



BE THE INSPIRATION

Rotary



PRESIDENT'S GUIDE

District 1080

2018-2019

Leadership & Training Committee

NOTE:

You can download an electronic version of this Guide from www.rotary1080.org and login to go to the “members only” pages, select “District” pages and click on “[President's Guide](#)”

You can also click on any link in the downloaded pdf of this document to find things quickly

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SO, YOU ARE GOING TO BE THE PRESIDENT OF YOUR ROTARY CLUB – CONGRATULATIONS!

- **As Club President your role is to lead an effective Rotary Club.**
- The **2018/19 Presidential Guide** aims to complement the training that is available to you through your participation at the Presidents Elect Preparation Session (PEPS) and the District Assembly and sets out to provide you with the essential information you will need in carrying out your role.
- **As President of your Club** you will in effect play two roles: -
- You are **the Figure-head**, chairing Club meetings, presiding over Club events and representing the Club to the public.
- You are the **Manager** of the Club, providing leadership, direction and inspiration to your fellow members.
- You do NOT have to do all the work, so delegate tasks to your teams or committees
- You can build upon your own network of local community/business/media contacts to assist you in achieving your goals.
- You can make contact with neighbouring Clubs to identify the potential for shared projects and utilising limited resources, strengthen and establish your own support system and develop your own informal external sounding board.
- You can identify key people within your Club and help them to prepare for taking a lead role and ensure that they attend District Assembly and other training.
- You can prepare early for your Club Assembly and Handover and work on 'hitting the ground running'.
- You can ask for help from your Assistant Governor and anyone on the District Team

- You will find much of your time will be spent massaging egos, smoothing troubled waters and helping others find their way. A bit of empathy goes a long way. So, does praise. And a sense of humour.
- **Above all be positive, ambitious yet realistic, be open, transparent and ensure the whole Club (and you!) enjoys your Presidency.**
- Finally, we hope that you will find something of help and value to you as President in the following pages. If we have missed anything, please let us know, or ask your Assistant Governor, or the appropriate District Chair. Hyperlinks, if you are using the [electronic version](#), or text links, for the paper version, will take you to more detailed information on specific topics.

So what do we do as Rotarians?

Club, Community, Vocation, International and Youth

These are the five avenues through which we serve and in doing so apply our core values of:

Service, Fellowship, Diversity, Integrity , Leadership

All of these core values are reflected in the [Object of Rotary](#) and [The Four-Way Test](#), which we use in our daily lives to foster and support the ideal of service for developing and maintaining high ethical standards in human relations.

Rotary Foundation - what is it and what does it do?

The American term “foundation” unfortunately does not always translate very well into UK language, and many people don't grasp what it is. **Foundation** is Rotary's charity.

“**Doing Good in the World**” is what Foundation is there for, because Foundation exists we can, very simply, do more of our Rotary work.

- You will already know that “End Polio Now” is a major task for Foundation, but additionally there are many projects funded by Foundation, covering fields such as humanitarian and educational programmes, as well as supporting individual Club and District projects.
- [Polio Plus Fund](#) supporting the Foundation through programme participation and financial contributions.
- Club members can financially support The Rotary Foundation by [making donations](#) personally (Every Rotarian, Every year)
- Your Club can donate directly to Foundation, preferably via the Foundation Chair. If you wish to make a Paul Harris Fellowship award, your Club will have had to donate at least \$1000 to Foundation prior to making the award.
- If you use the [RIBI-T website](#) template for your Club website, you are required to make a donation, currently £50, to Foundation

See the [Club Rotary Foundation Manual Quick Reference Guide](#) for more information on how your Club and Members can support The Rotary Foundation. You can also contact the District Foundation Chairman, [Derek Rothwell](#)

Qualifying for District or Global Grants

These grants are used to supplement the Club's funding for their projects, by matching their money with Foundation money.

The District Rotary Foundation Committee will run workshops for Grant Management. To be eligible for either District or Global Grants, Clubs must be "qualified". This requires the incoming President [PE] to attend training in grant application procedures or Club Secretary / Treasurer to deputise and Clubs must agree to the Club [Memorandum of Understanding \(MoU\)](#), a legal basis for the grants. Acceptance MUST be confirmed with the signatures of the current Club President and the Club President-Elect, and the MoU must be returned to the Foundation Chairman. *This must be undertaken every year to qualify*

Available from the Foundation Drop Box are papers that cover the following:

- . District Application documents
- . Legal documents
- . RI documents
- . Scholars & Vocational Training Teams
- . Accessing the on-line application process
- . Grant Management Manual

For further information on how your Club can get more engaged with The Rotary Foundation...

Contact the District Foundation Chairman: Derek Rothwell
foundationchair@rotary1080.org.uk

Your Support Team in Club and District

District Governor 2018/2019

David Simpson

email davidrsimpsoncar@btinternet.com 01394 385839

The District Governor represents Rotary International and acts as the primary link between RIBI and RI on all Rotary developments across District 1080

Assistant Governors

[Assistant Governor list](#) - check District website for details

Assistant Governors serve for up to three years with a wide-ranging remit to support the District Governor and help meet the District goals.

Their main duties and responsibilities are: -

- Visit each Club in his or her assigned region, as agreed with the District Governor.
- Attend Club Assemblies.
- Lead the Presidents-Elect Preparation Seminar (PEPS) and attend the District Assembly.
- Attend, and actively encourage and promote attendance at the District Conference, District Council and other District meetings.
- Help to identify and develop future District leaders.
- Promote and coordinate Club Presidents area 'get-togethers'.
- Attend some of the social activities, such as Charter anniversaries, presentation of PHF awards and similar events, on behalf of the District Governor.

Other District Officers and Committees

District Committees develop Rotary programmes across the District and offer support and advice to Club programmes:

Community & Vocational: *Chairman* **Nick Corke**
email nick.corke@ic24.net 07880 673700

International Committee: *Chairman* **Robert Lovick**
email rlovick2000@btinternet.com 01692 670076

Foundation Committee: *Chairman:* **Derek Rothwell**
email derek@drothwell.co.uk 01394 386381

Leadership & Training Committee: *Chairman:* **John Samuel**
email john.r.samuel@outlook.com 01366 382464

Marketing & PR: **Ian Elliot**
email rotary@iebms.co.uk 01603 632454

Youth Services: *Chairman:* **Bill Redmayne**
Email whr-dg1080-0506@btconnect.com 01945 466733

Membership: *Chairman:* **Ray Burman**
Email rayburman@me.com 01842 828891

District Protection Coordinator: **Tim Randell**
timrandell61@yahoo.co.uk

Health & Safety: **Marian Randell**
marian@safetyboss.co.uk

District Protection Officer: **Dorothy Pulsford-Harris**
dottie.fenedge@gmail.com

1080 News Editor – [Rodney Howell](#)

District Social Media Editor - and - District Webmaster and Data Officer – [Martin Brocklebank](#)

Club Officers, their roles and responsibilities:

The Officers of the Club are the President, President-Elect, Immediate Past President, one or more President Nominee, Treasurer and Secretary. The Officers, other than the Immediate Past President, are elected in the manner prescribed in the [By-laws of the Club](#) and hold office for one year or until their successors are elected. Club Secretaries and Treasurers may not serve more than five consecutive years.

The Roles of the Club Officers

The roles of the Club Officers are defined in the RIBI Standard Club [Bylaw 3, clause 4](#) [*Requires Login*], the following is an outline

President:

the role of President can be likened to that of Chairman of the Board in a large Company, **the buck stops with you!**

- run the Club meetings
- chair the Club Council
- attend Committee meetings as and when appropriate
- take overall responsibility for the smooth running of the Club
- provide direction and enthusiasm for the Club
- massage egos, smooth troubled waters

President-Elect:

The President Elect is the Managing Director of the Company

- manage the smooth running of the Club
- deputise for the President in his or her absence at meetings
- delegate tasks whilst maintaining supervision of them

President Nominee:

- Perform such duties as necessary to support the President and President Elect.

Secretary:

- the role can be very wide-ranging and is probably the most complex job in the Club
- the job may be split, for example, the Club may have a Minutes Secretary and a Programme Secretary
- Maintain Club records, correspondence and communications between the Club, District, RIBI and RI

Treasurer:

- Responsible for maintaining accurate records of all financial transactions relating to the Club
- Carrying out all financial transactions on behalf of the Club
- Present financial statements to Club Council and at Club Business meetings
- It is preferable that Club and Charity accounts are separate
- Arrange for audit or Independent Financial Examination of all Club and Charity accounts

Additional Officers:

It may be appropriate for the Club to have additional Officers, for example there could be a Minutes Secretary, or a Programme Secretary, or an Assistant Treasurer. In addition, the Club will have Committees to handle specific areas of Club activities, or it may take the task-related approach of having one person nominally chairing the task and drawing a group of Members together to carry out the task.

Continuity

Nobody is indispensable, but you don't want to find out how difficult a particular job is when the Officer can no longer do it, for whatever reason! Plan for continuity, have people lined up for the jobs before they become vacant, and have them shadow the incumbent to get the hang of the job, should they need to step in.

It helps to have two years' worth of potential Officers, to make the

planned or unplanned changes less stressful. Often, this will be done by having Members serve on Club Committees, so they are familiar with the way the Club operates.

Committees or Teams?

You are not bound by any rules that state how you should organise the administration of your Club. Whilst the Committee structure is well-tried and tested, particularly in a small Club it can impose considerable commitment on Members' time and this can reduce the enjoyment of Club Membership.

An alternative approach is to have one Member as the nominal Committee Chair, who then gathers those Members best suited for a particular project into a Team, which may disband at its completion. It may well be that Club Council will originate the task, but of course it might come from an individual Member. Someone with passion for a project is a far better choice to drive a project forward than a disinterested Committee.

Club Programme

It is usual to have your President Elect manage the programme (note “manage” is not the same as doing it, though that option may be chosen). The following Key Dates should be included

- March 17th Grants fair
- April 21st District Assembly all Club members
- end of June/early July Club and District Handover Events
- July 1st Pay RIBI & District Subs [invoiced*]
- October 3rd District Council Meeting
- 13th October 2018 [District Conference](#)

- December SGM (update RI & District Database)
- January 1st, 2019 Pay RIBI [half-year, invoiced*]
- January/ March Update RI Data base
- March 3rd to 17th PEPS training for President Elects & President Nominees
- April 6-8th [RIBI Conference](#)
- April District Grants Fair

Update District Data base with Club Officers
- April/May Club AGM
- May Foundation Contribution
- May/June Club Assembly,
RI Convention
- Any time Charter evening

** NOTE: Half year invoices are issued by RIBI using the club membership on the Database [DMS] as at 1st July and 1st January each year – it is therefore important that this is accurate otherwise you will be charged for leavers not terminated.*

Then, add in your regular meetings, business meetings, individual Club Activities, events, talks, visits to other Clubs etc.

If you have Speakers at regular meetings, it is a good idea to put the subject etc. into the Programme. It will be helpful when introducing a potential Member to Rotary, to be able to invite them to a meeting which includes a speaker who might specifically interest the potential Member.

Key Club Annual Events

Club Assembly - One of the Club's most important meetings

- As incoming President, your own Club Assembly is one of the most important meetings of the Club's year

Purpose:

- To set out the programme for the Club, for the coming year and to facilitate the communication from RI, RIBI and District to the Club

Timing:

- After District Assembly up to 30th June
- Date to be agreed with your Assistant Governor as soon as practicable as the AG (or representative) will normally attend this meeting .
- Club Assembly must be held in May/June, after District Assembly, and certainly before the start of the new Rotary Year.

Procedure for Club Assembly [[link needs login](#)]

- President opens the meeting and chairs the first part of the proceedings which should take the normal form, i.e. apologies, welcome the Assistant Governor & guests, Loyal toast, notices etc.
- President makes introductory remarks and hands over the Chair to the Incoming President.
- Address by Incoming President who should then introduce in turn, those giving Committee reports.
- Incoming President invites Assistant Governor to comment and sum up.
- Vote of thanks to Assistant Governor.
- Incoming President hands back chair to the President who will close the meeting.

General Points

- **Club Assembly is NOT a review of past events, it is for the plans for the future year to be outlined by the incoming Team**
- To share with members of the Club, your **aims and aspirations** as President for the coming year.
- To highlight the main RI/RIBI/District **themes/messages/preferred projects** for the next year. Some Clubs take no notice of these, in favour of their own.
- To allow Committee Chairs to explain their **committee's plans** for the new year.
- To receive the comments & response from the Club Members to the proposed programme.
- **to enable members to support and endorse the coming year's programme and commit to its successful implementation.**
- The Assembly should not be rushed - allow plenty of time for the presentations and discussion after each report.
- The incoming President should not steal the Committees' thunder when you make your initial introduction.
- Ideally there should be no other business or speakers involved at Assembly.

President Elect's tasks before Club Assembly

- Ensure that if a nominated Chair cannot attend District Assembly that a deputy is sent and that those team members that were absent from District Assembly are fully briefed on the issues discussed.
- Meet and agree with your team their outline proposals for the coming Rotary year.
- Request/encourage all new Committees to meet at least once before Club Assembly.
- Ensure the Club Assembly Agenda is circulated to all Club members prior to the meeting and share with members the importance of Assembly.
- **Request/encourage Chairs to submit written reports of their proposals in advance and circulate to all members.**

Ensure that the date of the Club Assembly is agreed with the Assistant Governor and that he/she has details (time, venue) and received all written reports from yourself and Committee Chairs in advance so that the Assistant Governor can make a positive contribution to the meeting.

Annual General Meeting

You may choose to hold an Annual General Meeting at which you can present the achievements of your Club, with presentations from Committee Chairs and Club Officers.

This could be a good opportunity to make any presentations, eg Paul Harris Fellowships, and to thank Members for their work, and to thank people from your community who have supported your Club's efforts (remember to invite them!).

Special General Meeting [SGM]

This meeting is important as it must include receipt of the [audited accounts](#) and the election of Club Officers for the coming Rotary year. It must occur before the end of December, there must be a period of 14 days' notice, and it must be attended by a quorum of at least one third of the Membership.

The following must be nominated by a Member (with the Nominee's permission) at least 7 days in advance

- President-Elect
- President-Nominee, (President in the Rotary year after next)
- Club Secretary for the next Rotary year
- Club Treasurer for the next Rotary year
- Voting Delegates to the next RIBI Conference/District Council

The Secretary should then update RIBI /RI Global Database and District data base as soon as possible

Club Meetings:

recent changes made by RI Council on Legislation have made very significant changes to the rules governing Club Meetings. For a detailed explanation, [CoL](#) [*Link Requires Login*]

In principle, your Club can meet whenever and wherever it wishes, with or without a meal, with or without the formality of Grace, Loyal Toast and Closing Toast, and whatever dress code your Club may wish. The meetings can even be “virtual” using the Internet, provided your Members have the necessary technology to participate.

[A typical Club meeting agenda](#) [*link requires login*] (in Appendix)

Do NOT feel under any obligation to follow this, or any other agenda, it is up to you how you run your meetings.

If you are going to have a Speaker, it is ill-mannered to precede the Speaker with a series of Club business discussions.

Bear in mind a fundamental principle of Rotary is “fellowship”, so you need to ensure the organisation of your meetings allows this to develop.

Some Clubs have taken the opportunity to meet every other week, with the intervening weeks devoted to Business Meeting/Committee meetings and a social evening. Another approach is for two adjacent Clubs to stagger their two meetings per month so that any Member can attend a meeting every week if they so desire. This has the excellent spin-off allowing a sharing of projects and fellowship. Bear in mind meeting on alternate weeks can delay projects and weaken fellowship.

Business Meetings:

Every Club needs to have a Business Meeting every month or so, to ensure Club projects are operating successfully and any structural or organisational changes are managed with the co-operation of all Members. Make sure an agenda goes out in good time prior to the meeting. If there are urgent matters to attend, use email or phone to introduce the issue in the interim.

Scatter Week

This is an opportunity to meet another Club, in this country or another. Scatter replaces the usual meeting or is a separate occasion to suit the Club you are visiting. You simply pick, for whatever reason, another Club and arrange for a group of Members to all visit that Club, or perhaps get your Members to literally “scatter” individually or in small groups to several Clubs during the week.

One caution, don't let Members think Scatter Week is an opportunity to simply miss Rotary for a week – this is a waste of an opportunity to see how Rotary happens in other Clubs, learn from them and have an enjoyable time.

Club Council:

The function of Club Council will vary according to the Club, and in particular its size.

In principle, to use the corporate analogy, Club Council is the Board of Directors. They are there to make a first pass at decisions relating to the Club. These may be the direction of the Club, according to the President's wishes, but they may also be about how to handle difficult situations, or complex issues.

In a small Club, these matters may go straight to the Club, during a Business Meeting, without the Club having a Council at all. In a larger Club, they simply reduce discussion by examining the issues to be decided and then presenting them in a concise way.

Occasionally, the issue may be very sensitive, and the President may need the advice of the senior Members of the Club, and Club Council provides this forum.

Development of your Club

Membership

This is a perennial issue in Rotary, just as in other organisations. There is no “magic bullet” and the methods are as many and varied as the Clubs.

Public image is paramount. Stereotypically, Rotary does not have a lively image! You need to change that in your community. If you don't appear as a vibrant, lively and fun group of people doing useful things to help your community, local, national and international, why should anyone want to join your Club? If you would like to have some support and advice on developing your Club's image, email the [District Public Image Chair](#) and ask.

Your Club has to be visible in your community and be seen to be making a positive contribution. If you provide money or aid to a local cause, make sure that Rotary and your Club are clearly featured in any press releases, use social media to flag up your involvement. Ensure any media coverage shows interesting or active participation (a “grip and grin” photos with a chap in a suit wearing a gong and holding a giant cheque and shaking someone's hand whilst standing side on to each other is unlikely to make the front, or any page!)

The age of Members is not very important, but if your Club is “male, pale and stale”, then don't be surprised if, with an average age of 75, you don't attract 40-60-year old's, male or female.

Be even less surprised if your Club is exclusively male (bear in mind that if that is from deliberate choice or action you run the risk of prosecution under Discrimination Law and Members are PERSONALLY liable if legal action occurs, and a complaint can be made by ANYONE who observes this discrimination)

Your Membership should reflect the local population, in both the people and the jobs they do.

You should develop a Membership leaflet, detailing when and where you meet, the sort of things you do in Rotary, contact details etc, ready to hand out whenever your Club is in public, at an event etc. Or perhaps a business card.

The internet provides an easy way to reach potential Members but does need commitment. There is little benefit in having a web-site that shows only what you did two years ago. The RIBI Template website can be used by any Club for a modest donation (currently £50) to Foundation and is easy to set up and personalise for your Club.

Social media, such as Facebook, Twitter, SnapChat, WhatsApp may be a mystery to the average Rotarian, but they are the means of communication for the younger generations, and if you want to lower your Club's average age, this is the way to go. But again, you will need commitment – find someone who has the necessary skills, or is willing to learn, and give them the job. You can get help with this from the [Public Image Chairman](#) and [District Webmaster](#)

Introducing a Potential New Member

So, you have a potential new member. They may know almost nothing about Rotary, so an introduction is necessary and helpful. Preferably get an experienced Rotarian to have a chat with them.

The chat should cover a brief history of Rotary, the concepts of fellowship and service, when, where and how the Club meets. It might also cover a brief overview of how Rotary is structured, Club/District/RIBI/RI, the sort of projects, local, national and international.

An explanation of the projects the Club has done, or is planning to do, with some discussion on how this fits with the potential Member's interests will give them a better idea of how well they will fit into the Club, and what the Club is all about.

It would be helpful to cover the costs of joining, of Membership, the cost of events like Charter Night and the time taken, typically, helping with Club projects. Rotary inevitably takes up time, so family and other commitments should be discussed, as well as the impact of job time and pressures.

The Application - Introducing a Prospective Member to Club - The [Seven Day Notice](#)

The Club Secretary must circulate details of a prospective member to each member of the Club as follows:

- Full name / DOB
- Home and any Business Postal Address
- Contact details / telephone
- Occupation

Members have **7 days** in which to respond to the Secretary with any objections to the prospective member being admitted to the Club

- Objections should first be considered by you, the President, and referred to Club Council for approval
- Objections must be factual and reflect on suitability to join and be an effective part of the Club. Bear in mind discrimination, based upon sexual orientation, gender, race or religion are NOT permissible grounds for objection.
- There is a procedure for deciding on the valid grounds for objection, should this become necessary – ask your AG to advise.

[Guide & Sample induction address template](#) - Club President

[link requires login]

Retaining Members

Although the Rotary motto is “service above self” very few of us are so altruistic that we will continue our Membership with no feeling of reward. There has to be some “pay-back”. You primarily must want to go to your regular meeting, because you enjoy it, and the things your Club does.

Fellowship is a somewhat archaic word, but we can be clear about the meaning – enjoying the company of other Members in a happy and cheerful environment. The friendships that develop within a Club are its foundation. This needs a balance to be struck between getting things done and having fun, though the two are often intertwined.

Putting square pegs into round holes is a fruitless exercise, so when you, as President, are looking at projects or the building of Committees or Teams, choose carefully and encourage those who stand back from taking on Club roles to join in, in roles that suit their talents or interests. It's far better to actually ask people what they would like to do than just drop them into a role.

Whilst there will be things that have to be discussed, don't turn every meeting into a Business Meeting. At a regular meeting keep business to an absolute minimum, so the “fun” side can prevail.

People like to feel wanted, so a “thank you, well done” from the President shows you notice, and you care.

If a Member is ill, or has not come to several meetings, find out what is going on and make tactful and friendly contact. Sadly, death awaits us all, as President you should attend the funeral of a Member, or their close family relation, on behalf of the Club.

Purely social, “fun” events are a good way to keep Members involved with each other and enjoying their Rotary, particularly when they involve family and friends. This is another route to gaining members.

In the event that a Member is expressing concerns about their Membership, tactfully find out what is the problem, and deal with it if you can. Bear in mind that attendance is no longer a major concern, and “leave of absence” is not really required provided you and the Member are aware of the situation. If the Member does leave, evaluate the reason and learn from it.

Club Mentors

To a certain extent, you, the President should be the primary Mentor, in that you are responsible for the overall conduct and activity of the Club and should go out of your way to make a new Member feel welcomed and informed. You might, however, like to appoint a Mentor as and when you feel it would help. Perhaps in a small Club, the role is unnecessary, all your Members should make a new Member welcome and answer any questions they may have. In a larger Club, the official role may be helpful, although the Membership as a whole should still be supportive.

A new Member needs to have Rotary explained. We tend to wrap things in acronyms and hierarchies, processes, agendas, rituals and preferences. These need to be properly explained well before the new Member feels lost or excluded. A “New Member” pack is a worthwhile item, but often a simple chat with an experienced Rotarian will do the job.

Sponsorship and Co-operative relationships

Developing relationships, partnerships, inter-agency cooperation and networking with the wider community, business and individuals plays a vital part in helping to promote and develop Rotary values. It is also a valuable Membership tool.

Rotary Districts, Clubs and other Rotary entities must not accept a cooperative relationship which conflicts with Rotary's ethical and humanitarian values, or is not in accord with the Object of Rotary

Individual Rotarians must not personally benefit from sponsorships or cooperative relationships.

Club Visioning- A Catalyst to Shape your Club's Future ?

Rotary Club Visioning is an initiative founded in 2005, in which a team of trained facilitators visit your Club to assist the Club in planning for the future. It is designed to enable each Member of your Club to think about where their Club is now, where it will be in five years' time and how it is going to get there. It is a programme in which each Member's voice can be heard. It should enable you to sustain and increase membership and implement even more successful service projects.

So, if your Club is struggling to find new Members, or is losing Members, or participation is dwindling it may well be that Club Visioning could help.

Club Visioning involves a formal visit to your Club by the **Visioning Team**. It will be an extended and intense experience, but it could make a big difference in leading your Club forward to develop the outline for its own five-year plan. The trained team will help you to draw out and define what you want for the future of your Club and which ideas could be the most effective to carry your Club through the next five years. They will not tell you what to do!
Contact the [Visioning Team Chairman](#)

Training and Support

The two key engagements for **all** Incoming Presidents and Presidents Elect are **PEPS** (President Elect Preparation Session) and **District Assembly**. These are vital forums for networking with your neighbouring Clubs and their Officers and accessing information and support from your AG and District Committee Chairs.

Please do ensure that you clear space in your diary to attend your own Area PEPS, encourage your Committees to come to District Assembly and your members to the District Conference and District Council meetings.

District participation

The District structure exists for the benefit of the Members, not the other way around. As President you should try to attend as many District events as you can, for example District Council, to bring your Club's opinions into the discussions. District Assembly, to find out what is happening in the coming year. District Conference, to meet the District team and many other Rotarians on a social level and be inspired. Encourage your Members to join you. District events are NOT for the “chosen few”, they are for every member and every Club.

District Leadership Training

The District programme of training and development is led by the Leadership & Training Committee in consultation with the DG Elect.

Programmes are devised around the Rotary year to ensure continuity and progression, changes in Office holder and RI, RIBI and District themes and initiatives.

Training events and materials are the subject of continuous improvement based upon surveys and feedback from participants

There a number of specialised training events organised for Club and District Officers

Presidents' Elect Preparation Session - (PEPS)

During March as arranged by the Assistant Governor

- To prepare incoming Presidents and Presidents Elect for their year ahead as leaders of their Club
- To help both to work as a team for the benefit of their Club.
- To act as a bonding session between the AG and the Area future Presidents

Attendees - Incoming Presidents and Presidents Elect,
Area Assistant Governor plus one facilitator or AG

Other Club Officers e.g. Secretary and Treasurer will have their own training sessions - *dates to be advised*.

District 1080 Assembly

- To brief Club delegates on RI/RIBI and District Themes/Projects.
- To inform Club delegates of the support they can expect from The District Teams during 2018/2019
- To inspire all attendees to carry on the work of Rotary.
- To provide an opportunity for 1080 Rotarians to meet each other for friendship and networking.

Attendees – District Governor, District Governor Elect, Past District Governor(s), Club Presidents and their Club team, District Officers, L&T Chair and Committee members. All Club members are welcome to attend. Members of Rotaract and Inner Wheel may be invited

Information Technology

You can use information technology to find everything you are likely to need to know about Rotary from several sources but beware using search engines as the results may be out of date. The following links are accurate:

- 1080 Website – you can see public access information and login to see “Members Only” information. Your login is your RI “My Rotary” login www.rotary1080.org
[requires login for Members Only]
- 1080 news – keeps you up to date with activity in the district link: 1080News you will need to login at www.rotary1080.org
- Data Management System [DMS] – [DMS](#) to login use your RI “MyRotary” There is a separate simple guide as Rotary Databases explained in this guide. The Club Secretary or designated “Club admin” will keep Club records up to date for accuracy.
- RBI has a member access where much information can be found – login in at www.rotarygbi.org
- RI has a wealth of information on the “My Rotary” access. You will need to have registered to gain access; if you have not registered go to [Register at MyRotary](#) - once registered you can sign in at ["My Rotary" Login](#) and explore the menu of information such as templates, guides and useful information.
- Rotary Club Central (now known as RCC2) can be accessed via My Rotary and [this link](#) explains it simply. It is a repository of data related to Club achievements, targets and projects, throughout RI
- The General Data Protection Regulation [GDPR](#) being introduced and Clubs must comply with the Regulations by 25th May 2018
- For any queries email <webmaster@rotary1080.org.uk>

Recent changes introduced because of CoL 2016

At the Council on Legislation meeting held in 2016 Clubs have been given greater freedom in respect of the character and frequency of meetings, type of membership and much more. To help Presidents a [separate booklet](#) has been prepared outlining these changes and will be distributed with this handbook.

Presidents are advised to consult with their Assistant Governor and/or the District Secretary before making any changes to the Club's current meeting time, frequency etc. as there may be unintended consequences of such changes.

Compliance with the Health and Safety, Equality, Safeguarding and Diversity Legislation

Presidents will be aware that for some time now Clubs have been required to signify their compliance with this legislation together with Health & Safety etc. by the simple signing of a [Compliance Form](#). This must be returned to the District Secretary within 4 weeks of taking office.

Whilst this meets the requirements of the various Acts, it is clear that very few Club Members have a clear understanding of the legislation and the consequences that could follow if a complaint were to be made. Note that a complaint may be made by a third party, and if the complaint is upheld and the Club has not followed the Compliance requirements, then the Club Members may be **personally liable** for any penalties.

To help Presidents and Club members a short booklet is included with the Presidents Handbook, and there is a brief summary at the end of this Guide, however if there is any doubt consult with your Assistant Governor or District Health and Safety Officer Marian Randell or Tim Randell tim@safetyboss.co.uk for queries concerning safeguarding, equality and diversity

Your future contribution to Rotary?

After what we hope will have been a successful, positive and memorable year as President you will no doubt be wanting to take a 'sabbatical' from Rotary and catch up with all those outstanding jobs and holidays. You are certainly entitled to take a back seat for a year.

Of course, as Immediate Past President you will be able to 'chip in' with some positive input at Club Council and be a sounding board for the new President.

But what have you got to offer and how can you continue to serve the Rotary movement?

Well, you will have certainly held a number of positions in your Club and developed your skills as an officer and chair of one or more committees. Hopefully, you will be able to look back on some significant successes and may like an opportunity to develop your ideas and skills on a wider stage.

District 1080 offers a wide range of opportunities for you to play a leading role in Rotary, expand your network and circle of friends and continue your personal development.

“District” always needs “new blood” so you might consider offering to join one or more of the District Committees, or perhaps you would like to become an Assistant Governor (generally considered the best job at District level)

Talk to your Assistant Governor before the end of your year and lay down a marker for the future. We are certain that you will not regret it.

Whatever happens, enjoy the ride!

Agenda for a Club Meeting

This is a typical agenda, but it is not cast in stone!

President opens the meeting - welcomes Members and guests

Apologies for absence - are not really relevant at a regular meeting, but should be recorded for Business Meetings

Clubs visited - these should be advised prior to the meeting

Grace- remember Rotary is not a religious organisation, and is not aligned to any particular faith so “grace” is not a requirement

***** meal ***** - there is no requirement to have a meal!

Loyal Toast – a formality handed down from Armed Services, and for which there is no requirement, your Club's choice.

Speaker – if you have one

Vote of thanks – only if you have a Speaker!

Any other business – avoid discussing Club business when you have guests or speaker

Variation if this is a Business Meeting – substitute the Speaker/Vote of Thanks with the business

Closing Remarks

Closing Toast – if desired

Induction of a New Member [\[link to guide\]](#)

(Name) you have been elected a member of this Club because we believe you to be a worthy representative of your vocation, in sympathy with Rotary ideals and prepared to help make those ideals effective in your business or profession, your community and internationally. Associated with the distinction of being a member of Rotary there are certain responsibilities: -

First, the basis of all Rotary is fellowship, regular attendance is essential, for without regular contacts, acquaintances cannot be turned into friends.

Second, the motto "service above self" is no idle phrase but represents an attitude to life which we should all practice in our different ways, according to our abilities and circumstances. In other words, as the object of Rotary which we have just heard read implies, we not only bring our vocation into Rotary, but we are expected to take Rotary into our vocation. `

` I welcome you (Name) not only into the membership of the Rotary Club of () but also into the greater fellowship of Rotary throughout the world.`

`I ask you to wear this badge with pride at all times. (shake hands and pin on badge), also give "Welcome to Rotary".`

Fellow Rotarians, I commend to you Rotarian (Name)
(Turning to the membership)-

I request you all not to fail in your duty to (Name) as a new member of our Club

Hand the new member a Membership Pack and invite them to speak if appropriate.

Health & Safety, Diversity, Safeguarding, Equality compliance

It is important that the following matters are addressed as soon as possible after taking office and when planning an event
All relevant forms can be found on MyRotary. You can find details of policies and procedures including risk assessments and insurance information.

You are required to sign the RIBI statement that the Club will abide by the health and safety policy, safeguarding, diversity and equality policy statements and send this to District within 4 weeks of taking office. If you are not prepared to abide by the requirements of the policies, you should not sign the documents and inform District accordingly.

Other matters that must receive attention

- Appoint one of your Rotarians as your Health and Safety Officer for the Club – they do not have to be an expert but someone possibly with business experience who could assist
- Similarly appoint a diversity and safeguarding officer who will deal with issues such as equality
- Ensure that you download a copy of the [RIBI Health and Safety policy](#) which gives detailed information concerning a number of issues including fire, first aid, manual handling, risk assessments etc. as well as a number of templates that can be used
- Ensure that suitable risk assessments and method statements are prepared before each event especially where these involve members of the public
- Ensure that where an event may not be covered by RIBI insurance – a new venture which has a risk element, for example, that the insurers are notified well in advance of the event taking place
- Where catering stalls are used to raise money, all persons involved with the preparation and handling of food must have the basic [Level 1 food hygiene certificate](#)
- Ensure that the weekly meeting venue is suitable and has adequate provision for escape in the event of a fire
- Where necessary review your Clubs approach to dealing with vulnerable persons – children and adults – and ensure

- that persons are DFBS checked where appropriate
- Avoid where possible any Rotarian being left alone with a vulnerable person to avoid any safeguarding problems
 - The Equality Act of 2010 applies to Rotary – this requires all Clubs to avoid discrimination of any person on grounds of age, sex, gender orientation, race, religion etc. Failure to follow the procedures could result in a Club and its members being liable for damages in the event of, for instance, a female applicant being refused entry to an all-male Club on the basis of her gender. Damages will have to be borne by the Club members.
 - As Club President you must sign the documents above to advise that you are actively following the guidance. If you decide not to follow the guidance, then you may personally be held liable for issues arising from non-compliance.
 - If any accident or major incident occurs, you should notify District as soon as possible – please obtain all relevant information surrounding the event and keep a record at Club level
 - **BE AWARE** that data protection rules are changing in May 2018 - [GDPR](#) and that persons must positively state that they are content for personal information held by the Club to be distributed to others in accordance with local policies and procedures. The Club cannot send out e-mails to any businesses, individuals etc unless they have their permission in writing. Under no circumstances should personal details of Club members be sent to persons outside of the Club without their permission.

If you need any help or guidance on any of these matters please contact either Marian Randell (District Health and Safety Officer) for queries concerning health and safety or Tim Randell (District Protection Co-ordinator) for queries concerning safeguarding, diversity and equality.

Tim and Marian can be contacted as follows
tim@safetyboss.co.uk and marian@safetyboss.co.uk

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