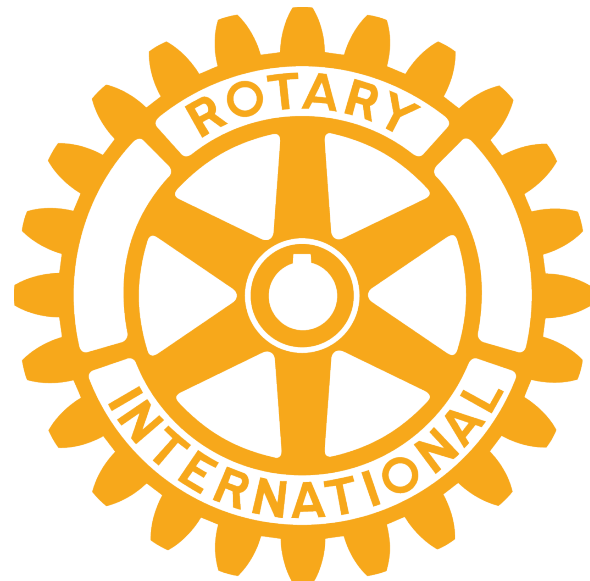# PETS 2020

MID-NORTHEAST PRESIDENTS-ELECT TRAINING SEMINAR 2020

President-Elect Discussion Leader Guides
March 20, 2020 DRAFT February 12, 2020

Mid-Northeast PETS
Presidents-Elect
Training Seminar

2020-21 District Governors
D7210 Tony Marmo
D7230 Mary Shackleton
D7255 Jacquelyn Yonick
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PETS 2020 Presidents-Elect Work Session: Discussion Leader Guide
Planning & Leading Your Year: *Lead Your Club – President 2019-22 manual, Chapters 1&2*
March 20, 2020 **DRAFT February 12, 2020**

1. **Introductions**
   -This is the first Presidents-Elect Work Session of the morning, give each PE participant about <u>15 seconds</u> to introduce themselves and share one very brief interesting fact about their Club.

2. **Your Job as Club President**
   You are all Club Presidents-Elect, what are some of your responsibilities prior to taking office on July 1?
   How do these responsibilities change on July 1, and what new responsibilities are added?
   -See "Your Job as Club President" in the introduction to LYC-P, pages iii & iv.
   • President-Elect Responsibilities
   • President Responsibilities

3. **Planning Your Year**
   What are Rotary's guiding principles, and how does your Club reflect these principles?
   • Rotary's Guiding Principles & Vision Statement

   What are your goals for your year as Club President, and how did you establish these goals?
   Why is multi-year leadership teamwork important in the process of assessing and setting goals for a Club?
   How and where do you share/post these goals with your Club, the District, and Rotary International?
   -Discussion Leaders will need to be very familiar with the process for setting Goals on Rotary Club Central.
   What is the Rotary Citation, and what role does it play in setting your Goals and energizing your Club?
   -Note that in 2020-21 there is no separate set of criteria for the Rotary Citation, you simply must set and achieve at least 13 of the 25 goals on Rotary Club Central
   - If time allows, break the participants into small groups to develop a plan to achieve the Rotary Citation, which will require internet access to Rotary Club Central on mobile devices or laptop.
   Note that the Rotary Citation is also available for Interact and Rotaract Clubs.
   • Strategic Planning
   • Setting and Evaluating Annual Goals
   • Rotary Citation

4. **Working with Your Leadership Team & Club Members**
   As Club President, are you solely responsible for the leadership of your Club?
   Who else is on the Leadership Team and how do you strengthen the relationship between Team members?
   • Club Board Officers & Elections

   What Club Committees should EVERY Rotary Club have, and how are they selected? See LYC-P, p9.
   • Club Committees & Chairs

   How do you and your Club develop and train your current and future leaders?
   How do you motivate and recognize your members and leaders?
   • Leadership Development & Succession
   • Member Education, Motivation & Recognition

5. **Work Session Recap & Evaluation**
   Remind the President-Elect participants to immediately evaluate this session on the MNE PETS app.

Resources
See the list of resources on the next page.
-Discussion Leaders will need to be familiar with ALL of these resources for this Work Session, as the Presidents-Elect will be provided with access to these resources prior to PETS, and some PE's may have related questions.

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Resources: Planning & Leading Your Year

- My Rotary: https://my.rotary.org/en
  - Club President: https://my.rotary.org/en/learning-reference/learn-role/president
  - Club Secretary: https://my.rotary.org/en/learning-reference/learn-role/secretary
  - Club Treasurer: https://my.rotary.org/en/learning-reference/learn-role/treasurer
  - Club Committee: https://my.rotary.org/en/club-committee
  - Membership: https://my.rotary.org/en/learning-reference/learn-topic/membership#assess
  - Rotary's Guiding Principles: https://my.rotary.org/en/guiding-principles
  - Rotary International's Strategic Plan: https://my.rotary.org/en/learning-reference/about-rotary/strategic-plan
  - Rotary Presidential theme resources: https://my.rotary.org/en/news-media/office-president/presidential-theme
- Rotary Club Central: https://rcc.rotary.org
- Learning Center courses or downloads: https://learn.rotary.org/members/learn/catalog
  - Mid-Northeast PETS Courses
  - Rotary Basics brochure
  - Strategic Planning Guide
  - Club President Basics course
  - Club Secretary Basics course
  - Club Treasurer Basics course
  - Club Administration Committee Basics course
  - Membership Committee Basics course
  - Foundation Committee Basics course
  - Service Projects Committee Basics course
  - Public Image Committee Basics course

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PETS 2020 Presidents-Elect Work Session Discussion Leader Guide
Running Your Meetings & Club: *Lead Your Club – President 2019-22 manual, Chapters 3&4*
March 20, 2020 **DRAFT February 12, 2020**

-This is the second Work Session that this group of PE's have been together, so please forgo the introductions.

1. **Creating an Engaging Club Experience**
   Being a Club President isn't just about running effective meetings. It's about creating an experience for your members that keeps them engaged. What do you plan to do to keep your members engaged and happy? How many of you have recently conducted a Member Satisfaction Survey?
   - Club Health and Member Satisfaction

   Have any of your Clubs implemented changes related to Rotary's recent "Club flexibility" suggestions?
   - Flexibility in Meetings, Membership Types and Attendance
   - Meeting Formats

   How do your Clubs alter your meetings for Club Assemblies, DG visits or Rotary's monthly themes?
   - Club Assembly & Governor Visits
   - Rotary Year Calendar

   Who is on your Club Administration Committee, and what is their role in Club & meeting management?
   - Club Administration Committee

2. **Rotary's Online Tools**
   What online resources are available to your Club's leadership and its members, and how are they used?
   -This topic could easily overwhelm; the goal is to simply make the PE's aware that these resources exist. See list in LYC-P p34.
   - My Rotary website
   - Rotary Club Central
   - Learning Center
   - Club Management System (ClubRunner, etc.)
   - Delegation of My Rotary administration

3. **Running an Efficient & Effective Club**
   What are the official minimum standards that must be met by all Rotary Clubs? See list LYC-P p25-26
   What other requirements apply to Rotary Clubs, and where can this information be found?
   - Rotary Minimum Standards
   - Club Constitution & Bylaws
   - Reporting Requirements
   - Working with the District
   - Risk Management

4. **Financial Management**
   What are the three types of dues paid by Rotary Clubs & Members. When are the RI dues payable?
   Are US Rotary Clubs required to file a tax return?
   - Dues and Fees
   - Rotary International Dues Invoice
   - IRS Reporting
   - Fundraising

5. **Work Session Recap & Evaluation**
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Resources
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Resources: Running Your Meetings & Club

- My Rotary: https://my.rotary.org/en
  - Club President: https://my.rotary.org/en/learning-reference/learn-role/president
  - Membership: https://my.rotary.org/en/learning-reference/learn-topic/membership#assess
  - Club Administration: https://my.rotary.org/en/manage/club-district-administration/club-administration
  - Club Flexibility: https://my.rotary.org/en/club-flexibility
  - CDS Representatives: https://my.rotary.org/en/contact/representatives
  - Calendar: https://my.rotary.org/en/news-media/calendar
  - Membership Dues: https://my.rotary.org/en/membership-dues
  - Club Liability Insurance Program: https://my.rotary.org/en/node/13381
  - Rotary International Club Dues Invoice FAQ: https://my.rotary.org/en/club-invoice-faq
  - Rotary Brand Center: https://brandcenter.rotary.org/en-GB
- Rotary Club Central: https://rcc.rotary.org
- Learning Center courses or downloads: https://learn.rotary.org/members/learn/catalog
  - Mid-Northeast PETS Courses
  - Is Your Club Healthy course
  - Practicing Flexibility and Innovation course
  - Building a Diverse Club course
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  - Rotary Club Health Check brochure
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  - Club Treasurer Basics course

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PETS 2020 Presidents-Elect Work Session Discussion Leader Guide
Strengthening Your Membership: *Lead Your Club – President 2019-22 manual, Chapter 5*
March 20, 2020 **DRAFT February 12, 2020**

1. **Introductions**
   -This is the first Work Session of the afternoon, and the groups have changed, so give each PE participant about <u>15 seconds</u> to introduce themselves and share one very brief interesting fact about their Club.

2. **Membership Responsibilities & Resources**
   Engaged and active Club Members make it possible for us to serve our community and the world beyond.
   Who is responsible for attracting and engaging members in your Rotary Clubs?
   How do you establish your Membership Goals, and how do you share them with RI and your members?
   - Club President-Elect & Club President responsibilities
   - Club Membership Committee & Goals
   - Club Members
   - Strengthening Your Membership manual

3. **Assessing Your Club**
   When did your Club last conduct a survey of your Members satisfaction and interests?
   Does your Club's membership accurately reflect your community's diversity?
   - Member Satisfaction
   - Club Flexibility
   - Club Diversity
   - How does your Club appear to a non-member?

4. **Engaging Your Club's Members**
   Engaging current Club Members is as crucial as attracting new Members.
   What does your Club do that ensures that your Members are engaged?
   - New Member Orientation
   - Enhancing the Club Experience

   What does your Club do to train and develop your Committee and Club leadership?
   - Committee Involvement & Leadership Development

   What role does hands-on Service play in attracting and engaging Members?
   - Hands-on Service by all members

5. **Attracting New Members**
   New members bring vitality to a Club. What are your Club's strategies for attracting new Members?
   - Implement innovative new projects in your community
   - Promoting Rotary in your community
   - Attracting young professionals
   - Reach out to Rotary Alumni
   - Managing Membership Leads from RI

   Has your Club recently sponsored a new Rotary Club or Satellite Club or Passport Club?
   - Mentoring New Clubs/Satellite Clubs/Passport Clubs

6. **Work Session Recap & Evaluation**
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Resources
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Resources: Strengthening Your Membership
- My Rotary: https://my.rotary.org/en
  - Membership: https://my.rotary.org/en/learning-reference/learn-topic/membership#assess
  - Club Flexibility: https://my.rotary.org/en/club-flexibility
  - Engaging Younger Professionals: https://www.rotary.org/en/engaging-younger-professionals-toolkit
  - Satellite Clubs: https://my.rotary.org/en/nofollow/cda-link/208976
  - Rotary Alumni: https://my.rotary.org/en/exchange-ideas/club-connections/alumni
  - Rotary Brand Center: https://brandcenter.rotary.org/en-GB
- Rotary Club Central: https://rcc.rotary.org
- Learning Center courses or downloads: https://learn.rotary.org/members/learn/catalog
  - Mid-Northeast PETS Courses
  - Lead Your Club – President 2019-22 manual
  - Strengthening Your Membership manual
  - Be a Vibrant Club brochure
  - Rotary Club Health Check brochure
  - Introducing New Members to Rotary brochure
  - Club Membership Committee Basics course
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PETS 2020 Presidents-Elect Work Session Discussion Leader Guide

Service & The Rotary Foundation: *Lead Your Club – President 2019-22 manual, Chapter 7&8*
March 20, 2020 **DRAFT February 12, 2020**

-This is the second Work Session that this group of PE's have been together, so please forgo the introductions.

1. **Your Service Projects**
   It is widely known that the two primary reasons that people join Rotary are to give back to their community and to connect with friends, and a successful hands-on service project does both!
   How does your Club identify the needs in your community in order to plan effective service projects?
   Does your Club perhaps have projects which have long standing projects which need to be replaced/retired?
   How do you establish your Service Goals, and how do you share them with RI and your members?
   - Club President-Elect & President responsibilities
   - Service Projects Committee & Goals
   - Community Needs Assessment

   What are Rotary's five Avenues of Service? What are Rotary's six Areas of Focus?
   Where can you go to find information and ideas about potential new service projects?
   - Rotary's five Avenues of Service
   - Rotary's six Areas of Focus
   - Rotary Showcase & Rotary Ideas

2. **Rotary Grants and Programs**
   -All too often we complicate our presentations of TRF with too many details; keep this SIMPLE!
   Rotary offers two primary types of grants (FREE MONEY!) for your Club's service projects:
   District Grants vary by District, but are generally smaller, short term activities, locally or international.
   Global Grants support large (minimum project $30,000) international projects with up to $200,000 of TRF matching grant award funding. This application process can often take a year or longer to complete.
   What type of District Grant projects does your Club do? What type of Global Grant projects?
   - District Grants
   - Global Grants

   Rotary offers other programs, including many for youth. What Rotary youth programs does your Club do?
   - Rotary Programs for Young Leaders
   - Rotary Peace Centers & Fellowships

3. **The Rotary Foundation**
   Our Rotary Foundation makes a difference in the lives of people around the globe, directly and through service projects undertaken by Clubs like yours. Funding for this work comes from donations to TRF.
   How do you establish your Foundation Goals, and how do you share them with RI and your members?
   What are the two primary TRF Fund types, and how do they differ?
   How do we recognize Clubs and individuals for their support of TRF? -See Donor Recognition in Resources.
   - Club Rotary Foundation Committee & Goals
   - Rotary Foundation Fund types
   - Annual Fund-SHARE grant funding model
   - Club and Individual donor recognition
   - District Support

4. **Work Session Recap & Evaluation**
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Resources
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Resources: Service & The Rotary Foundation

- My Rotary: https://my.rotary.org/en
  - Take Action: https://my.rotary.org/en/take-action
  - Our Causes – Areas of Focus: https://www.rotary.org/en/our-causes
  - Rotary's Guiding Principles: https://my.rotary.org/en/guiding-principles
  - Empower Leaders: https://my.rotary.org/en/take-action/empower-leaders
  - Youth Programs: https://www.rotary.org/en/our-programs/youth-programs
  - Rotary Grants: https://www.rotary.org/en/our-programs/grants
  - Project Lifecyle Resources: https://my.rotary.org/en/take-action/develop-projects/project-lifecycle-resources
  - Rotary Showcase: https://map.rotary.org/en/project/pages/project_showcase.aspx
  - Rotary Ideas: http://ideas.rotary.org/
  - Donor Recognition: https://www.rotary.org/en/donate/recognition
- Rotary Club Central: https://rcc.rotary.org
- Learning Center courses or downloads: https://learn.rotary.org/members/learn/catalog
  - Mid-Northeast PETS Courses
  - Lead Your Club – President 2019-22 manual
  - Rotary Foundation Reference Guide
  - Areas of Focus guide
  - Guide to Global Grants
  - Club Foundation Committee Basics course
  - Areas of Focus course

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PETS 2020 Presidents-Elect Resource Summary
March 20, 2020 DRAFT February 9, 2020

Club Leadership Resources   * indicates resources also available for download at https://petsmidnortheast.org

- My Rotary: https://my.rotary.org/en
  - Club President: https://my.rotary.org/en/learning-reference/learn-role/president
  - Club Secretary: https://my.rotary.org/en/learning-reference/learn-role/secretary
  - Club Treasurer: https://my.rotary.org/en/learning-reference/learn-role/treasurer
  - Club Committee: https://my.rotary.org/en/club-committee
  - Club Administration: https://my.rotary.org/en/manage/club-district-administration/club-administration
  - Club Flexibility: https://my.rotary.org/en/club-flexibility
  - CDS Representatives: https://my.rotary.org/en/contact/representatives
  - Calendar: https://my.rotary.org/en/news-media/calendar
  - Membership Dues: https://my.rotary.org/en/membership-dues
  - Rotary International Club Dues Invoice FAQ: https://my.rotary.org/en/club-invoice-faq
  - Rotary Brand Center: https://brandcenter.rotary.org/en-GB
  - Rotary's Guiding Principles: https://my.rotary.org/en/guiding-principles
  - Rotary International's Strategic Plan: https://my.rotary.org/en/learning-reference/about-rotary/strategic-plan
  - Rotary Presidential theme resources: https://my.rotary.org/en/news-media/office-president/presidential-theme
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  - Lead Your Club – President 2019-22 manual*
  - Be a Vibrant Club brochure*
  - Rotary Basics brochure*
  - Rotary Club Health Check brochure*
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  - Club President Basics course
  - Club Secretary Basics course
  - Club Treasurer Basics course
  - Club Administration Committee Basics course
  - Public Image Committee Basics course
  - Is Your Club Healthy course
  - Practicing Flexibility and Innovation course

Membership Resources

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  - Membership: https://my.rotary.org/en/learning-reference/learn-topic/membership#assess
  - Engaging Younger Professionals: https://www.rotary.org/en/engaging-younger-professionals-toolkit
  - Satellite Clubs: https://my.rotary.org/en/nofollow/cda-link/208976
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Service & Rotary Foundation Resources

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  - Our Causes – Areas of Focus: https://www.rotary.org/en/our-causes
  - Empower Leaders: https://my.rotary.org/en/take-action/empower-leaders
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