

CLUB OPERATIONS AND ADMINISTRATION

INTRODUCTION

INSTRUCTOR _____

LEARNING OBJECTIVES

At the end of this session, participants should understand the role of Club President and be able to:

1. Identify specific responsibilities of the Club President
2. Describe the administrative structure of an effective Rotary Club
3. Describe the reporting obligations of a Rotary Club
4. Identify risk factors affecting a Rotary Club and best practices for management
5. Identify the Rotary resources available to assist the Club President in the management of their club

RESOURCES

- Club President's Monthly Checklist
- Planning Calendar
- Club Leadership Plan – Summary and Worksheet
- Sample Board Meeting Agenda
- Sample Committee Plan Form
- Semi-Annual Report Form and Instructions
- RI Collection Cycle
- Club Administration and Reports for Club Leaders via RI Member Access
- RI Insurance Program Summary
- Youth Exchange Certification FAQ Sheet
- Youth Protection FAQ Sheets for Interact, Rotaract and RYLA
- Rotary Protocol
 - i. Introduction of Dignitaries
 - ii. Head Table Seating
 - iii. Flag Placement
- Rotary Resources
 - i. Download Library
 - ii. Club President and Secretary Resources
 - iii. Resources for Running a Club
- Club President's Manual
- Club Secretary's Manual
- Club Administration Committee Manual
- RI Visual Identity Guide (on RI website)
- Club Operations and Administration Curriculum Handout

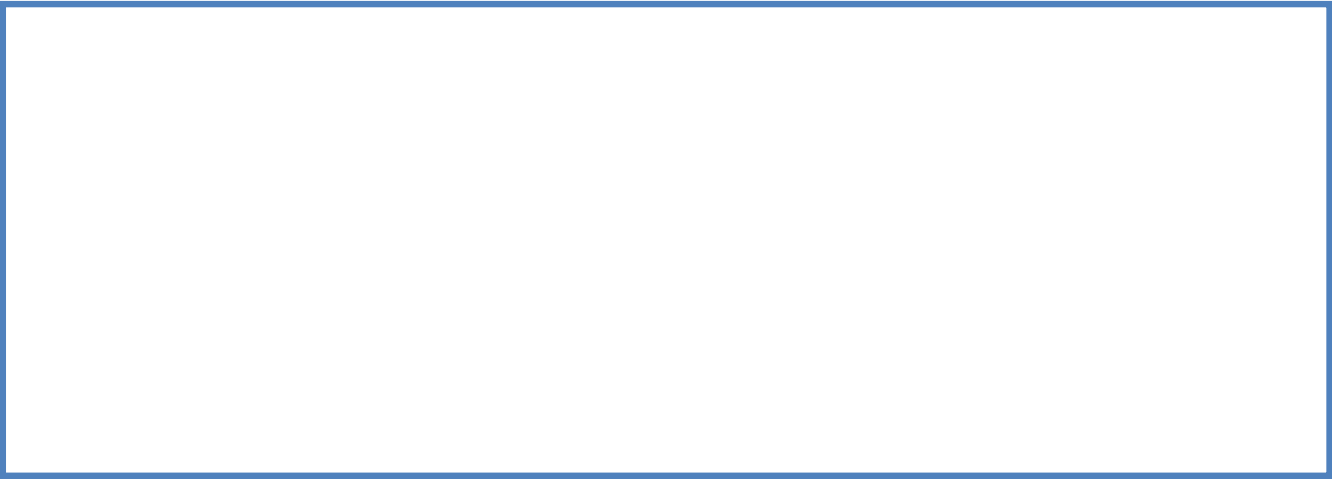
ROLES AND RESPONSIBILITIES

What is the Primary Role of the Club President?

What do you feel are some of the qualities of a good leader?

What are the elements of an effective Rotary Club?

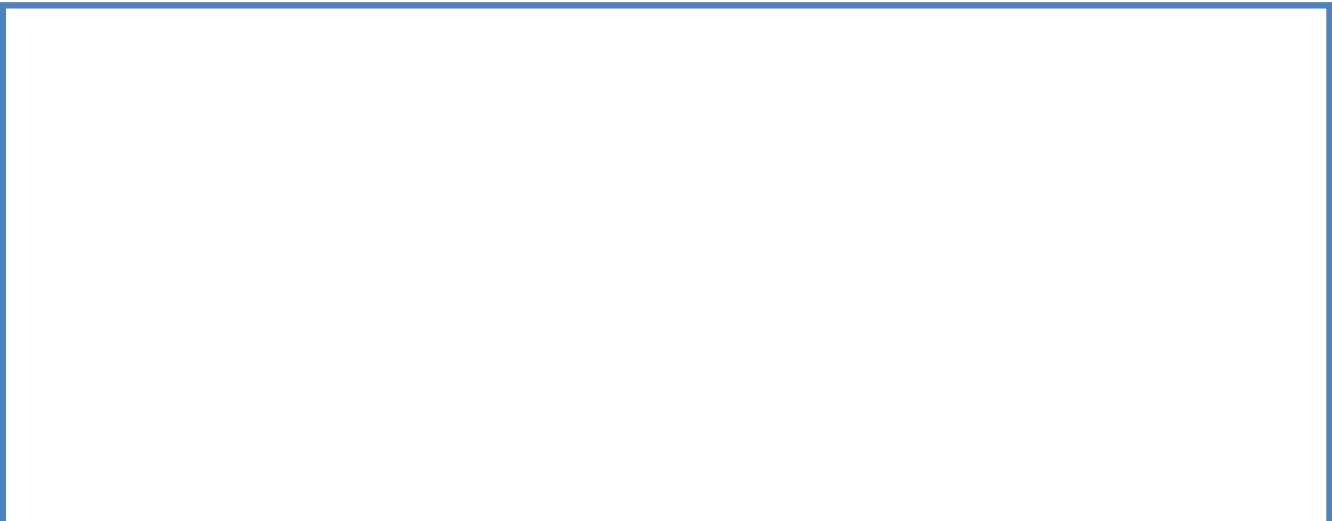
What do you think makes an effective Rotary Club?



What are some of the responsibilities of the Club President in leading an effective Rotary Club?



What tools will you use in fulfilling your Presidential duties?



CLUB CONSTITUTION AND BYLAWS

What is the Standard Rotary Club Constitution and why is it important to a Club President?

What are the Club Bylaws and what makes them different from the Club Constitution?

How would you go about amending your club's bylaws?

Is your club incorporated? Should it be?

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When would a club want to establish a separate foundation?

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CLUB ADMINISTRATION

How will you, as Club President, ensure your club's Board functions effectively?

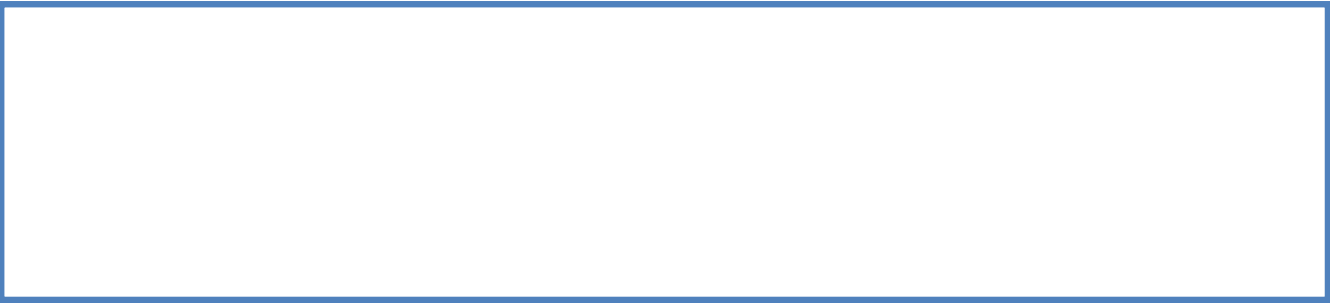
The recommended club committee structure includes a Club Administration Committee. What is the make-up and role of this committee?

What do you think are some of the criteria that go into ensuring that you have effective committees working in your club?

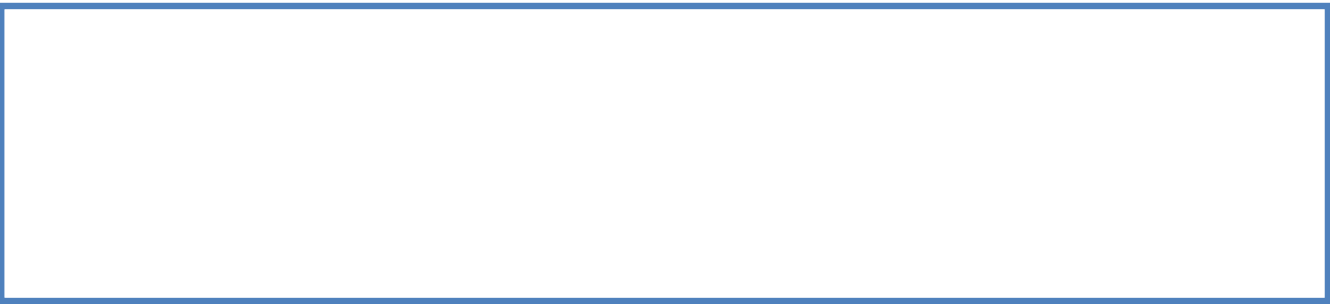
What are the RI reporting requirements?

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What are the District reporting obligations?

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What are The Rotary Foundation's reporting obligations?

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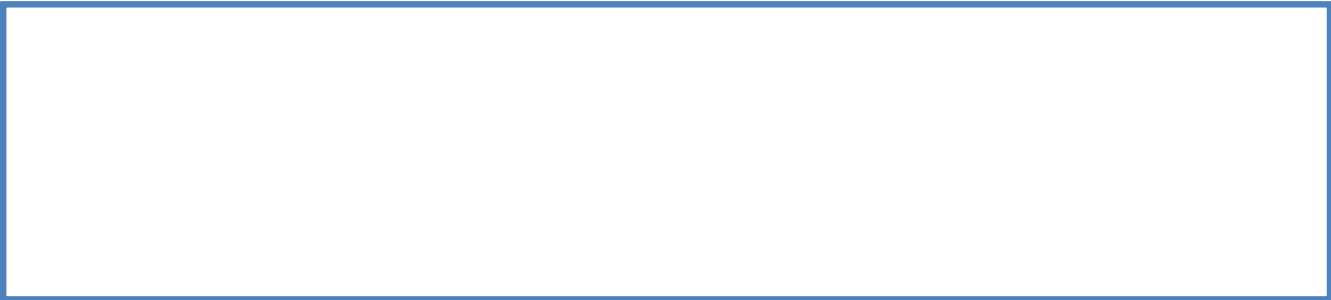
What are the consequences of failing to report?

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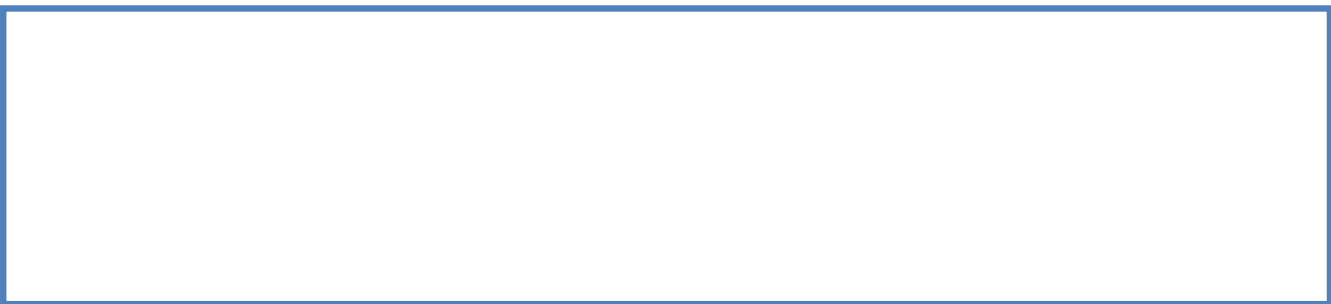
What information and actions are available to all Rotarians via Member Access?

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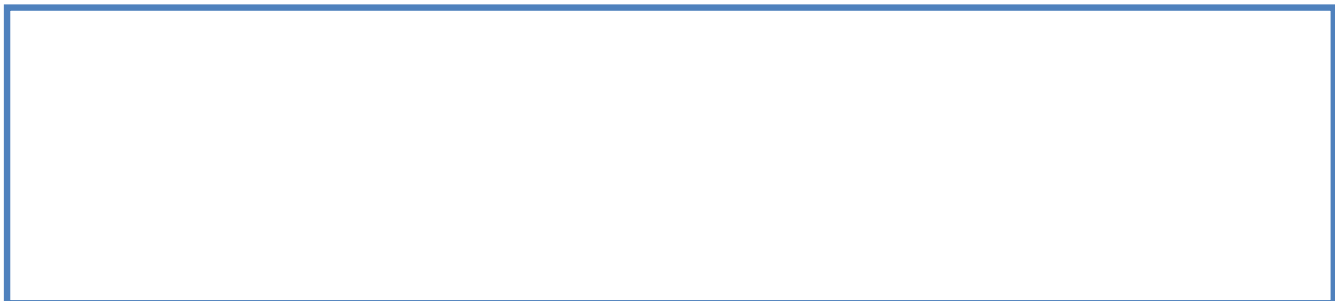
What additional information and functions are available to the Club President and Secretary?

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What can you do to ensure these meetings are well planned and effective?

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In what District meetings or events should you be encouraging participation?

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What innovative ideas might you employ to encourage participation in these events?



RISK MANAGEMENT

What are your financial responsibilities as Club President?

If you are from a US club, what else do you need to do annually? (Hint: it's a communication with Uncle Sam).

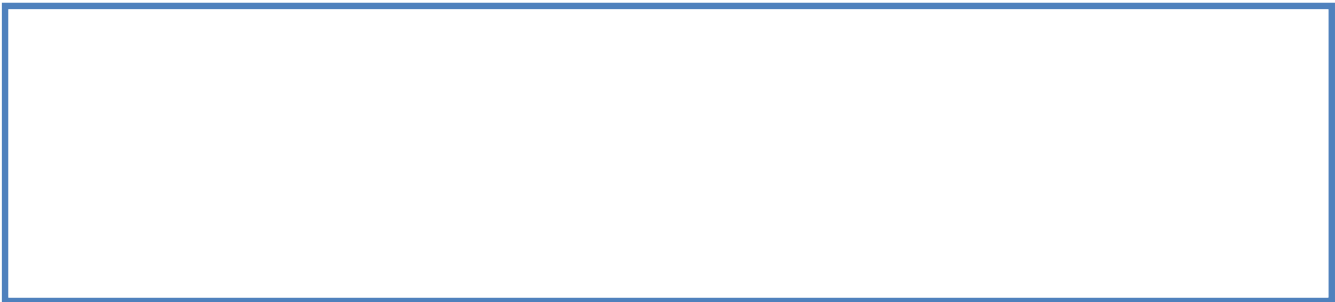
How often it needs to be filed?

Which clubs need to file?

What insurance coverage should your club have in place?

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What special responsibilities arise in connection with your club's youth programs?

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CASE STUDY

As club president, you will need to manage conflict amongst Rotarians within your club which threatens the club's effectiveness. Review the scenario below and answer the questions that follow:

The Rotary Club of Nowhere has reached an impasse over a service project being proposed by the club's service projects committee. The older members of the club are comfortable with the status quo – holding an annual fundraising gala auction and using the funds for scholarships and PolioPlus. The younger members of the club want to take on the construction of a park for disabled children that will require the involvement of all club members. The disagreement has split the club and seriously impacted the normal collegial atmosphere of the club to the point where the two factions will not even sit together at regular club meetings.

In analyzing this conflict, what factors do you feel are at play here?

How would you propose dealing with the conflict?

USEFUL INFORMATION

What are the rules regarding use of the Rotary emblem and name?

What are some of the guidelines we are expected to follow in recognizing dignitaries, displaying flags, conduct, and so forth?

Where do you obtain the Rotary pins, plaques and other merchandise you or your club may need?

Where do you go to get the information or help you may need in administering your club throughout your term as President?

BEST PRACTICES CHECKLIST

Review the items on this checklist. Check the items your club already does, and circle the items you would like your club to implement. Add any additional best practices related to your club.

Financial Management

- Register the club with the government, if required.
 - Submit club tax documentation, if required by the local or national tax code.
 - Set up separate club bank accounts for operating and charitable expenses, and assign two signatories to each account.
 - Develop a budget and follow it. (Be sure to monitor expenditures against the budget.)
 - Make sure the club has a procedure for sending contributions to The Rotary Foundation and dues to Rotary International.
 - Be aware of local laws regarding donated funds, and make sure those laws are being followed.
 - Have the yearly financial report reviewed by a qualified accountant who is not involved with the regular management of club funds, and give a financial report to all club members.
 - Make sure the club has an effective way to learn about financial best practices and that these practices are passed on to incoming officers.
 - Ensure that if the club has a foundation, it is managed in accordance with local laws.
 - Meet regularly with the club's treasurer to ensure the club's financial affairs operate smoothly.
 - Ensure club bylaws outline the process for disbursing funds.
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Risk Management

- Limit the club president's personal liability by anticipating what can go wrong and thinking about how the president or the club will respond and how any losses will be paid for.
 - Use written and signed contracts and keep the documentation for several years after the event. Involve local legal counsel when negotiating contracts.
 - Ensure the club has liability insurance for its activities and operations, as appropriate for the club's geographic area. Contact a local insurance agent or broker for assistance with insurance appropriate for the club.*
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MY ACTION PLAN

Action Item	
Who owns the action Item	
What is the time frame for the Action Item?	
How will you measure success?	
How will you recognize the contributions of others?	
How will you involve others?	