

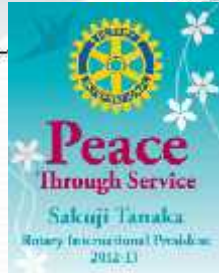
Welcome

Multi-District Presidents Elect Training Seminar (PETS)

RI Districts 9680, 9690, 9710 and 9750

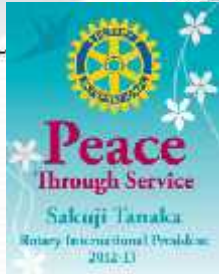
The Cube - Campbelltown

3rd and 4th March 2012



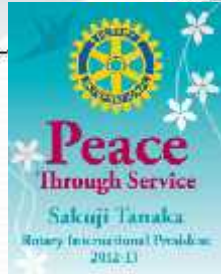
PP David Bamford OAM

- District 9690 Secretary/Administration Officer 2012 – 2013 and
 - 2011 – 2012
 - 2010 – 2011
 - 2009 – 2010
 - 2008 – 2009
 - 2007 – 2008
 - 2005 – 2006
- Member - Rotary Club of Blacktown City Inc since February 1975



Overview

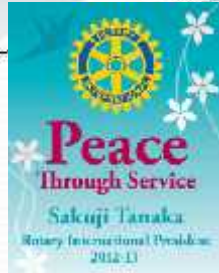
- Administration
 - in your Club
 - involving RI, RDU and your District



Role & Responsibility

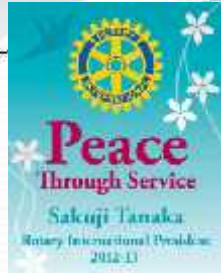
‘As Club President, your role is to lead an effective Rotary Club.’

Plan, set goals, communicate.



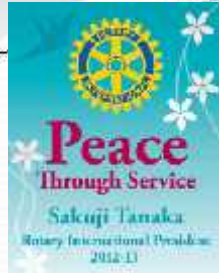
Constitution & By-Laws

- Last updated at 2010 RI Council on Legislation
 - Update your Club's documents - take into account in your By-Laws changes by NSW Fair Trading - effective from 1st July 2010
 - Special Resolution to change
 - Requires support of at least 3/4 of those eligible to vote, **not** 2/3 as per page 34 of President's Manual
 - Also, check your Constitution is 'RI approved'
 - contact Rotary International South Pacific & Philippines Office (RISPPPO) - Club & District Support Section to confirm



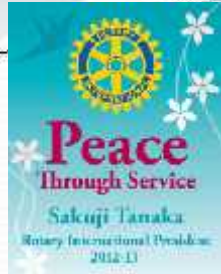
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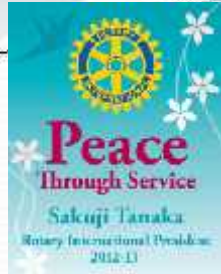
Club Budgets

- Administration/Club account
- Project/Charity account
- Any other account you may have
- As we raise funds from the community, i.e. Councils, ClubGrants (formerly CDSE) Scheme and various organisations we **MUST** have our accounts audited (Office Liquor, Gaming & Racing requirement)



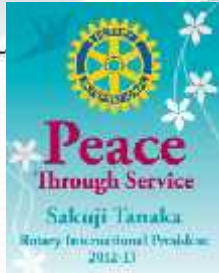
Charitable Fundraising Authority

- Ensure your Charitable Fundraising Authority is always current – check with Office Liquor Gaming & Racing (OLGR)
- Become familiar with OLGR fundraising requirements
- Refer 'Best Practice Guidelines' for Charitable Organisations



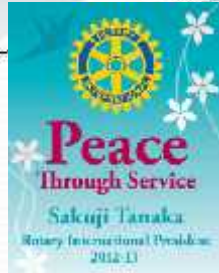
NSW Fair Trading

- Annual accounts – NSW Form A12 + \$\$\$
 - Have accounts **audited** annually
- Change of Constitution & By-Laws – NSW Form A6 + \$\$\$
- Public Officer - check who it is, update if required – NSW Form A9



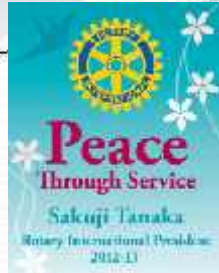
Risk Management

- Prepare a Risk Management assessment for each Club project, event, function
- Be aware of Risk Management issues:
 - e.g. President up the ladder
(Police Officer of the Year Award hanging banner)
- Issue a Risk Management 'Help Reckoner' to every Club member to increase awareness



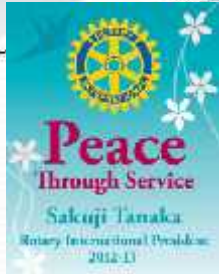
Calendar of Events

- Critical to plan **WELL** in advance to gain member support
- Nothing worse than a President or Director announcing (regularly) we need help this weekend
- Rotarians are busy people with commitments outside Rotary



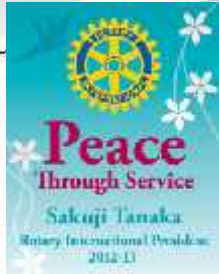
Timeline of Tasks

- We developed a Timeline of Tasks for District 9690 to avoid tasks being missed and/or deadlines not being met
- Develop one for your Club to assist your Board and Directors
 - I'm preparing one for
 - my Club
 - interaction between our District and Clubs



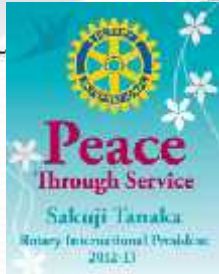
Policies of Club

- Document your Club's Policies e.g.:
 - Free meals for prospective members - how many?
 - Honorarium for President – amount?
 - Covering cost of Directors attending Presidents' Meetings - amount?
 - Presentation Evenings – who are guests of the Club, who pays?



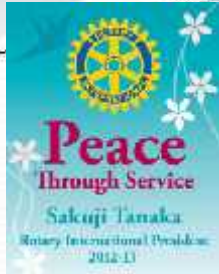
Meetings – have an Agenda

- Club
- Sub-Committees
- Board
- Club Assembly
- Annual General Meeting –or a procedures' document



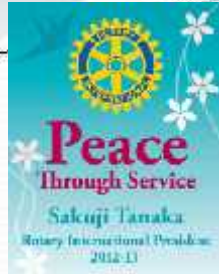
District Policies

- Become familiar with what your District has:
 - Insurance
 - New project – check with your District Insurance Officer (DIO) re current coverage
 - **CAN'T** assume because we have District insurance you are covered e.g. chainsaw race
 - Child Protection
 - Privacy
 - Risk Management
 - Sexual Harassment



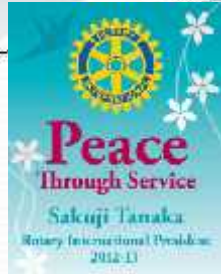
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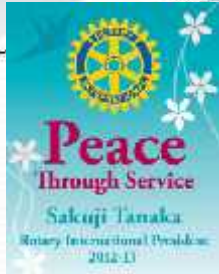
Reports to RI/District/RDU

- Semi-annual Dues (SAR) – RI
- Semi-annual Dues – District
- Semi-annual Dues – RDU
- Monthly Club attendance – District Attendance Officer



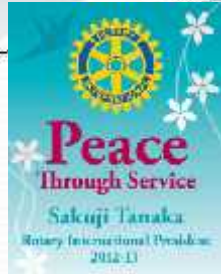
Reports to District Governor

- Planning Guide for Effective Rotary Clubs – RSVP date advised by District Governor
- RI Changemaker Award – RSVP to DG by 15th March 2012
- RI Presidential Citation – RSVP to DG by 6th April 2012
- Others – as and when required



Governor's Official Visit

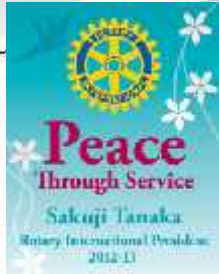
- Important to respect the office
- **DON'T** have a guest speaker on this occasion
- Encourage member attendance to hear important messages



Communication

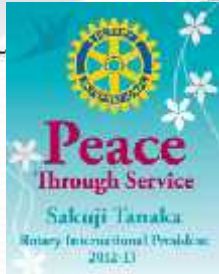
District to Club and vice versa

- Ensure responses to District are provided by RSVP date:
 - e.g. Resolutions, Club Electors
- Utilise email for speedy communication
- Prompt responses:
 - avoids follow-up by District personnel
 - ensures deadlines are met



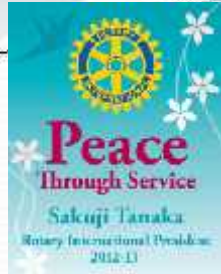
Resources - RI, RDU, District

- RI & website, Manual of Procedure (MOP)
- RDU & website
- RDU Merchandise & Promotions
- PETS & District Assembly
- District website
- District Governor
- Assistant Governors
- District Officers
- Past Governors



Resources - Club

- Roadside signage
- Promotional brochure/s
- Local newspaper/s
- Banners
- Pull-up banners
- Website
- President's Manual
- Directors' Manuals
- Past Presidents



Thank you and remember

**‘As Club President, your
role is to lead an effective
Rotary Club.’**

Plan, set goals, communicate.



Peace

Through Service

Sakuji Tanaka

**Rotary International President
2012-13**



Your Support From Rotary International

Club and District Support
PETS Session
Joy Walker



Learning Objectives

Resources from RI

Introduction to
RI & your CDS Team

Club Responsibilities to RI



RI Figures Worldwide

Countries and Geographical Areas	214+
Districts	532
Clubs	34,136
Rotarians	1,214,237
Rotaract Clubs	9,030
Interact Clubs	14,048
Rotary Community Corps	7,270



(statistics as of 30 January 2012)

Districts 9680, 9690, 9750, 9710

Districts	4
Clubs	199
Rotarians	5,632
Rotaract Clubs	22
Interact Clubs	32
Rotary Community Corps	1



(statistics as of 1 March 2012)



World
Headquarters

RIBC

Switzerland

India

Korea

Japan

Secretariat Around the World

Brazil

Argentina

A Global Network

Australia

Rotary International

Frank Pezzimenti
Regional Head
Rotary International

SPPO

Finance

Grace Ramirez
Regional Financial
Controller

John Jiang
Finance Coordinator
Australia & NZ

Rachel Hernandez
Finance Coordinator
Philippines

Melissa Assanza
Finance Correspondent -
TRF

C.D.S

Joy Walker
Manager
Club and District Support

Barbara Mifsud
CDS Coordinator

Mary Jayne Desmond
CDS Correspondent

T.R.F

Bruce Allen
Manager
The Rotary Foundation

Siobhan Moran
TRF Fund Development Officer

Krissy Aure-Canson
TRF Admin

Admin

Michelle Fuller
Administration Coordinator/
Literature

Amanda Kahlon
Reception/Admin Officer



At Your Service

Club and District Support (CDS)
is your contact for...

Administrative Services

Member Access

Policy Issues





CDS South Pacific & Philippines



Mary Jayne Desmond

Joy Walker

Barbara Mifsud





Club Responsibilities to RI

Minimum Rotary Club Standards

The Semiannual Report

Report Incoming Club Officers

Rotary Marks



Minimum Standards

- ✓ Meet regularly
- ✓ Conduct service projects
- ✓ Resolve club disputes amicably
- ✓ Maintain cooperative relations with the district
- ✓ Provide timely, accurate membership lists
- ✓ Pay RI and District dues
- ✓ Subscribe to a Rotary magazine
- ✓ Maintain appropriate general liability insurance
- ✓ Respect RI rules and regulations

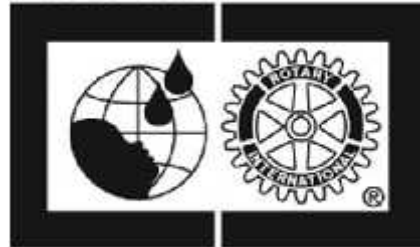


Departments at Your Service

The Rotary Foundation

risppo@rotary.org

PolioPlus



Rotary International



Siobhan Moran

Bruce Allen

Kristy Aure-Canson



Departments at Your Service

Finance Department

risppo@rotary.org



Marisa Pili

John Jiang

Melissa Asanza

Grace Ramirez

Rachel Hernandez



The Semi-Annual Report (SAR)

What?

Documents used to
calculate and pay club
dues to RI

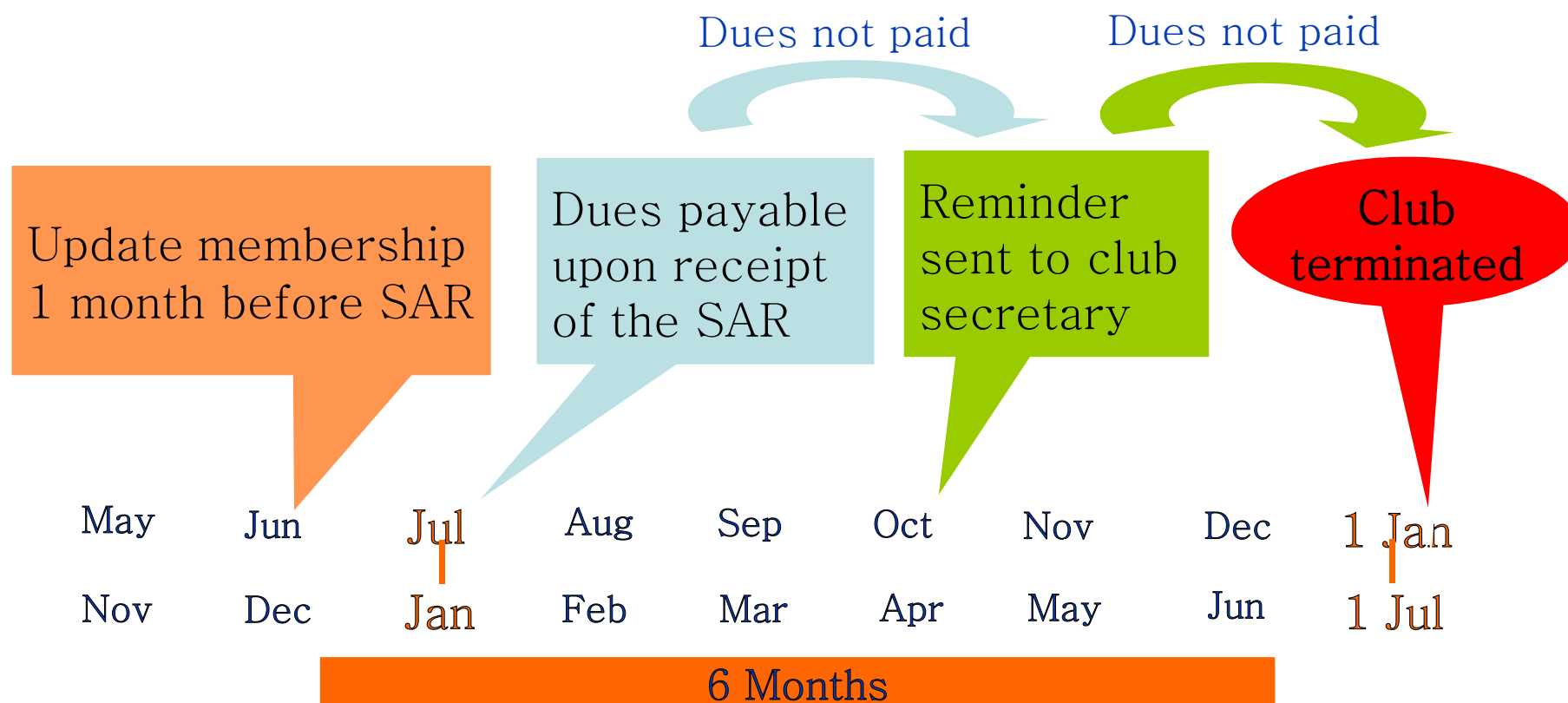
When?

Payable upon receipt



The Semiannual Report (SAR)

The Collection Cycle



Report Incoming Club Officers

Who?

- Current President, Secretary or Executive Secretary

Why is this important?

- Clubs receive RI correspondence
- Access rights for Member Access

Please update whenever there is a change

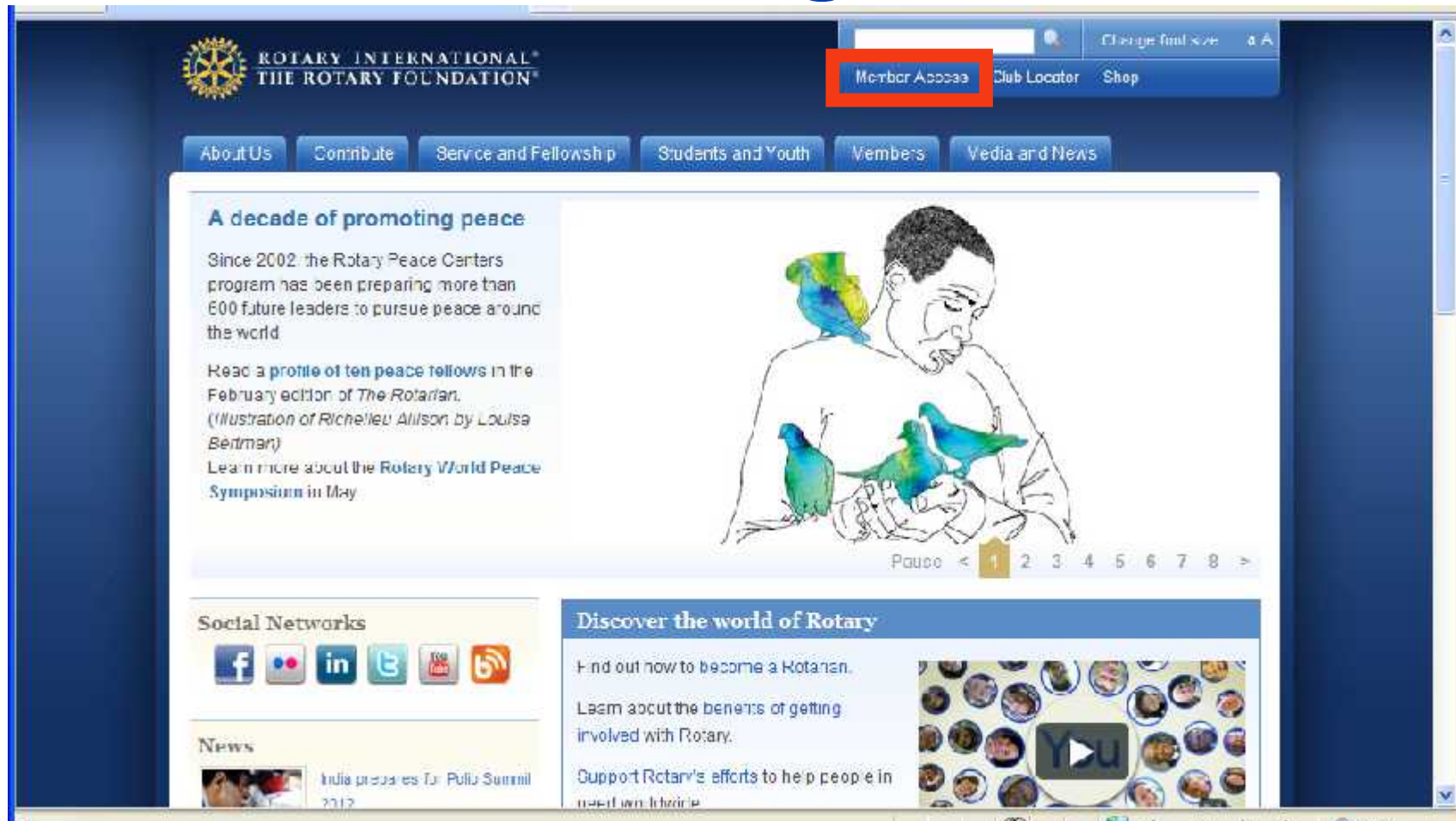


Publications



Member Access

How to Register?



Member Access

For Club Presidents and Secretaries

-  **Update Membership Data**
-  **Daily Club Balance Report**
-  **Contribute to The Rotary Foundation**
-  **View your Contribution History**
-  **Pay Semiannual Dues or Print Semiannual Report (SAR)**
-  **Search Club and District Data**
-  **Update Club Data**
-  **Manage E-mail Subscriptions**
-  **View Club Recognition Summaries (CRS)**
-  **View MCR, SHARE & Polio Reports**
-  **View FREY Eligibility Report**
-  **Register for Meetings**

Club Data | Members | Download

Reports: | Membership | CRS | MCR

Active Members 48 Record(s) Listed [Add Members](#) [Terminated Members](#)

The following are active members

	Name	Admitted	Member Type	Member Status
View Terminate Edit	Baastrup, Carl	30-Jun-2001	Active	Active
View Terminate Edit	Bertelsen, Ib	30-Jun-2001	Active	Active
View Terminate Edit	Birkmose, Peter Ogelvig	16-Aug-2004	Active	Active
View Terminate Edit	Bundgaard, Peter	08-Jun-1963	Active	Active
View Terminate Edit	Christensen, Jørgen	01-Nov-2000	Active	Active



Member Access

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- Daily Club Balance Report
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- View MCR, SHARE & Polio Reports
- View EREY Eligibility Report
- Register for Meetings

Club Officers

[Add Club Officers](#)

Current Officers

Open club officer positions for the current Rotary year: Foundation Chair, Treasurer

Meeting Details

	Meeting Place	Address	Meeting Day	Meeting Time
Ed	Roseville Golf Club	4 Links Av. Roseville N.S.W. 2089 Australia	Tues	1800

Incoming Officers

Open club officer positions for the incoming Rotary year: Foundation Chair, Treasurer, Secretary, Club Secretary, President, President Elect

Position	Start Date	End Date	Name	Address	Phone	E-mail
----------	------------	----------	------	---------	-------	--------



Member Access

-  **Update Membership Data**
-  **Daily Club Balance Report**
-  **Contribute to The Rotary Foundation**
-  **View your Contribution History**
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-  **View Club Recognition Summaries (CRS)**
-  **View MCR, SHARE & Polio Reports**
-  **View EREY Eligibility Report**
-  **Register for Meetings**

Rotary Club Of...

Semi Annual Dues per year, 1 July - 31 December 2010.

Please refer to your club's website for more information on the Semi Annual Dues and how to pay them. The SAR is a report of your club's financial status and is used to determine your club's financial health. It is also used to determine your club's eligibility for certain programs and services.

Semi Annual Report Member List and Semi Annual Report Form
 Semi Annual Report Member List
 Semi Annual Report Form

Membership updated after 1 December or 1 June will not be included in the January or June Semi Annual Report respectively.

Semi Annual Dues Invoice
 Club Name: ...
 District: ...

Invoice is calculated based on the membership information as of 1 June and 1 December.

Amount of payment due should be paid payable (amount to be subtracted) 7.00. On 1 July and 1 January of year. This is the date from the current SAR for your club. The date will be used to calculate the next invoice. If you have any questions, please contact your [District Business Committee](#).

Invoice Number:	SAR 00000000		
Dues code:	00000000		
Club Number:	000		
Club Name:	...		
District:	0000		

Invoice	Description	Amount in dollars	Total in dollars
1	Annual dues	7.00	7.00
2	Annual dues	7.00	14.00
3	Annual dues	7.00	21.00
4	Annual dues	7.00	28.00
Total:		28.00	28.00

You have the ability to determine the amount that you want to pay online. To pay this amount or to adjust it, please go to the top section.

CONFIRM 





Rotary Club Central

- **Why?**

Measure club activities in order to help clubs increase Rotary's global impact.

- **What?**

Goal areas – membership, service hours, programs participation, Foundation giving, public relations.

- **When?**

2012-13 – Launch in July 2012





[Member Access Home](#) > [Rotary Club Central](#) > [Club View](#) > Overview

Foundation Giving

Membership

Service Activities

Club view

District view

Print page

Overview

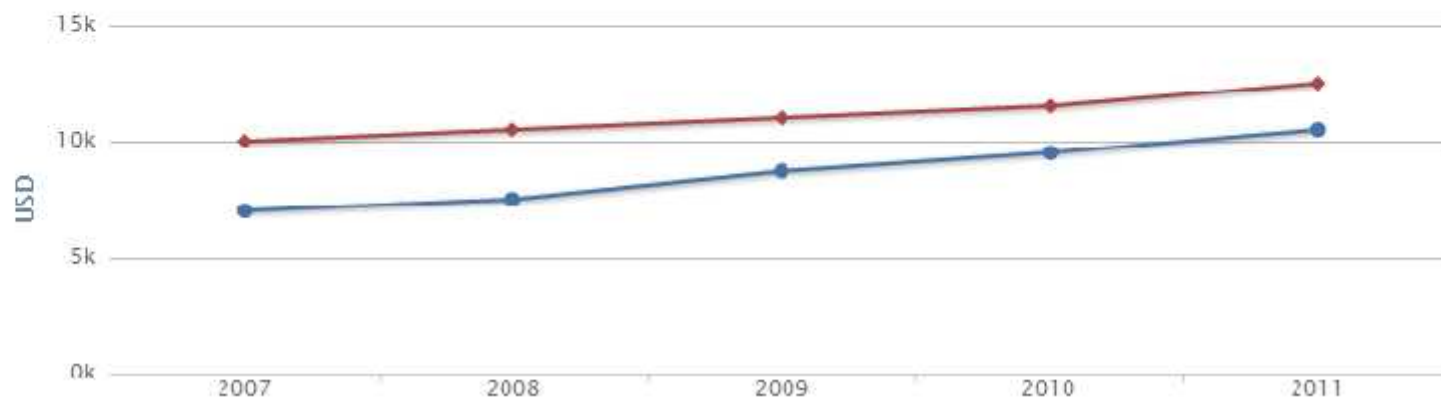
Track your club's Rotary Foundation giving goals by analyzing your club's giving trends and viewing progress towards set goals. Update your progress by editing goals at any time.

Trends

Some text can go here... Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vestibulum et aliquam dolor. Quisque sem ipsum, facilisis eget adipiscing eu, dapibus non neque.

Annual Fund Trend

2007 - 2012



Club view

District view

 Print page

Edit Annual Fund Goals

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Goals Calculator

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	5-YEAR HIGH	GOAL NUMBER	AVERAGE GIFT AMOUNT	GOAL TOTAL USD
Every Rotarian, Every Year (average amount per active member)	15	<input type="text"/>	<input type="text"/>	375
Sustaining Members (individuals contributing under 100 USD)	4	<input type="text"/>	<input type="text"/>	500
Paul Harris Society (individuals contributing 1000 USD or more)	1	<input type="text"/>	<input type="text"/>	2000
Other Contributions (individuals contributing under 100 USD)				<input type="text"/>
2012 - 2013 Goal Total				3875

Save Preliminary Goals

Clear all

Cancel

Assistant Governors and Club Groups

District governors and governors-elect will use this page to manage tasks related to assistant governors and the groups of clubs they will be working with during their term. Create new groups and assign clubs to each group, assign an assistant governor to each group, and view a list of assistant governors and their assigned groups. Sort any list by clicking on column headers.

[View](#) a list of club groups and the clubs/assistant governors associated to them.

[Group clubs](#)

[Manage assistant governors](#)

Assistant governors assigned to club groups

View a list of assistant governors currently assigned to a group and their term. Export the list in .CSV, PDF, or Excel format by clicking the appropriate icon. "Change group" enables you to modify any group assignment.



	Name	Group	Start Date	End Date
Change group	Mr Tom Agnew	1020_East	01-Jul-2011	30-Jun-2012

Track Your Clubs' Progress

Track your club's Rotary Foundation giving goals by analyzing your club's giving trends and viewing progress towards set goals. Update your progress by editing goals at any time.

Club Goals

Some text can go here... Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vestibulum et aliquam dolor. Quisque sem ipsum, facilisis eget adipiscing eu, dapibus non neque.

Annual Fund

Major Gifts

Benefactors

Bequest Society

VIEW DATA FOR: 2011 - 2012 ▼

VIEW SUPPORTING GOAL: Annual Fund Overview ▼

Annual Fund Overview

CLUB NAME	AG GROUP NAME	GOAL	GOAL PROGRESS	STATUS	
Club 1	Group A	8000 USD	6000 USD	Submitted	EDIT
Club 2	Group A	2500 USD	2500 USD	Preliminary	EDIT
Club 3	Group A	8000 USD	6000 USD	Submitted	EDIT
Club 4	Group A	2500 USD	2500 USD	Preliminary	EDIT
Club 5	Group B	8000 USD	6000 USD	Submitted	EDIT
Club 6	Group B	2500 USD	2500 USD	Preliminary	EDIT
Club 7	Group C	8000 USD	6000 USD	Submitted	EDIT



Rotary Showcase



- Information about club projects
- Community value
- Total contributions
- Not just TRF funded projects



Rotary Marks



Two Golden Rules

- Do not alter Rotary Marks
- Always mention the name of the club, district or project



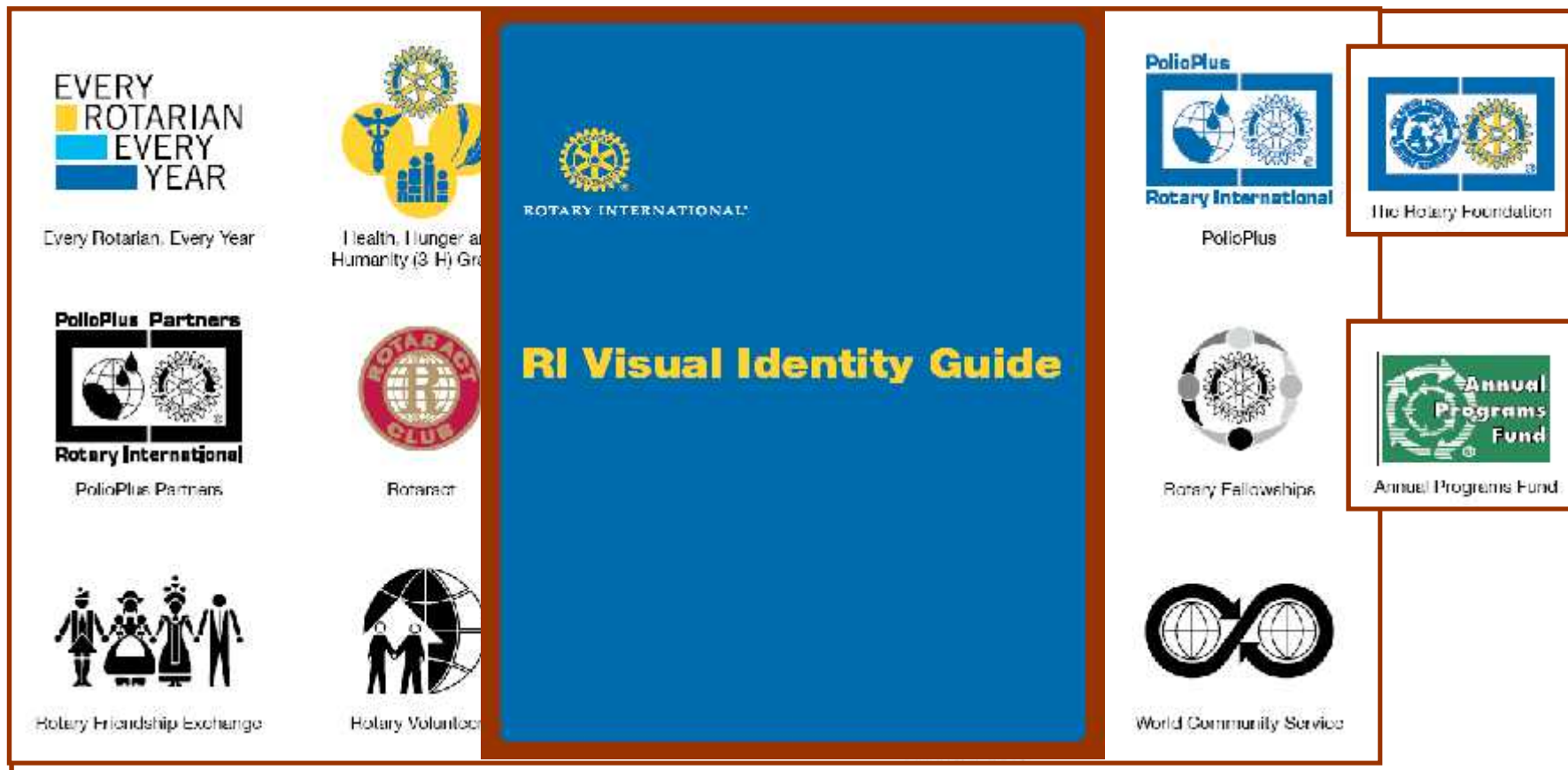
Rotary Marks

Why is this important?

- It ensures that clubs receive recognition
- It protects RI's good name and intellectual property
 - It protects RI from liability



Rotary Marks



Building Your Online Presence





Your Local RI Office



We look forward to hearing from you!



risppo@rotary.org



Peace

Through Service

Sakuji Tanaka

**Rotary International President
2012-13**



**END
POLIO
NOW**



Polio Eradication

13 JANUARY 2011



POLIO ERADICATION

Year to 25 February 2012

	<u>New Cases</u>	<u>25 Feb 2011</u>
Pakistan	11	8
Afghanistan	4	1
Nigeria	2	0
India	0	1
Chad	1	5
DR of Congo	0	7

• <u>Country</u>	<u>2011</u>	<u>2007</u>	<u>2000</u>
• Pakistan	198	32	199
• Afghanistan	80	17	120
• Nigeria	61	353	638
• India	1	874	265
• Chad	132	0	0
• DR of Congo	93	57	603
• China	21	0	0
• Total	650	1315	2971





Number of Countries

2012

2011

2007

2000

4 (6)

19

12

29

Total Number of New Cases:

18 (23)

650

1317

2971



**END
POLIO
NOW**

SOCIAL MEDIA

WHAT IS IT?



HOW MANY ARE THERE?

At the beginning of 2012 Wikipedia listed 208 major social media websites



THE TOP 15 @ JANUARY 2012



12 TIPS FOR NON PROFITS

Acknowledgment

- Joanne Fritz About.com Guide
- Sarah DiJulio and Marc Ruben co-authored a chapter in the book, *People to People Fundraising: Social Networking and Web 2.0 for Charities*, Wiley, 2007



12 TIPS FOR NON PROFITS

1. Pick the right social networks.
2. Extend your reach.
3. Prepare to lose control.
4. Know who is already pretending to be you.
5. Make a good first impression.
6. Post your edgiest, most viral content.
7. Find out which of your supporters are already on social networks.
8. Communicate with your social network friends on a regular basis.
9. Devote staff time to making your social networking effort a success.
10. Activate your social network supporters.
11. Think of social networking as an investment in the future.
12. Find an 'expert' to help you.



SOMEONE TO HELP

**Brendon Walker & District 9750 Rotaractors
developed templates for Facebook**

Email Brendon

support@rotarysocialweb.org



If you don't have time to look at your social media pages on a daily basis, you should probably think about an internet web site to get your message out there.





Peace

Through Service

Sakuji Tanaka

**Rotary International President
2012-13**