take part in activities and projects organised by, or supported by, the Rotary community in District 1010.

Name (Please print) \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**PART 3**

Title \_\_\_\_\_ Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_ Post Code \_\_\_\_\_

Telephone \_\_\_\_\_  Mobile \_\_\_\_\_

E-mail \_\_\_\_\_  By mail

(Please tick the box / boxes as to preferred method(s) of contact)

(\*Rotary District 1010 consists of 90 Rotary Clubs (February 2018), within a geographical area which includes the East & North East of Scotland, Northern Scotland, the Northern Isles and the northern Western Isles.)

## **Data Protection Principles & Procedures**

### **Information for Recipients**

Rotary undertakes to comply with the Data Protection Principles & Procedures for handling personal information, as set out in Data Protection legislation.

#### **Principles**

- Fairly and lawfully processed.
- Processed for specified and lawful purposes.
- Adequate, relevant, and not excessive.
- Accurate and, where necessary, kept up to date.
- Kept for no longer than is necessary for the purpose.
- Processed in accordance with the rights of the individual.
- Kept secure.
- Not transferred outside the EEA unless that country has equivalent levels of protection for personal data.

#### **Procedures**

Within Data Protection legislation, data concerning an individual must be held securely in accordance with specified procedures.

- The individual has given explicit consent.
- The reasons for keeping information are clearly identified.
- The nature and extent of information held reflects the reasons specified.
- The period of time for which the information is held is proportionate to the reasons.
- The information is reviewed with the individual concerned at appropriate intervals.
- The individual is given opportunities
  - to amend the information held
  - to alter consent regarding the notifications received
  - to be removed from the data base.

## Data Protection Checklist

This checklist will enable a Rotarian who is collecting and processing personal information in the course of a Club or District task/event/project to demonstrate that they have taken the eight Principles of Data Protection into account. Some sections may be acknowledged with a tick, some with a “N/A”, and some will require a short response.

<b>Rotary Club:</b>	<b>Task/Event/Project:</b>
<b>Name of Rotarian:</b>	<b>Date(s) of Task/Event/Project:</b>
<b>Signature of Rotarian:</b>	<b>Date completed:</b>
<b>Data Protection Principle</b>	<b>Response</b>
<b>Fairly and lawfully processed:</b> Information provided must not be altered or distorted in any way.	
<b>Processed for specified and lawful purposes:</b> The information may be used only for Rotary purposes. It cannot be used for any other task/event/project without the consent of the data subject.	
<b>Adequate, relevant, and not excessive:</b> Only data relevant to the specific and lawful purpose of the task can be collected. Extra data cannot be gathered “just in case”. Think carefully why you need each piece of data.	
<b>Accurate and, where necessary, kept up to date:</b> If you require to keep the data from year to year, you should obtain consent and should offer data subjects the opportunity to check that the data is accurate.	
<b>Kept for no longer than is necessary for the purpose:</b> Record how long you will need to keep the data and destroy it securely after that date.	
<b>Processed in accordance with the rights of the individual:</b> Data subjects have the right to check that information held about them is accurate, to know that it is being used only for the stated purpose and to have a choice over whether to provide the information and whether the organisation may continue to use it.	
<b>Kept secure:</b> Data must be kept safe from unauthorised processing and accidental loss, damage or destruction. Consider the following carefully:	
Record who is allowed to view the information and ensure that no-one else is able to access it.	
Paper-based records which include personal information should be held in a lockable cabinet.	

## Data Protection Checklist

(continued)

Files containing personal information held in a computer should be protected by a strong password.	
Any portable device used to transfer files containing personal information should be encrypted, eg laptop, data stick, external hard drive.	
Protect email addresses by using the bcc field in email distributions.	
Do not confirm or release personal information that you hold (including address, phone number, etc.) unless legally required to do so.	
Files containing personal information sent by email should be password protected. The password should be transmitted in a separate email.	
<p><b>Not transferred outside the EEA unless that country has equivalent levels of protection for personal data:</b></p> <p>This should not be an issue for information collected for a Club project.</p>	