

Description of **Polaris** Club Management System

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1 Polaris in summary

The RCMS (Rotary Club Management System) was developed by Rotary Switzerland-Liechtenstein around 20 years ago and was used by 17 European Districts, 945 Clubs in 5 countries with more than 52'000 members (users), for communication and updating of club and district activities. The system is owned by the "Verein Rotary Medien" (VRM), a nonprofit legal entity fully controlled by the 3 Rotary Districts Switzerland/Liechtenstein. RCMS is managed by Rotarians; the system is developed and operated by independent companies mandated and paid for that purpose.

With the introduction of RCMS V.5 beginning of 2021, RCMS was renamed to *Polaris*, the **polar star and a memorial of the Rotary founder, Paul Harris**. *Polaris* is a multi-language platform (presently German, French, Italian, English and Dutch). The extension of the language database to further languages may easily be done.

Rotarian life has not changed => Polaris is an evolution not a revolution!

Since April 2012, the system has been certified by Rotary International (RI) for automatic synchronization of data from *Polaris* database to the RI database. The synchronization is performed through the Swedish SEMDA-Tool.

Polaris is subject to the European regulations "GDPR" applicable to the processing of personal data as of May 25, 2018. *Polaris* complies with GDPR.

The **continued development of** *Polaris* is ensured by a process whereby members can announce their needs for new functionalities by putting them on a "common listing app" called Redmine. These proposals are taken up by a working group which is responsible for distributing them over future upgrades and versions.

Polaris, a web app "all devices" system, offers all required communication and management features clubs and districts require, including the **integration of Rotaract and Inner Wheel** and the concept of **Metropolitan** and **National** multi-districts website.



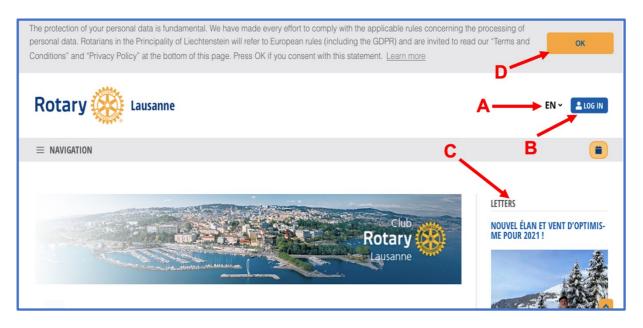


2 The home page (first page)

The layout is the same for all clubs as well as for the district, only the content varies. Below the Rotary Club of Lausanne, district 1990 <u>https://lausanne.rotary1990.ch/.</u>

Note: the club is free in the definition and presentation of the content of each rubric. The club home page includes the functions

- A. Choice of language (French, German, Italian, English, Dutch)
- B. Identification (Login) for member access with the e-mail address and a password
- C. A column reserved for information from the district or vice-versa from the clubs if on the district home page
- D. The disclaimer concerning the protection of personal data and access to documents of the General Data Protection Regulation "GDPR"



2.1 The column on the right side

The column on the club home page is reserved for information from the district (or viceversa from the clubs if on the district home page). As content it could be the governor letter, quick links to events, actualities, promotion of projects, etc.

In the middle part information about the next activities displayed on a slider and a carousel





2.2 The slider

For the presentation of next events or activities with pictures, short messages and a link for more information.

Message 1:



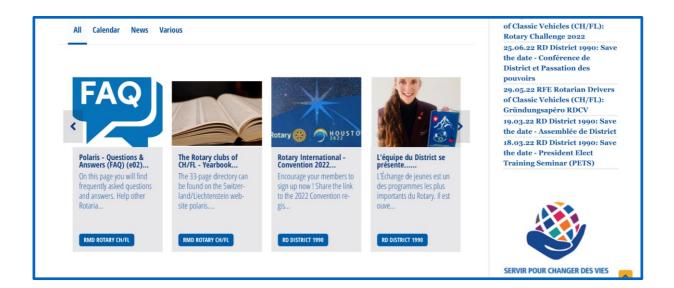
Message 2:





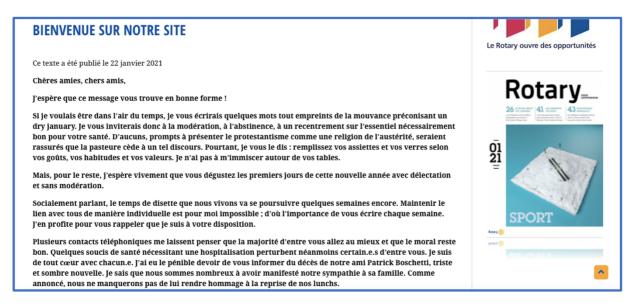
2.3 The carousel

while the slider is intended for actual activities (eyes catching), the carousel offers a window for medium-term activities



2.4 Bottom of the home page

Followed by a welcome or any other text or picture





at the bottom, information on the meeting place as well as shortcuts to social medias and documents like "Terms and Conditions" and "Privacy Policy".

MEETINGS HÔTEL LAUSANNE PALACE VISITEURS : MERCI DE VOUS INSCRIRE À NOS LUNCHS DANS NOTRE AGENDA VISITORS : PLEASE REGISTER TO OUR LUNCH IN OUR AGENDA FRIDAY 12:15 - Rue du Grand-Chêne 7:9 1003 Lausanne ROUTE PLANER		Parking Rotillion Parking Rotillion Piace Piace Bieu Léz Bieu Léz Bi
^D 20 ROTARY CH/FL > DISTRICT 1990 > LAUSANNE		
2021 © Rotary CH/FL, District 1990, Lausanne	Powered by Polaris ⁺	Terms and conditions Privacy p

3 The GDPR General Data Protection Regulation

Its provisions are applicable throughout the European Union from May 28, 2018. *Polaris* is compliant with the GDPR.

The protection of your personal data is fundamental. We have made every effort to com personal data. Rotarians in the Principality of Liechtenstein will refer to European rules (Conditions" and "Privacy Policy" at the bottom of this page. Press OK if you consent wit	(including the GDPR) and are invited to	
Rotary 🛞 Lausanne	A	
\equiv navigation		

A. Public visitors may read Privacy Policy and ...

B. Accept the conditions

Note: public visitors do not have any access to personal data.

Rotary 🛞	VEREIN ROTARY MEDIEN SCHWEIZ/LIECHTENSTEIN	
Rotary 🛞 Lausanne		EN ~ 🚨 LOG IN
\equiv NAVIGATION		
The Rotary Club Management System (herein	IVACY POLICY – ROTARY after referred to as the « <i>Polaris</i> ») also known as <i>Harmony</i> is an initiative of: htenstein(hereinafter referred to as the « MAR »)	
1 Definitions		~

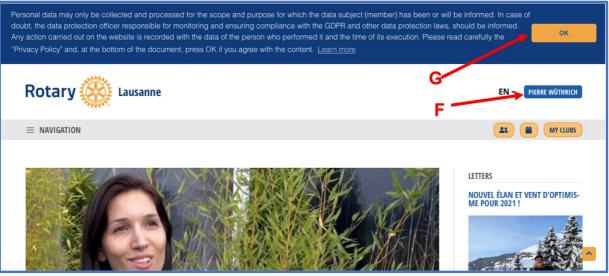
4 Login as member

Rotary 🛞 Lausanne		
\equiv NAVIGATION		
LOG IN		
Email *	≥ → B	
Password *	• C	
Stay connected *		
		•

- A. Click Log In
- B. Enter e-mail address registered for Polaris access
- C. And password
- D. If stay connected is activated, your credentials will be stored as long as will not log out
- E. Log in or let your password be reset, if forgotten

By the 1st login, the member should read and **ACCEPT the "Privacy Policy"** before entering the system. The consent with the policy is recorded in the system's logbook. By following logins, only a disclaimer is displayed for remaining the member (F) of his responsibility (G). The login is valid for all organisations within the same Polaris system. Different access rules may apply for the members own club and for other organisations.





4.1 Shortcuts for members after login

4.1.1 Access to "members"

Rotary 🔯 Lausanne	
	AL MY CLUBS
ACTIVES CANDIDATES GUESTS HONORARY MEMBERS OTHER CONTACTS DECEASED PAUL HARRIS	FELLOWS Enter search

- A. Link to the members of my club
- B. Selection of the members group e.g active, guest, etc.
- C. The presentation as list or portrait
- D. Another filter possibility
- E. Members of other clubs/districts may be found in the yearbook



4.1.2 Access to the upcoming events

Rotary 🛞 Lausanne			EN - PIERRE WÜTHRICH
\equiv navigation			😫 🗯 MY CLUBS
CALENDAR UPCOMING EVENTS	A		
SEE EVENTS OF OTHER CLUBS SEE NEXT EVENTS SEE PAST EVENTS/REPORTS	Enter search term	Next events	FILTER TRESET SEARCH
Réunion du comité du club Monday, January 25, 2021 18:00 - 21:00 🗄		c—	
♥ EN VISIO CONFÉRENCE			
Annulé - Visite de la Collection Georges Bemberg à la Fonda Thursday, January 28, 2021 18:00 - 21:00 🗄	tion de l'Hermitage		Contraction of the second
Né dans une famille d'origine allemande établie en Argentine vers 1850, Ge vie, une collection de peintures, de dessins et d'obiets d'art comptant parm			

- A. Shortcut to upcoming events
- B. Selection of events
- C. Another filter possibility

4.1.3 Access to all clubs I am registered in

Rotary 🛞 Lausanne	EN ~ PIERRE WÜTHRICH
	MY CLUBS
	A
MY CLUBS	
Home unit 🗲 🗕 🖪	
RC Forch ZH	
Guest unit(s) 🔶 C	
🤣 RC Lausanne 🛛 RD District 1990 🔗 RFE International Yachting Fellowship of Rotarians (IYFR)	/ 🔗 RS ICC - Inter-Country Committees
District(s)	
🤣 RD District 1990 🔗 RD District 1980 🥝 RD District 2000	

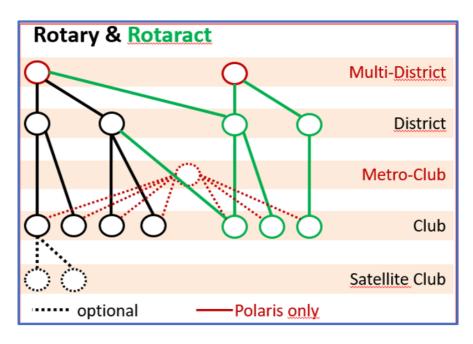
- A. Direct access to my clubs
- B. To my own club (home)
- C. Where I am registered as guest
- D. To my district or multi-district (here the three districts of Switzerland)

NEW: *Polaris* enables "Metro-Club" (metropolitan), representing group of clubs active in the same area enabling members to connect from their clubs to all other clubs. The clubs may belong to the same or to different districts, no limitation. Similarly, *Polaris* supports "Multi-

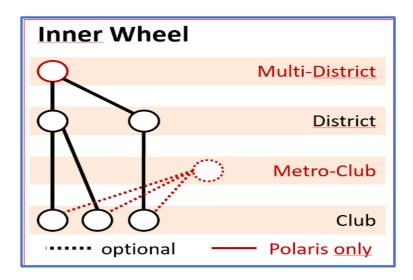


district" **area** over one or many countries e.g over the border or as a country wide area (see "D" on the above screen).

Polaris materialize the integration of Rotaract with a perfect transparence in the communication with Rotary



And Inner Wheel





5 **Navigation**

The pop-up navigation on the left side (A)

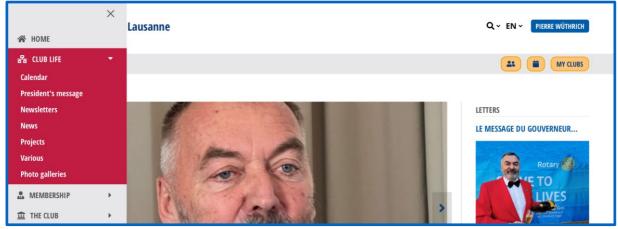


Display all available menus. Each menu may be opened or closed by pressing the dart symbol (B)



- A. Opening the navigation
- B. All menus

5.1 The Club life





5.1.1 Calendar, news, projects and various

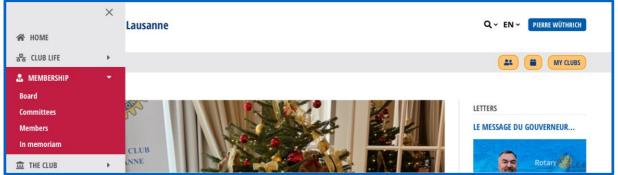
the window to the club life with the **event calendar**, the **news** and **projects**. Visitors may register to event

The access to the documentation e.g **Newsletters** (bulletins) and photos. In case of "Metro-Club", the member sees the agenda of all clubs improving the inter-Club communication.

NEW: *Polaris* enables a financial accounting on member level where each member sees the events he visited and the payments he made.

Note: the club is free in the definition of the structure and presentation of the content of each rubric.

5.2 The membership



Link to the **board**, **committees and members** of the club. Members of other clubs/districts may be found in the **yearbook (see chap.** <u>Access to "members"</u>)

5.3 The Club

Another way of search between "useful links", "Meeting Places" and "Rotary Organization". Note: the club is free in the definition of the structure and presentation of the content of each rubric.

쑴 HOME	×	ısanne	EN ~
5 CLUB LIFE	•		
	•		_
🏛 THE CLUB		DC	
Useful links		RS	
About us			Enter search term Choose home unit
Meetings			
Rotary organisation			
DOCUMENTS	•		



5.4 The document archives

Note: the club is free in the definition of the structure and presentation of the content of each rubric.

	×	ISanne EN V PIERRE WÜT
😭 HOME		
몲 CLUB LIFE	•	
A MEMBERSHIP	•	
查 THE CLUB	Þ	IRS
📥 DOCUMENTS		(K)
Folders		Enter search term Choose home unit 💌
Le MY SETTINGS	Þ	

5.5 The member settings

All settings made by the member himself.

♣o MY SETTINGS	A A		EN 🗸 PIERRE WÜTHRICH
Parameters	← B		MY CLUBS
External links			
Modify my password	C C		
	BERS	Enter search term	Choose home unit Telter
ID: 41324 RI ID: 5423911			
Your QR-Code helps us to capture your attendance and to register your data on any given event. Your QR-Code is a digital image of the Rotary-ID		Powered by Polaris ⁺	E C f C in
MY PRESENCE			

5.5.1 Personal data (A)

The member's data, excepted the mandatory marked "RI" may anytime be changed by the member himself. Copy of the changes are forwarded to the club secretary.

\equiv navigation			MY CLUBS
PERSONAL DATA			
Picture	Image : jpg, jpeg, gif,	Drop files here or click to upload	
	png	16.9 KB	
Title		RI	
First name *	Pierre	RI	<u>~</u>



With the mandatory data (marked RI) for Rotary International and below the private and partner contact information with restricted access (A) chosen by the member himself.

Private contact information			
		Visible only to members of my club	
Private address row 1 *	Im Haufland 35	RI 🔨 🗛	

5.5.2 The professional data

\equiv NAVIGATION			AL MY CLUBS
PROFESSIONAL DATA			
Professional title		•	
Profession		•	
Company		•	
Classification	Informatiksicherheit	RI	
Other honours		•	<u>^</u>

With the professional contact information. The mandatory data marked with "RI", all other with restricted access acc. to member decision.

5.5.3 The parameters (B)

\equiv navigation		
PARAMETERS		
Default postal address *	Private address ~	
Default phone number *	Private mobile phone	
Default email address *	Private email	
Communicates by *	Email and postal mail $\ \ $	
Email and newsletter notifications settings		
Receives newsletter(s)	Club, District ~	

Like the email address where the member would like to receive the information and the newsletters.



Postal mail settings			
Receives the printed yearbook	×		
Receives magazine *	Free of charge	~	
Postal mail log			
Welcome letter sent on	01.01.2000		
Letter to survivor sent on	#		
Languages			
Preferred display and newsletter languages (in	Available	Preferred	RI

And the preferred language

5.5.4 The external links

All external links the member used for himself

\equiv NAVIGATION			AL MY CLUBS
EXTERNAL LINKS			
Web social media			
Facebook	http://	13	
Xing	http://		
LinkedIn	http://	īn	
Twitter	http://		
			^
Video sharing			

	Youtube	http://	
	Vimeo	http://	
Chat and IP-phone			
	Skype		8
Shaving of shates			
Sharing of photos			



5.5.5 Modify my password (C)

The member may any time change his password

\equiv NAVIGATION		LE MY CLUBS
MODIFY MY PASSWORD		
Current password *	٥	
New password *	۲	
Repeat password *	٥	
	MODIFY MY PASSWORD	

5.5.6 The QR code

The QR-Code helps capturing the attendance and registering the member's data on any given event. The QR-Code is a digital image of the member's Rotary-ID. The QR-Code is intended to be stored on the member's smartphone enabling him to authenticate rapidly at the entrance of an event avoiding long waiting queue.

🛎 DOCUMENTS	•	ısanne-Blecherette	EN ~ SUPER ADMIN
🌲 MY SETTINGS	•	isanne-bletnerette	
Personal data			😩 📋 MY CLUBS
Professional data			
Parameters			
External links			
Modify my password			
1 1 1 1 1 1 1 1 1 1		Enter search term	Show all years 💌 FILTER
Your QR-Code helps us to o ture your attendance and register your data on any		DISTRICT VAUD > LAUSANNE-RIFCHERETTE	



5.6 My presence

A view on my actual presence

	×	Isanne	EN ~ PIERRE WÜTHRICH
\Lambda HOME			
묾 CLUB LIFE	•		AL MY CLUBS
S MEMBERSHIP	•		
童 THE CLUB	+		LETTER
DOCUMENTS	+		LETTERS NOUVEL ÉLAN ET VENT D'OPTIMIS-
Lo MY SETTINGS	•		ME POUR 2021 !
🛱 MY PRESENCE			14
A POLARIS ADMIN			ARL

The presence (attendances) is summarized.

ATTENDANCES/COMPENSA	TIONS		
Total statutory events closed	0		
Presence points earned Statutory events + extraordinary events +			
compensations: Statutory events: 0.0	0.0		
Extraordinary events: 0.0 Extraordinary compensations: 0.0			
Exempt from presence	0		
No entries found			

5.7 My Finances

In "My Finances" the member sees his personal account with all expenses like membership fee, lunch tickets, other events fee, etc. and all his payments.

😤 НОМЕ	×	nterthur Ost	EN ~ Swedish Nico
묽 CLUB LIFE	•		
	Þ		
童 THE CLUB	₽		
DOCUMENTS	₽	LUB WINTERTHUR OST	
A MY SETTINGS	•	unide 1004 session dat und aible baute sesson 700	Ô
MY PRESENCE		wurde 1964 gegründet und zählt heute gegen 700 ten Branchen.	*** *
KOE MY FINANCES		he in unserem Clublokal. Nebst interessanten Re- en setzen wir uns engagiert für wohltätige Pro-	
🔒 POLARIS ADMIN		en sie unter Projekte und Dienste. Das Ziel von im täglichen Leben. Rotary kommt diesem Ziel	Rotary
€ LOGOUT		chaft als eine Gelegenheit, sich andern nützlich g hoher ethischer Grundsätze im Privat- und im	24-mm



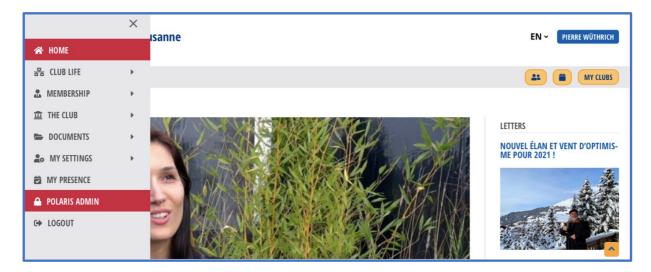


- A. The financial account each member has
- B. The category like "meals" or "all" or "main"
- C. The time frames
- D. The period

Rotary 🛞 Winterthur Ost			EN ~ SWEDISH NICO
			MY CLUBS
FINANCIAL ACCOUNT	В	c	
Enter a search term Q All	~ 01.07.2020	30.06.2021	
Current quarter Current half-year Current year	- D		
No optrice found			^

5.8 *Polaris* Admin

For accessing the administration level



Polaris administration only for a limited number of persons. Responsible for attribution of admin rights is the CICO (Club Internet Communication Officer)



Rotary 🛞	≡	Start	RC Forch ZH ~ EN Hi, Pierre P	
				l
প Homepage				l
🕤 Club life				
💄 Members				
🟦 Club Organisation				
1 Club Information				
Documents				
Club parameters				1
🗲 Utility	,			

Content and handling of the administration are described in a separate document.

6 Conclusions

The digitalization of clubs and districts requires the choice of an IT tool such as **Polaris**. Before making a choice, it is important to answer the following questions:

- What functions are essential for this digitalization, communication, management, interfacing with Rotary International, etc. What is the coverage of these functions by the evaluated tool?
- What does the district plan? The development with volunteers or with a contractor of an own system based on a toolbox (it's not *Polaris*) OR buy an existing "mature" preconfigured system already in function in many different European districts (it's *Polaris*)
- How does the new tool simplify the work of the board, the committees, the officers and the members of the Club?
- \circ $\;$ What is the support provided by the supplier of this tool? How responsive is it?

• What are the experiences of other districts? How long did it take to go into production? Clubs making good use of the *Polaris* were able to reduce or even eliminate expenses such as professional secretarial services.

To answer questions about *Polaris*, contact:

Rot. Serge Dupont Head of relationship to European Rotary districts Medias Association of Rotary Switzerland-Liechtenstein Mobile: +33 6 87 70 92 83 E-mail: <u>dupontserge@orange.fr</u>

Examples of current *Polaris* sites:

6.1 French districts

Rotary District 1520 Rotary District 1650 Rotary District 1680 https://www.rotaryd1520.org http://www.rotary-bretagne-mayenne.org https://www.rotary1680.org/fr/



Rotary District 1690 Rotary District 1710 Rotary District 1780

VEREIN ROTARY MEDIEN SCHWEIZ/LIECHTENSTEIN

https://rotary-1690.org https://www.rotary1710.org https://www.rotary1780.org

6.2 Switzerland & Liechtenstein districts

Rotary District 1980	https://rotary1980.ch/en/
Rotary District 1990	https://rotary1990.ch/en/
Rotary District 2000	https://rotary2000.ch/en/
Rotaract Committee	https://rotaract.ch/en/
Inner Wheel 199	https://innerwheel.ch/en/

6.3 Belgium and Luxemburg districts

Rotary District 2130	https://rotary2130.org
Rotary District 2140	https://rotary2140.org
Rotary District 2150	https://rotary2150.org
Rotary District 2160	https://rotary2160.org

6.4 Sweden (under construction)

Rotary District 2330 Rotary District 2340 Rotary District 2350 Rotary District 2360

6.5 Iceland (under construction)

Rotary District 1360