

Appendix 4: Discussion Questions for the District Assembly

Review these questions before you attend the district assembly. Compare thoughts with outgoing and incoming club leaders.

What are the major responsibilities of the treasurer in your club?

How can you prepare for your term as treasurer?

What potential fundraising activities will your club hold this year, and how will you be involved as treasurer?

Who might be a resource to you in your club and district?

How can you work with fellow club leaders and committees to manage club funds responsibly?

What is one goal you will work toward in the coming year? How does this support your club's long-range goals?

What problems might arise, and how could you address them?

The image shows a page from a notebook or a template. At the top, there is a purple header bar with a yellow wavy border. On the left side of the header, there is a circular logo featuring a gear and a cross. To the right of the logo, the word "Notes" is written in a white, sans-serif font. The main body of the page is covered by a light gray grid pattern.

Worksheet 2: Goals

Use this worksheet to draft a long-range goal and annual goals for three years to reach the long-range goal. Ensure that your goals are:

Shared. Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.

Measurable. A goal should provide a tangible point to pursue.

Challenging. A goal should be ambitious enough to go beyond what your club has accomplished in the past.

Achievable. Rotarians should be able to accomplish the goal with the resources available.

Time specific. A goal should have a deadline or timeline.

Long-range goal (goal for your club three years from now):

Year 1 annual goal:

Year 2 annual goal:

Year 3 annual goal:

Worksheet 3: Action Plan

In the space below, write one annual goal from your goals worksheet. Then, determine the action steps that need to be taken to meet this goal.

Annual Goal:

Action Step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

Resources needed:

Worksheet 4: Club Treasurer Case Studies

Read each case study below and answer the questions. Create a plan using the case study action plan worksheet on page 30.

Case Study 1

You are the new treasurer for the Rotary Club of Oakport. Your predecessor has been in the position for the last four years. The club has one bank account with US\$10,000 that has been transferred to your name. You are the only name on the account. The last financial review for the club was over five years ago.

Would you conduct a financial review?

What changes would you implement to how the club's finances are handled?

Case Study 2

The Rotary Club of Puerta Villa has traditionally been a small club. One member has handled the responsibilities of the secretary and treasurer positions for several years. However, this member recently left the club due to health issues. Your club is rarely open to change, but you have a lot of innovative ideas you would like to see implemented. You have shared these ideas with your club president-elect and several other members. The club president-elect is skeptical, but the club members are excited.

How will you convince your club president-elect to give your ideas a chance?

How could these changes affect the dynamics of your club?

Case Study 3

You have reviewed the semiannual dues invoices and would like to review them with the club secretary before paying the balance by 1 January. You have tried to meet with the club secretary several times before about other items, but she has not responded to your emails or phone calls. Not only is the deadline quickly approaching, but you want to make sure you have open communication between you and your club secretary.

What do you do?

Case Study 4

You have been the club treasurer for several years and this year will be your last. The club president has asked that you develop a learning process for financial best practices to pass on to future treasurers.

What process for learning about financial management best practices will you recommend?

What financial management practices does your club use that should continue and which should be changed?

Case Study Action Plan

Action Step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

What did you learn that you can apply to your club?

This image shows a full-page view of a notebook or worksheet. The top section features a purple header bar with a yellow wavy border at its base. On the left side of the header is a circular logo with a gear-like design and some illegible text. To the right of the logo, the word "Notes" is written in a large, white, sans-serif font. Below the header, the entire page is covered by a light gray grid pattern, consisting of small squares formed by dotted lines.

Worksheet 6: Problem-solving Guide

Use the Planning Guide for Effective Rotary Clubs and the goals worksheet from session 2 to develop your problem-solving guide. Analyze your club's goals, and think about potential challenges to achieving them. Then, offer solutions to these challenges.

	Goal	Potential Challenge	What resources are available?
Administration			
Membership			
Public Relations			
Service Projects			
Rotary Foundation			
Other			