MODULE 7

BEING A CLUB PRESIDENT

*Learning Outcomes:*

*President-Elects will understand the tasks to be completed before serving as president. They will also understand the tasks to be completed during their year as president.*

February 1, 2021

# Preface

*Serving as president of your Rotary Club is both challenging and rewarding. Effective management will aide in organizing the members to address club goals. Effective leadership will guide club members to achieve those goals. In this module we’ll review some of the key concerns in preparing/planning for your year as president and the expectations to be addressed during your presidency.*

### Accessing the Rotary’s Learning Center, the District’s Website and DACdb

During your review of the training material, you will be asked to access training materials, videos and power point presentations from RI’s learning Center, the District’s Website and DACdb (District and Club database). It is important that you have access to a computer, laptop or tablet so that you can review the online training materials when required. These three online resources require registration. If you are not registered then access each resource and register. Make sure you remember your User ID and Password. The web address for each site is:

District 7305 Website:

* + Type in [Rotary District 7305](https://rotarydistrict7305.org/) <https://rotarydistrict7305.org>
  + At the top right corner click on Member login.
  + You are already registered with your email address serving as your UserID. If this is the first time accessing the website you should create a new Password.
  + Look for District Library along the right side of the window and identify learning resources listed in the training manual.

DACdb:

* + Type in DACdb < <https://www.dacdb.com>>
  + If new register for your account. If already registered sign in with User Id and Password.
  + When learning resources become available the participants will be instructed on how to access the information.

Note: Clubs need to integrate DACdb with the RI data base. The instructions are located in the District Library (District 7305 Website) as well as the Application to Integrate the data bases. See Dan Dougherty or Dennis Piper (IT@rotarydistrict7300.org) if you need assistance.

MyRotary.org

* + Type in MyRotary.org < [My Rotary | My Rotary](https://my.rotary.org/en/)>
  + If new, register for your account. If already registered sign in with User Id and Password
  + Scroll to bottom of page until you see the Online Tool Box.
  + Look for Learning Center and click.
  + Type training program name in search box.

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During your year as club president, you’ll provide the vision to tackle social issues in your community, and the leadership to strengthen your club as it joins with Rotary in addressing the world’s toughest challenges. Take advantage of your members’ expertise and your community’s resources to carry out this work. Find support from your district leaders and Rotary International on topics including public relations, membership development, and more.

## 7.1 Roles and Responsibilities of the President

## Being the Club President is an exciting opportunity to not only support your club, but also an opportunity to grow as a leader. Each club is unique because of its members and the community the club serves.

**Activity 7.1** Review the slide presentation [*Roles and Responsibilities: Club President*](https://www.dacdb.com/Accounts/7305/Downloads/0/Club%20President/Roles%20And%20Responsibility%20Club%20President.pdf). (tinyurl.com/18nwn033).

Questions:

1. To what extent have you thought about the concerns raised in this slide presentation that a President needs to address?

2. What is the unique characteristic(s) of your club that makes it an exciting place to be a member?

3. What are your priorities when your term as president begins?

## 7.2 Checklist for President-Elects

Based on the slide presentation and past experiences of club presidents, a checklist was developed for President-Elects that identifies a number of issues to consider in planning for your presidency.

**Activity 7.2** President-Elects need to prepare for their year. Review the list of recommended actions to lead your club.

**AS PRESIDENT-ELECT**

* Attend the prePETS, PETS and District Assembly.

Review your club’s current situation: membership, community service, fund raising, social network, engaging meetings, recruitment, etc. Use the [Rotary Club Health Checkup](https://www.dacdb.com/Accounts/7305/Downloads/0/Club%20President/rotary_club_health_check_en%20(2).pdf) (tinyurl.com/4z565z2w) or locate under Club President in the DACdb District Files for a checklist of additional items to consider in your review. Review club’s strategic plan and update or conduct a strategic plan using RI’s [Strategic Planning Guide](https://www.dacdb.com/Accounts/7305/Downloads/0/Club%20President/Strategic%20Planning%20Guide.pdf) (tinyurl.com/uny9yxj3) for Clubs or locate under Club President in the DACdb District Files. Looks ahead to the next three to five years.

* Discuss club needs with the Board of Directors.
* Prioritize club needs and select the ones you will focus on.
* Discuss your priorities/goals with the Assistant Governor and other District Leaders.
* Once priorities/goals are determined enter them into the Rotary Club Central’s goals webpage.
* Ensure your secretary and treasurer have an account on My Rotary and can access their DACdb account to update membership and club data regularly. Complete by July 1st.
* Appoint Committee Chair Persons, set goals for each committee. Encourage communication between club and district committees. Review activities, goals, and expenditures, and participate in decisions. Enter names of Chairs in DACdb before July 1st.
* Supervise the preparation of a club budget with the treasurer following proper accounting practices, including an annual financial review. Complete by July 1st

Questions:

1. To what extent have you addressed these activities in your preparation as President-Elect?

2. Have you developed a timeframe to complete these activities?

3. Be prepared to discuss your progress or limitations in addressing these activities during Tuesday night’s review session.

## 7.3 Checklist for Presidents

As president one will handle a variety of activities during the course of the year. Maintaining awareness of these and planning accordingly, one will be able to achieve the club goals and promote a vibrant club.

**Activity 7.3** The following summary of expectations aids in conducting a successful year as president of your club. Discuss with your Assistant Governor any concerns or innovative ideas that arises.

**AS PRESIDENT**

* Provide clear communication among your club and district leaders.
* Recognize the accomplishments of club leaders and members.
* Motivate members to reach goals.
* Listen to all members and make sure their needs are met.
* Set goals for each committee.
* Monitor club goals and update in Rotary Club Central.
* 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.
* Collaborate with the governor and assistant governor on club and district matters.
* Work with your assistant governor and neighboring club presidents on choosing a date and venue for the joint meeting for the district governor’s required visit. Complete as soon as possible.
* Prepare for the district governor’s required visit by completing the questionnaire with your board. Complete at least 2 weeks before governor’s visit.
* 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.
* Enter incoming President and Vice President in DACdb. Complete by December

**Becoming an Effective Leader – Seven Simple Rules**

* Step 1: Lead by Example. ...
* Step 2: Take Responsibility for Your Team's Decisions. ...
* Step 3: Always Keep a Positive Attitude. ...
* Step 4: Trust, Both in Yourself and in Your Team. ...
* Step 5: Look for Opportunities for Growth for Your Team. ...
* Step 6: Delegate Already! ...
* Step **7**: Finally, Embrace Chaos.
* Review and ensure that your club follows Rotary’s youth protection policies and the Statement of Conduct for Working With Youth when participating with youth programs.
* Adapt your club’s bylaws to reflect the way the club works.
* Encourage members to attend district meetings, functions, other clubs’ functions and promote the Rotary International Convention.
* Attend the district conference.
* Submit an annual report to your club on the club’s status before leaving office.
* Arrange for a joint meeting of the incoming board of directors with the outgoing board.
* Work with your successor before leaving office.

START YOUR CLUB ON A PATH TO VIBRANCY

Vibrant clubs engage their members, conduct meaningful projects, and try new ideas. List the new ideas your club wants to try, and create a plan to increase community interest and attract more members.

As you develop your plan, use these tips and ideas, and let your club evolve.

* Communicate openly in your club.
* Prepare members for future roles to smooth leadership transitions.
* Adapt your club’s bylaws to reflect the way the club works.
* Develop strong relationships within your club.
* Make sure all members are involved in activities that genuinely interest them.
* Coach new and continuing members in leading.
* Create practical committees for your club.

Questions:

1. Why is setting goals important to leading your club?

2. How will you assure that club members are onboard with achieving the goals?

3. Membership is an important issue for clubs. What plans are you and the Membership Chair planning to maintain and increase membership?

4. What special program(s) does your club conduct on an annual basis?

Additional Resources

Club President Basics [Rotary Learning Center](https://learn.rotary.org/members/learn/lp/2/club-president-basics)

Club Goal Setting [Rotary Learning Center](https://learn.rotary.org/members/share/asset/view/628)

Be a Vibrant Club (PPT) [Rotary Learning Center](https://learn.rotary.org/members/share/asset/view/1353)