

CLUB PRESIDENT BASICS

This Club President Basics textbook is partly extracted from RI online Learning Center course. Please visit the Rotary Learning Center for further information needed on the Rotary website: [Rotary.org](https://www.rotary.org)

**Translating Committee
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Get Ready: Club President

The year of planning before you take office is crucial to achieving the objectives you set out for your club. Learn about your role and responsibilities, how you can prepare for your term, as well as best practices for building and preparing a strong leadership team.

Congratulations on being chosen to lead your club! As president, you lead your club, engage and inspire members, conduct meaningful service projects, and promote Rotary in your community.

Role and responsibilities

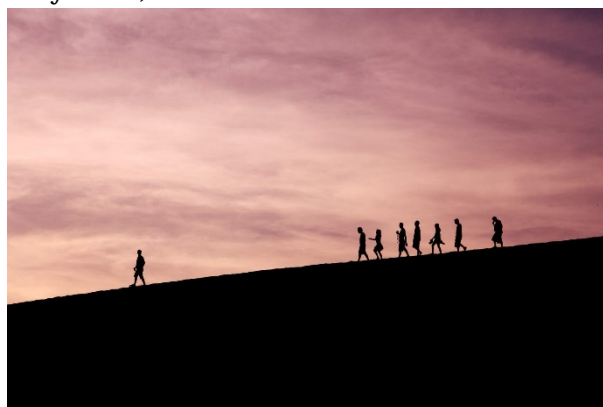
Whether you're a new Rotary or Rotaract club president or returning to this role, welcome! This is a great time to lead your club and make a difference in your community.

In this module, we'll explore your role and responsibilities, the skills you need to be successful, how you can prepare for your term, and how to select and prepare your club officers.

Let's start by going over your responsibilities. Select the plus signs to learn more.

LEAD YOUR CLUB

- Oversee the election of club officers and board of directors for the next Rotary year.
- Serve as director of your club's board.
- Plan and lead monthly board meetings.
- Ensure that comprehensive training is conducted for club members, as needed.
- Make sure your secretary and treasurer update membership and club data regularly. In RIBI use the Data Management System (DMS).
- Report incoming Rotary club officers, either on My Rotary or through your club management system by 1 February prior to their term.
- Update Rotaract club and member data, as well as report club officers by 30 June.
- Collaborate with the governor and assistant governor on club and district matters.
- Communicate important information from the governor and Rotary International to club members.
- Prepare for the district governor's official visit (Rotary clubs).
- Work with club officers to update your club's constitution and bylaws as necessary.
- Attend the district conference.
- Encourage members to attend district meetings, and promote the Rotary Convention and Rotaract Preconvention.
- Submit an annual report to your club on the club's status before leaving office.
- Arrange for a joint meeting of the incoming board of directors with the outgoing board.



OVERSEE CLUB FINANCES

- Supervise the preparation of a club budget and proper accounting practices, including an annual financial review.
- Oversee the management of club finances and make sure your club invoice is paid.
- Minimize risk associated with club activities.



GUIDE EFFORTS TO ATTRACT AND ENGAGE MEMBERS

- Appoint and meet with your membership committee, and make sure the chair is reported to Rotary.
- Work with your membership committee to ensure someone is taking responsibility to manage the club's membership leads.
- Set your club's annual membership goal in Rotary Club Central (Rotary clubs); align your goal with district goals.
- Promote training for members at all stages, including new and current members.
- Look for opportunities to sponsor a new club in your area.
- Define a strategy for engaging program alumni in club events and activities.
- Recognize club members for efforts in your own way, or by using the Avenues of Service awards.
- Create an inclusive culture and diversify club membership.



DEVELOP YOUR CLUB'S PUBLIC IMAGE STRATEGY

- Appoint and meet with your public image committee members, and make sure the chair is reported to Rotary.
- Work with your public image committee to develop or refine a communications plan.
- Review your club's current public image initiatives in the Goal Center on Rotary Club Central (Rotary clubs).
- Set your club's public image goals using Rotary Club Central (Rotary clubs).
- Serve as the club spokesperson when working with the media, or identify a member to serve as spokesperson
- Provide updates on Rotary's vision and mission and the club's community service efforts to business and civic leaders, young professionals, and other organizations.
- Cultivate relationships with local media and other organizations that can provide an opportunity to promote Rotary.
- Promote projects or activities that illustrate how your club is making a difference in your community.
- Make certain the Rotary logos are used properly by using the Brand Center.

- Rotaract clubs can also:
 - Promote an event or activity that it held during World Rotaract Week on social media
 - Use Rotary International’s messaging and public service materials, such as broadcast videos, print ads, and other material in the Brand Center, to promote Rotaract in their community during the Rotary year
 - Submit their best project for the Rotaract Outstanding Project Awards



PROMOTE THE ROTARY FOUNDATION

- Rotary clubs:
 - Appoint and meet with your club Rotary Foundation committee, and make sure the chair is reported to Rotary
 - View your club’s trends in financial contributions to The Rotary Foundation in Rotary Club Central
 - Work with your president to understand and agree to the club memorandum of understanding (MOU). Once you're president, understand and agree to the club MOU and implement its terms.
 - Work with your Foundation committee to make sure your club is qualified to apply for Rotary grants and make sure your club maintains that qualification
 - Set your club goals for financial contribution and program participation before the start of your year in Rotary Club Central
 - Ensure that reports on open grants are submitted on time
 - Work with your Foundation committee to make sure your club is qualified to apply for Rotary grants
 - Recognize club members for their contributions to The Rotary Foundation
- Rotaract clubs:
 - Work with the club Rotary Foundation committee to provide training opportunities, develop fundraising strategies, and share information with the club’s members in support of The Rotary Foundation
 - Contribute to Rotary’s Annual Fund to meet the requirements for the Rotaract Giving Certificate
 - Work to become qualified to apply for Global Grants. Contact your district leadership to make arrangements to attend a district grant management seminar
 - Partner with a Rotary club on a district or global grant



LEAD SERVICE EFFORTS

- Select and meet with your service projects committee members, and make sure the chair is reported to Rotary.
- Assess your club's current projects using Rotary Club Central (Rotary clubs).
- Determine service goals using Rotary Club Central (Rotary clubs).
- Determine how many members will participate in club service activities during the Rotary year (Rotaract clubs).
- Work with your committee to:
 - Determine whether projects in progress will continue into next year
 - Assess your club members' professional skills and expertise
 - Collect information about your club members' interest in leading or participating in service projects
 - Ensure that opportunities for members to lend their expertise through service projects are available throughout the year
- Determine how you can assess the community's needs and measure project outcomes.
- Make sure your club follows the steps for a successful project:
 - Consulting with experts who can provide guidance early in the planning phase,
 - Conducting a needs assessment
 - Further planning and implementation, and evaluation
- Provide support to your club-sponsored organizations: Interact, Rotaract, and Rotary Community Corps (RCC).
- Follow Rotary's youth protection policies and the Statement of Conduct for Working With Youth, and implement the requirements for the Youth Exchange program.
- Consult with these district committees for service-related questions and requests for support:
 - International service committee
 - Community service committee
 - Rotary Foundation committee
 - District Rotaract committee



What skills do you need for this role? Here are just a few that will help you succeed as president. Select the boxes to learn more.

Communication	Strategic thinking	Interpersonal
Delegation	Motivation	Problem-solving

Communication

How will you pass information along to your members, other club officers, the district, and the community? Having a robust communication plan is crucial for building relationships and increasing awareness of your club's good work.

Strategic thinking

Strategic thinkers see the big picture. What decisions are you and your club officers making that will affect the long-term outlook of your club? Think about your long-term goals and create or refine your club's strategic plan.

Interpersonal

Think about how you'll make requests of your club leadership team, build relationships, manage expectations, and provide critical feedback.

Delegation

To have a successful year, you may find it necessary to delegate tasks, ideas, and projects to other club officers. Consider whether certain activities are a good use of your time, or could be done by someone else.

Motivation

Find out what motivates each member of your club to get involved. Regularly assess if the motivators are working and make changes as needed.

Problem-solving

Think about how you'll address challenges in your club:

1. Identify the problem and any obstacles to solving it
2. Consider your options
3. Take action
4. See how it turns out and make changes if needed

Consider how you can use your leadership skills to perform your role.

Match the responsibilities on the left by dragging them to the skill best needed to carry it out on the right.

1) Checking in with club officers on progress toward goals.	a) Delegation
2) Asking each member how they'd like to be involved in the club.	b) Interpersonal
3) Making sure your secretary and treasurer update membership and club data regularly.	c) Motivation
4) Relaying important information from the district and Rotary International to club members.	d) Problem-solving
5) Working with your members to develop long-term goals.	e) Communication
6) Handling a disagreement between club officers.	f) Strategic thinking

Answer

1 – b, 2 – c, 3 – a, 4 – e, 5 – f, 6 – d,

Preparing for your role

How can you prepare for your role? Select the cards to find out some best practices.

Meet with the outgoing club president

Learn about the status of the club, any challenges it's facing, as well as goals, projects, and other activities that will extend into your term.

Understand how your club operates

Review the Standard Rotary Club Constitution, Recommended Rotary Club Bylaws, Standard Rotaract Club Constitution, and Recommended Rotaract Club Bylaws.

Get trained

Attend your presidents-elect training seminar (PETS), district training assembly, and district conference (and, in RIBI, district council meetings).

Prepare club officers

Encourage incoming club officers to attend the district training assembly and Rotaract club officer training.

Create a My Rotary account

Ask your club leadership team to create one, too. Your My Rotary experience is based on your role, and you have access to some useful tools.

Report club officers

Ensure all club officers are reported on My Rotary so they can receive important communications from Rotary International.

Set some goals

Set and track goals for your club in Rotary Club Central. Rotaract clubs can use the Citation goals and Instructions for Rotaract Clubs worksheet.

Planning for your year

Clubs that follow a strategic plan report higher levels of member engagement, retention, and satisfaction.

Now's the time to start thinking about the goals you want to set for the year, as well as long-term. Does your club have a strategic plan? If not, the Strategic Planning Guide can help you create one.

Rotary's strategic plan, known as our Action Plan, unifies the direction of Rotary International and The Rotary Foundation and sets our strategic priorities. Align your goals with Rotary's Action Plan by thinking about how your club can increase the value of its projects, activities, processes, and member and community engagement.



Increase our impact. How can you measure the results of your service projects? Doing so will help you see the impact your club is having and ensures that your projects add value to the community — which helps attract members, partners, and donors. Get more ideas here.



Expand our reach. Think about how you can collaborate with new groups, which makes your club more appealing, encourages a diverse membership base, and expands your capacity for service. Get more ideas here.



Enhance participant engagement. How can you create a club environment that adds value to your members' lives? Take the time to understand their needs and how they'd like to be involved in your club. Get more ideas here.



Increase our ability to adapt. Are there opportunities to streamline how your club operates? Do your activities add value? Evaluating your internal processes and activities is essential to creating a strong foundation for innovation, sustainability, and growth. Get more ideas here.

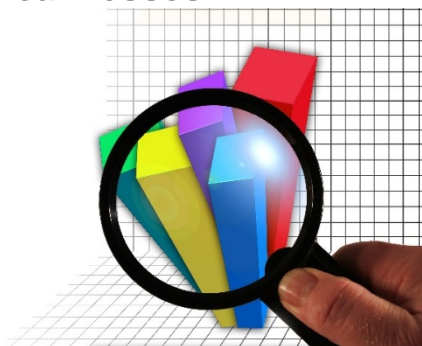
SETTING ANNUAL GOALS

You can use your club's strategic goals to help set annual goals. Start by meeting with your assistant governor before your presidents-elect training seminar to examine past club trends and current practices. You can find a five-year history of your club's performance on Rotary Club Central. Your club leadership team will carry out the club's plans, so be sure to involve the team in goal development too.

If you're a Rotaract club president, you can use the Citation Goals and Instructions for Rotaract Clubs to plan your annual goals.

Here are some best practices for setting annual goals.

Step 1 **Analyze your club's strengths and weaknesses**



Review past club trends and current practices. Ask club officers and members to take the Rotary Club Health Check and use the results to find your club's strengths and weaknesses.

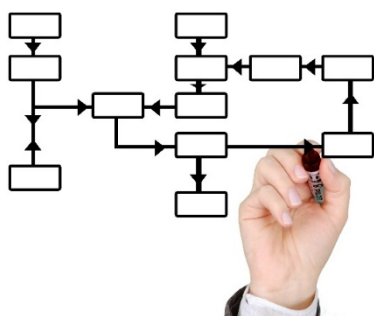
Step 2 **Develop goals**



Goals should be measurable, challenging, achievable, and time-specific. They should also allow your club to operate effectively and engage all of your members. Start by reviewing last year's goals. Is there anything you'd like to continue? Determine what worked well in the past and what needs to change.

As a Rotary club president, make sure you enter your goals into Rotary Club Central by 1 July.

Step 3 **Create action plans**



After you develop goals, be sure to create an action plan to achieve them. Help members feel involved by asking them to implement the plan. For example, divide each goal into small, manageable steps with due dates and set milestones for achieving the goal.

Step 4 **Evaluate progress**



Keep your goals current and track progress periodically by using Rotary Club Central's trend graphs and reports. Review your goals often to determine whether you need to make adjustments. Motivate members by sharing your club's progress toward goals at a club meeting or assembly.

The following Rotary club officers can set and edit goals in Rotary Club Central for the year of their term, starting the year before they take office and ending the year after:

- Rotary club President
- Secretary
- Treasurer
- Foundation chair
- Membership chair
- Public image chair
- Service projects chair
- Executive secretary/director
- Executive director/assistant

Rotary Citation

Rotary, Rotaract, and Interact clubs can earn a Rotary Citation for achieving goals that strengthen Rotary and their clubs. Goals include increasing club membership, developing sustainable service projects, giving to The Rotary Foundation, and building awareness of Rotary in your community.

Citation goals for Rotary clubs can be found in Rotary Club Central, while Rotaract and Interact clubs complete an online form. For more information and a list of citation goals see the Rotary Citation page on My Rotary.

Building a strong leadership team

You're also responsible for overseeing the work of all club officers to help them reach their goals for the year. The following club committees are recommended:

Rotary clubs:

- Administration
- Membership
- Public image
- Rotary Foundation
- Service projects

Rotaract clubs:

- Club
- Community service
- Finance
- Foundation
- International service
- Professional development

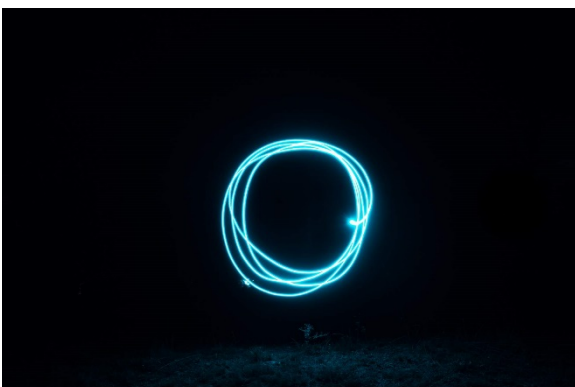
You may appoint additional committees and subcommittees as needed.

Selecting club officers

Everyone has the ability to become a great leader.
Here are some tips for selecting club officers.

Understand your members' interests

Get to know your members and find out what their professional abilities, personal interests, and talents are. Knowing how they'd like to be involved and asking them to participate will help you select members who are a good fit for a role. It will also give your members a more satisfying club experience.



Ensure continuity

Because committee activities may carry over from one year to the next, you may choose to make multiyear appointments or reappoint some members to ensure continuity.

Mix it up

Having a variety of members serve in leadership roles is important to your club's success. Here's why:

- It brings in new ideas for your club
- Senior committee members can share their experiences for facilitating effective change.
- Allowing newer members to serve in leadership roles creates higher engagement.



Be clear and open to ideas

Be sure to explain the role and its responsibilities, and provide space to hear how your members would envision this role.

Summary

Report appointments on My Rotary or through your club management system by 1 February (Rotary clubs) and 30 June (Rotaract clubs).

PREPARING CLUB OFFICERS

Here are some ways to prepare club officers for their roles:

- Give them a job description for their position that clearly outlines their responsibilities
- Encourage them to take online training specific to their role on the Learning Center
- Encourage them to attend the district training assembly to learn more about their role and work together as a leadership team
- Recommend that they meet with their predecessor

Challenges in filling roles

Depending on the size of your club and other factors, it may not be easy to fill leadership roles from year to year.

YOUR LEADERSHIP STRATEGY

What will your leadership strategy be? As a president, you may approach leadership differently depending on the situation. Consider the following when working with your team:

- Environment and culture
- Your approach to problem solving
- How decisions will be made
- Strategies for setting and carrying out goals
- Approaches to cultivating new leaders
- How you'll delegate responsibilities
- How you'll monitor progress toward goals
- How you'll keep your team motivated

What's next

Ready to get started? You've learned a lot about how to prepare for your role. Think about these questions as you prepare for your PETS:

- 1) How does your club reflect Rotary's Action Plan?
- 2) Which part of your club's strategic plan has the biggest impact on your club?
- 3) How will you involve your members in setting goals?
- 4) What is your club's process for selecting officers?
- 5) How will you prepare club officers for their roles?

Resources

The Learning Plan for **Club President Basics** consists of various courses that you may learn from the Learning Center at Rotary.org

- Getting Started with the Learning Center
- Get Ready: Club President
- Working with Your Club Leadership Team
- Minimizing Risk
- Rotary's Action Plan and You
- Best Practices for Engaging Members
- Rotary Club Central Resources
- Online Membership Leads
- Rotary Foundation Basics
- Protecting Youth Program Participants

