

PRESIDENTS ELECT TRAINING SEMINAR 2012

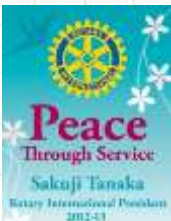
**ROTARY DISTRICT 9680
BREAKOUT 1**



PETS – D9680



DISTRICT STRUCTURE & GOALS



District Governor
John Dodd

Executive

Secretary - Gina Growden
Treasurer - Jim Wells
DG Support - Geoff Brennan

Special Purpose

Training - PDG Pam Pritchard
Conference - Bob Kaye Smith
Communications - Les Walsh

Projects

Foundation - PDG Tony Castley
Community - Cliff Hoare
International - Lynn Davies
Vocational - Peter Kirkwood
Youth - Jade Catherall

**Club Assistance
& Membership**

Club - Barry Starr
PR - Mark Wallace
Membership - Mark Anderson

Membership AG's

PETS – D9680

DISTRICT GOALS

John Dodd

**District Governor
2012-13**



“Rotary is an opportunity for acquaintance between business and professional people with a view to service.”

RSVP = the Need to Respond on Time

A hallmark of a professionally run volunteer organisation



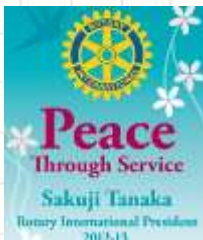
PETS – D9680 MEMBERSHIP

Membership Mentor AGs
Professionally run Clubs
= Retention
New Clubs, including
Coffee Club



PETS – D9680 CONFERENCE

Shoalhaven 2013
CONFERRing
Rotary, Rotary, Rotary
Need to register early



PETS – D9680 FOUNDATION

Funds to be spent:

\$27,000 on Ambassadorial Scholar

\$23,000 on Simplified Grants for Club
Projects

\$6,000 on GSE with Turkey March/April
2013

\$59,000 in Matching Grants for Club
Projects:

Your Club's contribution x 3.5

“YES DESK”



PETS – D9680

IMPROVING OUR IMAGE

- a. The need to look at our clubs as others see them, not from our viewpoint.
- b. Focus on what is important – Membership and Service



PETS – D9680

OFFICIAL DG VISITS

To be held on a Zone basis
Every fortnight in first 6 months
Each Club to present what they are doing
Allows for individual Club attention

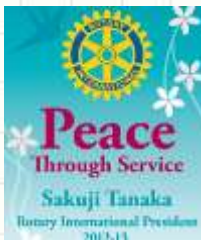


PETS – D9680

ZONE ASSISTANT GOVERNORS

Specific tasks including:

- Organising official visits
- Keeping register of volunteers
- Setting up Rotaract Clubs
- Ensuring statutory compliance



PETS – D9680

PRESIDENTS' MEETINGS

Full meetings in August, October,
December,
February, April and June

Zone meetings to be held when
considered necessary.





Welcome to District 9680 **PETS** - Membership



Presenter ^{PP} Mark Anderson
Presentation Date : 3 March, 2012

What is Membership?

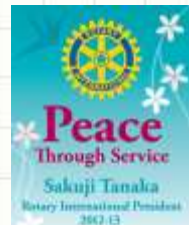




Membership

Recruiting & retaining a diverse membership offers many benefits to a club:

- Greater credibility with the community
- Broader perspectives, ideas, talents & skills
- Expanded volunteer resources
- Leadership opportunities
- Enhanced fundraising potential





District Membership Goals

Net growth of
District by **133**
members

District
Membership
Goal is 2,000
members

Goal is to have
the average
club above 30
members

Provide Club
Membership
Mentors

Clubs with 20
or less
members get
individual care.

18 Clubs
identified

Charter 2
“Coffee” Clubs

Understand
the format

Ensure EVERY
CLUB does a
Membership
Assessment.

Tools to be
provided

* Rotary Knowledge
Enhancement Seminar

Provide the
material for the
RoKES* Program

Zone Focus





The Club Assessment

Includes



- Planning Guide for an Effective Club
- Classification Survey
- Membership Diversity Assessment
- 25-Minute Membership Survey
- Retention Model
- Termination Profile





Membership Planning Tool

The Planning Guide for an Effective Club

Available from
www.rotary.org

Planning Guide for Effective Rotary Clubs

The Planning Guide for Effective Rotary Clubs is a tool to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in this section are common ways clubs might choose to pursue membership goals. Clubs are encouraged to develop alternative strategies to achieve their membership goals when appropriate.
Download a Microsoft Word version at www.rotary.org.

MEMBERSHIP

Current State: _____
Current number of members: _____
Number of members as of 30 June last year: _____ 30 June five years ago: _____
Number of male members: _____ Number of female members: _____
Average age of members: _____
Number of Rotarians who have been members for 1-3 years: _____ 3-5 years: _____ 5-10 years: _____
Number of members who have proposed a new member in the previous two years: _____
Check the aspects of your community's diversity that your club membership reflects:
☐ Profession ☐ Age ☐ Gender ☐ Ethnicity
Our classification survey was updated on _____ and contains _____ classifications, of which _____ are unfilled. (year) (number) (number)
Describe club's current new member orientation program: _____

Describe club's continuing education programs for both new and established members: _____

Our club has sponsored a new club within the last 24 months: ☐ Yes ☐ No
Number of Rotary Fellowships and Rotarian Action Groups members participate in: _____

Club Assessment Tools 2





Classification Survey

List Classifications not represented in the club

List local businesses that have a significant impact on the local community

Do current classifications reflect the local community

What modifications to current classifications do you recommend

Classification Survey

Rotary Year 20__ - __

Rotary Club of _____

Classifications Represented	Percent of Total Membership	Full? Yrs or No
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		

Top 10 classifications in our community that are not currently represented in our club membership:

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

Survey Completion Date: _____

Club Assessment Tools 11





Recruitment Action Plan

**DO NOT
ADVERTISE for
new members?**

**This is a lazy
approach and
results in poor
selection**

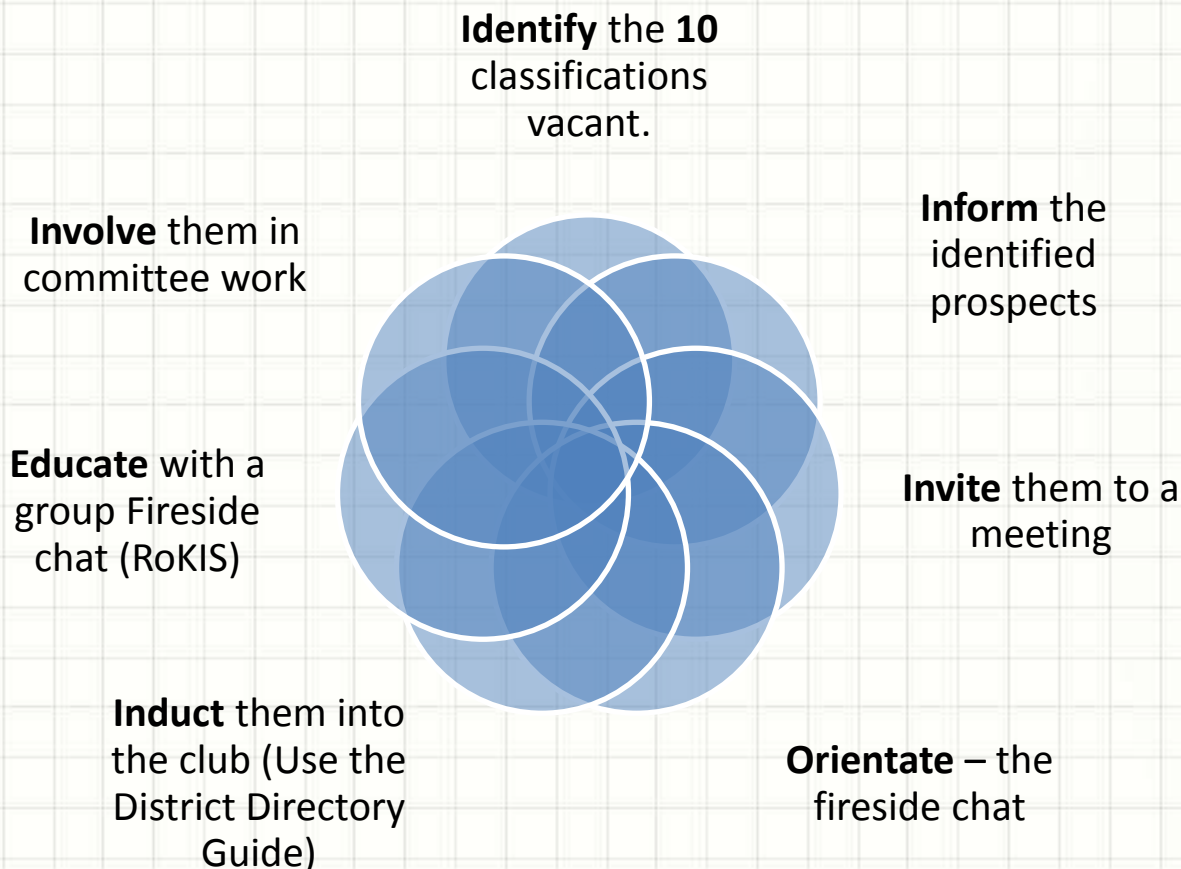
**Identify the
Classifications
that need to be
filled**

**Results from the
Classification Survey**





Recruitment Action Plan





Retention Action Plan

Identify all members with less than 2 years membership

- Invite all of them to a Lounge Meeting at your home
- Conduct "This is Rotary"
- Have open discussion on current club programs

Work with Club Service on the Social program

- A strong social program enhances membership

Encourage and get commitment for them to attend:

- The District Conference
- A District Seminar
- Do a Make up at a club while on holiday

Continue the Rotary Education Process

- Recommend one meeting a month to Rotary Education

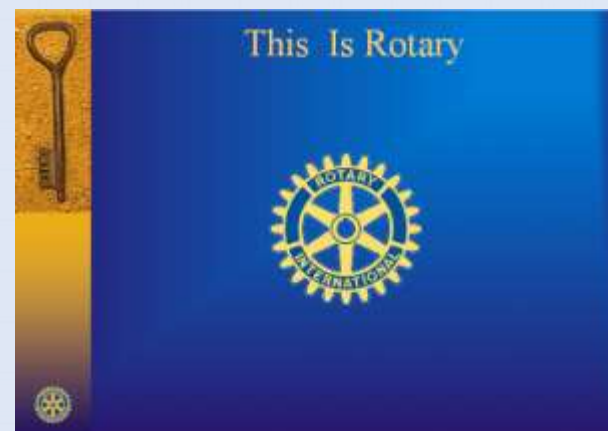




Member Education

This program involves

- Rotary History
- Rotary Structure
- Rotary Projects
- Rotary Acronyms
- Generally useful information



*This Presentation was developed
By Ross Ballenger from the
Rotary Club of WPH Cherrybrook



Membership



The Membership Mentor

(Will have AG Status within the District)





Membership Mentors



Clubs of 20 members or less will be appointed a Mentor.

- Most President will have met your Mentor at PETS



Objective is to grow each of those clubs to **25** members at the very minimum



The Mentor will be an experienced Rotarian and will assist the club in **ALL** aspects of membership development





Zone Mentors

North Western
Mike Hallen
Pennant Hills (20)

Upper North Shore
Warren Soos
Berowra (14)
Waitara (17)

Beaches
Deidre Anderson
Manly (Potential Issue)

Riverside
Roseanne Gallo
Eastwood (18)
Gladesville (20)

Central Coast
Bryan O'Shannassy
East Gosford (15)
Wyong/Tuggerah (16)

Peninsula
Gavin Ralston
Narrabeen Lakes (18)
Terry Hills (17)

Northern Districts
Phil Isaacs
North Rocks (14)

The Hills
Barry Philps
Norwest Sunrise (20)
Rouse Hill (18)

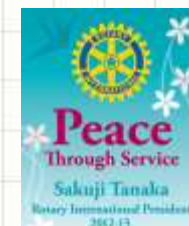
Lower Central Coast
Ross Pearse
Gosford West (16)
Kariong/ Somersby (19)

Upper Central Coast
Liz North
The Entrance (18)

City North
Bruce De Graaf
Neutral Bay (13)
Nth Sydney Sunrise (17)
St Leonards (8)

North Shore
Ann Smith
Chatswood Sunrise (7)

There will be a Mentor
specifically for your club





Membership Mentors



If your club is under 25 members, recognise that there is a membership opportunity.



Ask your members if they recognise that there is an opportunity to increase membership



Ask your Membership Mentor to conduct an analysis of your club
(The Club Assessment)

- The venue
- The meeting time
- The meal (if you have one)
- The management of the meeting
- The program
- General appeal



This is followed up by a meeting with the Club Board





Membership Mentor

The Club Assessment

- Looks at the Meeting from an outsider
- Pass mark of 50
 - Good General Appeal
- Followed by Board discussion

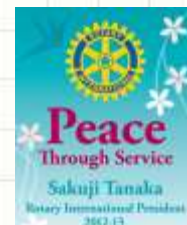
The image shows a screenshot of a Rotary Club assessment form. The form is titled "Rotary Club of ..." and contains a list of 20 items, each with a corresponding checkbox. The items are: 1. Meeting room, 2. Meeting time, 3. Meeting place, 4. Meeting agenda, 5. Meeting format, 6. Meeting length, 7. Meeting cost, 8. Meeting refreshments, 9. Meeting entertainment, 10. Meeting music, 11. Meeting lighting, 12. Meeting temperature, 13. Meeting ventilation, 14. Meeting cleanliness, 15. Meeting security, 16. Meeting safety, 17. Meeting accessibility, 18. Meeting parking, 19. Meeting signage, and 20. Meeting overall. The form is designed to be filled out by an outsider to assess the club's meeting from their perspective.

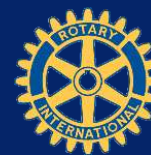


Membership Mentors

Post the Club
Assessment
you
Membership
Mentor will
meet with
your Board:

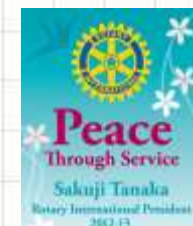
- Conduct a Classification Survey
- Identify the **10 best fit classifications**
- Give guidance on how best to approach the prospects
- Follow process to induct 5 new members at a time
- Repeat the process





Membership Packet

- Introductory Cover
- Introduction Letter from the Club President
- What is Rotary?
- Why Join Rotary?
- Club Brochure
- Membership Application
- Listing of Rotary Club venue's & times in our region



PETS – D9680

**BREAKOUT
FOR CLUBS <20
with
Zone Membership
Mentors**



PETS – D9680

**BREAKOUT
FOR CLUBS 20+
with
DGE John Dodd
& Mark Anderson**



PETS – D9680

MORNING TEA



PRESIDENTS ELECT TRAINING SEMINAR 2012

**ROTARY DISTRICT 9680
BREAKOUT 2**



PETS – D9680

DISTRICT BUDGET

Jim Wells
District Treasurer



PETS – D9680

MEMBER DUES

MEMBER DUES (pa)		\$
R Int	50	
RDU (Mag)	35	
District	116	
	-----	201
Club (typical)		99
Total		<hr/> 300



PETS – D9680

DISTRICT DUES - TREND

Year	DG	\$	\$ change
2005/06	Greg Muldoon	90.20	
2006/07	Pam Pritchard	101.20	12.2%
2007/08	Monica Saville	101.20	-
2008/09	Tony Castley	104.50	3.3%
2009/10	John Cameron	109.45	4.7%
2010/11	George Papallo	111.65	2.0%
2011/12	David Rands	116.00	3.9%
2012/13	John Dodd	116.00	-



PETS – D9680

DISTRICT DUES - COMPARATIVES

DISTRICT DUES - COMPARATIVES

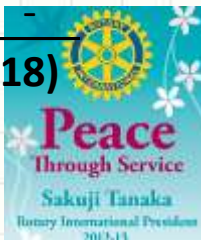
		\$
District 9690 - Western Sydney	2011/12	112
District 9750 - Southern Sydney	2010/11	
No of members:		
(club)	20	130.91
	40	123.51
	60	121.04



PETS – D9680

BUDGET SUMMARY

	\$	Bu 11/12	12/13
	No of members	1,950	1,850
INC.	Dues @ \$105.45 (net of gst)	205,628	195,083
	Interest	8,000	8,000
	TOTAL INCOME	213,628	203,083
EXP.	Management (Institute)	31,750	29,750
	Insurance	38,000	43,000
	Functions (Conf. Levy)	40,000	38,000
	Training	51,000	45,000
	Admin. (Directory, Thornleigh)	30,350	34,350
	Public Relations (net)	-	5,000
	Foundation (GSE)	5,500	5,000
	Other, incl. Avenues of Service	12,500	3,000
	TOTAL EXPENSES	209,100	203,100
	Contingency	4,000	-
	SURPLUS/ (DEFICIT)	528	(18)



PETS – D9680

WHAT HAPPENS NOW?

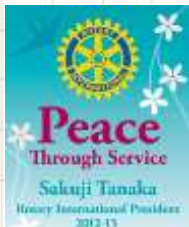
- Issue Detailed Budget to Clubs
- Review reserve requirements
- Presidents Vote at Assembly –
Apr 21st



PETS – D9680

FINANCIAL MANAGEMENT

Jim Wells
District Treasurer



PETS – D9680

WORKING WITH DISTRICT

**Assistant Governors &
Executive Team**

PDG Pam Pritchard



What is the role of Assistant Governors?



PETS – D9680

ASSISTANT GOVERNORS' ROLE

- Assisting the development of club goals
 - Attending club meetings and assemblies as invited
 - Assisting planning of District Governor's zone meetings
- Acting as a liaison between DG and clubs
- Assisting clubs with service projects
- Encouraging the development of future district leaders



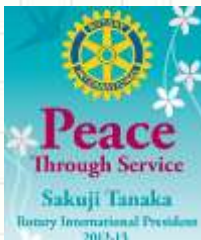
What is the role of District Directors and Avenue of Service Chairs?



PETS – D9680

DIRECTORS & CHAIRS ROLE

- Training Club Directors at District Assembly
- Providing information to club directors on programs, projects and activities
- Encouraging clubs to become involved in programs, projects and activities
- Seeking opportunities to address clubs on their area
- Working closely with Assistant Governors and Membership Mentors
- Encouraging the development of future leaders.



PETS – D9680

LEADERSHIP & TRAINING

Rotary Leadership Institute

PDG Barry Philps



PETS – D9680

CLUB AND BOARD MEETINGS

- LEADERSHIP
 - VOLUNTEERS
 - OTHER PRIORITIES
 - MORE FOLLOW UP
 - NO SANCTIONS
 - MAY NOT HAVE THE SKILLS



PETS – D9680

CLUB AND BOARD MEETINGS

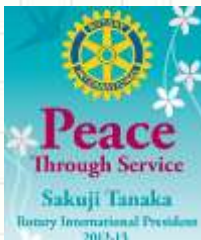
- YOU'RE THE BOSS JUST TELL THEM
 - To give information
 - Specific, tailored agenda
 - Little or no discussion
 - Solutions not sort
 - No mutually derived commitment or action



PETS – D9680

CLUB AND BOARD MEETINGS

- COMMITMENT and TEAM BUILDING
 - Facilitate discussion
 - Encourage participation by ALL
 - Create understanding of different views and experiences
 - Seek information, solutions and consensus
 - Gain commitment for action



PETS – D9680

FACILITATING

- Is not easy
 - Listen and look carefully, mainly keep quiet
 - You direct discussion, keep on track
 - Positive and valuable experience
 - Delegate note keeping
 - Be positive
- Techniques to create discussion
 - Open questions – who, how, where, what, when, why



PETS – D9680

FACILITATING

- Silent type
 - Seek their personal opinion or experience
- Dominant type
 - Summarise remarks
 - Asks others for comment or experiences
 - Ask them to summarise points



PETS – D9680 FACILITATING

- CONSENSUS
 - PARTICIPATION IN PLANNING
 - VIEW HELD BY MOST
 - REVIEW WITH CLUB MEMBERS



PETS – D9680

ROTARY LEADERSHIP INSTITUTE

- Started in 1992 West USA
- Give knowledge, leadership and Team skills
- Held at District office Thornleigh
- 3 part program
- 9:00 – 3:15.
- Full course is \$105



PETS – D9680

LUNCH



PRESIDENTS ELECT TRAINING SEMINAR 2012

**ROTARY DISTRICT 9680
BREAKOUT 3**



PETS – D9680

Official Visits

John Dodd



PETS – D9680 OFFICIAL VISITS

BEACHES

TUESDAY

17/07/2012

INT COLLEGE OF MNGMT

Balgowlah

Brookvale

Dee Why Warringah

Manly

Manly Sunrise

CENTRAL COAST

MONDAY

30/07/2012

CC LEAGUES

East Gosford

Erina

Kincumber

Wyong Tuggerah

CITY NORTH

WEDNESDAY

25/07/2012

NORTH SYDNEY LEAGUES

Crows Nest

Mosman

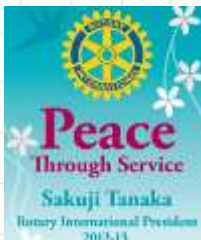
Neutral Bay

North Sydney

North Sydney Sunrise

Northbridge

St Leonards



PETS – D9680 OFFICIAL VISITS

LOWER CENTRAL COAST

WEDNESDAY

19/09/2012

EVERGLADES GOLF CLUB

Gosford City

Gosford West

Kariong Somersby

Umina Beach

Woy Woy

NORTH SHORE

TUESDAY

4/09/2012

HORNSBY RSL

Chatswood

Chatswood Inter.

Chatswood Sunrise

Lane Cove

Lindfield

Roseville Chase

NORTHERN DISTRICT

MONDAY

13/08/2012

PENNANT HILLS GOLF CLUB

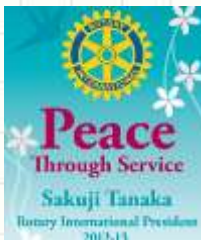
Beecroft

Carlingford

Epping

North Rocks

Thornleigh



PETS – D9680

OFFICIAL VISITS

NORTHWESTERN DISTRICT

TUESDAY
7/08/2012
DURAL COUNTRY CLUB

Dural
Galston
Kenthurst
Pennant Hills
West Pennant Hills & Cherrybrook

PENINSULA

TUESDAY
25/09/2012
CHECKERS COUNTRY RESORT

Belrose
Frenchs Forest
Narrabeen Lakes
Pittwater
Terrey Hills

RIVERSIDE

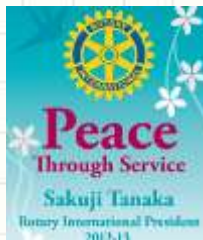
WEDNESDAY
11/07/2012
NEXT GENERATION

Eastwood
Gladesville
Hunters Hill
Macquarie Park
North Ryde
Ryde

THE HILLS

MONDAY
27/08/2012
CASTLE HILL COUNTRY CLUB

Castle Hill
Glenhaven
Norwest Sunrise
Rouse Hill
The Hills-Kellyville
Winston Hills



PETS – D9680 OFFICIAL VISITS

UPPER CENTRAL COAST

TUESDAY

11/09/2012

MINGARA RECREATION CLUB

Gosford

Gosford North

Northlakes Toukley

Terrigal

The Entrance

UPPER NORTH SHORE

MONDAY

20/08/2012

HORNSBY RSL

Berowra

Hornsby

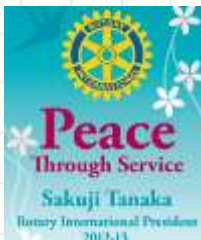
Ku-ring-gai

St Ives

Turramurra

Wahroonga

Waitara



PETS – D9680

Presidents' Manuals

John Dodd



PETS – D9680

MANUALS TO GUIDE YOU

Two complementary manuals which have most of the answers you require:

- The **Club President's Manual** (issued by Rotary International)
 - In Appendix I this includes the Planning Guide For Effective Rotary Clubs
- District 9680 **Club President's Training Handbook**

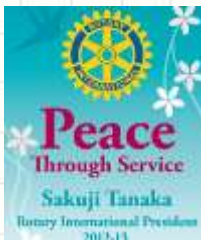


PETS – D9680

RI CLUB PRESIDENTS' MANUAL



- Role and Responsibilities
- Working with your Club and District Leaders
- Club Administration
- Membership
- Service Projects
- The Rotary Foundation
- Public Relations
- Goal Setting



PETS – D9680

CLUB PRESIDENT'S TRAINING HANDBOOK

ROTARY INTERNATIONAL
DISTRICT 9680



CLUB PRESIDENT'S
TRAINING HANDBOOK
2012-2013



INTRODUCTION

PART ONE: YOU, THE PRESIDENT

4

- 1.1. LEADERSHIP
- 1.2. GOAL SETTING
- 1.3. TIME MANAGEMENT
- 1.4. DELEGATION
- 1.5. PREPARING FOR OFFICE

PART TWO: LEADING YOUR CLUB

11

- 2.1. VIBRANT CLUBS
- 2.2. TEAM SELECTION
- 2.3. THE ROLE OF THE BOARD
- 2.4. COMMITTEES
- 2.5. MEETINGS
- 2.6. BUILDING A PLAN

PART THREE: LEADING YOUR CLUB

20

- 3.1. WORKING TOWARDS AN EFFECTIVE CLUB
- 3.2. MEMBERSHIP
- 3.3. PUBLIC RELATIONS
- 3.4. CLUB OFFICERS
- 3.5. THE DIGNITY DIMENSION

PART FOUR: YOUR DISTRICT

34

- 4.1. THE DISTRICT ORGANISATION
- 4.2. THE OFFICIAL MEETING
- 4.3. DISTRICT FINANCES
- 4.4. PRESIDENTS' MEETINGS
- 4.5. DISTRICT REGULATIONS
- 4.6. COMMUNICATIONS
- 4.7. MISCELLANEOUS

APPENDIX A: BOARD MEETING AGENDAS

43

1. THE FIRST BOARD MEETING
2. SECOND MEETING OF INCOMING BOARD
3. SUBSEQUENT BOARD MEETINGS

APPENDIX B: CLUB FORUM AGENDAS

46

APPENDIX C: SAMPLE BUDGET & CASH FLOW STATEMENT

49

APPENDIX D: BUSINESS PLAN SUMMARY

51



PETS – D9680

RESOURCES ON CLUBRUNNER



 *Reach Within to Embrace Humanity*

Communication Intranet *for Rotary Clubs and Members*

Home Administration Avenues of Service Foundation Membership Archive Calendar Blogs About us

Training

- Introduction

Related Pages

- Training Resources
- PETS
- District Assembly
- Manuals
- Expo at District Assembly

Links

- Club Officers' Kit
- Planning Guide for Effective Rotary Clubs
- Resources for running a Club



PETS – D9680

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS

- **ASSESS AND APPRECIATE THE STATE OF YOUR CLUB – CURRENT + FUTURE + PLAN**
- **ESTABLISH CLUB GOALS WITH CONSULTATION**
- **SUBMIT TO AG BY JULY**



PETS – D9680

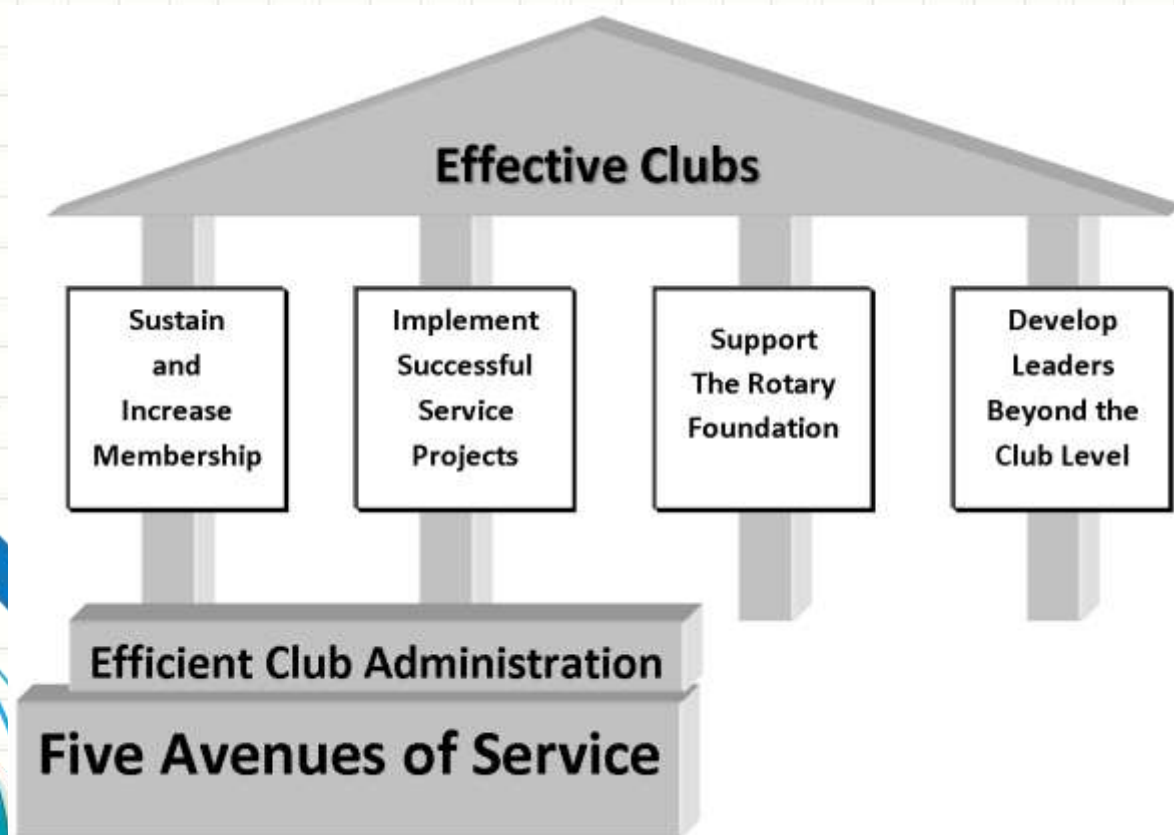
EFFECTIVE CLUBS

PDG Pam Pritchard



PETS – D9680

EFFECTIVE CLUBS



PETS – D9680

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS

- **ASSESS AND APPRECIATE THE STATE OF YOUR CLUB – CURRENT + FUTURE + PLAN**
- **ESTABLISH CLUB GOALS WITH CONSULTATION**
- **SUBMIT TO AG BY JULY**



PETS – D9680

DISTRICT ASSEMBLY

PDG Pam Pritchard



District Assembly

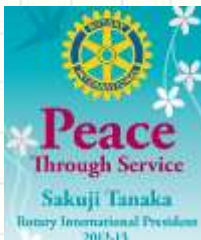
Time: 7:30 Registration

9:00 Introduction

Date: Saturday, 21st April 2012

Venue: PLC Pymble

Avon Road, Pymble



DISTRICT ASSEMBLY

7:30 - 9:00 REGISTRATION

9:00 - 9:45 Plenary

9:45 - 10:15 Tea/coffee

10:15 - 11:00 [1] Presidents,
Secretaries, Administration
Directors, and Treasurers

10:15 – 11.15 [2] Directors and
Avenues of Service chairs



DISTRICT ASSEMBLY

11:00 - 12:30 [1] Breakout: Presidents, Secretaries, Administration Directors, and Treasurers

11:15 - 12:30 [2] Breakout: Directors and Avenues of Service chairs

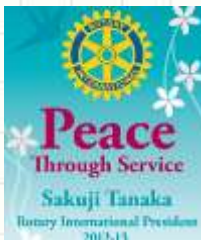
12:30 - 1:30 Lunch

1:30 - 2:30 Breakout by role (12 groups)

2:30 - 3:45 Board Meetings

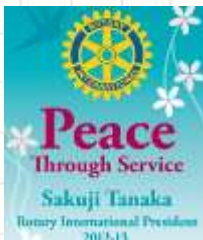
3:45 - 3:50 Conference Promotion

3:50 - 4:00 Final message



DISTRICT ASSEMBLY PLENARY 'B'

- Budget
- ClubRunner
- Risk Managemnt
- Annual Report
 - Dues



DISTRICT ASSEMBLY PRESIDENTS' BREAKOUTS

- Breakout 1: Effective Planning Guide, Leadership, Strategic Planning,
- Breakout 2: TRF, Role of AGs & Zone breakouts



PETS – D9680

WRAP UP

John Dodd

District Governor
2012-13



PETS – D9680

THE END

