



LEAD YOUR CLUB

President
2016-19 Edition





This is the 2015 edition of the Lead Your Club: President manual for club presidents holding office in 2016-17, 2017-18, and 2018-19. The information in this publication is based on Rotary's constitution and policy documents. Please refer to those resources for exact Rotary policy. Changes to Rotary's constitution and policy documents override policy as stated in this publication.

CONTENTS

INTRODUCTION

YOUR JOB AS CLUB PRESIDENT

1 PLAN YOUR YEAR	1
Your Club Leadership Plan	2
Strategic Planning.....	3
Setting Annual Goals.....	3
Evaluation.....	4
Discussion Questions	5
Appendix	
1. Rotary’s Strategic Plan.....	6
2 CLUB MANAGEMENT	9
My Rotary.....	10
Club Administration Committee.....	11
Rotary Meetings.....	12
Running Successful Club Meetings.....	12
Club Assemblies.....	14
Governor’s Visit.....	14
Elections.....	15
Reporting Requirements.....	15
Club Constitution and Bylaws.....	15
Financial Management.....	16
Risk Management.....	18
Discussion Questions.....	20
Appendixes	
2. Rotary Training Events.....	21
3. Installation of Club Officers.....	23
4. Financial and Risk Management Best Practices Checklist.....	24
3 YOUR LEADERSHIP	27
Working With Your Club.....	27
Club Committees.....	29
Working With Your District.....	30
Discussion Questions.....	31
Appendix	
5. Sample Club Committee Structure.....	32

4 YOUR MEMBERS	35
Club Membership Committee	36
Attracting Members	38
Engaging Members	38
Your Alumni Connections	39
New Clubs	40
Discussion Questions	41
Appendix	
6. Rotary Awards	42
5 PROMOTE ROTARY	45
Club Public Relations Committee	46
Answering Questions About Rotary	47
Using Rotary Marks	48
Discussion Questions	50
Appendix	
7. Key Points for Talking About Rotary	51
6 THE ROTARY FOUNDATION	53
Club Rotary Foundation Committee	54
District Support	54
Foundation Funding	56
Discussion Questions	58
7 YOUR PROJECTS	61
Service Projects Committee	62
Rotary Service Programs	62
Discussion Questions	64
Appendixes	
8. Rotary Service	65
9. Risk Management for Working With Youth	66

INTRODUCTION



As a member of Rotary's global network of more than 34,000 Rotary clubs, you have access to a wealth of Rotary services and resources available through [Rotary.org](https://www.rotary.org). You'll find publications translated into nine languages; information, resources, and club data; Rotary grants to carry out effective and sustainable projects; and support from staff at Rotary headquarters and international offices.

Use this manual to learn more about your role as club president before you attend the presidents-elect training seminar (PETS) and district training assembly. If you have questions or comments about this manual or any of Rotary's training resources, please contact:

Learning and Development Team

Email: learn@rotary.org

Phone: +1-847-866-3000

WHAT ARE YOU WAITING FOR? BE A VIBRANT CLUB



Be a Vibrant Club guide includes:

- A club success story from your region
- Ideas for your club to try
- Resources for your club on My Rotary



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Rotary 

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	

STRATEGIC PLANNING GUIDE

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

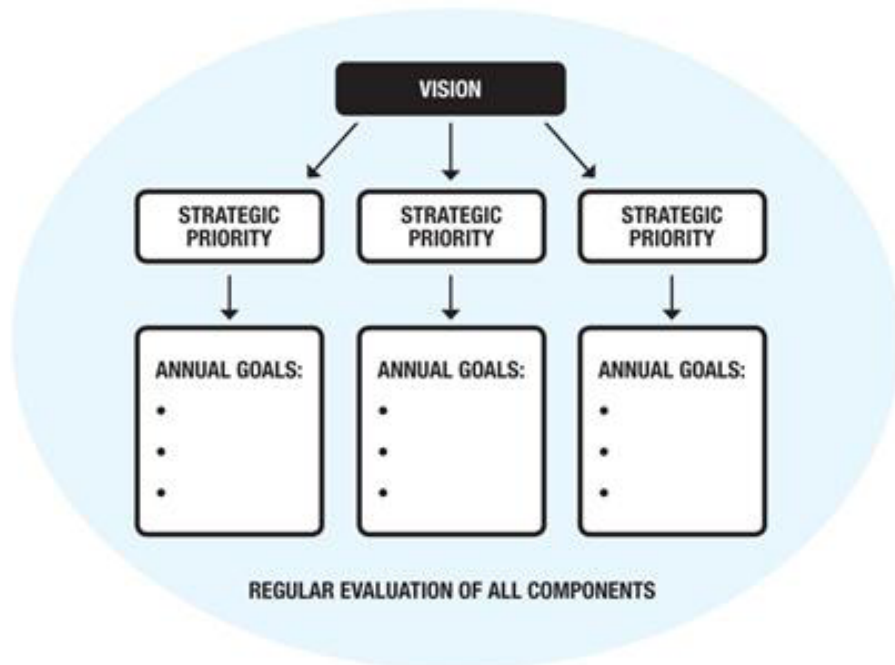
Your assistant governor can offer advice. To find other resources for strengthening your club, contact your [Rotary coordinator](#), immediate past president, or [Club and District Support representative](#).

STRATEGIC PLANNING

Find out more about [Rotary's strategic plan](#) at [Rotary.org](#).

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.

DISCUSSION QUESTIONS

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

How will you involve your members in setting goals?



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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CHAPTER 2

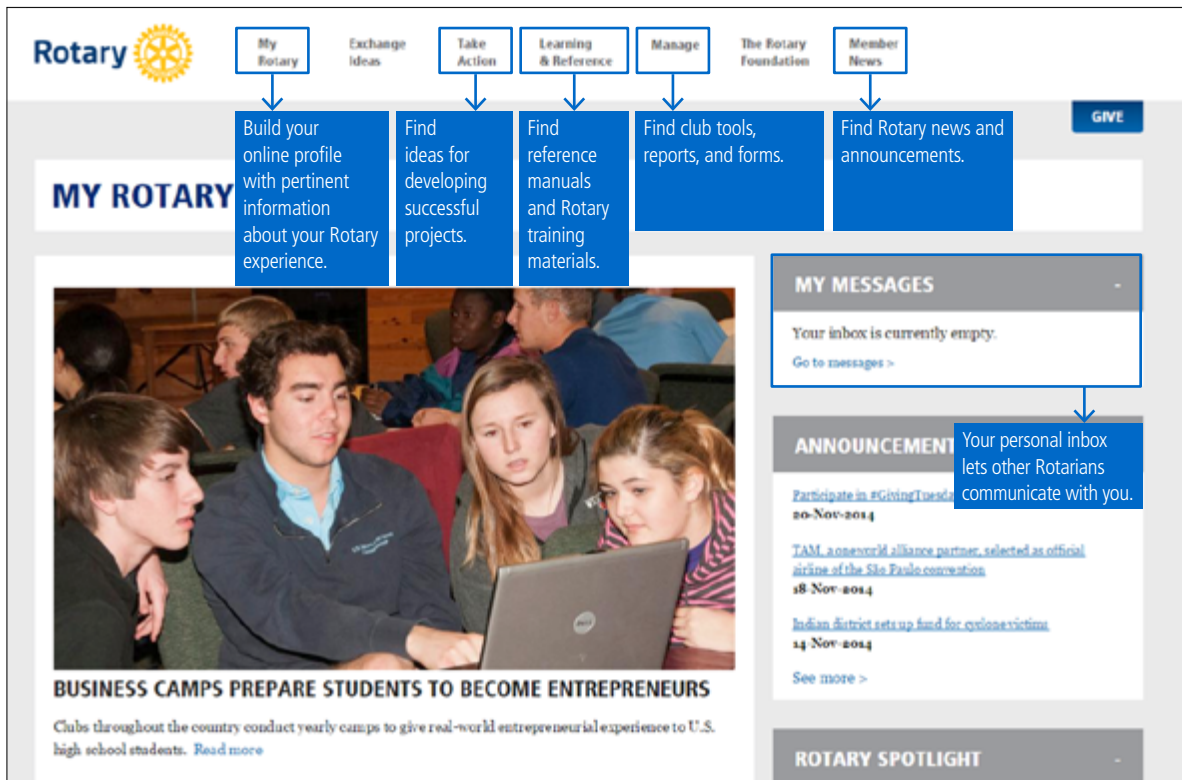
CLUB MANAGEMENT



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 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 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:

- 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)

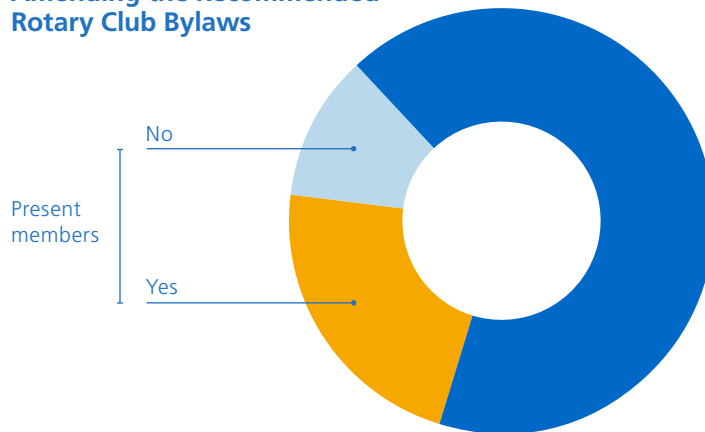
CLUB CONSTITUTION AND BYLAWS

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: ≥ 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.

