

GET READY: CLUB PRESIDENT



This *Get Ready: Club President* textbook is one of the courses in the learning plan of Club President Essentials 1. Please visit the Rotary's Learning Center for further information needed on the Rotary website: [Rotary.org](https://www.rotary.org)

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Get Ready: Club President

Course Description

Learn about your role and responsibilities, the skills that will help you succeed, and how you can prepare for your term, including how to select and prepare club officers.

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Your role

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. Whether you're a new club president or are returning to this role, it's a great opportunity to lead your club and make a difference in your community.

Let's start by reviewing the responsibilities of your role.

Lead your club

- Preside at club meetings and ensure that they are carefully planned and begin and adjourn on time.
- Plan and lead monthly board meetings. If your club has a satellite club, arrange regular meetings with its board as well to promote continuity and success.
- Oversee the election of the club's officers and the board of directors for the next Rotary year.
- Appoint qualified club committee chairs and make sure they are reported to Rotary through My Rotary or your club management system.
- Ensure that each club committee has set goals and defined objectives.
- Attend the district conference if your district holds one.
- Collaborate with the governor and either your assistant governor or the district Rotaract representative on club and district matters.
- Collaborate with the club learning facilitator to implement a learning strategy for club members.
- Share important information from the governor and Rotary International with club members.
- Assess your club's current trends and set goals in Rotary Club Central, especially those labeled as priority goals.
- Submit an annual report to your club on its status before you leave office.
- Work with the president-elect in order to promote continuity and success.
- Arrange for the incoming board members to meet with the outgoing board.



Oversee club finances

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

Guide efforts to attract and engage members

- Work with the club membership committee to determine who will be responsible for managing membership leads.
- Work to make sure your club members reflect the diversity of your community.

Lead service efforts

- Work with the service projects committee to:
 - Determine whether current projects will continue next year
 - Gather information about your members' interest in leading or participating in service projects
 - Ensure that members have opportunities to use their expertise on service projects throughout the year
- Create an environment that safeguards young people, in part by adhering to Rotary's youth protection policies and the Statement of Conduct for Working with Youth and meeting the requirements for Rotary Youth Exchange if your club participates in it.



Develop or refine your club's public image strategy

- Work with the club's public image committee to create or update a communications plan.
- Serve as the club's spokesperson or designate another member to do so when working with the media.
- Make certain that Rotary and Rotaract logos are used properly and that the names of all projects follow the guidelines in the Brand Center.

Participate in and promote Foundation grants and programs

- Work with the club's Foundation committee to ensure that the club is qualified to apply for Rotary grants and maintains that qualification.
- Make sure that grant reports are submitted on time.
- Recognize club members for their contributions to The Rotary Foundation.
- Rotaract club presidents should encourage contributions to the Annual Fund to earn the Rotaract Giving Certificate.

Now, let's consider how you can prepare for your term.

Preparing for your role

Learn more about how you can prepare for your term.

Meet with the outgoing club president.

Learn more about the club's status and any challenges it's facing, as well as the 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.

Attend learning events.

Participate in your presidents-elect learning seminar and club leadership learning seminar.

Prepare club officers.

Encourage incoming club officers to attend the club leadership learning seminar or Rotaract club officer preparation.

Use My Rotary.

Ask your leadership team to create accounts and use the resources available to them. What members find on My Rotary is based on their role, so they'll have access to useful tools.

Report club officers to Rotary.

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

Set your club's goals.

Lead your club in setting and tracking goals in Rotary Club Central.

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

What skills do you need for this role?

Communication skills



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

Strategic thinking skills



Strategic thinkers consider multiple perspectives and ideas as part of the complete situation. What decisions are you and your club officers making that will affect the future success of your club? Think about your long-term goals and then create or refine your club's strategic plan.

Interpersonal skills



Think about how you'll build relationships, manage expectations, ask other club leaders to complete tasks, and provide feedback.

Delegation skills



At times, you may need to delegate tasks and projects to other club officers. Consider whether certain activities are the best use of your time or could be completed by someone else.

Motivation skills



Find out what inspires each member of your club to get involved. Regularly assess whether those factors are still effective, and make changes as needed.

Problem-solving skills

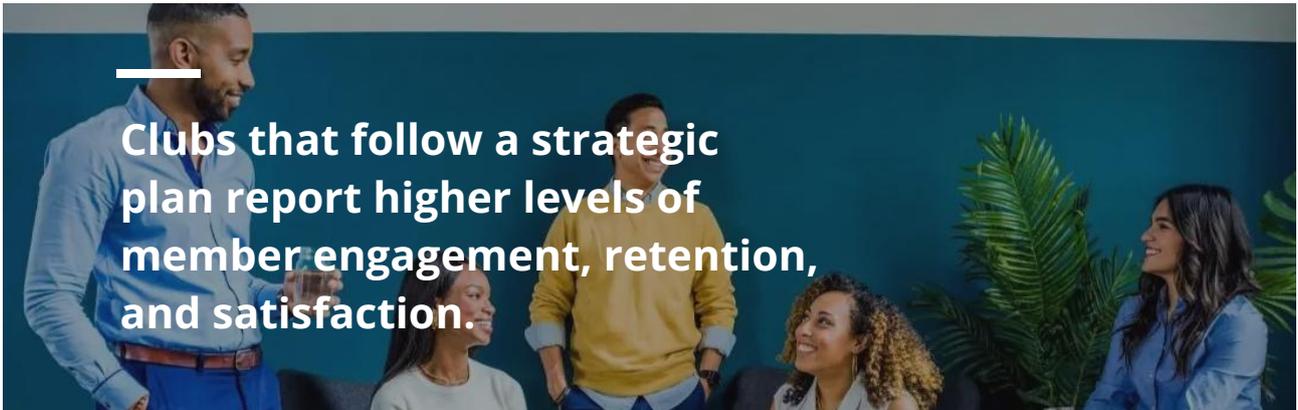


Think about how you'll address challenges in your club:

1. Identify the problem and any obstacles to solving it.
2. Consider your options.
3. Take action.
4. Assess the results and make changes if needed.

Now, let's consider how you can start planning for your year as president.

Planning for the 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 with your club 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. How can you apply the strategic priorities of the Action Plan in your own club? Align your goals with the Action Plan by thinking about how your club can increase the value of the membership it offers through club projects, activities, and processes, as well as member and community engagement.



Increase our impact.

How can you measure the results of your club's service projects? Doing so will help illustrate the impact your club makes and ensure that your projects are of value to the community, which will help attract members, partners, and donors.



Expand our reach.

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



Enhance participant engagement.

How can you create a club environment that members will value? Make sure you fully understand their needs and how they want to be involved in the club.



Increase our ability to adapt.

Are there ways to streamline club operations? Is the club experience a valuable one? Evaluating your club's processes and activities is essential to creating a strong basis for innovation, sustainability, and growth.

Setting goals

In thinking about the future you want for the club, it's essential to understand its present and recent past. You can find a five-year history of your club's performance in Rotary Club Central. Meet with your assistant governor or district Rotaract representative before the presidents-elect learning seminar to get their perspective and understand the club's recent trends and current situation. Then you can use your club's strategic goals to help you set annual and longer-term goals. Be sure to involve your club leadership team in developing the goals, because they will take part in implementing the plans.

The list of goals in Rotary Club Central includes six priority goals that all clubs should set, as well as additional goals you can select if they support your club's strategic plan. Club leaders can set goals for up to three years at a time. You'll want to review any previously set goals to decide whether they need to be updated and what goals to set for upcoming years.

Learn more below about setting 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 Club Health Check and use the results to identify your club's strengths and challenges.



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 members. Start by reviewing goals from the last year and those set for the next three years in Rotary Club Central. Which do you want to continue? Determine what worked well in the past and what needs to change.

Enter or revise your goals in Rotary Club Central by 1 July.

Step 3 Create action plans

After you determine your goals, develop specific plans for how you'll 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 then set milestones for achieving the goal.





Step 4 Evaluate progress

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

These Rotary and Rotaract club officers can set and edit goals for their terms in Rotary Club Central, starting the year before they take office and ending the year after:

- President
- Secretary
- Treasurer
- Vice president
- Foundation chair
- Membership chair
- Public image chair
- Service projects chair
- Club learning facilitator
- Executive secretary/director (for Rotary clubs)
- Club adviser (for Rotaract clubs)

Club Excellence Award

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

To be eligible for the Club Excellence Award, Rotary and Rotaract clubs need to pay each invoice balance in full (before receiving the 60-day reminder letter from Rotary International), and all clubs need to report that they achieved over 50% of the goals listed in Rotary Club Central.

You can find more information about the Club Excellence Award on the Awards page of My Rotary.

Building a strong leadership team

As club president, you're also responsible for overseeing the work of all club officers and helping them reach their goals for the year. These club committees are recommended by Rotary's governance documents to handle specific tasks and topics.

Rotary clubs:

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

Rotaract clubs:

- Service
- Professional development
- Finance
- Club administration
- Rotary Foundation
- Membership
- Public image

You can appoint additional committees and subcommittees as needed.

Selecting club officers

Everyone has the potential to become a better leader. Here are some tips for selecting club officers and helping them develop their skills.

Understand members' interests

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



Ensure continuity

Because a committee's activities may continue from one year to the next, you can choose to make some leadership terms last for a few years or reappoint some members to the same roles.

Choose a variety of members

Having a diverse array 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 operate smoothly and facilitate effective change.
- Having newer members serve in leadership roles engages them more.



Be clear as well as 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.

Report appointments through My Rotary or your club management system by 1 February for Rotary clubs or 30 June for Rotaract clubs.

Preparing club officers

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

- Give each of them the role's job description, which clearly outlines their responsibilities.
- Remind them to take the courses in the Learning Center that are required for their role.
- Emphasize the importance of their participation in the club leadership learning seminar so they can learn more about their role and 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 the leadership roles. Use the scenario below to find out how one club president approaches this issue.

Your leadership strategy

What will your leadership strategy be? As a president, you might lead in different ways depending on the situation. When you work with your team, consider:

- How you can build a culture of innovation and inclusion in your club and with 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 the club's progress toward its goals
- How you'll keep your team motivated

What's next

You've learned a lot about how to prepare for your role. Now, think about these questions as you prepare for the presidents-elect learning seminar:

- How does your club reflect Rotary's Action Plan?

- What part of your club's strategic plan has the biggest impact on your club?

- How will you involve your members in setting goals?

- What is your club's process for selecting officers?

- How will you prepare club officers for their roles?

Resources

You can access resources that will help you prepare for and carry out your role as club president.

Rotary Club Central

Review, edit, and set goals for your club.

Club Health Check

Use this tool to analyze your club's strengths and weaknesses and explore potential solutions.

Rotary's Action Plan

Learn more about our Action Plan and explore tools to use with your club, including the Strategic Planning Guide.

Brand Center

Download club logos, templates, and promotional materials to enhance your club's public image.

Awards

Learn more about the awards and recognition available from Rotary International, including details about the Club Excellence Award.

Club President Essentials: Learning plan description

Looking for ways to help your club succeed? Get advice on planning for your year, creating an engaging club experience, and working with your leadership team to help your club run smoothly.

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Courses in the Learning plan

- Getting Started with the Learning Center
- Get Ready: Club President
- Managing Club Business
- Working with other Club Leaders
- Minimizing Risk
- Rotary's Action Plan and You
- Best Practice for Engaging Members
- Rotary Club Central Resources
- Online Membership Leads
- Rotary Foundation Basics

