

Planning for Your Year 1st Time Presidents

Session Goals

- To review the expectations of a Club President
- To begin the discussion on the effective planning for a year

Resources

- **Lead Your District - President** - Initial Pages Describing list of responsibilities
- Chapter 1 - Planning your Year

Discussion Questions

1. **Introductions** - Allow your group to introduce themselves. Suggestion is name, club location and size. You could also ask for the one thing that their club is passionate about.

2. **Using the Resource Pages** - Have participants read and briefly discuss

- Responsibility as President-Elect
- Responsibility as President

Facilitator may either use the easel and create the list from the participants, or, have the group take turns reading the lines. Leave time for discussion of these points, but this entire exercise should not exceed 25 minutes. Appropriate questions would include: Why is this important? Or Have you thought of this? Place particular emphasis on Club Central.

3. **Why is it important to have a plan for your year as President?**

Facilitator is expected to lead the group to the conclusion that success hinges upon good planning.

4. **What are you planning for your year as President? Who should be involved in the planning process?**

Facilitator should allow discussion to progress. Ask about the plans for Membership, Public Image, Service Projects and Foundation. The crux of the discussion should get to the point that the entire club needs to be part of the planning process for success. Feel free to ask for examples.

5. **How will you actively seek to increase the Leadership and Succession Planning process in your club?**

Facilitators should allow open idea exchange. There is no right answer. The idea is to get your Presidents to think about succession planning earlier rather than later.

Second Time Around - Problem Solving and Planning

Session Goals

- To discuss participant's previous experiences as Club President
- To use that information to plan their year

Resources

Resources

Lead Your District - Initial Pages Describing list of responsibilities

- Chapter 1 - Planning your Year

Discussion Questions

1. **Introductions** - Allow your group to introduce themselves. Suggestion is name, club location and size. Ask them to list the one thing that they will definitely change in their next term, as compared to their last term.

2. **Using the Resource Pages** - Have participants read and briefly discuss

- Responsibility as President-Elect
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Facilitator may either use the easel and create the list from the participants, or, have the group take turns reading the lines. Leave time for discussion of these points, but this entire exercise should not exceed 25 minutes. Appropriate questions would include: How did you do this in your last term as President?

3. **Do you feel that you adequately planned for your last term as President ?**

Facilitator is expected to lead the group in a discussion which may end up with what was right/wrong about their last term.

4. **What are you planning to do differently this time? Who should be involved in your planning process?**

Facilitator should allow discussion to progress. Ask about the past and future plans for Membership, Public Image, Service Projects and Foundation. The crux of the discussion should get to the point that the entire club needs to be part of the planning process for success. Feel free to ask for examples.

5. How will you actively seek to increase the Leadership and Succession Planning process in your club?

Facilitators should allow open idea exchange. There is no right answer. The idea is to get your Presidents to think about succession planning earlier rather than later.

YOUR JOB AS CLUB PRESIDENT



As president you lead your club, engage and inspire members, and promote Rotary in your community. Find detailed information in *Lead Your Club: President*.

AS PRESIDENT-ELECT

Consult the club president on decisions affecting the club

Serve as a director of your club's board

Appoint committee chairs and a trainer for your year*

Supervise preparation of the club budget

Encourage incoming club officers to attend district training assembly

Create an account on Rotary.org

Attend your presidents-elect training seminar (PETS), district training assembly, and district conference

Set and track goals for your club in Rotary Club Central at Rotary.org

*Responsibility is indicated in the Rotary Code of Policies.

AS PRESIDENT

Set goals for each committee. Encourage communication between club and district committees. Review activities, goals, and expenditures and participate in decisions.*

Supervise the preparation of a club budget and proper accounting practices, including an annual financial review*

Make sure your secretary and treasurer have an account on Rotary.org to update membership and club data regularly

Collaborate with the governor and assistant governor on club and district matters*

Communicate important information from the governor and the Secretariat to club members*

Prepare for the district governor's required visit

Follow Rotary's youth protection policies and the Statement of Conduct for Working With Youth and implement the requirements for the Youth Exchange program

Plan and lead monthly board meetings*

Plan and lead interesting and relevant club meetings and organize fun social events*

Ensure that comprehensive training is conducted for club members, as needed*

Involve members in carrying out your club's goals outlined in Rotary Club Central

Track your club goals in Rotary Club Central

Encourage members to attend district meetings, and promote the Rotary Convention

Attend the district conference*

Submit an annual report to your club on the club's status before leaving office*

Work with your successor before leaving office*

Arrange for a joint meeting of the incoming board of directors with the outgoing board*

*Responsibility is indicated in the Rotary Code of Policies.



Rotary

JOIN LEADERS: www.rotary.org/myrotary/president

CHAPTER 1

PLAN YOUR YEAR



What are your goals for your year as club president? How will you connect with leaders in your community, club, and district to make positive, lasting change? As president, you're in a unique position to strengthen relationships, discover and celebrate your club's diverse perspectives, and apply your members' professional expertise and experience to improve communities at home and around the world.

You can help your club reach its goals by inspiring members to:

- Attract and engage members
- Carry out projects
- Contribute to The Rotary Foundation
- Participate in Rotary programs
- Develop leadership skills
- Promote the club's good work

Rotary's **guiding principles** give members a **common purpose** and direction, serving as a **foundation for our relationships with one another** and for the action we take in the world.

GOAL-SETTING RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Develop and evaluate your club's strategic plan to make sure it's current and relevant	Implement and regularly evaluate your club's progress toward its goals
Set annual goals in Rotary Club Central that build toward your club's long-range goals	Inspire every club member to participate in club activities
Create an action plan for each goal	Celebrate accomplishments
Attend training to develop goals with your leadership team	

Work with your club's leadership team to identify goals for your year as club president and after. Rely on the [Strategic Planning Guide](#) for developing goals and action plans.

YOUR CLUB LEADERSHIP PLAN

Find ideas for making your club effective, fun, and relevant in [Be a Vibrant Club: Your Club Leadership Plan](#). The guide includes regionalized best practices that you can use to develop your own club leadership plan.



Use the [Creating Your Club Leadership Plan](#) worksheet to create your own plan.

Review the [Recommended Rotary Club Bylaws](#) to create or revise your club's bylaws.

Review your club's current practices and talk with members to identify what's working and what isn't adding value. A well-thought-out club leadership plan can create:

- Members who are aware of club goals and willing to share their opinions about the club's future
- Members who are invested in their club's success
- Members who are engaged
- Club and district leaders
- Club succession plans that ease the transition from one Rotary year to the next

Your assistant governor can offer advice. To find other resources for strengthening your club, contact your [Rotary coordinator](#), immediate past president, or [Club and District Support representative](#).

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STRATEGIC PLANNING GUIDE

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Membership

Session Goals:

- To use facilitated discussion to create an attainable Membership Plan
- To explore new options for club Membership Expansion
- To discuss options for Membership Retention

Resources

- **Leading Your Club - President - Chapter 4**
- **Membership Assessment Tools**
- **Council on Legislation Changes - 2016**

Discussion Questions

1. Has your club net membership grown in the past 24 months?

This discussion should be short, UNLESS a participant has had a significant growth in their club. Then, it would be great for the successful ones to discuss their situations.

2. Does your club represent a cross-section of your community, or do you feel that your club is diverse in its nature? *Rotary is not exactly known for its diversity. Try to lead the group in a discussion of how to change that. Try to encourage ideas that will promote club diversity in classification, race, gender, nationality, language, and age.*

3. How does your club look for new members? Has it been successful?

This discussion could go so many different ways. Try to be prepared with ideas from the two resource guides. Don't forget to mention the empty-nesters and the newly retired, besides the young professionals.

4. Do you feel that your club has good retention of its members? Is it hanging on to members which are no longer healthy for the club? *It is worthwhile to have a discussion about how to keep members. Don't forget to discuss the changes from COL 2016, with regards to flexibility.*

5. How can you best determine what the best course of action could be for the future of your club? *This is a segway into the introduction of The Membership Satisfaction Survey, found on page 5.1- 5.10 in the Membership Assessment Tools. Also, one might mention exit surveys.*

CHAPTER 4

YOUR MEMBERS



Engaged and active club members make it possible to serve communities at home and around the world, to support the work of The Rotary Foundation, and to develop into future leaders. But most of all, engaged and active members make your club a fun place for all members.

Make certain that your membership reflects the diverse professions and cultures of your community. A diverse membership not only attracts potential candidates, it also promotes innovation and provides the skills and experience your club needs to make positive changes in your community.

MEMBERSHIP DEVELOPMENT AND RECRUITMENT RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint and meet with your membership committee	Lead by example: Propose a new member and encourage each member to do the same
Assess your club's membership and analyze trends	Coordinate committee efforts to develop ways to engage members
Set your club's annual membership goals in Rotary Club Central; align your goals with district's goals	Conduct a club assembly on successful strategies to attract new members
Implement innovative strategies to attract and engage members	Work toward full representation of your community's diversity in your club
Promote training for members at all stages, including new and current members	Recognize club members for sponsoring new members
Look for opportunities to sponsor a new club in your area	Recognize members for their contributions to the club
Define a strategy for engaging program alumni in club events and activities	Modernize your policies and procedures, making them flexible to address the needs of today's professionals



Your key resource is [Strengthening Your Membership: Creating Your Membership Development Plan](#).

CLUB MEMBERSHIP COMMITTEE

Developing a strong membership development plan is a strategic priority for Rotary. Your club membership committee is essential to implementing your membership plan. Its main role is to recruit, retain, and educate club members. Your club may amend its bylaws to reflect the specific responsibilities of your membership committee, adding subcommittees as needed. See appendix 5 for sample committee structures.

Plan meetings and activities during Membership Month (August) and Youth Services Month (May).

The membership committee should consist of Rotary members who have strong connections to a cross-section of the community, are interested in improving the membership experience for all your members, enjoy working with people, and have a thorough knowledge of Rotary.

Check in regularly with your membership committee to determine what new strategies are needed to achieve your membership goals.

Your membership committee has these responsibilities:

- Track your club membership goals in Rotary Club Central
- Promote the importance of attracting and engaging members
- Use classification surveys to target occupations and businesses in your community that are not reflected in your club
- Develop a plan for improving member engagement and for recruiting a membership that is diverse in age, gender, and ethnicity
- Survey members and initiate changes in response to feedback
- Use membership assessment tools to evaluate your club
- Sponsor new clubs in the community

5 THINGS YOU CAN DO NOW!

1. Make your meetings dynamic and inviting.
2. Give members the chance to use their knowledge and expertise, or learn new skills, by providing interesting and challenging assignments.
3. Provide flexible meeting times.
4. Plan family-friendly events.
5. Invite young professionals to experience Rotary by including them in your club's projects and social events.

Register for an upcoming membership [webinar](#) or view [recordings](#) of past sessions at www.rotary.org/webinars.

Subscribe to the [Membership Minute](#) e-newsletter and join the [Membership Best Practices discussion group](#) on Rotary.org.

ASSESS YOUR CLUB

As president-elect, you should work closely with your club's membership committee to assess your club and to establish membership goals in [Rotary Club Central](#). Find out how to evaluate your club in [Membership Assessment Tools](#). To understand membership trends:

- Review your club's long-range membership goals: What should the club look like in three years? In five years?
- Review your club's five-year membership profile and trends (club retention statistics, number of new members, number of new members who remain with the club, member demographics)
- Complete a classification survey regularly to identify professions represented in the community but not in your club
- Consult with your district governor, assistant governor, district membership chair, or Rotary coordinator
- Encourage participation in the district membership seminar
- Assess your club culture regularly to ensure that it's relevant; suggest whatever changes are necessary to make your club attractive to current and prospective members

Once you've evaluated your club's membership history and trends and drafted membership goals, develop an action plan for achieving them. Contact your [Rotary coordinator](#).

DIVERSITY

A club that embraces and celebrates diverse perspectives is simply more interesting and relevant. A diverse club can draw from a greater pool of experience and knowledge for creating positive change in your community.

Your club's representation of different ages, genders, and ethnicities should be as diverse as your community. Use surveys and assessments to evaluate your club's diversity and create an action plan to address opportunities for expanding it.

Rotary policy prohibits limitations on membership based on gender, race, color, creed, or national origin. Refer to the Rotary International Bylaws for more information.

ATTRACTING MEMBERS

New members can bring new vitality to your club, fresh ideas and energy, increased capacity to serve your community, and potential future leaders, all of which can help ensure your club's long-term success.

To encourage club members to invite new members, work with your membership committee to:

- Implement innovative new projects that spark interest or address a pressing need in the community
- Promote club activities using social media, direct marketing, and local media to show your club's impact on the community
- Target members of groups or professions in the community that are not represented in your club
- Reach out to Rotary alumni
- Invite prospective members to participate in events or projects

Take the Strengthen Rotary course in the [Learning Center](#) for more ideas on connecting with potential new members in your community.

Celebrate new members by holding a meaningful induction ceremony. Find ideas in [New Member Orientation: A How-to Guide for Clubs](#).

ENGAGING MEMBERS

Engaging current club members is as crucial as attracting new ones. To engage members, involve them in activities, assign them leadership roles, and communicate with them regularly. To devise a strategy for maintaining your club's membership, start by asking former members why they left.

Members who are engaged are dedicated, active, and motivated. Engaged members will make your club activities more fun and effective. They are also more likely to invite prospective members to join.

Use [Membership Assessment Tools](#) to identify your club's retention strengths and weaknesses, and then work with the membership committee to implement strategies for improvement.

Every member of your club should play an active role in introducing and welcoming new members. Assign a mentor to each new member to ease his or her transition into the club.

MOTIVATING MEMBERS

Common motivators include:

- Belief that goals will benefit the community and their club and that goals are achievable
- Social opportunities to connect with other volunteers
- Career networking opportunities
- Milestones showing progress
- Recognition of their efforts

RECOGNITION

Recognizing the efforts of club members is an important part of your role. See Rotary.org and appendix 6 for information about Rotary honors and awards.

Your district may have its own awards for clubs or individuals; ask your governor or assistant governor. Individual clubs are encouraged to develop their own awards.

As president, you present awards to club and community members. Maximize the motivational potential of such recognition events by:

- Inviting the governor to present the award
- Inviting family members to attend
- Photographing the presentation for club communications
- Inviting prospective members

YOUR ALUMNI CONNECTIONS

Your club has a valuable asset in the thousands of Rotary alumni who've participated in a Rotary program. They are powerful advocates for Rotary as well as potential members and donors. Rotary program alumni include those who have participated in any of the following programs:

- Interact
- Rotaract
- Rotary Youth Exchange
- New Generations Service Exchange
- Rotary Youth Leadership Awards
- Rotary Peace Fellowships
- Rotary Scholarships (funded by global grants and district grants)
- Vocational training teams (members and leaders)
- Ambassadorial Scholarships
- Grants for University Teachers
- Group Study Exchange (members and leaders)
- Rotary Volunteers

Invite alumni to become members. If they're not ready to join, encourage them to participate in club events and activities. Alumni can help your club:

- Connect with clubs from different countries for service and fellowship
- Promote Rotary by sharing their personal experiences of how Rotary changes lives with club members and the media
- Encourage involvement in Rotary programs to their peers
- Select, orient, and host program participants

Subscribe to the quarterly e-newsletter Reconnect to learn about alumni activities, events, and news.

Club officers can access a report on Rotary.org that provides names, program details, and contact information for all former Rotary program participants associated with your district.

Rotary offers alumni a global network of influencers, including community and business leaders, who can be a tremendous resource throughout their careers. Emphasize the opportunities and advantages of being involved in Rotary when speaking with alumni about their involvement in your club.

NEW CLUBS

If your club sponsors a new Rotary club, be sure to assign members the following responsibilities:

- Assisting in planning and organizing the administrative processes of the new club
- Helping to organize the new club's programs and projects
- Reporting to the district governor as requested on the new club's progress during its first year
- Serving as a mentor to the new club for at least two years

When you hear of a group of committed Rotary members who'd like to meet at a different time or day, or a group of active and engaged community members who can't meet at your club's prescribed day and time, suggest they start a new club and offer to sponsor them.

For more information, contact your district governor, district membership committee, or district extension committee. Find information about how to [start a club on Rotary.org](#).

Presidents of Rotary e-clubs have different club meeting responsibilities, noted in the [Standard Rotary Club Constitution](#). Find additional information in [What You Need to Know About Rotary E-Clubs](#), or contact your [Club and District Support representative](#).

Elective - Club Operations and Administration

Session Goals

- To review best practices for running a meeting
- To discuss the basics of club management
- To review best practices for administration

Resources

Leading Your Club - President - Chapter 2 and 3

Leading Your Club - Club Administration Manual

Discussion Questions

ICEBREAKER - Ask the participants to describe the qualities of the WORST meeting they have ever attended - Rotary or not. After the scribe writes down the list, take the paper down, tear in half and say “Don’t do that!”

1. Based upon the exercise just completed, ask participants how they will run engaging and fun meetings. *This is a great opportunity for the participants to exchange ideas. At some point, make sure that you mention the importance of an agenda. Discuss strategies for dealing with meetings that start to veer off course, like tabling and making it clear that the meeting will stay on point and, if time permits, bring the item back up for discussion. Also, make sure that the participants get the idea that it is important to be fully prepared. Review Pages 12-13 to get additional ideas.*

2. Ask the participants to discuss how they are planning to oversee the club’s reporting requirements. Stress that President Ian Riseley wants TWO numbers from each club this year: How many volunteer hours were given and how much total money had been donated through the club. *Be ready to list the reporting requirements, including dues payments and membership reporting. A complete list is on Page 15. The facilitator should guide the participants to get to the conclusion that the easiest way to do this is through Rotary Club Central. Don’t forget that Club Central will have a completely new look on July 1. Club Presidents should get into the habit of checking their dashboards on a weekly basis.*

3. Discuss with the group the value of the District Governor’s visit. How can they get club members involved in planning for the visit? *Discuss how the club should prepare. Make sure that you mention that the DG visit is to be the only program of*

discussion. Be sure to mention that the Board should be involved with a personal visit, as well. The District should be a valuable resource for any questions regarding Club Operations.

4. Lead the group in a discussion about Financial management for the club.

Discuss the importance of a budget and that dues are due July 1 and January 1. Make sure that they realize that all invoices are now electronic. Ideas for this discussion may be found on pages 16-18.

5. Discuss the benefits of having a written Risk Management plan. *Planning for anything that can go wrong, decreases risk exposure and safeguards the members.*

6. Discuss how the participants will encourage their club members and officers to attend training events.

7. Ask the group if they have ever seen the Club By-Laws. *It is very important that if they avail themselves of some of the key changes from COL 2016, the club by-laws must reflect those changes. Reference p. 15-16.*

8. Open the floor for any questions regarding the administration and management of their clubs. *Be prepared for any number of questions. If you are asked something that you do not know, be sure to have the individual contact their District Governor Elect. Don't forget that the Manual of Procedure is online and searchable.*

CHAPTER 2

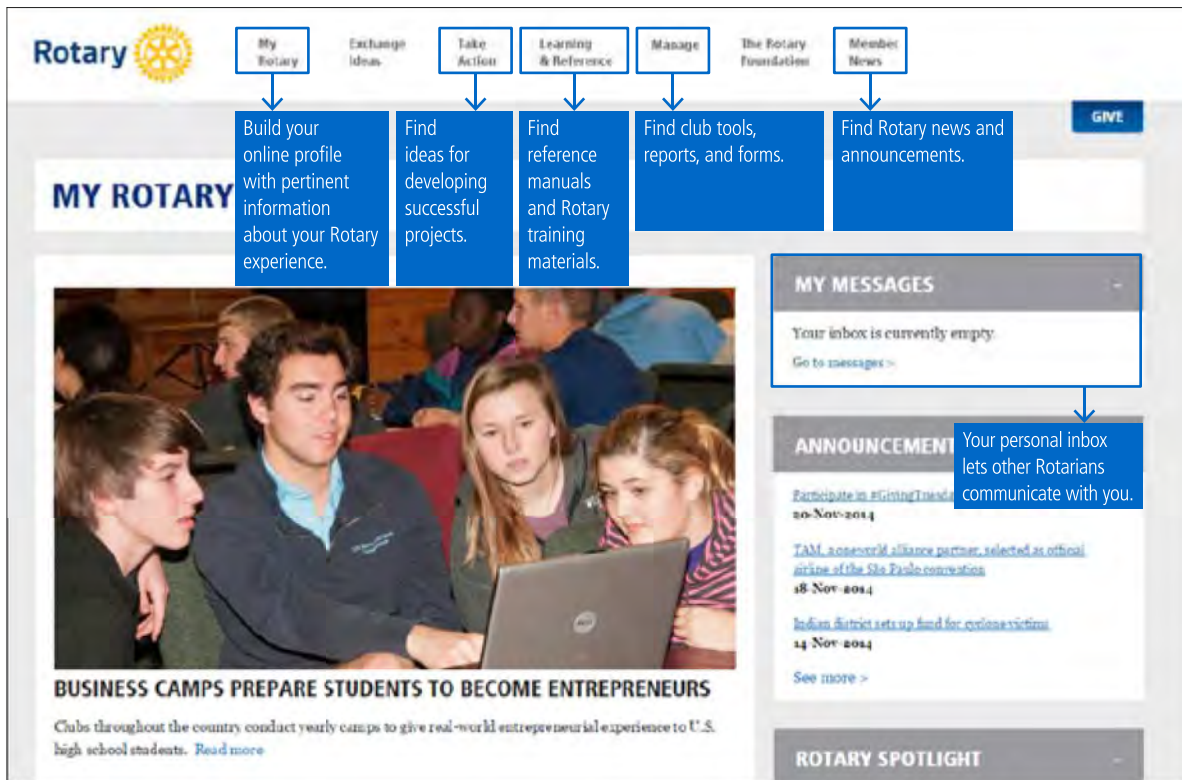
CLUB MANAGEMENT



Although managing your club is the board’s responsibility, as president you’re charged with seeing that your club runs efficiently and effectively. Whether you’re planning board meetings and club assemblies, preparing for required visits from district leaders, or overseeing club finances, your leadership is vital.

Rotary.org has resources to help you manage your club. Assistant governors and your Club and District Support representatives can also answer questions throughout the year.

AS PRESIDENT-ELECT	AS PRESIDENT
Appoint and meet with your club administration committee	Run engaging and fun club meetings, board meetings, and club assemblies
Learn about club policies and procedures by reviewing the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws	Oversee the club’s reporting requirements and check with the club secretary to make sure changes to your membership list are made within 30 days
Work with club leaders to update your club’s constitution and bylaws	Prepare for the district governor’s visit and visits from your assistant governor
	Oversee the management of club finances and make sure your club invoice is paid
	Encourage members to attend district training meetings
	Minimize risk associated with club activities
	Make certain the Rotary logos are used properly



MY ROTARY

By creating an account on [Rotary.org](https://www.rotary.org) you gain access to the latest reports, information, and tools. Your account helps you do Rotary business quickly and efficiently and ensures that Rotary has accurate records for your club. It also allows you to:

- Customize and share your profile
- Join or start a [discussion group](#)
- [Find volunteers, partners, and donations for your projects](#)
- View a [dashboard](#) of important links, documents, and online communities
- Take online courses to help you prepare for your year as club president

The [Manage](#) tab on [Rotary.org](https://www.rotary.org) reveals the tools and links you'll need to effectively manage your club. Use these features and resources to make your year a success.

You can carry out a variety of duties and stay informed on [Rotary.org](https://www.rotary.org):

- Update personal information
- Rotary Club Central goals and reports ([learn more](#))
- [Club officer reports](#)
- Update club data
- Update membership data (add, edit, or remove members)
- Daily club balance report
- Contribution and recognition reports
- SHARE and polio reports

- Contribution access and contribution history
- Manage newsletter subscriptions
- Search the [Official Directory](#)

Only you and your club secretary can activate access rights for other officers, so be sure that club officers are reported by 1 February for the following year. Add new officers by choosing the link on the Club Administration page of Rotary.org.

ROTARY CLUB STANDARDS

The Rotary International Board of Directors has adopted these minimum standards for an effective club:

- Pays its Rotary membership and district dues without outside assistance
- Meets regularly
- Makes sure its members subscribe to The Rotarian or a Rotary regional magazine
- Implements service projects that address needs in the local and international community
- Receives visits from the governor, assistant governor, or an RI officer
- Maintains appropriate liability insurance for the geographic region in which it is located, or pays mandatory liability insurance with the club dues invoice (United States and its territories only)
- Acts in a manner consistent with the [Rotary International Constitution](#), [Rotary International Bylaws](#), and [Rotary Code of Policies](#)
- Updates club membership and officers in a timely manner at Rotary.org, via data integration, or by sending information to data@rotary.org
- Resolves club disputes in an amicable manner
- Maintains cooperative relations with the district
- Cooperates with Rotary International by not initiating or maintaining litigation against it, The Rotary Foundation, associate foundations, or the international offices of the Secretariat
- Follows and completes the election review process established in the Rotary International Bylaws

These standards are only the beginning of what makes a successful Rotary club. Work with your assistant governor to ensure that your club reaches its full potential.

CLUB ADMINISTRATION COMMITTEE

Although you oversee the management of your club, your administration committee carries out the specific responsibilities. Your club can amend its bylaws to reflect the specific responsibilities you assign the committee, and any subcommittees you deem necessary.

Appoint your club secretary and treasurer to this committee. The committee chair, appointed by you, will be part of your club leadership team (see chapter 3 for more information).

Give your club administration committee these responsibilities:

- Help the club secretary track club attendance
- Maintain club membership information and report changes to Rotary International
- Help the club treasurer collect member dues
- Organize interesting and fun club meetings
- Organize social events for club members
- Produce club communications, such as the club newsletter and website

The Origin of Rotary

The name “Rotary” originated with the practice of rotating meeting sites among members’ places of business. Use a variation on this idea to keep members connected and engaged in meetings.

ROTARY MEETINGS

Club, district, and international meetings enable club members to connect and share ideas for creating positive change. In the following sections, you’ll find tips to help you prepare for such meetings.

Meeting with your club board is an important part of your role as president. At these meetings, decisions will be made about new members, club practices, and other matters affecting the whole club. Be sure to clearly communicate your expectations to your team and allow time for board members to report on and discuss concerns about their activities and projects. (See chapter 3 for more information.)

Be sure to promote the Rotary Convention, district training assembly, and district conference to your members.

For details on these Rotary training events, see appendix 2.

RUNNING SUCCESSFUL CLUB MEETINGS

The club meeting is where most members experience Rotary. They catch up with friends, hear what’s happening in their community, and organize club activities and projects. Make sure your meetings are connecting with members by creating programs that encourage a sense of pride in being a member, increase awareness of local and global issues, and keep members informed of Rotary initiatives. Show Rotary Videos to begin your meeting to showcase projects around the world. Display a slideshow of Rotary Images and your club’s photos to show pride in Rotary members at work.

Your club administration committee can help you develop engaging club meeting agendas. Encourage innovative ideas for a fun, inspiring, and interesting meeting.

Plan meetings to coincide with special observances on the Rotary calendar, such as Membership Month (August), Rotary Foundation Month (November), and Rotary Fellowships Month (June).

SAMPLE AGENDAS FOR CREATIVE CLUB MEETINGS

WEEK 1: REGULAR CLUB MEETING	WEEK 2: AFTER HOURS MEETING
<ul style="list-style-type: none"> • Welcome members and introduce guests • President announcements • Member profile: sharing about your profession, family, etc. • Featured speaker or update on projects in progress or being planned <ul style="list-style-type: none"> – What have you achieved so far? – What is needed from the club? – What is the timeline? – How are we involving the community? – How are we promoting the project? – Which members are involved? • Open forum • Closing remarks 	<ul style="list-style-type: none"> • Welcome members and introduce guests • Hold at a different location and time from your regular meeting (perhaps a member’s home or a bar or restaurant) • Schedule a featured speaker or local personality • Plan a speedmeet with timed conversations about project ideas • Discuss ideas over snacks and drinks
WEEK 3: WORKING MEETING	WEEK 4: BRING A FRIEND MEETING
<ul style="list-style-type: none"> • Welcome members and introduce guests • President announcements • Featured speaker, community organization presentation • Strategic plan <ul style="list-style-type: none"> – Revisit the club’s vision: Where do we want to be in three years, and are we on track? – What still needs to be done? – Has anything changed that affects our plan? Do we need to change the plan? • Open forum • Closing remarks 	<ul style="list-style-type: none"> • Welcome members and introduce guests • President announcements • “Guest” activity (ask a guest to speak, highlight a project related to the theme) • Open forum • Closing remarks

CLUB ASSEMBLIES

Club assemblies offer an opportunity to exchange ideas and share information about issues of importance to your members. Most clubs hold four to six assemblies per year.

Encourage attendance by all members, but especially new members. You, or another designated club officer, should lead club assemblies. Seek out member input to make certain that the meetings address their interests and concerns. Below are some suggested timeframes and topics for club assemblies.

TIMING	PURPOSE
Immediately after the district training assembly (before 1 July)	To share plans developed at the district training assembly (club president-elect presides)
After 1 July	To discuss goals for the year
Two weeks before the district governor's visit	To prepare for the visit
During the governor's visit	To discuss the club's status with the governor
Midpoint of year (January/February)	To review progress toward club goals and determine the plan for the rest of the year
April or May	To provide an opportunity for open discussion (ideas for bringing club projects and activities to completion)

GOVERNOR'S VISIT

One of your district governor's core responsibilities is to visit all clubs in the district, either individually or in groups, to provide support and present an update on district goals. This visit is an opportunity for your club to discuss your goals, achievements, and concerns with the district leader.

If possible, schedule the governor's visit to coincide with an event that highlights your club's accomplishments, such as a charter night, induction ceremony, new member orientation program, award presentation, or Rotary Foundation event.

To prepare for the visit:

- Review your club's progress toward its goals. Reflect on member morale. Identify questions or concerns you want to discuss with your district governor.
- Organize reports of committee plans, activities, and accomplishments.

ELECTIONS

During your first six months in office, you will oversee the election of club officers and the board of directors for the next Rotary year. The club board consists of the president, president-elect, secretary, and the immediate past president; vice presidents, if elected, may also serve on the board. Check your club's bylaws for information about the board selection process. Officers and directors must be members in good club standing.

Consider holding an officer installation meeting at the beginning of the Rotary year (see appendix 3 for a sample club officer installation agenda). It's a great way to bring members together to show support for their new club leaders and appreciation for the outgoing board.

REPORTING REQUIREMENTS

It is critical to keep your club information in Rotary's database up-to-date. Every club is required to submit the following:

- To Rotary International
 - Changes to club member data by 1 July and 1 January in order to receive a correct club invoice
 - New and terminated members within 30 days
 - New officers for the next Rotary year by 1 February or new club meeting information
 - Information for the Official Directory by 1 February
 - Use of Rotary Foundation funds, if your club has been awarded a grant
- To your district
 - Club goals (using [Rotary Club Central](#))
 - Monthly attendance figures
 - Membership goals by 1 June (using [Rotary Club Central](#))

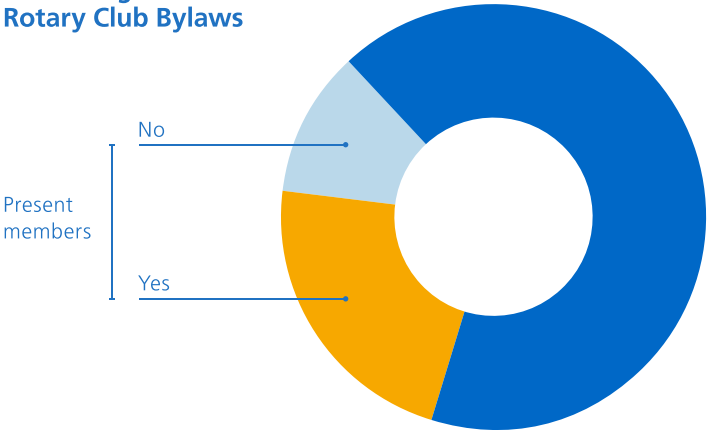
CLUB CONSTITUTION AND BYLAWS

The Standard Rotary Club Constitution provides the basic rules for all Rotary clubs. It is updated every three years to include changes enacted by the Council on Legislation. Your club's bylaws provide additional guidelines for managing your club. Use the [Recommended Rotary Club Bylaws](#), which reflect current Rotary policy, as a template, adapting them to reflect your club's culture. Review your club bylaws regularly and update them as needed.

Your club members must vote on any proposed amendments to the bylaws. Be sure to notify members about the proposed amendment at least 10 days before a regular meeting, then be sure at least one-third of active members (a quorum) are present to vote. In order to pass, the amendment needs the votes of two-thirds of the members present.

Amendments must conform to the Standard Rotary Club Constitution and the Rotary International Constitution and Bylaws.

Amending the Recommended Rotary Club Bylaws



Quorum: 1/3 of members
Pass: $\geq 2/3$ of quorum

Example:
63 Members in a club
21 Members are present
14 or more members
need to vote yes to
amend the bylaws

FINANCIAL MANAGEMENT

Your fiscal responsibilities include monitoring club funds, practicing good stewardship, and making sure that the club complies with all applicable local laws, including those concerning taxes and nonprofits. (See appendix 4 for financial management best practices.)

DUES AND FEES

Work with your club treasurer to review or establish a system for collecting and paying dues and fees.

Club dues. Club dues can be collected weekly, monthly, or quarterly, as determined by your club, with the dues amount set each year. These dues, which vary by club, generally fund operating expenses such as meetings, meals, speaker gifts, and supplies and should be based on your annual budget.

Admission fee. This fee for new members should be outlined in the club's bylaws. It applies to all members except transferring or former members of other clubs and Rotaractors.*

District dues. Many districts maintain funds for financing district-sponsored projects and supporting district administration, with each club contributing through per capita dues. The amount is approved each year at the presidents-elect training seminar, the district training assembly, or the district conference.

Rotary dues. Twice a year, clubs are charged per capita dues as follows:

2015-16: \$27.50

2016-17: \$28.00**

* See the Standard Rotary Club Constitution, Article 11, for more details.

** Dues will remain constant after 2016-17 unless changed by the Council on Legislation.

All dues are payable on 1 July and 1 January. For each new member admitted within a club billing cycle, the club must pay prorated dues to Rotary International — one-sixth of the amounts listed above for each full month of membership.

These dues pay for the organization's general operating expenses and give you access to Rotary International services and resources, including publications in multiple languages; club, district, and project support; training, guidance, and resources for incoming club leaders; and the Rotary website.

Rotary fees. Besides dues, Rotary members are charged for required magazine subscriptions, Council on Legislation fees, and other expenses.

CLUB INVOICE

Rotary sends an invoice to the club secretary in July and in January, which is based on your club's membership list on 1 July and 1 January.

Your secretary is responsible for adding and removing members within 30 days. Be sure your club membership list is kept current so you receive an accurate invoice. You, the club secretary, or club treasurer can pay the invoice by credit card on [Rotary.org/Manage/Club Administration](https://Rotary.org/Manage/ClubAdministration).

Your club's invoice includes Rotary per capita dues and magazine subscriptions (two Rotarians residing at the same address can subscribe jointly to the official magazine). Your July invoice also includes Council on Legislation fees.

Submitting dues guarantees your club's membership and good financial standing in Rotary International as well as access to Rotary resources.

TERMINATION AND REINSTATEMENT

Any club that doesn't pay its dues and fees to Rotary on time will be terminated four months after the most recent invoice date. The club can also be suspended or terminated if any of its members has misused funds from The Rotary Foundation.

Termination. Four months after the 1 January or 1 July invoice date, clubs with unpaid per capita Rotary dues will be terminated. Clubs that have not fulfilled their entire financial responsibility within 150 days of termination will lose their original charter and will not be eligible for reinstatement.

Reinstatement. Within 150 days of termination, the club must pay all financial obligations to Rotary, including a reinstatement fee of \$30 per member. The club must provide a current list of members to ensure that accurate data is recorded at the time of reinstatement.

Member termination. Your club secretary should contact any club member who fails to pay dues within 30 days after the deadline, communicating an absolute deadline and the amount owed in writing. If the dues aren't paid within 10 days of the notification date, membership may be terminated, if the board agrees. The board may reinstate membership if the terminated member petitions and pays all his or her club debts.

TAXES

Check with local and national tax codes to determine which forms your club must file, if any. Consult your district finance committee and assistant governor for more information.

All clubs in the United States are required by law to submit an informational return to the Internal Revenue Service every year. Contact the IRS for more information.

FUNDRAISING

Make an impact during your year as president with projects and activities that meet the needs of communities at home and around the world. An effective fundraising plan is key to supporting your projects and Rotary's global humanitarian efforts.

Make sure your members follow these financial best practices to promote transparency:

- Report money earned through fundraising to your local government.
- When promoting fundraising activities, clearly identify where the funds will go: to a local club, the district's own foundation, The Rotary Foundation, or some other entity.
- If a fundraising event qualifies as tax-deductible, issue receipts to donors.
- Submit contributions to The Rotary Foundation separately from payments to Rotary International.

Club foundations. If your club has or plans to set up a foundation or charitable trust, be sure it follows local laws. Consult with your local tax authority about reporting requirements, and contact your [Club and District Support representative](#) for more information.

RISK MANAGEMENT

To make certain that your club identifies and manages potential risk exposure and safeguards members, program participants, and assets, consider these basic questions when planning activities and events:

- What can go wrong?
- If something goes wrong, how will I or the club respond?
- How will any losses or damages be paid?

If there's a significant possibility that something could go wrong, you can reduce risk by:

- Not conducting the activity or event
- Modifying the activity or event to minimize risk
- Preparing a plan to address problems
- Finding or hiring another organization that will agree to participate and share the risk

Lead Your Club:
Treasurer has more information about club foundations. Find more information about planning a fundraiser in [Lead Your Club: Service Projects Committee](#).

Financial and risk management best practices are listed in appendix 4.

Although conducting business with handshakes or verbal agreements may be common, Rotary strongly recommends using written contracts. A contract should clearly define the roles and responsibilities of each party and may include provisions to limit or transfer risk. Involve a legal professional whenever working with contracts, and always read and be sure you understand the contract before signing. Keep contracts or other legal documents for several years after an event in case of a liability claim.

We urge clubs to obtain professional legal and insurance advice about liability protection. For example, seek professional advice about incorporating the club (or its activities) or purchasing appropriate liability insurance coverage. Clubs in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged by Rotary and paid for by U.S. Rotarians. Clubs outside the United States should consider purchasing insurance if they do not already have it. See the [Manual of Procedure](#) for additional information.

DISCUSSION QUESTIONS

What are your personal goals for managing your club?

What innovative ideas would you like to implement in your year?

How will you get members involved in planning for your governor's visit?

APPENDIX 2

ROTARY TRAINING EVENTS

District Training Events Convened by the Governor-elect

Training Events/ Time of Year	Purpose	Organizer	Materials
District team training seminar February	Assistant governors and district committee leaders learn their new roles and responsibilities and work on district goals and the district leadership plan.	District training committee	For leaders: District Team Training Seminar Leader's Guide For participants: Lead Your District manuals for assistant governors and committees
Presidents-elect training seminar (PETS) February or March	Club presidents-elect learn their new responsibilities and work with assistant governors to set their goals.	District training committee	For leaders: Presidents-elect Training Seminar Leader's Guide For participants: Lead Your Club: President training manual
District training assembly March-May (after PETS)	Club presidents-elect build on PETS training to gain leadership skills, while other incoming club leaders learn their new responsibilities. Club leadership teams refine their goals for the year.	District training committee	For leaders: District Assembly Leader's Guide For participants: Club Officers Kit manuals for: President Secretary Treasurer Committees
District membership seminar April or May (after district training assembly)	Club presidents, club membership committee chairs, interested Rotarians, and district leaders learn how to sustain and increase membership.	District membership committee	For leaders: District Membership Seminar Leader's Guide For participants: Determined by the district
Grant management seminar Determined by the district	Club presidents-elect (or club-designated appointees) learn how to manage Rotary grants. Clubs applying for global grants must attend.	District Rotary Foundation committee chair, grants subcommittee chair, district training committee	For leaders: Grant Management Seminar Leader's Guide For participants: Manage Your Global Grant manual

District Training Events Convened by the Governor

Training Events/ Time of Year	Purpose	Organizer	Materials
District Rotary Foundation seminar July-November	Club Rotary Foundation committee chairs and interested Rotarians learn about the Foundation and Rotary grants.	District Rotary Foundation committee, district training committee, regional Rotary Foundation coordinator	For leaders: District Rotary Foundation Seminar Leader's Guide For participants: Determined by the district
Leadership development program Determined by the club	Club members gain leadership skills that apply both to their professional lives and their leadership roles in Rotary.	Club trainer, president, assistant governor, district training committee	For leaders: Leadership Development: Your Guide to Starting a Program For participants: Materials developed by the club or district
District leadership seminar Immediately before or after the district conference	Current or past club presidents and other club leaders who have served three or more years learn about leadership opportunities in Rotary.	District training committee	For leaders: District Leadership Seminar Guide For participants: Determined by the district
District conference Any time except at the same time as the district training assembly, during the Rotary institute, the International Assembly, or the Rotary convention	Rotarians hear inspirational addresses and discuss matters of importance to clubs and Rotary International.	District training committee	For leaders: District Conference Manual
Rotaract district leadership training meeting Any time after club open elections and before 30 June	Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and the general public learn about Rotaract.	District Rotaract representative	For leaders: Guide for District Rotaract Leaders

APPENDIX 3

INSTALLATION OF CLUB OFFICERS

The following suggested agenda for the installation of officers can be adapted as needed.

1. Remarks from outgoing president (presider)
2. Outgoing officers and directors thanked
3. Continuing directors and officers acknowledged
4. New president installed

Oath for the president

I, _____,
as president of the Rotary Club of _____,
will, to the best of my ability, administer the duties of the office of president in a business-like manner and in accordance with the club's constitution and bylaws.

5. Presentation of past president pin to outgoing president
6. Installation of incoming officers and directors

Oath for officers and directors

I, _____,
do accept and understand the charges of the office to which I am elected and will work with diligence for the betterment of the club.

7. Introduction of committee chairs
8. Passing of the gavel

Outgoing president

I hereby declare the new officers and directors installed and give president

_____ the gavel as a symbol of the transfer of the club's administration.

9. New president's address

APPENDIX 4

FINANCIAL AND RISK MANAGEMENT BEST PRACTICES CHECKLIST

Review the items below to ensure that your club follows transparent and professional financial practices. Select qualified professionals to implement these best practices appropriately.

FINANCIAL MANAGEMENT

- Register the club with all government entities, as required.
- Submit club documentation and tax filings, as required by local and national tax codes.
- Set up club bank accounts appropriately and assign two signatories to each account.
- Establish procedures for handling club funds.
- Develop a budget and follow it.
- Make sure the club has procedures for sending contributions to The Rotary Foundation and sending dues, on time, to Rotary International.
- Make sure the club has a procedure for reporting officers and their contact information (including email addresses) to Rotary International.
- Comply with laws regarding donated funds and payment of dues.
- Have the annual financial report reviewed by a qualified accountant who is not involved with the regular management of club funds.
- Make sure club officers are educated about financial best practices and that there is continuity of procedures with incoming officers.

RISK MANAGEMENT

- Limit liability by anticipating what can go wrong, what the response will be, and how losses or damages will be paid.
- Use written contracts when appropriate, involve local legal counsel when working with written contracts, and retain contracts and other legal documentation appropriately.
- Consult with a legal and insurance professional about liability protection for your club's events and activities.
- Ensure your club has appropriate liability insurance for its activities and operations; consult a local insurance professional.
 - Clubs and districts in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged by Rotary and paid for by U.S. Rotarians.

2016 COUNCIL ON LEGISLATION UPDATES



There have been many changes to Rotary policies and procedures since your leadership manuals were written, including some from the 2016 Council on Legislation. Here is a summary of those changes, which override entries in the Lead Your Club manuals. The most recent versions of the club constitution and bylaws are available on Rotary.org.

GENERAL INFORMATION

The following changes to the Bylaws of Rotary International, effective 1 July 2016, apply to all Rotarians:

Becoming a Rotarian

Clubs may determine their own rules for transferring members, dual membership, and honorary members. They're also free to continue following the traditional provisions for these members. The only mandatory qualifications for membership are that Rotarians must be adults who have demonstrated good character, integrity and leadership; have a good reputation in their business, profession and community; and be willing to serve in their community and around the world.

Potential members who owe money to a Rotary club aren't eligible for membership. Clubs must confirm that transferring or former Rotarians seeking membership don't have any outstanding debt to their previous club. (For complete details, see the RI Bylaws, section 4.030.)

Flexibility in meeting frequency, format, and attendance

Council on Legislation representatives voted overwhelmingly to eliminate limitations on how Rotary clubs conduct their meetings, and recognized the fact that a club's health is not determined by attendance alone. With the RI Board's endorsement of the Council's changes, clubs now can:

- Determine the best day and time for their meetings
- Change or cancel a meeting
- Count service projects or social events as meetings
- Choose whether to meet in person or online, to alternate between online and in-person meetings, or even to use both formats at the same time (for example, a member could participate in an in-person meeting through a video chat)
- Amend their bylaws to change attendance requirements and termination policies involving members with poor attendance

Rotary clubs now can reduce their meeting frequency, as long as they meet in some way at least twice a month. They are still expected to forward attendance reports to the district governor within 15 days of the last meeting of each month.

Flexibility in membership types

Rotary has two types of membership: active and honorary. Clubs can now offer additional types, such as associate, corporate, and family, as long as they report these individuals as active members and collect RI membership dues from them.

Rule of 85

Rotarians can be excused from attendance if two conditions are met: They have been a member of one or more Rotary clubs for at least 20 years, and their years of club membership plus their age equals at least 85.

E-clubs and Rotary clubs

Given the new flexibility granted to all Rotary clubs, Rotary is no longer making a distinction between e-clubs and traditional clubs. References to e-clubs have been removed from the RI Bylaws and the Standard Rotary Club Constitution, but clubs may continue to designate themselves as e-clubs to emphasize that they meet exclusively or primarily online.

Dual membership for Rotaractors

In order to facilitate the transition from Rotaract to Rotary, the RI Bylaws now permit Rotaractors who meet the qualifications for membership to join a Rotary club while remaining Rotaract members.

Suspension

Clubs may now suspend a member for a maximum of 90 days. At the end of that time, they must terminate or reinstate the member. A suspended member has the right to appeal the suspension or request mediation or arbitration.

CHANGES TO LEAD YOUR CLUB SERIES

Decision	Lead Your Club:		
	President	Secretary	Treasurer
Semiannual club dues will increase from \$28 in 2016-17 to \$30 in 2017-18, \$32 in 2018-19, and \$34 in 2019-20.	Chapter 2	Chapter 4	Chapter 2
Two Rotarians residing at the same address may choose to subscribe jointly to The Rotarian or to the regional magazine prescribed for their club.	Chapter 2	Chapter 4	Chapter 2
Clubs are no longer required to charge an admission fee; however, they can choose to continue charging one.	Chapter 2	Appendix 5	Chapter 2
The treasurer is a permanent member of the club board.	Chapter 2 and 3	Chapter 2	
Written board minutes must be provided to all members within 60 days of the meeting.		Chapter 2	Chapter 2

Elective - Leading Volunteers

Session Goals

- To use group problem-solving to troubleshoot volunteer issues
- To develop a personal leadership plan that optimizes volunteer cooperation
- To review best practices for successful retention of volunteers

Resource - This Document and Facilitator's Experience

Discussion Questions - *Although the answers listed are the key points, other ideas may come up. Please pace your discussions.*

1. Why do people volunteer? *A useful segway into this discussion could be asking the participants why they personally volunteer.*

- They were asked
- They want to do something good for others and their community
- They are looking for social networking
- They want to remain active
- Personal fulfillment

2. What are barriers to volunteerism? *It is useful to think of these things when one is trying to work with volunteers. It also helps to shape one's approach to the volunteer.*

- Time - *remember that it may not be lack of time, it might be lack of priority*
- The need for flexibility, unable to commit, afraid to commit
- Costs - *financial and personal resources*
- Location
- Lack of child care
- Type of service (homeless, prisoner, etc.)- *unappealing*
- You are not asking in the right manner - *it takes more than a blurb in a newsletter. Direct, personal interactions work best.*
- The task is not clear – *people don't understand what you are asking for. Whether the volunteer is a potential club member or a helper, you need to define the scope of what is expected.*

3. Why do people stop volunteering? *This is the the main part of this session. These points are very important to get to the parts of a leadership plan.*

- They feel that their skills and time is not being utilized well.
- There is a lack of clarity with regards to the club's purpose or goals.
- Leaders don't give up their roles easily or are very slow to embrace others.
Insecure leaders often act like they are the only ones who can perform a task and disregard the need to share leadership roles.
- You don't provide a volunteer friendly environment – create a culture where volunteers are given high expectations and know that they are playing an important role.
- Inadequate supervision or leadership quality
- Lack of training - *Great example - Rotary continues to train its leaders in a measured and predictable manner. Kiwanis discontinued this a few years ago and has experienced a large loss of clubs.*
- Nonexistent or ineffective communication
- Lack of feedback or recognition - **CELEBRATE!!!**

4. What do volunteers want - or what makes them happy? *Again, this is a facilitated discussion. Ask for a scribe and try to hit all of these points.*

- Be prepared for them.
- Make them feel welcome.
- Train them.
- Make the work interesting.
- Know up front how much time the job will take.
- Make them feel appreciated.
- Communicate with them.
- Let them know that they are making a difference.
- Make them socially connected.
- Make sure that they learn something new.

5. Review Best Practices to Retain Volunteers

- Volunteers stay if their tasks and procedures are clear.
- Volunteers stay if they feel welcomed and appreciated.
- Volunteers stay if they bond to someone within the organization.

- Volunteers stay if they receive feedback that connects their job to program success. *Volunteers like to see the outcome of their work.*
- Volunteers stay if they have a voice *-involve them in the decision making process*
- Volunteers are motivated by opportunities to learn new skills.
- Volunteers are motivated by opportunities to “change the world.”
- Make sure that the work is meaningful to the individual
- Promote volunteers to other roles that take advantage of their experience (*volunteer ladder*)
- Ask for feedback - *it will only improve your program*

6. Rules of Retention - *if time permits, then this is a discussion, otherwise, this is a final wrap-up list for the session.*

- Retention doesn't happen in a vacuum.
- Retention is an outcome, not a task.
- Don't waste the volunteer's time.
- Let volunteers do the work they want to do.
- Thank volunteers for their efforts. □REWARD + RECOGNITION = RETENTION
- Don't automatically assume you've lost a volunteer.

Elective - Strengthening Your Club

Facilitator needs to review the Vibrant Club Brochure and be ready for anything

Session Goals

To encourage participants to create a club environment where every member feels empowered to shape the club's future and make it extraordinary. This session should be covered with a great deal of enthusiasm and will require a skilled facilitator.

Resources

- **Be A Vibrant Club**

Discussion - take FIVE minutes for each of the following

- 1. Decide Where Your Club wants to be in three to five years**
- 2. Set annual goals and enter them into Rotary Club Central**
- 3. Hold club assemblies to keep members engaged and knowledgeable**
- 4. Communicate openly in your club**
- 5. Prepare members for future roles to maintain a smooth leadership transition.**
- 6. Adapt your club's bylaws to support the way your club works.**
- 7. Develop strong relationships.**
- 8. Make sure that all members are involved in activities that genuinely interest them.**
- 9. Coach new and current members in leading**
- 10. Create Committees that are practical for your club**



BE A VIBRANT CLUB

YOUR CLUB LEADERSHIP PLAN
NORTH AMERICA



JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org

YOUR ROTARY CLUB

Is your club vibrant? Does it engage its members, conduct meaningful projects, and try new ideas? Your club's activities should reflect the diversity and personality of its members. As you develop a plan for your club, use these tips and ideas, and be open to letting your club evolve. Remember, if you try something new and it doesn't work, you can always try something else. **Every member should feel empowered to shape your club's future and make it outstanding.**

MEET MY VIBRANT CLUB

When I became the president of my Rotary club, we had nine members. We were a dinner club and had two-hour-long meetings at a children's restaurant.

The first thing we did to reinvigorate the club was move our meetings to a golf and country club in our area. This was a venue where professionals would want to gather for a meeting — and it was free.

We then changed the format of our meetings from dinner to a cocktail-and-appetizer style of meeting. This enabled us to keep our meeting to one hour long, was cost-effective, and allowed our younger members to get home to their families for dinner.

Finally, we added variety to the structure of our weekly meetings. Week one includes a vocational talk, so members know about each other's businesses. Week two is a Rotary information session. Week three is where we feature a guest speaker, and week four is our club assembly, where the entire club is updated on projects and fundraisers.

We asked club members to make a list of potential members and then phoned them and personally invited them to join the club. This resulted in 11 new members, 90 percent of whom were under the age of 40. Then we made sure that each new member joined a committee based on their interest. Finally, we make sure that we have a lot of fun at every one of our meetings. This has been a crucial element for us, as it has led to camaraderie and enhanced fellowship.

Nick Krayacich
Rotary Club of LaSalle-Centennial
Canada



1

Decide where your club wants to be in three to five years.

Your club includes an array of community leaders who share a passion to make a positive impact. Together, decide what you want your club to be like in three to five years. Then determine what you need to do to attain your club's vision. Your long-range goals should address your club's membership, service projects, public image, leadership development, and involvement in The Rotary Foundation. Update your strategic plan as needed, and determine how all club members can contribute to achieving long-range goals.



Ideas to try

- Devote a month of club meetings to developing a strategic plan using the Strategic Planning Guide.
- Hold a club meeting in a new location to inspire members to be creative and voice their opinions.
- Develop a strategy for increasing member engagement over the next five years.

2

Set annual goals and enter them into Rotary Club Central.

Once you set your long-range goals, you'll need to set annual goals that support them. Be sure your goals are achievable and measurable. Annual goals can be entered into Rotary Club Central, where they can be tracked and updated. Encourage all club members to view your club's goals in Rotary Club Central and provide input. Update your goals regularly so Rotary Club Central always shows the most current information.



Ideas to try

- Focus on something your club is good at and make it something you're great at.
- Ask club committees to propose annual goals that address community needs.
- Have a goal check-in on your meeting agenda once a month to update members.

All resources are available at www.rotary.org/myrotary.

Resource on My Rotary:

Strategic Planning Guide

Resources on My Rotary:

Rotary Club Central

Rotary Club Central Resources course in the Learning Center

3 Hold club assemblies regularly to keep members engaged and knowledgeable.

Club assemblies help all members feel connected. When all members have the opportunity to voice their ideas about club goals and activities, your club can maximize its collective expertise to address a local need. Many clubs use assemblies as a chance to inspire their members and fuel their shared passion to make a difference. An environment such as a club assembly that welcomes diverse perspectives is the perfect place to channel enthusiasm into action.



Ideas to try

- Exchange club presidents with a nearby club for a meeting. After the exchange, schedule an assembly to talk about the experiences of the president and members.
- Designate time in an assembly for new members to share their first impressions of the club and for members to share new ideas.
- Once a month, include a 10-minute open forum at the end of a club meeting and encourage members to present new ideas or a topic for discussion.

4 Communicate openly in your club.

Communication should go two ways in your club. Club leaders should be transparent in communications with members, and members should feel free to communicate openly with club leaders. Your communication plan should include relaying information at club meetings, on your club website, and through social media.



Ideas to try

- Frequently update your club website and social media accounts; separate members-only information from information intended for the public.
- Pair Internet-savvy members with those who are less experienced to help them navigate the website and social media.
- Share information with members and check in regularly to see how members are feeling.

Resources on My Rotary:

Club President's Manual

Club Administration Committee Manual

Resource on My Rotary:

Rotary Brand Center

5 Prepare members for future roles to maintain a smooth leadership transition.

Annual leadership changes provide opportunities for members to take on new roles. It is helpful for members to understand the leadership roles and get involved early in the transition process. There are many ways to achieve continuity, including making appointments for multiple years; having a current, incoming, and past chair on each committee; and having the current club president work closely with the president-elect, president-nominee, and immediate past president. Thinking ahead will help ensure that there are enough volunteers to fill new leadership positions each year.



Ideas to try

- Have club leaders find their own successors during their terms of service. They are the most familiar with what the job requires and who would succeed in that role.
- Learn more about members' talents and interests, and assign them to roles they would enjoy and excel in.
- Conduct on-the-job training for incoming club officers at least one month before they take office.

6 Adapt your club's bylaws to support the way your club works.

As your club evolves, so should your bylaws. The Recommended Rotary Club Bylaws are a starting point for outlining your club's practices. Consider the recommended bylaws as a template that your club can edit and revise to reflect new practices and procedures.



Ideas to try

- Check that your club is using the latest version of the Recommended Rotary Club Bylaws.
- Put your club's bylaws on your club website or distribute them at club assemblies so members can offer suggestions.
- Review them once a year as a club and share them with new members.
- Consider running pilot tests of new club procedures to see if they work before amending your bylaws.

All resources are available at www.rotary.org/myrotary.

Resources on My Rotary:

*Leadership Development:
Your Guide to Starting a
Program*

Club President's Manual

Club Secretary's Manual

Club Treasurer's Manual

Club Administration,
Membership,
Public Relations,
Service Projects,
and Rotary Foundation
Committee Manuals

Resources on My Rotary:

Recommended Rotary Club
Bylaws

Standard Rotary Club
Constitution

7 Develop strong relationships within your club.

Connect with other members in your club and find common interests. When you enjoy your Rotary club, you will likely stay involved. When families are invited to join club events, younger members are more likely to attend. Provide opportunities for club members to make connections with one another, especially when a new member joins the club.



Ideas to try

- Sit with different people at every meeting and get to know them better.
- Consider forming a satellite club to meet the needs of members who commute or have young families.
- Invite friends and families to meetings, service projects, and events. Show them how wonderful volunteering is, and encourage them to join or help out regularly.
- Survey club members to find out what kinds of social events they would like to attend and days of the week and times that are convenient for them.

8 Make sure all members are involved in activities that genuinely interest them.

Rotarians join clubs to create a positive impact in their communities and to make new connections, and that's why they stay. Club involvement keeps new and long-time members engaged. Active members feel ownership of and dedication to their clubs' projects. Consider asking members to volunteer to support service projects and other club initiatives.



Ideas to try

- Get new members involved early in meaningful ways. Find out why they joined the club, and ask them to take on roles or help with projects or events related to whatever convinced them to join.
- Conduct a member interest survey, and use the results to plan projects and activities and to develop weekly programs.
- Have members introduce themselves to the club, including information about their background, talents, and interests to make other members aware of the club's talent pool.
- Consider ways that members can learn and gain experience from club activities. These new experiences can translate into professional and personal development.

Resources on My Rotary:

Rotary Fellowships Handbook

Rotarian Action Groups

Convention registration at www.rotary.org/convention

Resources on My Rotary:

Communities in Action

Membership Assessment Tools

Project Lifecycle Resources

9

Coach new and current members in leading.

Rotary clubs are full of professionals and leaders. With extra training about Rotary and useful leadership skills, members will be well equipped to lead your club one day. Prepare future club leaders by providing an orientation for new members and leadership development opportunities for all members. Current club leaders should be sure to attend district training meetings and apply what they learn to their work in the club.



Ideas to try

- Appoint a club trainer or training committee to oversee the training plan for your club.
- Let young and newer members take on leadership roles. They can apply their existing knowledge and experience while also honing skills for their careers.
- Ask members what leadership skills they would like to learn.

10

Create committees that are practical for your club.

Your club should have committees that help the club run well. Recommended committees include:

- Club administration
- Public relations
- The Rotary Foundation
- Membership
- Service projects

Create other committees, such as Rotary grants or youth service, if you need to. Whichever committees you choose, they should help your club take action to achieve its goals.



Ideas to try

- Small clubs: Consider how you can combine the work of committees.
- Large clubs: Create additional committees to get all members involved.

Resources on My Rotary:

Connect for Good

New member information

Trainer's Toolkit in the Learning Center

New Member Orientation

Leadership Development: Your Guide to Starting a Program

Resources on My Rotary:

Club Committee Structure

Club Administration, Membership, Public Relations, Service Projects, and Rotary Foundation Committee Manuals

Elective - Strategic Planning and Continuity

Session Goals

- To discuss the importance of a strategic plan
- To review the strategic plan of Rotary International
- To discuss methods used to create a strategic plan for a club

Resources

- **Lead Your Club - President Pages 3-4**
- **Lead Your Club - President Pages 6-7** (*Rotary International Strategic Plan*)

Discussion Questions - *Remember that the last discussion from the morning centered around how the participants will actively seek to increase Leadership and Succession in their clubs. You will need to be very careful with time in this session.*

1. What is the definition of Strategic Planning?

Engage the group in a discussion of the benefits of planning. How far in advance should a club plan? Who would have to be involved in that planning process? How is Strategic Planning different from normal planning? (Planning done based upon facts)

2. Look at the Rotary International Strategic Plan on Pages 6.

Have the group notice that the Values in Action is the first part of the plan. Divide the group into groups of 3-4 members. Ask them to develop a list of values that would be appropriate for their own clubs. It is perfectly fine to use the RI list, the goal is to have a discussion. Have the groups briefly present their Value List.

3. Visioning - *In order to make a strategic plan, the end goal must be chosen. Ask participants to go back to their groups and create of vision of what their Rotary club will be like in 3-5 years. This is the most difficult part of this process. Have the groups share their visions.*

4. Look at the Strategic Plan on Page 6 again. Go over the three main categories of Goals - *1. Support and Strengthen Clubs 2. Focus on Humanitarian Service 3. Enhance Public Image and Awareness. Now, ask the groups to use their visions to create THREE major goal areas which would support that vision. For instance, Develop Leaders, Engage Club Members, Start an International Project, Have better*

meetings, etc., etc. Ask the groups to share their three goal areas. These will become the **Strategic Priority**.

5. Ask the participants to pick one Strategic Priority per group. Ask them to create a list action items which would support that main goal area with the following requirements:

- Specific
- Measurable
- Attainable
- Realistic
- Time-Specific

Ask the groups to share their ideas. Allow the group to decide if the action item(s) fulfill the requirements.

Depending on time, the facilitator needs to express to the group that this is a process that they need to do with their club members and leaders. Remind them that they have district support and club support from RI. Also remind them that the easiest way to track goals is to enter them in Rotary Club Central.

Rotary International summarized their strategic goals with the image on Page 7. Tell the group to consider creating some sort of image for their own club.



Rotary

STRATEGIC PLAN

OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

OUR STRATEGIC GOALS



Support and strengthen clubs

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels



Focus and increase humanitarian service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally



Enhance public image and awareness

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities

JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org/strategicplan



We are leaders who act responsibly and take action to tackle some of the world's most pressing challenges.



JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org/strategicplan

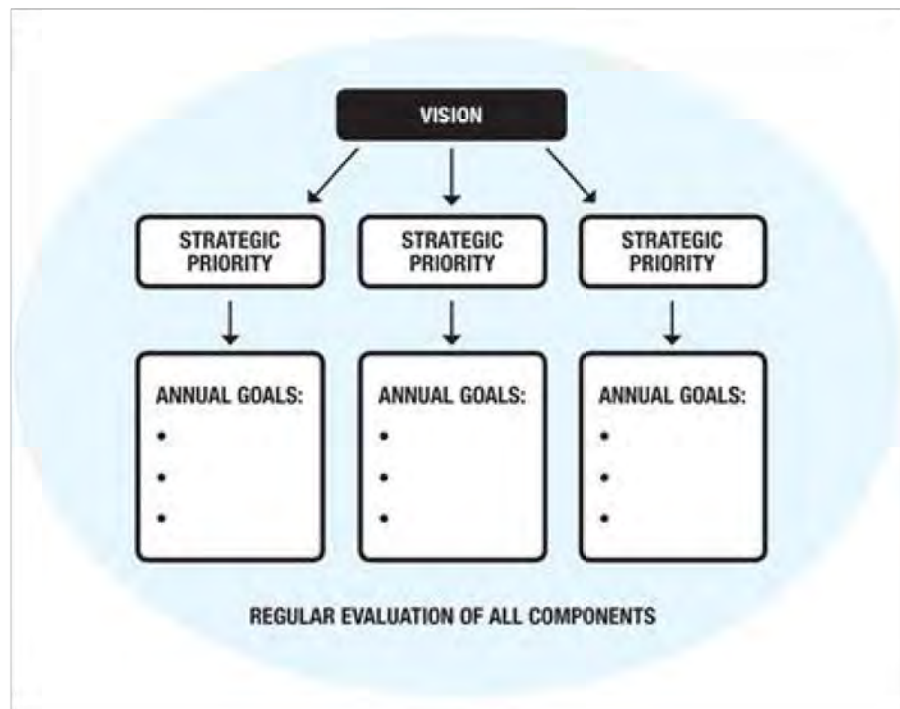
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Find out more about Rotary's strategic plan at [Rotary.org](https://www.rotary.org).

STRATEGIC PLANNING

Your club's strategic plan is a long-term commitment requiring the support of all your members. Rotary International encourages Rotary clubs and districts to align their goals with Rotary's strategic plan (appendix 1).

Clubs that follow a strategic plan report higher levels of member engagement, retention, and satisfaction. Use the [Strategic Planning Guide](#) to develop a thoughtful and collaborative strategic plan that works for your club.



SETTING ANNUAL GOALS

Start by involving all members in setting club goals. Survey members to find out what they like about the club and what they would like to see changed. Find a sample membership questionnaire in [Club Assessment Tools](#).

For best results, set goals that are specific, measurable, attainable, realistic, and time-specific. For example: “Increase membership by 10 percent by the end of the year” instead of “Add new members.”

[Rotary Club Central](#) enables you to set and track your annual goals for membership, service, and Foundation giving. As a club leader, you can review a five-year history of your club's performance and use your strategic goals to help set annual goals. And you can assess your progress using Rotary Club Central's trend graphs and reports. Review your goals often to determine whether adjustments are needed.

After you've defined your goals, plan how you'll achieve them, using the Your Action Plan worksheet. Involve members in developing and implementing your club's action plans. Find out more by taking the Rotary Club Central Resources course in the [Learning Center](#).

Although only designated club leaders can revise goals in Rotary Club Central, all members can view and track club achievements on Rotary.org. Encourage your members to review club reports regularly so they're informed about their club's progress.

EVALUATION

As you monitor progress toward your club's goals, talk with members to identify effective strategies. Then apply these insights and share them with the club president-elect and president-nominee.

Review long-term and annual goals with your assistant governor and district governor when they visit your club.

Elective - Effective Use of Technology

A facilitator for this session must be able to navigate Rotary Club Central and Facebook!

Session Goals

- To introduce Rotary Club Central
- To insure that all participants in session have a My Rotary Account
- To discuss the Rotary Global Rewards
- To make participants aware of Rotary Showcase
- To introduce participants to Social Media
- To discuss a club's website

Resources

- **Rotary Club Central Guide** - available online
- **Facebook Reference Guide** - available online

The facilitator is to provide an interactive session

- **Log onto My Rotary**
- **Show the Features of My Rotary**
- **Go to Rotary Showcase**
- **Go to Rotary Global Rewards.**
- **Go to Club Central - review setting goals** - *open a discussion with the group as to the usefulness of setting and achieving measurable goals*
- **Be sure to show the Rotary Learning Center**
- **Be sure to show where Brand Central is located**
- **Now move to Facebook**
 - a. **Ask if clubs have a facebook page**
 - b. **Discuss Facebook pages as a club vs individual**
 - c. **Discuss number of updates, etc.**
- **If time permits, discuss the front-facing club website - updating, etc.**
 - a. *Reminder - change the theme logo on websites.*