Rotary VEREIN ROTARY MEDIEN SCHWEIZ/LIECHTENSTEIN

Polaris

Description of ***Polaris*** Club Management System

Polaris in summary 2

The home page (first page) 3
- The column on the right side 3
- The slider 5
- The carousel 6
- Bottom of the home page 6

The GDPR General Data Protection Regulation 7

Login as member 8
- Shortcuts for members after login 9
  - Access to “members” 9
  - Access to the upcoming events 10
  - Access to all clubs I am registered in 10

Navigation 12
- The Club life 12
  - Calendar, news, projects and various 13
- The membership 13
- The Club 13
- The document archives 14
- The member settings 14
  - Personal data (A) 14
  - The professional data 15
  - The parameters (B) 15
  - The external links 16
  - Modify my password (C) 17
  - The QR code 17
- My presence 18
- My Finances 18
- Polaris Admin 20

Conclusions 21
- French districts 21

Switzerland & Liechtenstein districts 22
Belgium and Luxembourg districts 22
Sweden (under construction) 22
Iceland (under construction) 22

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 non-profit 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**.

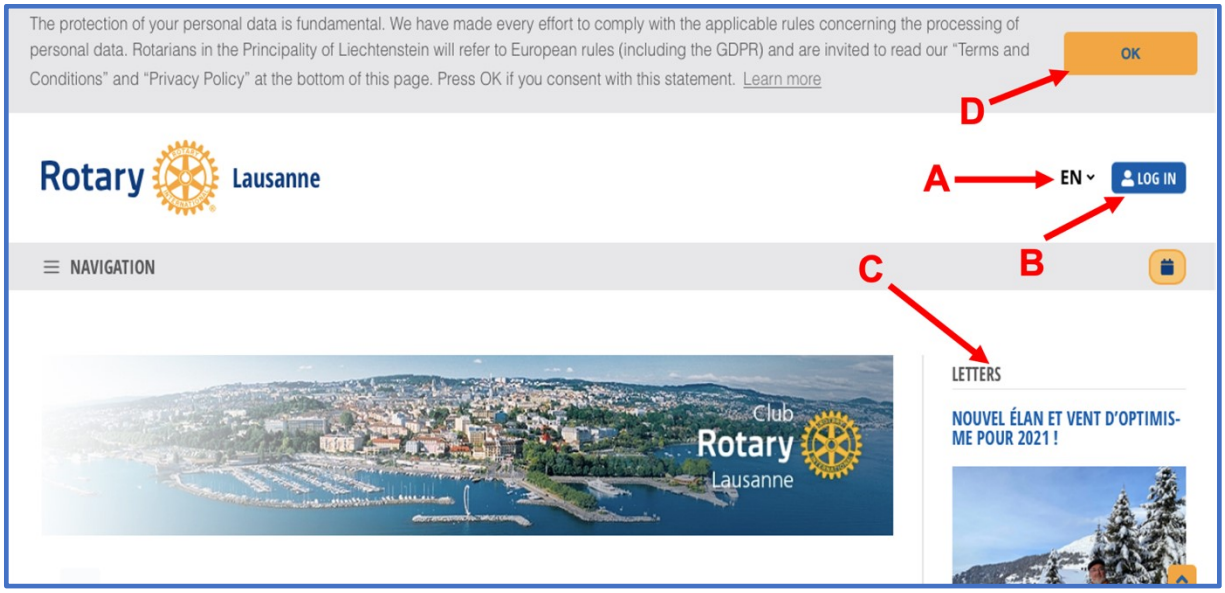
The **continued development of *Polaris*** is ensured by a process whereby members can announce their needs for new functionalities by putting them on a "common listing app" called Redmine. These proposals are taken up by a working group which is responsible for distributing them over future upgrades 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 https://lausanne.rotary1990.ch/.
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

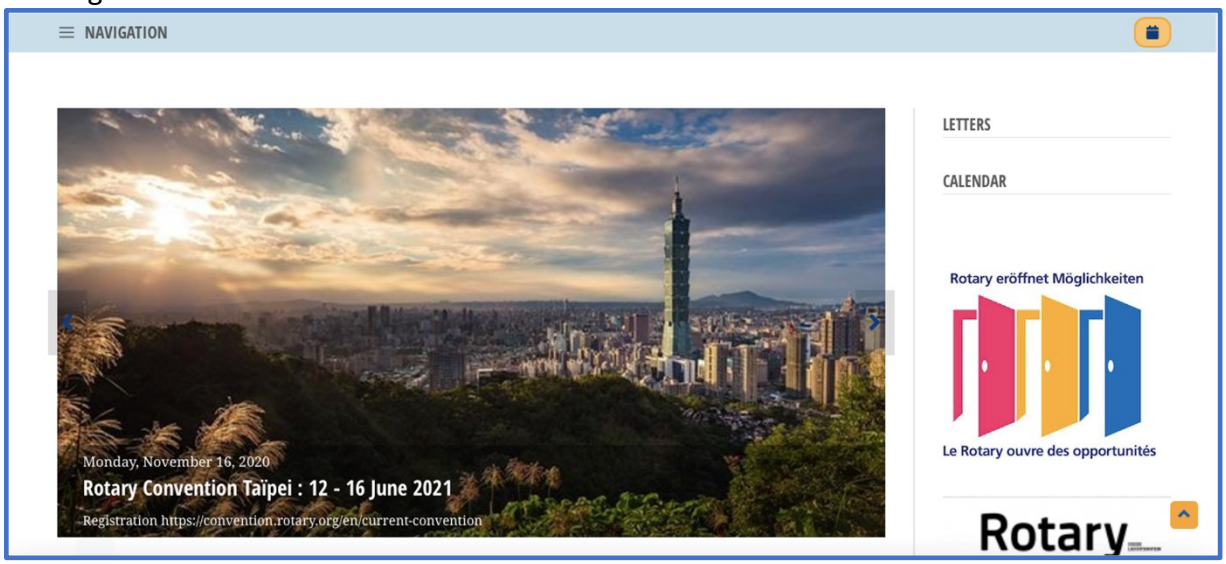
The column on the club home page is reserved for information from the district (or vice-versa from the clubs if on the district home page). As content it could be the governor letter, quick links to events, actualities, promotion of projects, etc.

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.

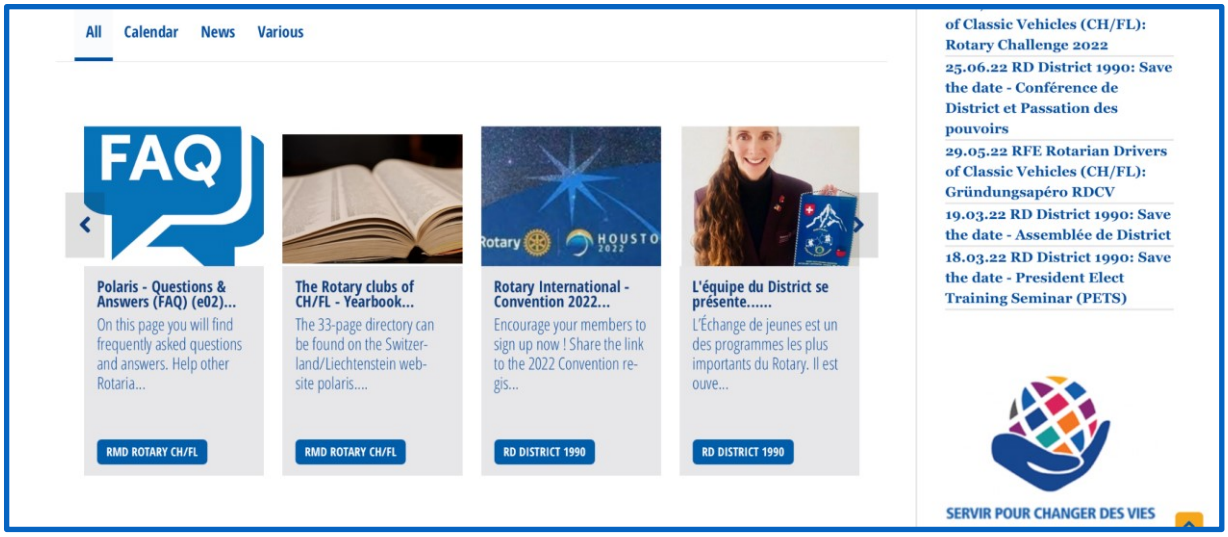
Message 1:



Message 2:

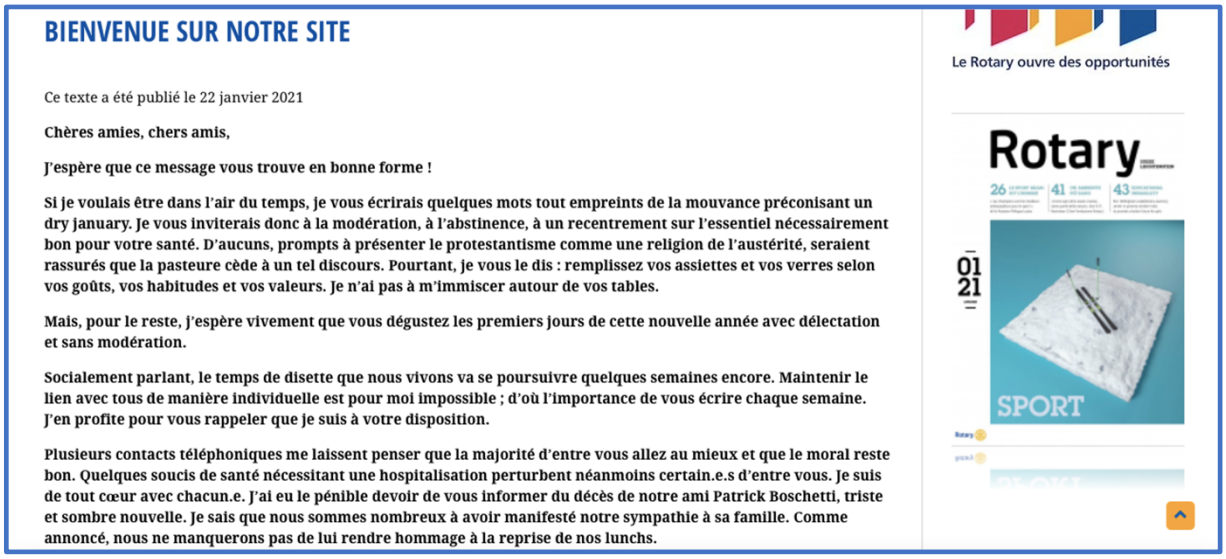
2.3 The carousel

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

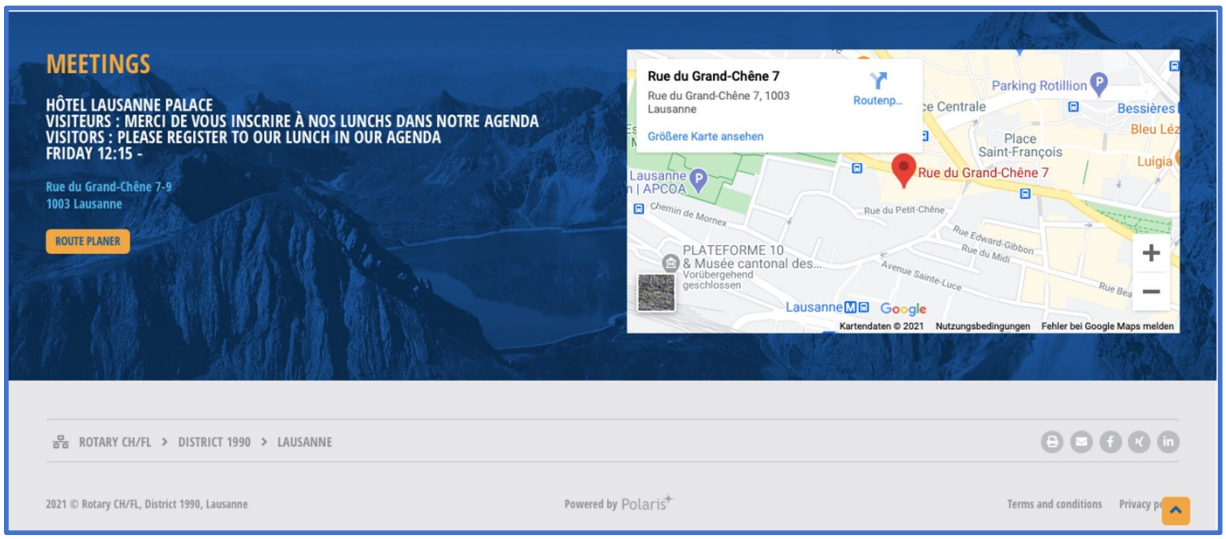


2.4 Bottom of the home page

Followed by a welcome or any other text or picture

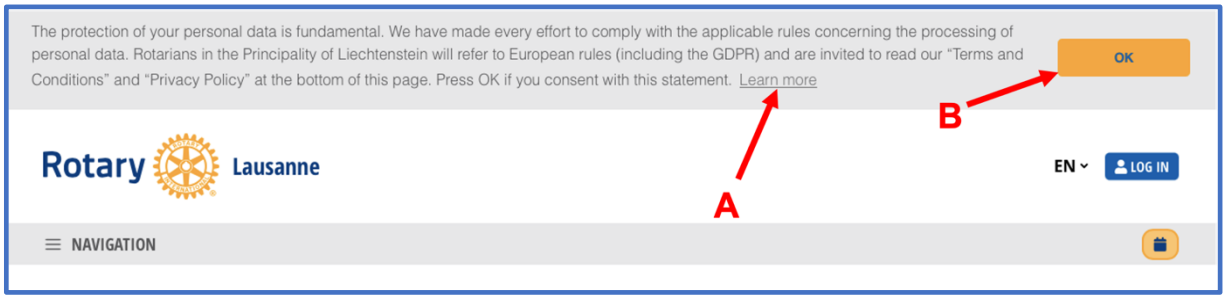


at the bottom, information on the meeting place as well as shortcuts to social medias and documents like “Terms and Conditions” and “Privacy Policy”.



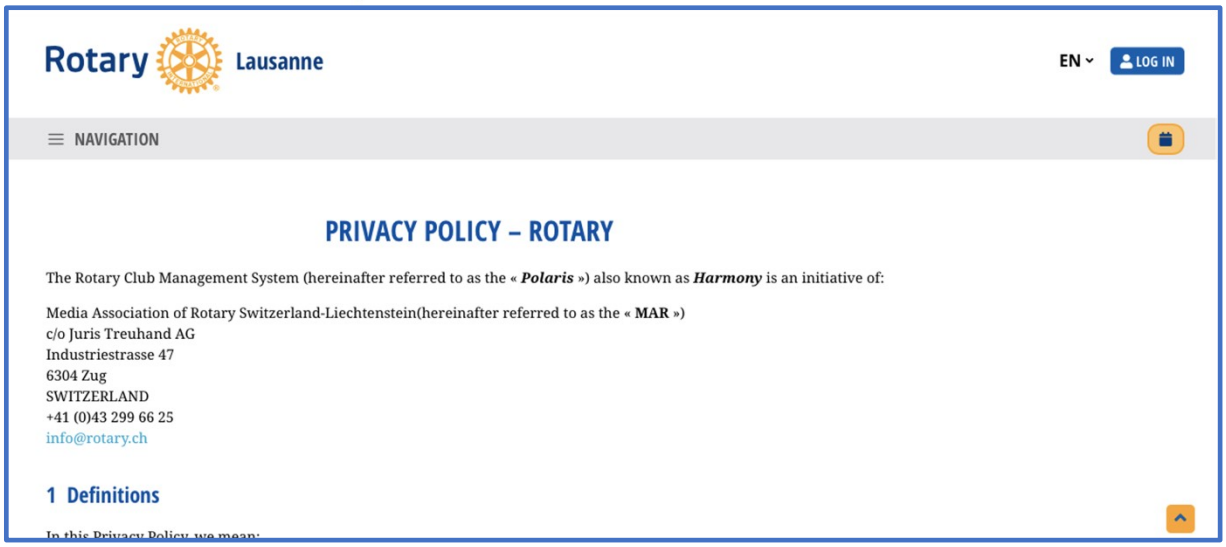
3 The GDPR General Data Protection Regulation

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

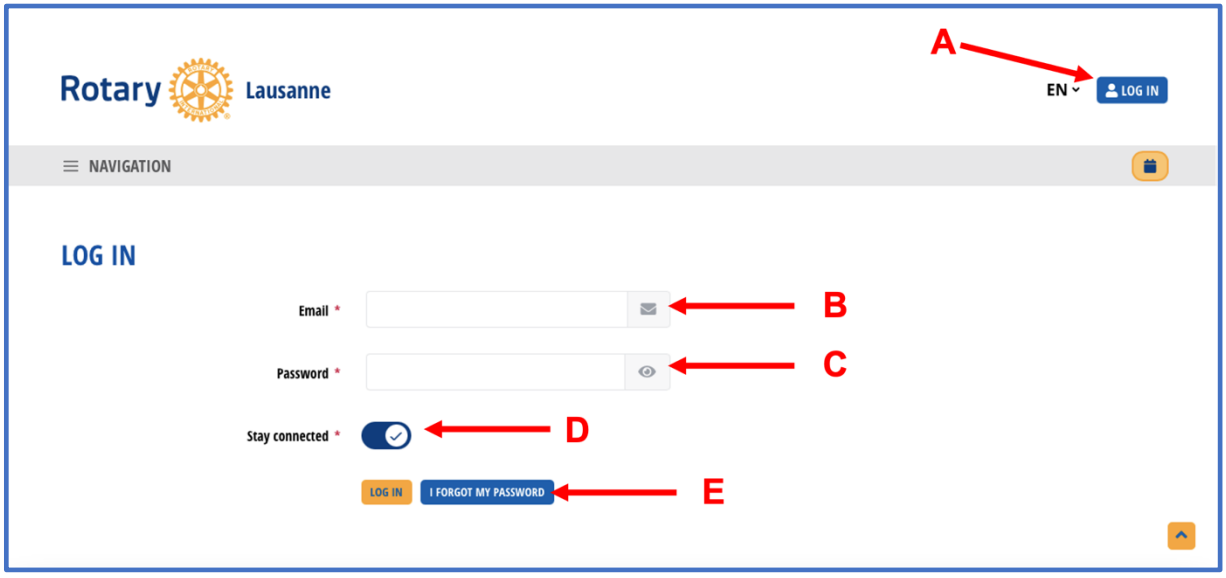


A. **Public visitors** may read Privacy Policy and …
B. Accept the conditions

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

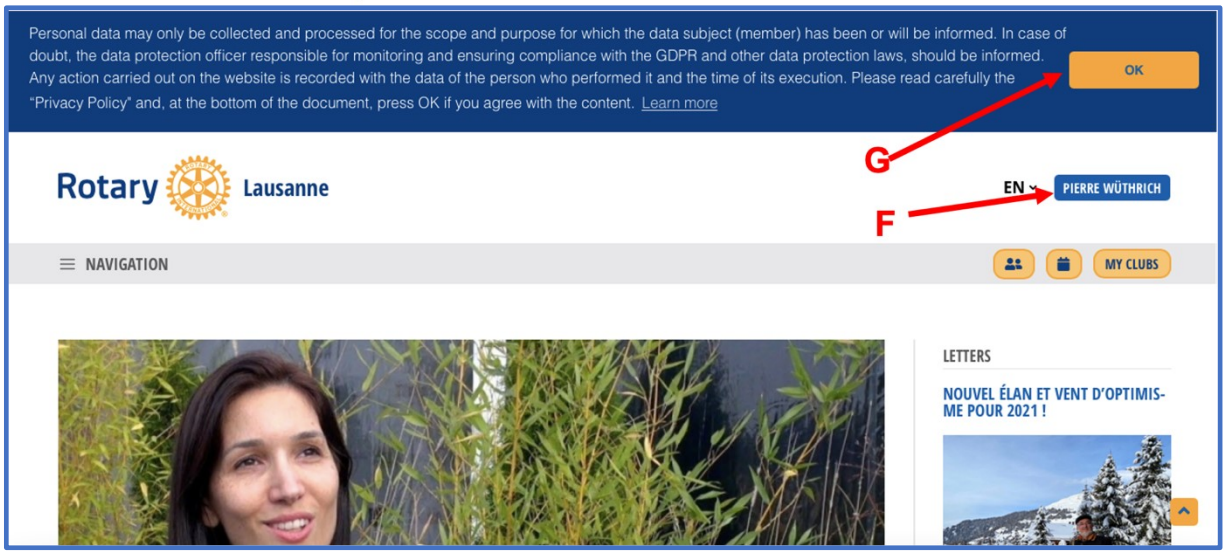


4 Login as member



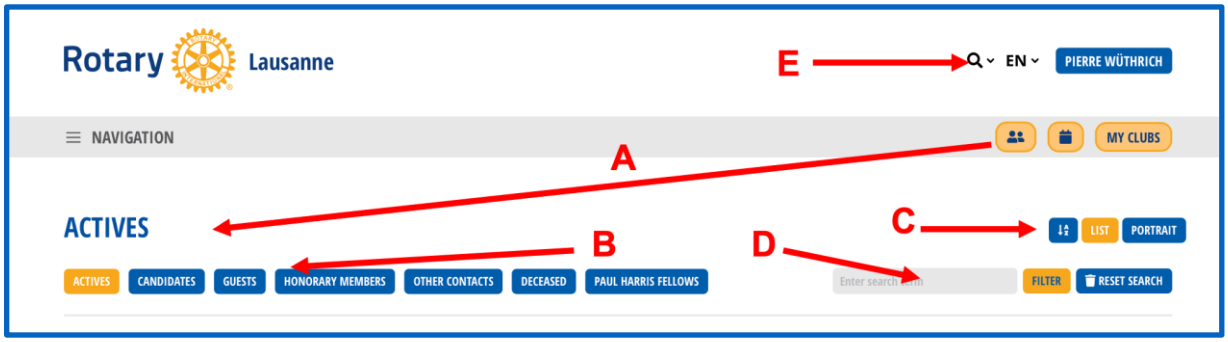
A. Click Log In
B. Enter e-mail address registered for Polaris access
C. And password
D. If stay connected is activated, your credentials will be stored as long as will not log out
E. Log in or let your password be reset, if forgotten

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.



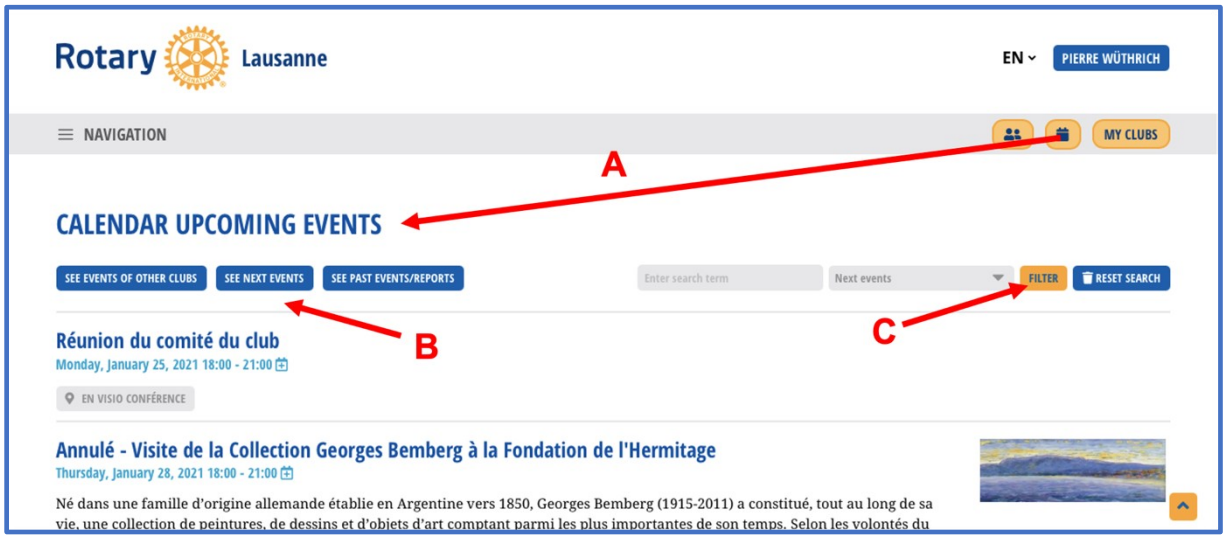
4.1 Shortcuts for members after login

4.1.1 Access to "members"



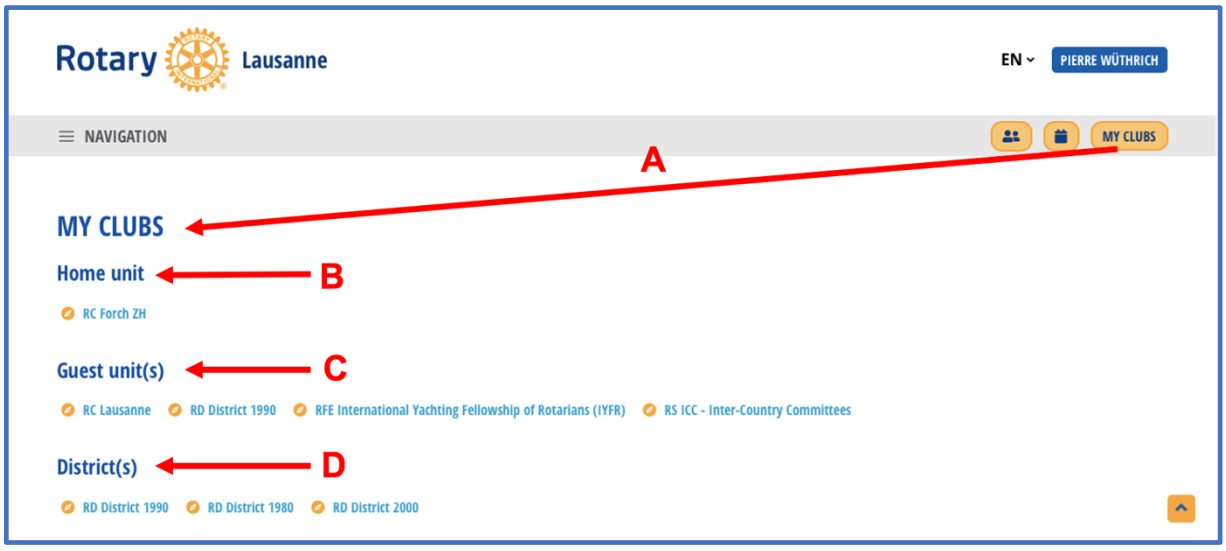
A. Link to the members of my club
B. Selection of the members group e.g active, guest, etc.
C. The presentation as list or portrait
D. Another filter possibility
E. Members of other clubs/districts may be found in the **yearbook**

4.1.2 Access to the upcoming events



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

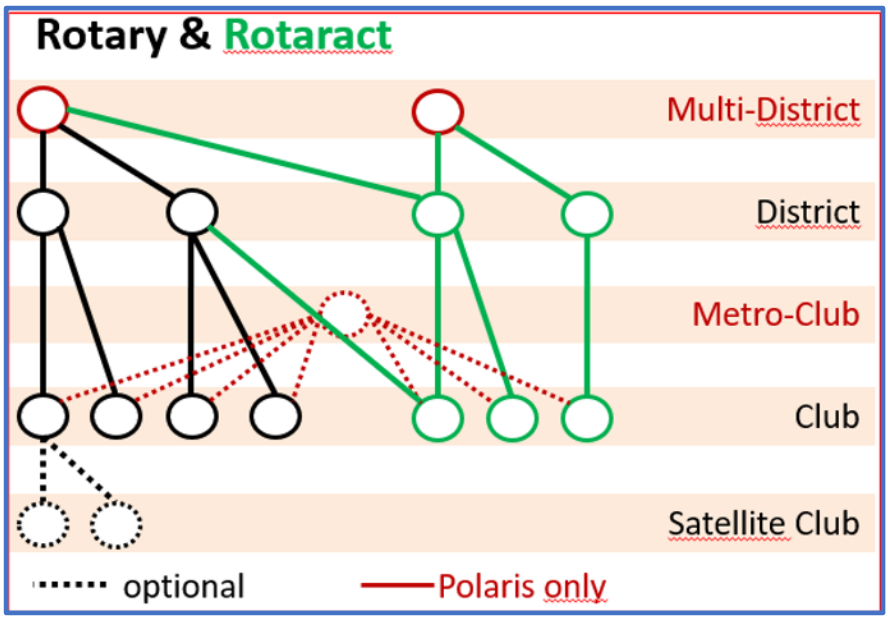
4.1.3 Access to all clubs I am registered in



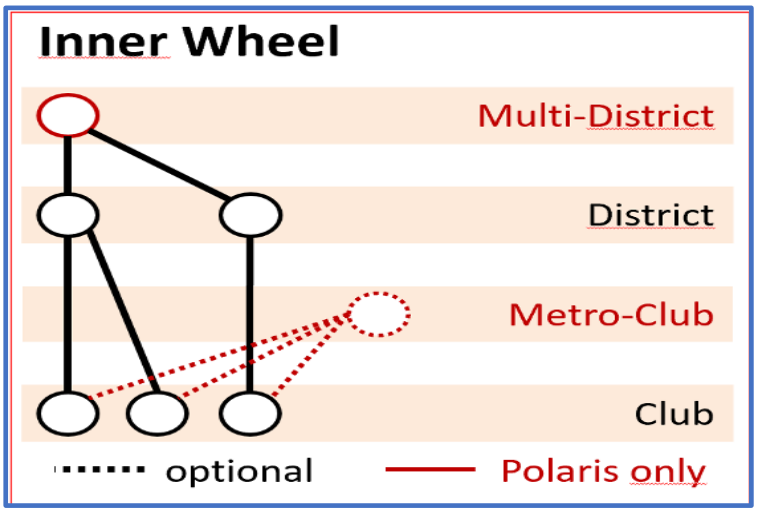
A. Direct access to my clubs
B. To my own club (home)
C. Where I am registered as guest
D. To my district or multi-district (here the three districts of Switzerland)

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



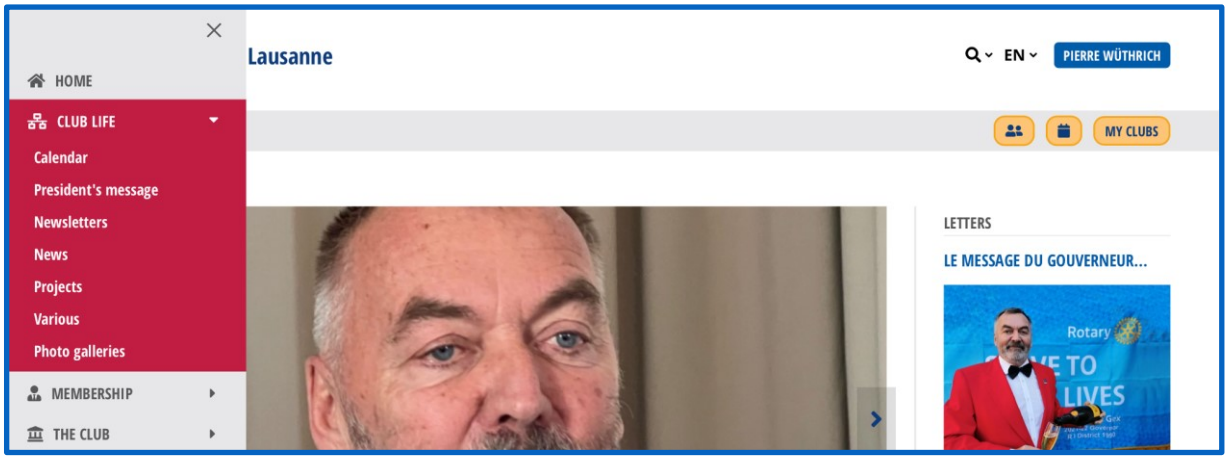
5 Navigation

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

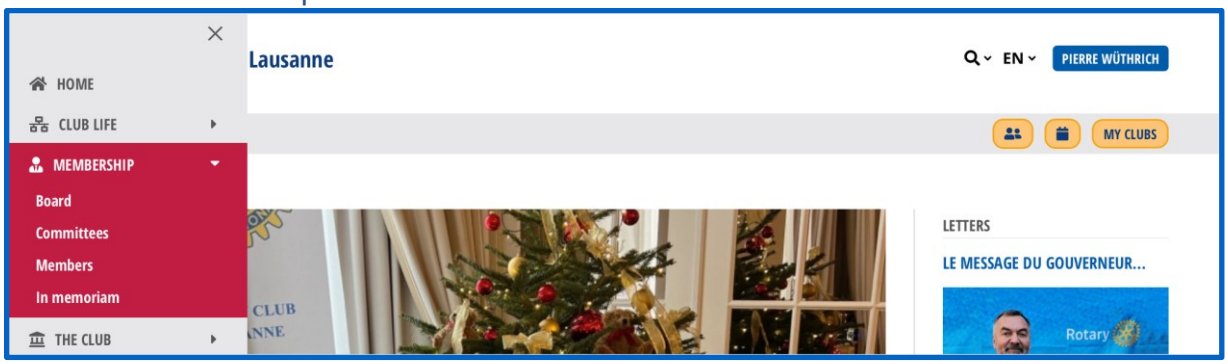
the window to the club life with the **event calendar**, the **news** and **projects**. Visitors may register to event

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. Access to "members")**

5.3 The Club

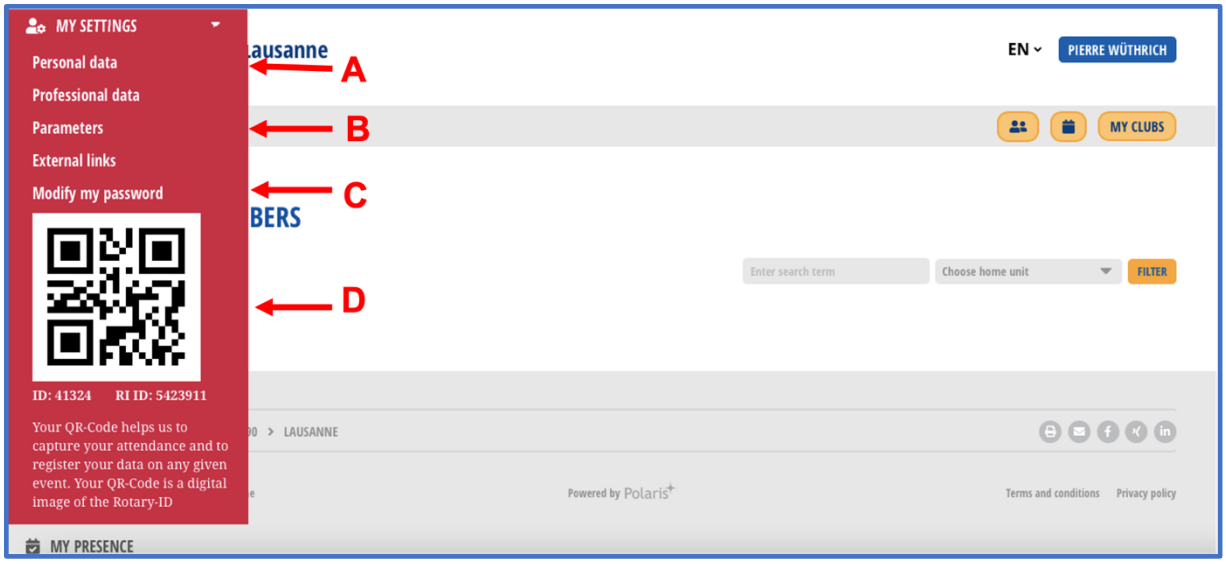
Another way of search between "useful links", "Meeting Places" and "Rotary Organization".
Note: the club is free in the definition of the structure and presentation of the content of each rubric.

5.4 The document archives

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

5.5 The member settings

All settings made by the member himself.

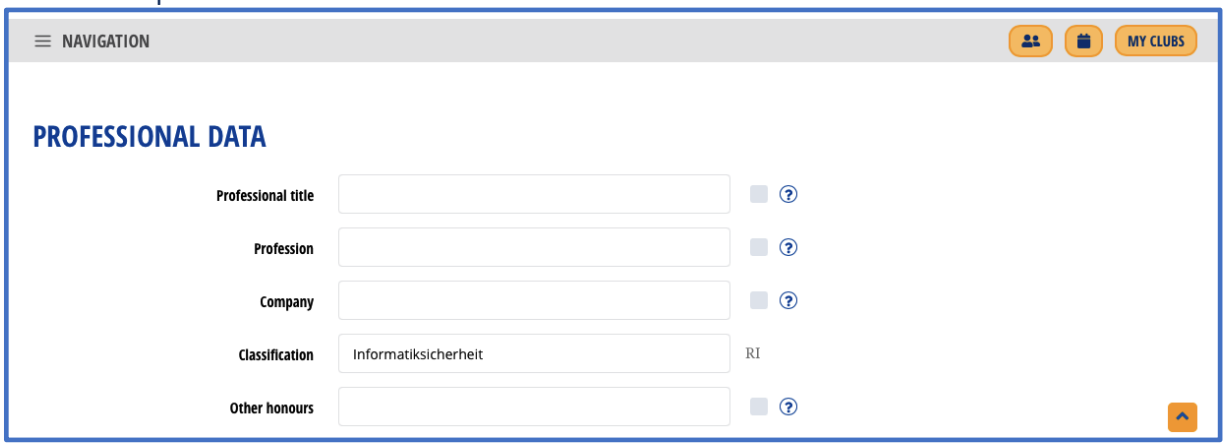


5.5.1 Personal data (A)

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.

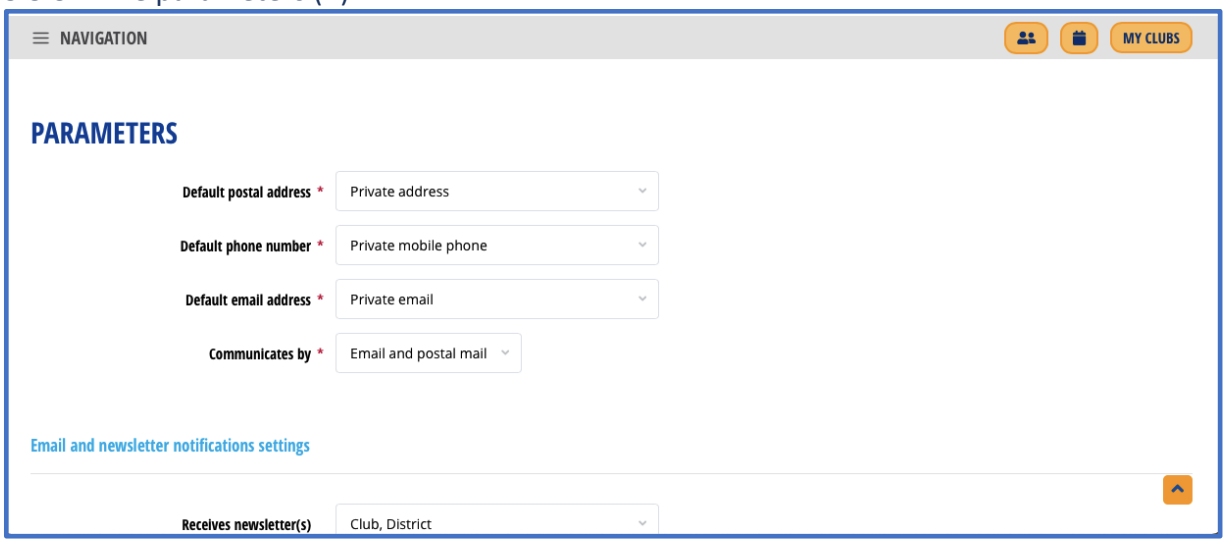
With the mandatory data (marked RI) for Rotary International and below the private and partner contact information with restricted access (A) chosen by the member himself.

5.5.2 The professional data

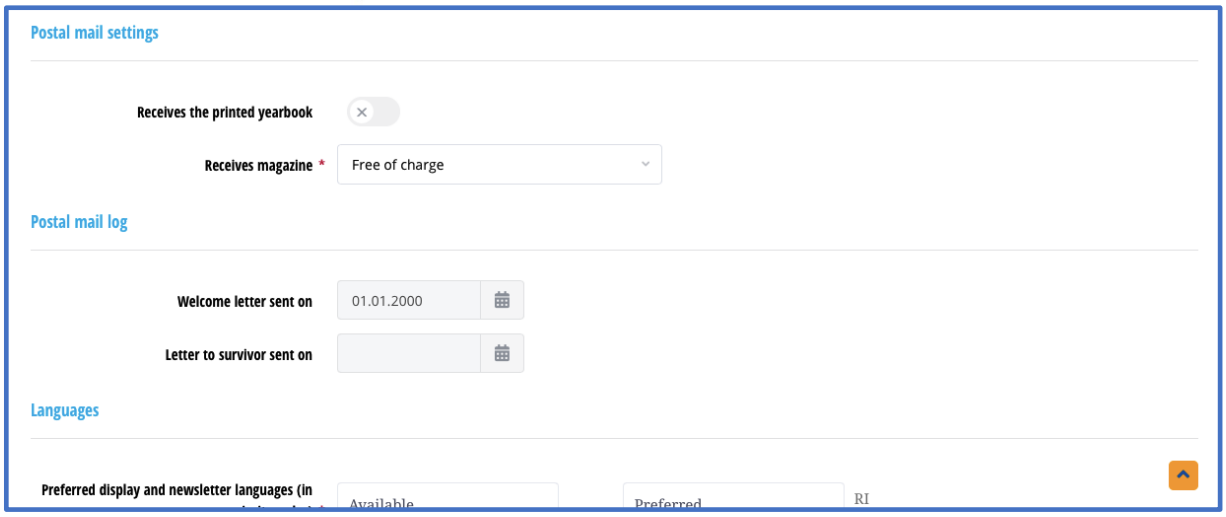


With the professional contact information. The mandatory data marked with “RI”, all other with restricted access acc. to member decision.

5.5.3 The parameters (B)



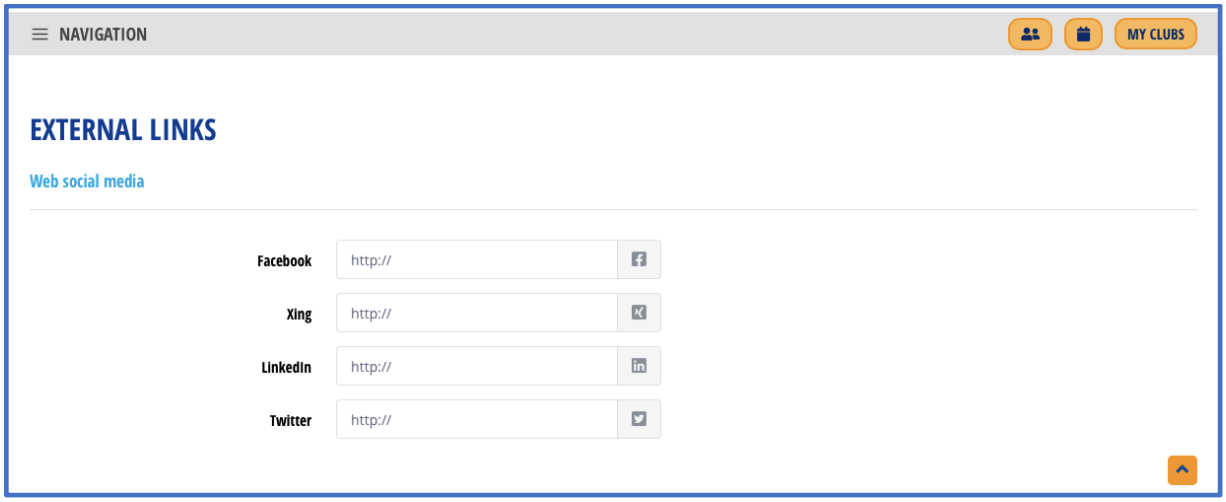
Like the email address where the member would like to receive the information and the newsletters.

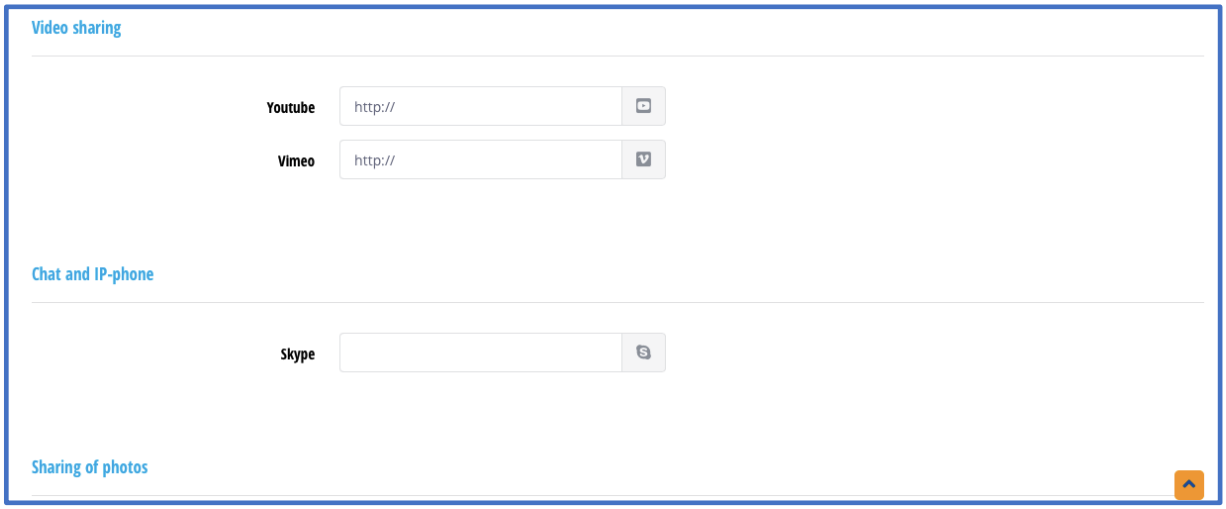


And the preferred language

5.5.4 The external links

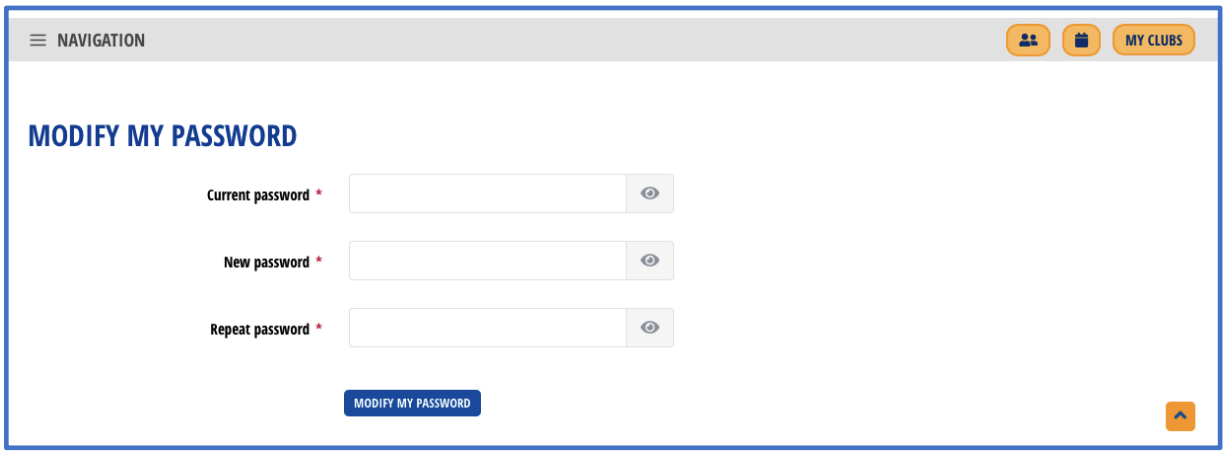
All external links the member used for himself





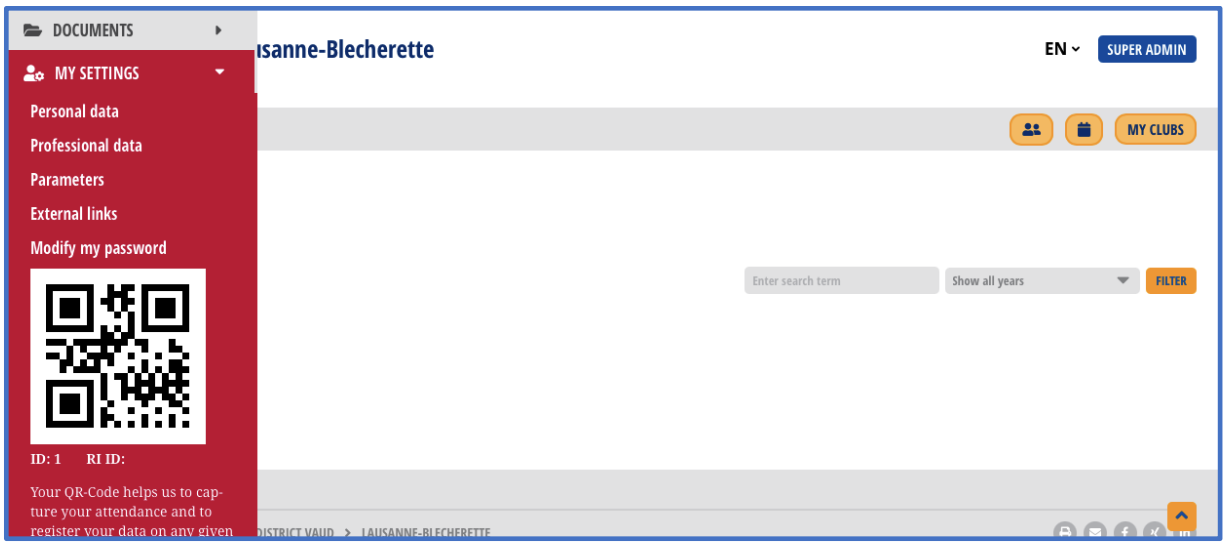
5.5.5 Modify my password (C)

The member may any time change his password



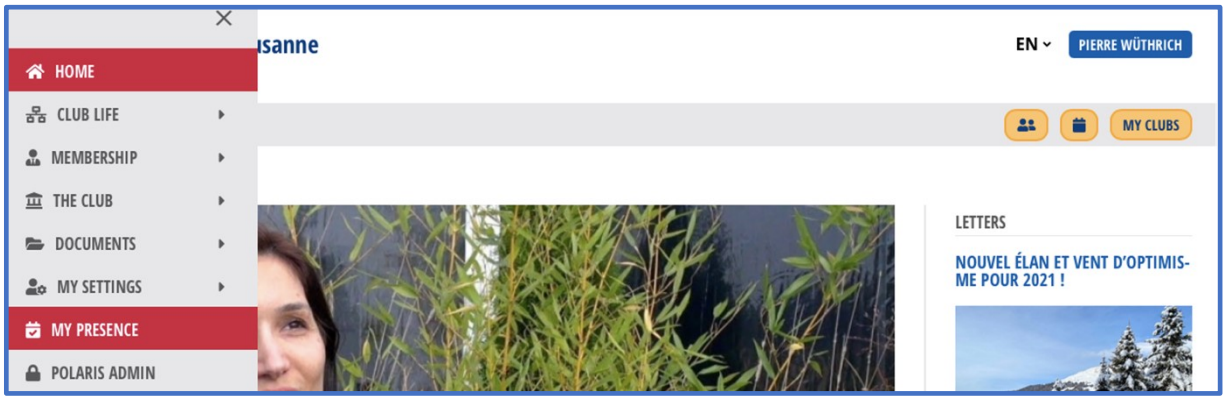
5.5.6 The QR code

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.



5.6 My presence

A view on my actual presence

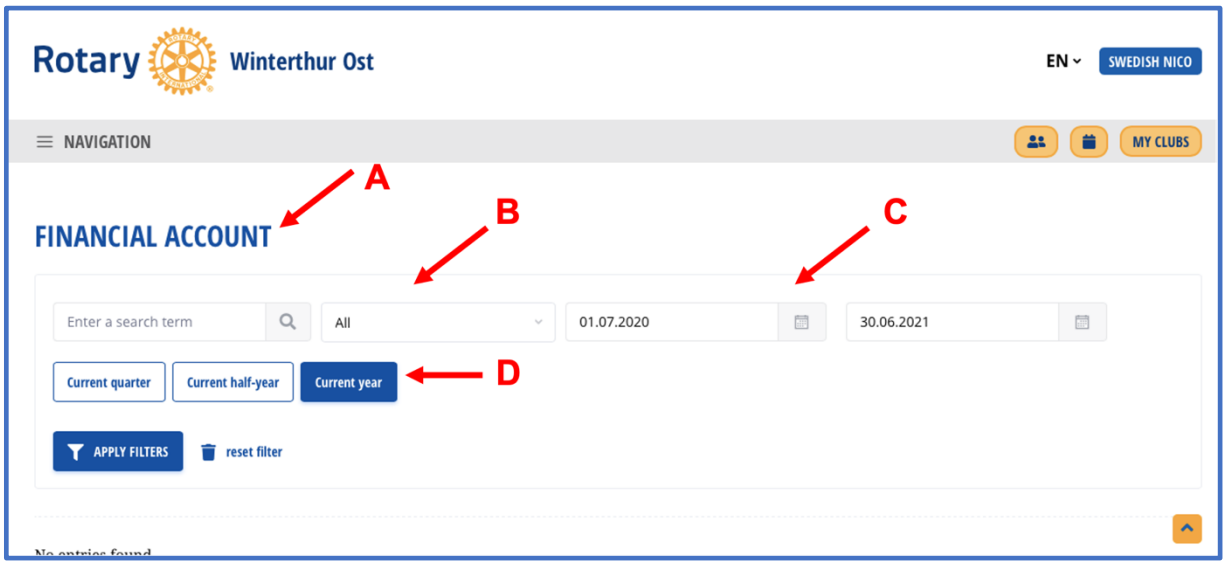


The presence (attendances) is summarized.

5.7 My Finances

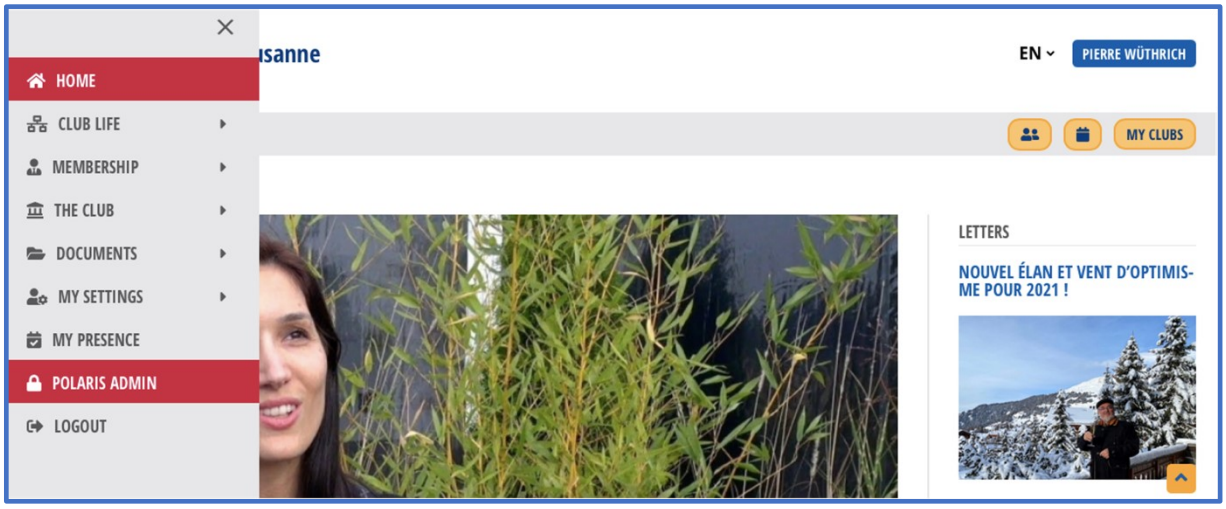
In "My Finances" the member sees his personal account with all expenses like membership fee, lunch tickets, other events fee, etc. and all his payments.

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



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)

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?
- 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: dupontserge@orange.fr

Examples of current ***Polaris*** sites:

6.1 French districts

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

Rotary District 1690	https://rotary-1690.org
Rotary District 1710	https://www.rotary1710.org
Rotary District 1780	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