

GET READY: CLUB PRESIDENT

This *Get Ready: Club President* textbook is partly extracted from RI online Learning Center course. Please visit the Rotary's 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

Course Description

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

Contents

Role and responsibilities	1
Preparing for your role	6
Planning for your year	7
Building a strong leadership team	10
What's next	13
Resources	14

Role and responsibilities

Whether you're a new Rotary or Rotaract club president or returning to this role, 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 that will help you succeed and how you can prepare for your term, and how to select club officers and prepare them for their roles.

Let's start by reviewing your responsibilities.

LEAD YOUR CLUB

- Oversee the election of the club's officers and board of directors for the next Rotary year.
- Serve as director of your club's board.
- Plan and lead monthly board meetings.
- Make sure that club members get any training they need.
- Make sure the secretary and treasurer update the club's membership and other data regularly.
- For Rotary clubs: Report incoming club officers, either on My Rotary or through your club management system, by 1 February before their term.
- For Rotaract clubs: Update club and member data; 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.
- Work with club officers to update your club's constitution and bylaws as needed.
- Attend the district conference.
- Encourage members to attend district meetings; promote the Rotary International Convention and preconvention meetings.
- Submit an annual report on the club's status to your club before you leave office.
- Arrange a joint meeting of the incoming board of directors with the outgoing board.
- For Rotary clubs: Prepare for the district governor's official visit.





OVERSEE CLUB FINANCES

- Supervise the preparation of a club budget and ensure proper accounting practices, including an annual financial review.
- For Rotary clubs: Oversee the management of club finances and confirm that your club invoice is paid.
- Minimize any risk associated with club activities.

GUIDE EFFORTS TO ATTRACT AND ENGAGE MEMBERS

- Appoint and meet with your club's membership committee, and make sure the chair is reported to Rotary.
- Work with your membership committee to ensure someone takes responsibility for managing membership leads.
- Set an annual membership goal that aligns with your district goals. Rotary clubs, record it in Rotary Club Central.
- Promote training for members at all stages of membership.
- Look for opportunities to sponsor new clubs in your area.
- Determine a strategy for engaging program alumni in club events and activities.
- Recognize club members for efforts in your own way or by nominating them for Avenues of Service Awards.
- Create an inclusive club culture and work to diversify your club's membership.



DEVELOP YOUR CLUB'S PUBLIC IMAGE STRATEGY

- Appoint and meet with the public image committee and make sure the chair is reported to Rotary.
- Work with the public image committee to develop or refine a communications plan.
- Rotary clubs: Review your club's current public image initiatives in the Goal Center in Rotary Club Central, and set new public image goals in Rotary Club Central.
- Serve as the club spokesperson when working with the media, or designate a member to serve as spokesperson.
- Cultivate relationships with local media and other organizations that can provide an opportunity to promote Rotary.
- 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.
- Promote projects or activities that illustrate how your club is making a difference in your community.
- Make certain the Rotary or Rotaract logos are used properly by following the guidelines in the Brand Center.

- Use Rotary International's messaging and public service materials, such as videos, print ads, and other materials in the Brand Center, to promote Rotary and Rotaract in their community.
- Rotaract club presidents can also:
 - Promote your club's World Rotaract Week events or activities.
 - Submit their best project for the Rotaract Outstanding Project Awards.



PARTICIPATE IN AND PROMOTE FOUNDATION GRANTS AND PROGRAMS

- Rotary clubs:
 - Appoint and meet with your club Rotary Foundation committee and make sure the chair is reported to Rotary.
 - Work with the Foundation committee to make sure that your club is qualified to apply for Rotary grants and maintains that qualification.
 - Both as president-elect and as president, you'll need to understand and agree to the club memorandum of understanding (MOU).
 - ☐ Review the MOU each year and decide if any changes are needed. Then agree to its terms by signing and dating it.
 - ☐ Present the club MOU to all club members, especially if changes are made.
 - ☐ When you're president, implement the club MOU and ensure that club members abide by its terms.
 - Make sure that reports on any open grants are submitted on time.
 - In Rotary Club Central, view your club's trends in financial contributions to The Rotary Foundation and, before the start of your term, set club goals for financial contributions and program participation.
 - Recognize club members for their contributions to The Rotary Foundation.
- Rotaract clubs:
 - Work with the club Rotary Foundation committee to offer training, develop fundraising strategies, and share information with members in support of the Foundation.
 - Contribute to Rotary's Annual Fund to earn the Rotaract Giving Certificate.
 - Work to become qualified to apply for global grants. Contact your district leaders to arrange 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 the service projects committee and make sure the chair is reported to Rotary.
- Rotary clubs: Use Rotary Club Central to review your club's current projects and set service goals for your term.
- Rotaract clubs: Set a goal for member participation in club service activities during your term.
- Work with the service projects committee to:
 - Determine whether projects that are in progress will continue next year.
 - Gather information about members' interest in leading or participating in service projects and about their skills and expertise that could contribute to your club's service efforts.
 - Ensure that opportunities for members to use their expertise for 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 these steps for successful projects:
 - Consult with experts who can provide guidance early in the planning phase.
 - Conduct a community assessment.
 - Use crowdsourcing, grants, and fundraisers to acquire resources.
 - Implement your project.
 - Evaluate your projects outcomes.
- Support the Interact clubs and Rotary Community Corps (RCCs) that your club sponsors.
- Follow Rotary's youth protection policies and the Statement of Conduct for Working with Youth, and meet the requirements for Rotary Youth Exchange.
- Consult these district committees on service-related questions and to request support:
 - International service committee
 - Community service committee
 - Rotary Foundation committee
 - District Rotaract committee



What skills do you need for this role? Here are a just a few that will help you succeed as president.

Communication	Strategic thinking	Interpersonal
Delegation	Motivation	Problem-solving

Consider how you can use your leadership skills to perform your role. Drag each responsibility on the left to match it with the skill that is most needed to carry it out on the right.

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

Answers

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

Preparing for your role

How can you prepare for your role?

Meet with the outgoing club president

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

Learn how your club operates

Review the standard club constitution and your club's bylaws.

Get trained

Participate in your presidents-elect training seminar (PETS), district training assembly, and district conference.

Prepare club officers

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

Use My Rotary

Ask members of your club leadership team to create accounts and use them, too. What you see on My Rotary is based on your role, and you'll have access to useful tools.

Report club officers

Make sure all club officers are reported to Rotary so they can receive important communications from Rotary International.

Set some goals

For Rotary clubs, set and track goals for your club in Rotary Club Central. For Rotaract clubs: 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.

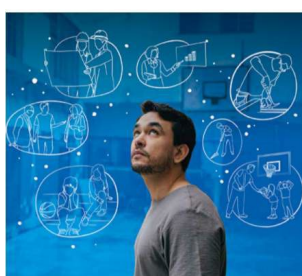
Now's the time to start thinking about the goals you want to set for the year and for the long-term. Does your club have a strategic plan? If not, the Strategic Planning Guide can help you create one.

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 club's service projects? Doing so will help you see the impact your club makes and ensure that your projects are of value to the community — which helps attract members, partners, and donors.



Expand our reach.

Think about how you can collaborate with other groups, which makes your club more appealing, fosters a diverse membership base, and expands your capacity for service.



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.



Increase our ability to adapt.

Are there opportunities to streamline how your club operates? Is the club experience a value one? Evaluating your club's processes and activities is essential to creating a strong foundation for innovation, sustainability, and growth.

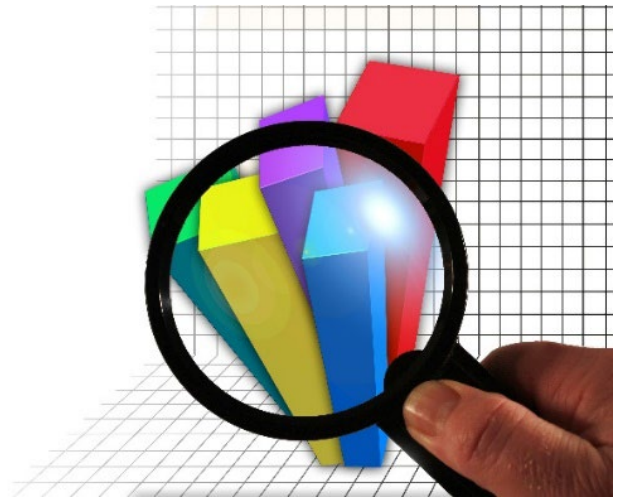
SETTING ANNUAL GOALS

You can use your club's strategic goals to help you 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 developing goals too.

If you're a Rotaract club president, you can use the *Citation Goals and Instructions for Rotaract Clubs worksheet* to set 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 part in the Rotary Club Health Check and use the results to find your club's strengths and weaknesses.

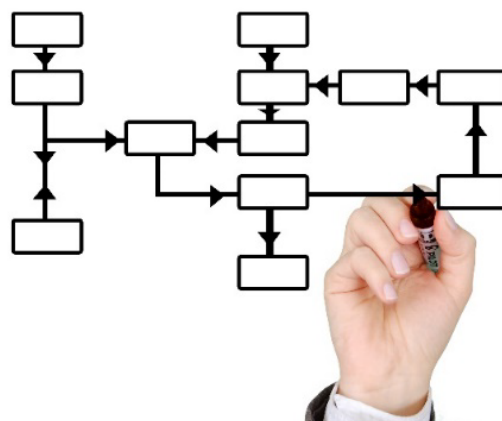


Step 2 Develop goals

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. What would you like to continue? Determine what worked well in the past and what needs to change.

If you're a Rotary club president, enter your goals in Rotary Club Central by 1 July.

Step 3 Create action plans



After you develop goals, 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 updated and periodically track progress toward them 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.

Rotary Citation

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

To be eligible for the Rotary Citation, clubs need to pay each invoice balance in full (before receiving the 60-day reminder letter from Rotary International Accounts Receivable), and all clubs must report achievement of over 50% of the listed goals.

The citation goals and other Rotary Citation resources can be found on 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
- Rotary Foundation
- International service
- Professional development

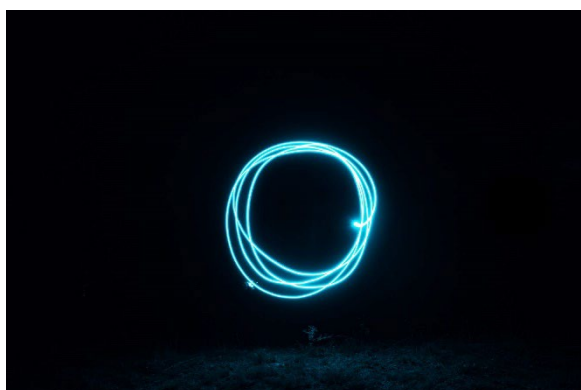
You may appoint additional committees and subcommittees as needed.

Selecting club officers

Everyone has the potential to become a great leader.
Here are some tips for selecting club officers and bringing out their best.

Understand members' interests

Get to know your club's members and find out what their professional skills, personal interests, and talents are. Knowing what they'd enjoy doing and asking them directly to get involved will help you find members who are a good fit for each role. It will also give them a more satisfying club experience.



Ensure continuity

Because committees' activities may continue from one year to the next, you might choose to make some leadership terms last for a few years or reappoint some members to the same roles 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 more ideas for your club to consider.
- Experienced committee members can share their knowledge to help the club run smoothly and facilitate effective change.
- Having newer members serve in leadership roles engages them more.



Be clear and be open to ideas

Make sure to explain each role and its responsibilities, but also listen to members' ideas for their roles and support them in pursuing their vision.

PREPARING CLUB OFFICERS

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

- Give each of them a job description for their role that outlines their responsibilities clearly.
- Suggest that they take courses for their role in the Learning Center.
- Encourage them to participate in the district training assembly to learn more about their role and to work together as a leadership team.
- Recommend that they meet with their predecessors.

Challenges in filling roles

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

YOUR LEADERSHIP STRATEGY

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

- How you can build a culture of innovation and inclusion within your club and your leadership team.
- How you'll lead members who have different work styles and perspectives.
- How you'll approach problem-solving.

- How you and the team will make decisions.
- How the club can set and achieve goals.
- How you can cultivate new leaders.
- How you'll delegate responsibilities.
- How you'll monitor progress toward goals.
- How you'll keep your team motivated.

What's next

Are you 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 club 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
- Managing Club Business
- 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

