

# WORKING WITH YOUR CLUB LEADERSHIP TEAM

This Working with Your Club Leadership Team 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)

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# Working with Your Club Leadership Team

## Course Description

Learn how you can work with other club leaders to plan activities, structure committees, engage members, and set and achieve goals for your club.

As a member of your club's leadership team, it's important for you to know who else is on the team and to understand how you'll work with one another and with district leaders.

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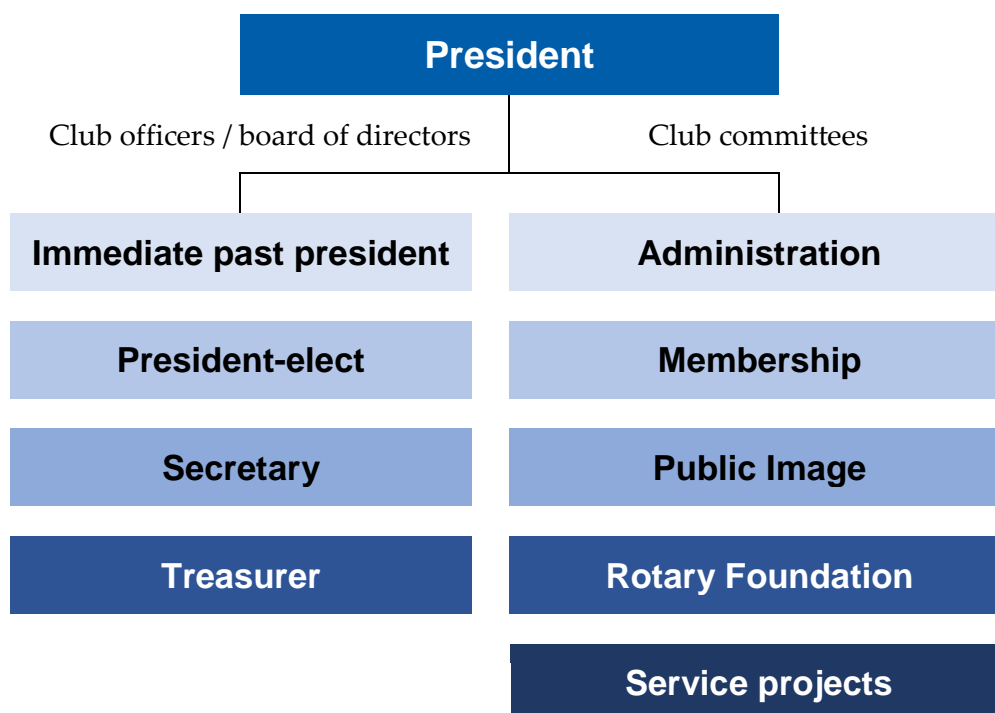
# Club Leaders: An Overview

Club leaders work together to organize activities, engage and educate members, and set and achieve goals. The leadership team includes:

- The board of directors
- Committee chairs
- Other officers as specified in your club's bylaws

The board needs to include at least the president, immediate past president, president-elect, secretary, and treasurer. It may also include other officers, such as vice president, president-nominee, or sergeant-at-arms. Make sure that any additional positions on your club's board are listed in your bylaws.

Learn more about these **Rotary club leadership roles**.



<b>President</b>	The president presides over club and board meetings, and oversees the work of club officers and committees.
<b>Immediate past president</b>	The immediate past president serves as a director of the club's board.
<b>President-elect</b>	The president-elect prepares for their year in office and serves as a director.
<b>Secretary</b>	The secretary manages the administrative aspects of the club such as membership information, club and board meeting minutes, and historical records.

<b>Treasurer</b>	The treasurer oversees all funds, including collecting membership dues and Rotary Foundation contributions.
<b>Administration</b>	The administration committee helps with meetings logistics, collecting club dues, and club communications.
<b>Membership</b>	The membership committee implements the club's membership plan and attracts, engages, and educates members.
<b>Public image</b>	The public images committee creates and implements a plan to tell Rotary's story to the public, and promotes the club's projects and activities.
<b>Rotary Foundation</b>	The Rotary Foundation committee inspires the club's members to participate in its activities and give to the Foundation.
<b>Service projects</b>	The service projects committee leads the club's humanitarian service initiatives by planning and carrying out projects.

### Other leadership roles

Select each card below to learn more about additional club leadership roles.

#### Vice president

This person serves as a member of the board and leads board meetings in the president's absence.

#### Executive secretary/director

This person carries out administrative duties for the club. This role differs from the club secretary role and can be a paid position held by a nonmember.

#### Sergeant-at-arms

This person maintains order at meetings, greets visitors, and may have other duties that are determined by the club.

#### Club trainer

This person works with club officers on events such as new member orientation and on other member training.

Officers and board members are elected, while committee chairs are appointed by the president. Review the Sample Club Committee Structure chart to find examples of how your club can set up its committees based on its size and needs.

## Knowledge check



Your club bylaws may list officers or board positions beyond the ones that Rotary International requires.

- ☐ True
- ☐ False

### **Answer: True**

Your board may include other officers, such as vice president, president-nominee, or sergeant-at-arms.

# The Board's Role

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As a member of the board, you help determine the club's direction and the experience members will have.

## The board's responsibilities

The board is elected to manage the overall interests of the club. It works closely with the president to achieve the club's goals. The Recommended Rotary Club Bylaws and the Recommended Rotaract Club Bylaws include some specific responsibilities.



### Oversee the work of club officers and committees

You and the other board members will guide the efforts of the other officers and the committee members to ensure that their work aligns with the club's goals and direction.

Review the goals throughout the year and work with the incoming leaders to set goals for the next year.

### Review the monthly club finance report

Each month, the treasurer will give a report to the board to detail the club's financial situation. You'll review this report to:

- Make sure the budget includes realistic amounts for club operations and projects
- Approve expenditures that aren't already listed in the club budget







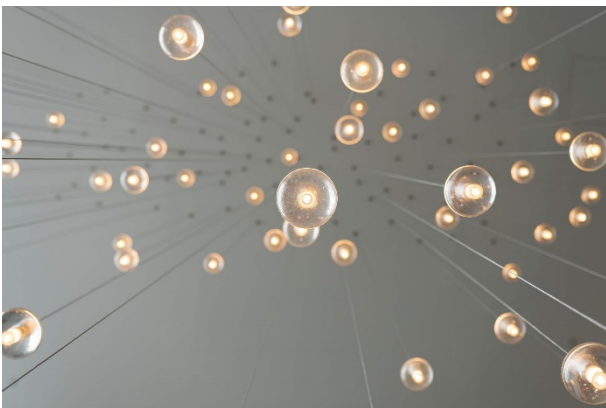
## Consider prospective members

You and the other board members will review prospective members and decide whether to invite them to join. You'll consider candidates proposed by current members as well as candidates from the online Manage Membership Leads system. (Do this within 30 days of receiving a lead.) Be sure to inform members who propose candidates of the board's decision.

## Review club policies

You'll review the club's bylaws regularly to ensure that they're current, that they're being implemented as intended, and that they reflect Rotary's diversity, equity, and inclusion practices.

Think about how you could simplify your club's processes, and then adjust your bylaws accordingly.



## Be innovative

You and the rest of the board will assess your club regularly to see if it's meeting members' needs and reflects the community.

Consider innovative ways to make the club more vibrant, more attractive to new members, and more engaging for current members.

## Know your community

Explore the needs of your community and the communities that you partner with to help you establish meaningful club goals.



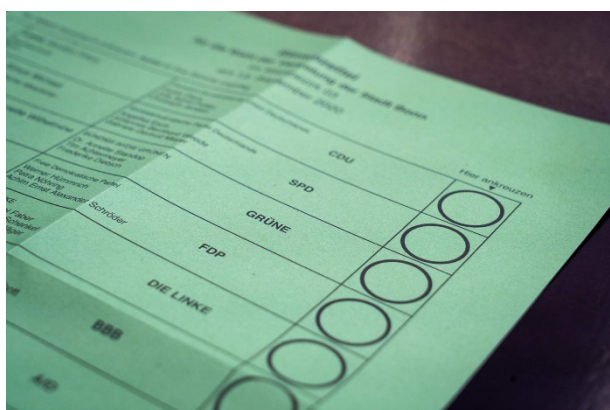
## Board meetings

The club board should meet regularly, usually once a month. Use this time to discuss ideas, evaluate your progress, and make decisions about prospective members, club practices, and other things that affect the whole club. You can also report on and discuss goals, activities, and projects.

You may also have to mediate disputes, terminate members, make decisions about harassment claims, or replace club officers if any roles become vacant during the year.

The president leads the board meetings. The secretary usually:

- Works with the president to set the agenda
- Sends meeting notices to board members and confirms that they'll attend
- Takes minutes and writes a report for the club within 60 days
- Invites the assistant governor if it's appropriate



## Elections

Elections for board members and other club officers for the year that starts 1 July are overseen by the president and should take place no later than 31 December. One month before the elections, members nominate other members who are in good standing for:

- President-elect (or president-nominee, depending on your structure)
- Vice president (optional)
- Secretary
- Treasurer
- Any open board positions

Consider giving descriptions of each club officer role to potential candidates before the elections. You can also publish the qualifications and duties for leadership roles on your club website or in your newsletter.

Review your club bylaws and the Recommended Rotary Club Bylaws or Recommended Rotaract Club Bylaws to find more information about the election process.

## Succession planning

Part of the board's role is to move the club forward and plan for its future. Evaluate your leadership structure to make sure it aligns with your club's strategic plan and with how members want the club to evolve.

Succession planning makes a club more stable. To support the club's goals and strategic plan, you and the rest of the board can collaborate not just with one another during your term but also with your predecessors and successors. When you're thinking about future leaders, look for people who have demonstrated leadership ability or the potential for growth. Make sure you create

opportunities for people with different kinds of experience in order to diversify your club's leadership. It's good for more people to be heard and for club leaders to have varied perspectives.

After you've prepared a succession plan, update your bylaws and make sure all members have a copy. Doing this annually can help your club be prepared if a leader unexpectedly steps down.

# How you'll work with each other

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Now that you know more about the leadership roles and the board's overall responsibilities, think about how you can work together to:

- Achieve your club's goals
- Plan projects and events
- Hold meaningful club assemblies
- Help members learn
- Recognize people's achievements

## Setting and achieving goals

Think about the goals you have for your role. Do they align with your club's strategic plan and Rotary's Action Plan? Making sure that they do will help your club become more vibrant and appealing to its members and to your community.

Think about how you and other club leaders can work together to achieve goals. Consider:

- What parts of the club does this goal affect?
- Who else on the leadership team can work toward this goal with me?
- What project can we collaborate on to achieve this goal?

## Planning projects and events

Organizing a project or event is a collaborative effort. Think about a project you'd like to implement or an event your club is currently involved with. Start by listing all the tasks that will need to be done. What parts of the club are affected and who can help?

A club planned a service project and needed the involvement of various club committees to accomplish it. Select each plus sign to learn how each committee helped the project succeed. Consider what your club's committees or other leaders might be able to do for your next project.



### ① Service projects committee

This committee worked with the president and other club leaders to plan the project.

When you plan a project, consider:

- What community issue is your club trying to address?
- Who from the leadership team should be involved in the community assessment?
- What kind of data from the project would it be useful to collect? Which aspects of your project will you measure?

### ② Membership committee

This committee developed a strategy to attract participants to the project and assessed members' interest in getting involved.

When you plan a project, consider:

- Is this project a good way to engage members?
- How many of the club's members typically participate in projects?
- What groups can you invite to work with you so that their members get to know your club better? Customize your message to each group.

### ③ Rotary Foundation committee

This committee applied for a district grant to fund the project and helped the service projects committee find other funding to support it.

When you plan a project, consider:

- How can you align the project with one of Rotary's areas of focus?
- What alumni can you ask to participate in the project and in the fundraisers for it?

### ④ Public image committee

This committee promoted the project and publicized the impact it made in the community.



When you plan a project, consider:

- What resources in the Brand Center can you use to increase people's understanding of Rotary and to build engagement in the community?
- How can you promote the project on social media and coordinate with your project partners to highlight your common interests?

## Planning meaningful club assemblies

A club assembly should inspire and engage all members. Most clubs have four to six assemblies each year, though some clubs hold them every month.

Work together to plan assemblies that are meaningful to members as well as to club leaders, and encourage all members to attend. You might use the assemblies to:



Talk about project ideas or update members about current projects



Discuss what members like about the club and what they want to change



Ask for input on the club's goals and strategic plan, and try to build consensus



Update people about committee activities and initiatives



Encourage participation in Rotary and Rotary Foundation programs



Celebrate the club's and its members' achievements

Consider these opportunities to hold club assemblies:

TIMING	PURPOSE
Immediately after the district training assembly (before 1 July)	Tell members about the plans that were developed at the district training assembly (the club president-elect would preside)
After 1 July	Discuss the club's goals for the year
Two weeks before the district governor's visit	Prepare for the visit
During the governor's visit	Discuss the club's status, projects, and goals with the governor
Midyear (January or February)	Review the club's progress toward its goals, discuss overall member satisfaction, and discuss plans for the rest of the year, including any needed changes

## Opportunities to help members learn

You and the other board members can also work together on meaningful experiences that motivate people to participate in your activities, join your club, and stay in Rotary. Help members find value in your club by making sure they know about the opportunities to learn and grow that Rotary offers. You can do this by talking with members about your own club's — and Rotary's — programs, projects, and resources and by offering professional development opportunities.

Take time to listen to both new and longtime members. A club's leaders all share the responsibility of talking with members to find out their interests and ideas for the club, whether they feel a sense of belonging, and whether being a club member is a good use of their time and money. Based on these conversations, discuss what changes are needed to make sure the club can evolve along with its members. This will engage people and cultivate new leaders.

Learn more about how you and other club leaders can help members gain knowledge and skills.

### **New member orientation**

Develop a program for new members that covers all aspects of your club and the various ways to get involved.

### **Club and Rotary topics**

Talk with members or have short presentations during club meetings to help people learn about the different areas of the club and Rotary.

### **Professional development**

Understand the skills people want to develop and suggest courses in the Learning Center, or integrate leadership development into club activities.

- ① **Rotary's Learning Center offers members many benefits, with courses about Rotary-specific topics and leadership roles as well as professional development topics like public speaking, leading change, and managing conflict. You might ask members to take a certain course and then use your next meeting to discuss that topic in greater depth or to practice a new skill.**

A designated club trainer can also help members develop skills or learn about specific topics. Ask people what they want from their membership and tailor the experience accordingly. The trainer can work with other club and district leaders to develop relevant and engaging programs.

## **Recognition**

The club board also has the ability to recognize members for their dedication and achievements.

Remember that club members are volunteers who value their time. You can show your appreciation first by keeping expectations reasonable. Find out what motivates each member of your club to get involved, and regularly assess whether those motivating factors are still effective. Make changes as needed.

Another way to show appreciation for your members' commitment is to recognize them with awards. Potential honors include:

- Membership Society
- Avenues of Service Award
- Rotary Foundation District Service Award
- Service Award for a Polio-Free World

See the Awards page to learn more about these and other types of recognition.



## Make recognition events inspiring and motivational

Find ideas about how to make an honor even more meaningful below.



Ask the governor to present the award.



Invite family members to attend.



Take photos at the ceremony and share them (with the participants' permission) on the club website and social media.

# How you'll work with the district

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Your district leaders (the governor, assistant governors, committee members, trainer, secretary, and past governors) want your club to succeed. The district supports your club by:

- Providing guidance about membership, projects, and other topics
- Connecting you with other clubs that are working on similar issues or projects
- Offering leadership and service opportunities
- Sharing updates from Rotary International
- Coordinating district grants, global grants, and programs such as Rotary Youth Leadership Awards (RYLA), Rotary Youth Exchange, and Rotary Peace Fellowships

Learn more about district leaders and how they support you.

## Governor

Your governor helps your club create meaningful experiences that engage new and longtime members. The governor works to inspire members to carry out service projects and participate in Rotary programs while ensuring that your club gets any support it needs.



The governor also:

- Strengthens clubs, organizes new clubs, and works to increase membership
- Encourages participation in Rotary Foundation programs
- Encourages contributions to the Foundation
- Serves as a spokesperson for the district and works to improve Rotary's public image

## Assistant

Your assistant governor is your main district contact throughout the year. Assistant governors interact with many clubs and observe various ways to approach common issues. They can share their insights to help you meet goals and overcome challenges.

Your assistant governor also:

- Visits your club regularly to talk about your activities, resources, and opportunities
- Helps your club set goals, find solutions to problems, and meet district and RI administrative requirements



## Secretary



The secretary handles the day-to-day activities of the district, such as:

- Helping club secretaries report membership information to the district
- Generating reports from Rotary Club Central or My Rotary to help club and district leaders see trends in membership or Foundation giving
- Providing other help to club secretaries as needed

## Committee Members

District committees are closely aligned with club committees, so their committee members can help you with issues in their area of expertise.

Required district committees	Optional district committees
<ul style="list-style-type: none"><li>• Finance</li><li>• Membership</li><li>• Public image</li><li>• Rotary Foundation</li><li>• Training</li></ul>	<ul style="list-style-type: none"><li>• Alumni</li><li>• Community service</li><li>• District conference</li><li>• Diversity, equity, and inclusion</li><li>• Interact</li><li>• International service</li><li>• Nominating</li><li>• Rotaract</li><li>• Rotary Youth Leadership Awards (RYLA)</li><li>• Rotary Youth Exchange</li></ul>

## Governor visits

During the year, the governor will visit with every club in the district, either individually or in groups, to offer support and guidance, give updates about the district's goals, and inspire members to achieve club goals. Work with the assistant governor and governor to schedule the visit to coincide with an event that highlights your club's accomplishments, such as a charter night, induction ceremony, club assembly, awards presentation, or Rotary Foundation event.

The governor will meet with the board to discuss your club's progress toward its goals. If you have questions about what the governor will expect, you can ask your assistant governor.

Learn more about how to prepare for the visit.



Review your club's progress toward its goals and consider what adjustments you should make.



Think about morale among club members and what feedback you've heard recently.



Decide what questions or concerns you want to discuss with the governor.



Prepare reports about your committee plans, activities, and accomplishments.

Assess your knowledge about working with the district. Match the district role or committee on the left with how each one might help you.



**Answer:**

1 – b, 2 – d, 3 – e, 4 – a, 5 – c

# Your communication plan

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Think about what kind of information you want to communicate, how you want to convey it, and how often you'll do so. Use this checklist to decide how you'll share updates within your club and with the district.

## Communication within your club

- ☐ Will various members of the leadership team be responsible for relaying certain kinds of information?
- ☐ What forms of communication work best for our members and for the prospective members we hope to attract?
- ☐ Who needs to know the information first?
- ☐ How will you determine how urgent a message is?
- ☐ How quickly should the information be given to members?
- ☐ How will different kinds of messages be communicated? (In person, by phone or text, by email, in a newsletter, or through instant messaging apps or secure social media groups.) Who will decide which method is best if a need to communicate arises suddenly?

## Communication with your district

- ☐ In what situations will club committees work directly with the district?
- ☐ What types of information will be shared with the district?
- ☐ Who will communicate with district leaders?

# What's next

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By building relationships with other club leaders, fostering collaboration, and communicating effectively, you'll be able to manage your club more efficiently.

You've learned a lot about how to fulfill the responsibilities of your role. Consider these questions as you prepare for the district training assembly and the year ahead:

- ☐ How will you strengthen your relationships with other club leaders?
- ☐ How can you motivate members to help the club achieve its goals?
- ☐ How will you identify future leaders and help them develop their skills?
- ☐ How will you work with your governor and assistant governor?