
Session 1: Roles and Responsibilities

(60 Minutes)

Learning Objectives

At the end of this session, participants will:

1. Identify ways to prepare as President Elect.
2. Understand the role of Club President.
3. The role as President for the 1st 6 months.
4. The role as President for the 2nd 6 months.
5. Implementation of the Club Leadership Plan.

Session Outline

Introduction	5 minutes
Responsibilities as President Elect	20 minutes
Responsibilities as President for the 1 st 6 months	10 minutes
Responsibilities as President for the 2 nd 6 months	10 minutes
Club Leadership Plan	10 minutes
Review & Learning Objectives	5 minutes

Materials

Slides

1. Session Title
2. Learning Objectives
- 3A. Responsibilities as President's Elect – Before PETS
- 3B Responsibilities as President's Elect – After PETS
- 3C Formation of the Board
- 3D The Formation and work of a Strategic Planning Committee
- 3E Working with your Board and the current Board
4. Responsibilities as President for the 1st 6 months
5. Responsibilities as President for the 2nd 6 months
6. Club Leadership Plan
7. Learning Objectives

Worksheet

1. Summary
2. Case Study
3. Implementing the CLP

Training leader's notes

- For information on facilitating this session and a list of interactive activities, refer to "How to Use the Session Guide" at the beginning of this leaders' guide, available from your district training committee.
- This session guide is an outline only. Review it and tailor it to your audience, inserting examples related to your district where appropriate.
- When you see this O symbol, consider incorporating an interactive activity.
- During the session, refer participants to the Club President's Manual (222), and explain the sections relevant to this session. For current Rotary information and publications, go to www.rotary.org.

Introduction
 Show Slide 1
Session Title

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10.	Implementation of the Club Leadership Plan.
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Review & Learning Objectives	5 minutes
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2. Learning Objectives	2. Case Study
3A. Responsibilities as President's Elect – Before PETS	3. Implementing the CLP
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3D The Formation and work of a Strategic Planning Committee	
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Training leader's notes

- Introduce yourself to participants, and explain your role as the facilitator of their discussions.
- Discuss groups guidelines that will ensure the discussions are effective, such as taking turns speaking, welcoming and accepting all comments, and limiting the use of mobile phones.
- Consider starting the session with a “getting to know you” activity related to the session topic.
- Review the session’s learning objectives with participants.
- Refer participants to the session summary (work-sheet 1), and encourage them to take notes.

1.1 Responsibilities as President Elect Before PETS

- Ask 2 – 4 participants to share what they have done, list the answers on a flip chart.
- Ask others what they thought was missing.
- Ask participants to select 4 things they consider of importance they should do in terms of priority.
- Show prepared Slide 3A
- Seek consensus

Slide No. 3A Responsibilities as President's Elect Before PETS

- Study the President Elect's Workbook.
- Study the CLP
- Ensure that you have the Current M.O.P. as reference
- Ensure that you have the club's constitution and by-laws with you
- You should already have appointed your Board of Directors

1.2 Responsibilities as President Elect After PETS

- Ask a few participants to share what they think are their responsibilities after PETS.
- Ask others to comment
- Show prepared Slide 3B
- Seek consensus

Slide 3B Responsibilities as President Elect After PETS

- Hold regular meetings with your Board of Directors
- Allocate responsibilities
- Initiate Strategic Planning Process
- Meet with current Board to ensure smooth hand-over
- Arrange dignified change-over function

1.3 Formation of the Board and its duties:

- Ask 2 to 4 participants to share how their Board was formed, the number of persons in the Board and allocation of responsibilities.
- List their answers in 3 separate columns – how Board form, the number, the duties.
- Ask others to add their suggestions from experience.
- **Show prepared slide No. 4**
- Seek consensus

Slide No. 3C

Formation of the Board

- Ensure your Club's traditional process of selecting the Board of Directors is followed
- Ensure that your Board consist of President, IPP, PE, Honorary Secretary, Honorary Treasurer & 5 standing committee Chairs, namely club administration, membership, service projects, public relations, Rotary Foundation. This to meet the requirement of CLP.
- Preferably, the number of Directors should be kept small (minimum: 11)
- Include new matured members as Directors.

1.4 The Formation and work of a Strategic Planning Committee

- Ask several participants whether their Clubs has such a committee, if not, why not.
- Obtain consensus that such a committee is essential.
- List reasons why it is essential.
- Discuss how such a committee is structured and its terms of reference.
- Discuss the difference between yearly goals and the strategic plan.
- **Show slide No. 5**
- Seek consensus.

Slide No. 3D

The Formation of a Strategic Planning Committee

- Chair of Committee to initiate the organisation of a retreat.
- President & Chair to get total buy-in
- If possible, engage an external facilitator
- To help formulate a 3-Year plan

1.5 Working with your Board and the current Board

- Ask participants how this should be done.
- Share ideas, list ideas on the flip chart.
- **Show slide No. 6**
- Seek consensus

Slide No. 3E

Working with your Board and the current Board

- Current President, PE, PN to meet often and ensure the continuation of the established strategic plan.
- Last 3 Board meetings to be combined meetings so that proper hand-over can be done.
- Proper hand-over procedures be done.

As President for the 1st 6 months

- Implementation of goals for the year.
- How should this be done.
- Conduct a discussion on this, list answers on the flip chart.
- Ask participants to select 4 in order of priorities on things they should do.
- **Show Slide No. 4**
- Seek consensus.

Slide No. 4

As President for the 1st 6 months

- Within 2 months, ensure that the club has a strategic plan with annual goals to be filled.
- Ensure that committees formed are in-line with the CLP.
- You would have conducted the 1st Assembly at the time of the Governor's visit.
- Ensure that all dues, RI, District and Club has been collected.
- Ensure that weekly meetings are properly run
- Ensure that all committees meet regularly

As President for the 2nd 6 months

- Invite participants to share what they think should be done to ensure success at the end of year of office and how to hand over responsibilities to the next team.
- List the suggestions on the flip chart.
- Discuss 4 of the more important activities that should be carried out.
- **Show Slide No. 5** (All to suggest what goes into this slide).
- Seek consensus

Slide No. 5

As President for the 2nd 6 months

- Ensure all committees have set target annual goals to pursue.
- Monitor their work.
- Ensure major project properly executed.
- Ensure leadership renewal takes place.

Club Leadership Plan

Break-out session:

- **Show Slide No. 6** on the Club Leadership Plan.
Point out that since November 2004, the CLP has been the recommended administrative framework for Rotary Clubs.

Point out the CLP is not mandatory.

However, it's use and helps to develop continuity and consensus in projects, decision making and goal setting.

It can also provide a larger supply of well trained leaders.

Increase members involvement.

Act to guide the work of the Club.

Refer participants to worksheet attached for their studies.


Slide No. 6

Club Leadership Plan

Review

Training leader's notes

- Review the learning objectives to ensure that all topics were covered sufficiently. Answer any questions.
 - Using the summary sheet, ask participants to share something they learned during the session and an action they will take as a result of this session. Participants can share with the person next to them or with the entire group.
 - Thank participants
-

 Show slide No. 7

Learning Objectives

Slide No. 7

Learning Objectives

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Training Leader's note

- Gauge participants' knowledge and experience using the questions below, and adjust the facilitated discussions accordingly.

Refer to worksheet 1
Summary

Refer Worksheet 2
Club Leadership Plan Case Study

Refer Worksheet 3
Implementing the Club Leadership Plan

Worksheet 3: Implementing the Club Leadership Plan

Review each implementation step below. Check the steps your club currently does and circle what steps your club is having difficulty with.

Implementation Steps

To implement a club leadership plan, current, incoming, and past club leaders should:

- Develop a long-range plan that addresses the elements of an effective club for the next three to five years.
- Set annual goals using the *Planning Guide for Effective Rotary Clubs* in harmony with the club's long-range plan.
- Conduct _____ (#) club assemblies that involve members in the planning process and keep them informed of the activities of Rotary.
- Develop a clear communication plan among the club president, board, committee chairs, club members, district governor, assistant governors, and district committees.
- Provide for continuity in leadership, including the concept of succession planning, to ensure the development of future leaders. Ensure the president-elect and president-nominee are involved in the decision making and work with the committee chairs to appoint a chair-elect to each committee.
- Amend bylaws to reflect the club committee structure and the roles and responsibilities of club leaders. Consider adopting the Recommended Rotary Club Bylaws, found at www.rotary.org.
- Provide opportunities to increase fellowship among members of the club.
- Take steps to ensure that every member is active in a club project or function, such as appointing all members to a committee and assigning responsibilities to new members.
- Develop a comprehensive training plan that ensures
 - Club leaders attend district training meetings
 - Orientation is consistently and regularly provided for new members
 - Ongoing educational opportunities are available for current members
 - A leadership skills development program is available for all members

Club leaders should implement the Club Leadership Plan in consultation with district leaders as described by the District Leadership Plan. The plan should be reviewed annually.

During my year, I will focus on the following:

Worksheet 2: Club Leadership Plan Case Study

Develop a plan for advising a Rotary club that is implementing the Club Leadership Plan. Answer the questions below.

A Rotary club has 40 members. It has lost at least three members each of the last five years and has only brought in an average of two new members a year over the same period of time. In its 10 years of existence, the club has held an annual breakfast to raise funds for the fire department, a 5-kilometer run to raise funds for the school district, and a holiday meal for a retirement community. The club has never sponsored a Rotary Foundation or World Community Service project. The club does not know the contents of its bylaws and is unsure of when it was last revised. The club has never pursued public relations.

The president-elect heard about the Club Leadership Plan at the presidents-elect training seminar and feels it could improve the club. She has come to you to ask for your assistance in working out a timetable over the 15 weeks until the new Rotary year begins to implement the plan.

What are the problems this Rotary club is facing?

How can each implementation step of the Club Leadership Plan address these problems?

What goals might you advise the club to set for the first year of the plan?

What suggestions would you make to help the club follow the Club Leadership Plan throughout the year?