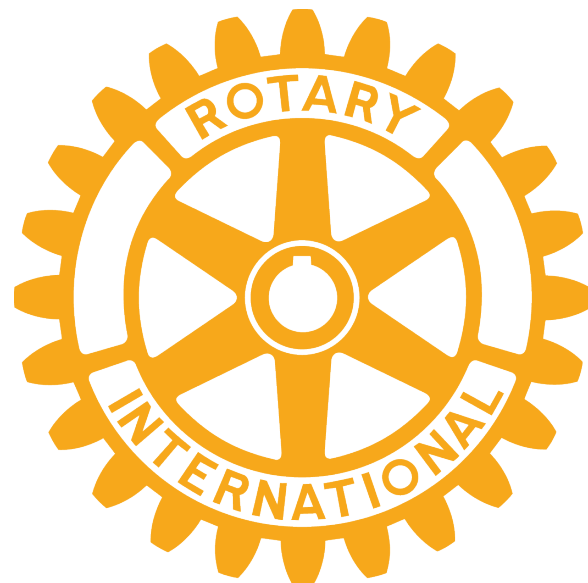


PETS 2020



MID-NORTHEAST PRESIDENTS-ELECT TRAINING SEMINAR 2020

President-Elect Work Session Summaries

March 20, 2020



Mid-Northeast PETS
Presidents-Elect
Training Seminar

2020-21 District Governors

D7210 Tony Marmo
D7230 Mary Shackleton
D7255 Jacquelyn Yonick
D7410 Joe Loughman
D7475 Ann Walko
D7490 Carl Hassett



Mid-Northeast PETS Presidents-Elect Training Seminar

2020-21 District Governors

D7210 Tony Marmo
D7230 Mary Shackleton
D7255 Jacquelyn Yonick
D7410 Joe Loughman
D7475 Ann Walko
D7490 Carl Hassett

PETS 2020 Presidents-Elect Work Session Summary

Planning & Leading Your Year: *Lead Your Club – President 2019-22 manual, Chapters 1&2*

March 20, 2020

1. Introductions

2. Your Job as Club President

- President-Elect Responsibilities
- President Responsibilities

3. Planning Your Year

- Rotary's Guiding Principles & Vision Statement
- Strategic Planning
- Setting and Evaluating Annual Goals
- Rotary Citation

4. Working with Your Leadership Team & Club Members

- Club Board Officers & Elections
- Club Committees & Chairs
- Leadership Development & Succession
- Member Education, Motivation & Recognition

5. Work Session Recap & Evaluation

Resources

- 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 Citation: <https://my.rotary.org/en/news-media/office-president/presidential-theme>
 - 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
 - Lead Your Club – President 2019-22 manual
 - Strengthening Your Membership manual
 - Be a Vibrant Club brochure
 - 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



Mid-Northeast PETS Presidents-Elect Training Seminar

2020-21 District Governors

D7210 Tony Marmo
D7230 Mary Shackleton
D7255 Jacquelyn Yonick
D7410 Joe Loughman
D7475 Ann Walko
D7490 Carl Hassett

PETS 2020 Presidents-Elect Work Session Summary

Running Your Meetings & Club: *Lead Your Club – President 2019-22 manual, Chapters 3&4*

March 20, 2020

1. Creating an Engaging Club Experience

- Club Health and Member Satisfaction
- Flexibility in Meetings, Membership Types and Attendance
- Meeting Formats
- Club Assembly & Governor Visits
- Rotary Year Calendar
- Club Administration Committee

2. Rotary's Online Tools

- My Rotary website
- Rotary Club Central
- Learning Center
- Club Management System (ClubRunner, etc.)
- Delegation of My Rotary administration

3. Running an Efficient & Effective Club

- Rotary Minimum Standards
- Club Constitution & Bylaws
- Reporting Requirements
- Working with the District
- Risk Management

4. Financial Management

- Dues and Fees
- Rotary International Dues Invoice
- IRS Reporting
- Fundraising

5. Work Session Recap & Evaluation

Resources

- 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
 - Lead Your Club – President 2019-22 manual
 - Strengthening Your Membership manual
 - Be a Vibrant Club brochure
 - Is Your Club Healthy course
 - Practicing Flexibility and Innovation course
 - Building a Diverse Club course
 - Best Practices for Engaging Members course
 - Rotary Club Health Check brochure
 - Club President Basics course
 - Club Secretary Basics course
 - Club Treasurer Basics course

PETS 2020 Presidents-Elect Work Session Summary

Strengthening Your Membership: *Lead Your Club – President 2019-22 manual, Chapter 5*

March 20, 2020

1. Introductions

2. Membership Responsibilities & Resources

- Club President-Elect & Club President responsibilities
- Club Membership Committee & Goals
- Club Members
- Strengthening Your Membership manual

3. Assessing Your Club

- Member Satisfaction
- Club Flexibility
- Club Diversity
- How does your Club appear to a non-member?

4. Engaging Your Club's Members

- New Member Orientation
- Enhancing the Club Experience
- Committee Involvement & Leadership Development
- Hands-on Service by all members

5. 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
- Mentoring New Clubs/Satellite Clubs/Passport Clubs

6. Work Session Recap & Evaluation

Resources

- 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
 - Best Practices for Engaging Members course
 - Is Your Club Healthy course
 - Building a Diverse Club course
 - Kick-start Your New Member Orientation
 - Practicing Flexibility and Innovation course
 - Strategies for Attracting New Members course



Mid-Northeast PETS Presidents-Elect Training Seminar

2020-21 District Governors

D7210 Tony Marmo
D7230 Mary Shackleton
D7255 Jacquelyn Yonick
D7410 Joe Loughman
D7475 Ann Walko
D7490 Carl Hassett

PETS 2020 Presidents-Elect Work Session Summary

Service & The Rotary Foundation: *Lead Your Club – President 2019-22 manual, Chapter 7&8*

March 20, 2020

1. Your Service Projects

- Club President-Elect & President responsibilities
- Service Projects Committee & Goals
- Community Needs Assessment
- Rotary's five Avenues of Service
- Rotary's six Areas of Focus
- Rotary Showcase & Rotary Ideas

2. Rotary Grants and Programs

- District Grants
- Global Grants
- Rotary Programs for Young Leaders
- Rotary Peace Centers & Fellowships

3. The Rotary Foundation

- 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

Resources

- 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 Lifecycle 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



Mid-Northeast PETS Presidents-Elect Training Seminar

2020-21 District Governors

D7210 Tony Marmo
D7230 Mary Shackleton
D7255 Jacquelyn Yonick
D7410 Joe Loughman
D7475 Ann Walko
D7490 Carl Hassett

PETS 2020 Presidents-Elect Resource Summary

March 20, 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>
 - Rotary Citation*: <https://my.rotary.org/en/news-media/office-president/presidential-theme>
 - 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>
- 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*
 - Be a Vibrant Club brochure*
 - Rotary Basics brochure*
 - Rotary Club Health Check brochure*
 - Strategic Planning Guide
 - 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

- My Rotary: <https://my.rotary.org/en>
 - 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>
 - Rotary Alumni: <https://my.rotary.org/en/exchange-ideas/club-connections/alumni>
- Learning Center courses or downloads: <https://learn.rotary.org/members/learn/catalog>
 - Mid-Northeast PETS Courses
 - Strengthening Your Membership manual*
 - Introducing New Members to Rotary brochure
 - Club Membership Committee Basics course
 - Best Practices for Engaging Members course
 - Building a Diverse Club course
 - Kick-start Your New Member Orientation
 - Strategies for Attracting New Members course

Service & Rotary Foundation Resources

- 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>
 - 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 Lifecycle 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>
- Learning Center courses or downloads: <https://learn.rotary.org/members/learn/catalog>
 - Mid-Northeast PETS Courses
 - Club Public Image Committee Basics course
 - Areas of Focus course
 - Rotary Foundation Reference Guide*
 - Club Foundation Committee Basics course
 - Guide to Global Grants