



Session 5: Running Your Club (45 minutes)

Relevance: Club presidents are responsible for managing club administrative activities, including understanding how to use Member Access, overseeing the management of club finances, minimizing risk for activities, and ensuring that Rotary Marks are used properly.

Option 1: Panel



Panels work best when the objective is to convey information through personal stories, expert-led demonstrations, and/or visual presentations. The room should be set up with a table in front for panelists and theater seating for the audience, and should be able to accommodate needed audiovisual equipment.

Learning Objectives

- Learn how to use Member Access to expedite administrative duties.
- Understand your basic duties regarding club finances and risk management.
- Learn the process for amending club bylaws.

For the Trainer

Before the session:

- Review the resources listed below.
- Ask three to five current or recent past club presidents to be your panelists, and consult with them on the presentation topics below.
- Encourage panelists to include slides or other visuals to accompany their presentations.
- Plan time at the end of the session for a Q&A.
- Communicate with panelists regularly to coordinate their presentations, ensuring that the desired topics will be covered and the presentations won't be redundant.
- Review slides 33-35 and make any necessary changes. Have your panelists send slides for their presentations so you can coordinate them for the session.
- Make sure you have the necessary materials: computer, projector, and screen.

During the session:

- Review learning objectives with participants at the start.
- Refer participants to the resources below.

Resources

Chapter 3 of the [*Club President's Manual*](#): Running Your Club

[Running a club](#)

[Club Treasurer's Manual](#)

[Club and District Support Representative](#)

[Member Access](#) and [Member Access Quick Reference Guide](#)

Presentation Topics

The following topics should be covered in panelists' presentations:

- Member Access (what club presidents need to know, how to register, accessing club information, reports)
- Club finances/budgeting (best practices, working with your treasurer, budgeting)
- Risk management (liability, responsibilities as club president, lessons learned)
- Amending club bylaws (how to do it, why it's important, example of an amended bylaw)
- Rotary Marks (how to use them correctly)



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Option 2: Idea Exchange



Idea exchanges work best with topics that participants have experience with. A training leader facilitates discussion, ensuring that all participants have a turn to speak and that no one dominates the discussion. The trainer can incorporate an activity at the end of the session so participants can apply the ideas discussed. Idea exchanges work best when seating is arranged in a U shape.

Learning Objectives

- Learn how to use Member Access to expedite administrative duties.
- Understand the basic duties regarding club finances and budgeting.
- Identify best practices for performing administrative duties.

For the Trainer

Before the session:

- Review the resources listed below.
- Become familiar with Member Access and its functionalities.
- Review the activity options below and choose the one that will work best.
- Review slides 36-39. Decide which ones you will use, make edits or additions, and think about when you will show each one.
- Make sure you have the necessary materials: flip chart and markers.

During the session

- Review learning objectives with participants at the start.
- Refer participants to the resources below.
- Use the discussion questions below to facilitate idea sharing among participants.
- Finish the session with one of the activities below to help participants apply the information learned.

Resources

Chapter 3 of the [*Club President's Manual*](#): Running Your Club

[*Running a club*](#)

[*Club Treasurer's Manual*](#)

[*Club and District Support Representative*](#)

[*Member Access*](#) and [*Member Access Quick Reference Guide*](#)

[*RI Visual Identity Guide*](#)

Discussion Questions

- What is Member Access and how can it help you do your job?
- What is the president's role in club finances and budgeting?
- How will you create a budget that appeals to your members?

- How do you know when your bylaws need to be updated? What is the process for updating them?
- How can you ensure that you minimize risk when planning an event?
- What are Rotary Marks and what do you need to know about them as a club president (see slide 39)?

Activities

Choose one of the following activities:

1. Have participants share their questions about administrative duties and record them on a flip chart. Ask participants to divide up into groups of three or four, assign each group a question that was mentioned, and have group members come up with a solution. After 10 minutes, ask each group to share its solution and record it on the flip chart.
2. Write each of the following topics on a sheet of flip chart paper, and post them around the room: Member Access, Finances, Bylaws, Risk Management, Rotary Marks. Ask participants to rate themselves on each topic listed on a scale of 1 to 5, with 1 signifying “little knowledge” and 5 “significant knowledge.”

Divide the group in half and ask one-half of participants to stand by the topic they have little knowledge about, and the other half to stand by the topic they have significant knowledge about. Involve assistant governors, who can fill in as experts as needed.

After five minutes, have the halves switch roles. At the end of the activity, each participant should have both taught something and learned something.

Note: Allow time to cover any district or regional issues pertaining to this topic.