

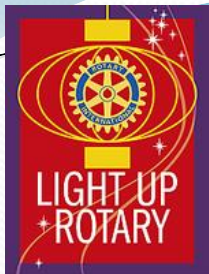
# Welcome

## **Multi-District Presidents Elect Training Seminar (PETS)**

RI Districts 9675 and 9685

Liverpool Catholic Club - Liverpool

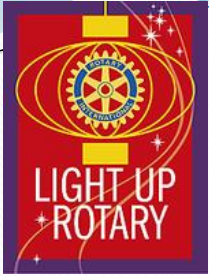
15<sup>th</sup> March 2014



# PP David Bamford OAM

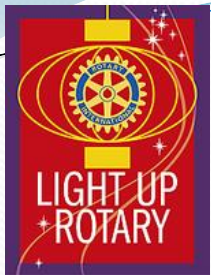
- District 9675 Secretary
  - 2014 – 2015
- District 9690 Secretary/Administration Officer
  - 2012 – 2013
  - 2011 – 2012
  - 2010 – 2011
  - 2009 – 2010
  - 2008 – 2009
  - 2007 – 2008
  - 2005 – 2006
- Member – RC Blacktown City since February 1975





# Overview

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

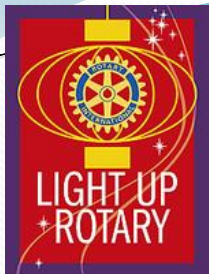


# Role & Responsibility

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

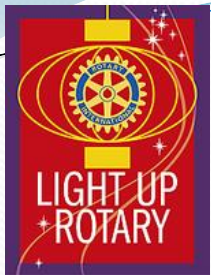
Plan, set goals, communicate.





# Constitution & By-Laws

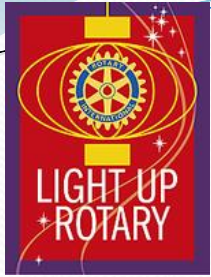
- Last updated at 2013 RI Council on Legislation (COL), next Council in 2016
  - Update your Club's documents – also take into account in your By-Laws changes made by NSW Fair Trading effective from 1<sup>st</sup> July 2010
  - Special Resolution to change
    - Requires support of at least 3/4 of those present & eligible to vote, **not** 2/3 as per page 39 of your President's Manual
  - Also, check your Constitution is 'RI approved'
    - contact Rotary International South Pacific & Philippines Office (RISPPPO) - Club & District Support Section to confirm



# Club Budgets

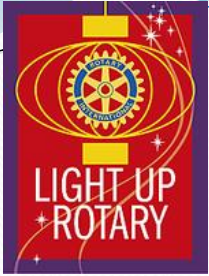
- Administration/Club account
- Project/Charity account
- Any other account you may have
- As we raise funds from the community, i.e. Councils, ClubGRANTS and others we **MUST** have our accounts audited annually (Office Liquor, Gaming & Racing requirement)





# Charitable Fundraising Authority

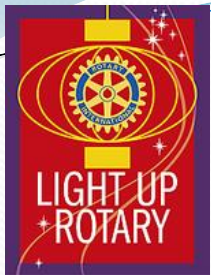
- Ensure your Charitable Fundraising Authority is always current – check with Government Licensing Service (select Services, Charities & NFP, Check Charitable Fundraising License)
- You **can't** fundraise without a current authority
- Become familiar with OLGR fundraising requirements
- Refer 'Best Practice Guidelines' for Charitable Organisations



# NSW Fair Trading

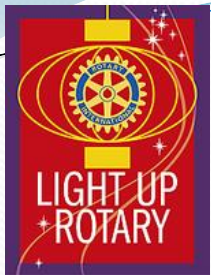
- Annual accounts – NSW Form A12 + \$\$\$
  - Have accounts **audited** annually
- Change of Constitution & By-Laws – NSW Form A6 + \$\$\$
- Public Officer - check who it is, update if required – NSW Form A9





# Risk Management

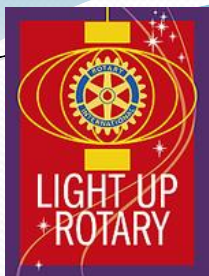
- Prepare a Risk Management assessment for each Club project, event, function
- Be aware of Risk Management issues:
  - e.g. President up the ladder (Police Officer of the Year Award hanging banner)
- Issue a Risk Management 'Help Reckoner' to every Club member to increase awareness



# Calendar of Events

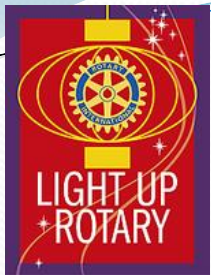
- Critical to plan **WELL** in advance to gain member support
- Nothing worse than a President or Director announcing (regularly) we need help this weekend or next
- Rotarians are busy people with commitments outside Rotary





# Timeline of Tasks

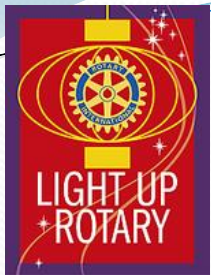
- We developed a Timeline of Tasks for District 9690 to avoid tasks being missed and/or deadlines not being met and also a Timeline for the interaction between our District and Clubs
- Develop a Timeline for your Club to assist your Board and Directors



# Policies of Club

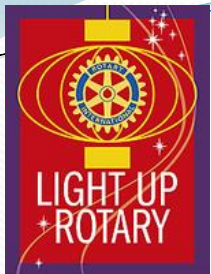
- Document your Club's Policies e.g.:
  - Free meals for prospective members - how many?
  - Honorarium for President – amount?
  - Covering cost of Directors attending Presidents' Meetings - amount?
  - Presentation Evenings – who are guests of the Club, who pays?





# Meetings – have an Agenda

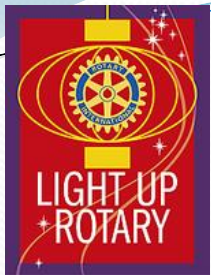
- Club
- sub-Committees
- Board
- Club Assembly
- Annual General Meeting – or a Procedures' document



# District Policies

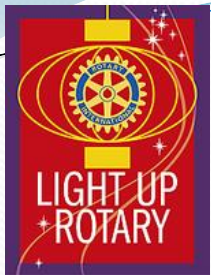
- Become familiar with what your District has:
  - Constitution & Regulations
  - Insurance
    - New project – check with your District Insurance Officer re current coverage
    - **CAN'T** assume because we have District insurance you are covered e.g. chainsaw race
  - Child Protection (changes coming 1<sup>st</sup> Jan 2015)
  - Privacy
  - Risk Management
  - Sexual Harassment





# Reports to RI/District/RDU

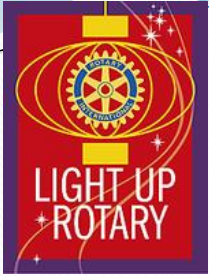
- Semi-annual Dues (SAR) – RI
- Semi-annual Dues – District
- Semi-annual Dues – RDU
- Monthly Club attendance
  - to District Attendance Officer **by required date**



# Reports to District Governor

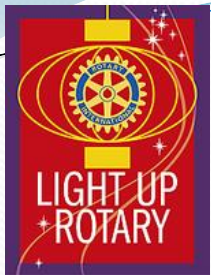
- Your Club Goals for 2014 – 2015
  - Update on RI's website via Rotary Club Central
- RI Presidential Citation for 2013 – 2014
  - RSVP to current DG by 31<sup>st</sup> March 2014
- RI Presidential Citation for 2014 – 2015
  - RSVP to your DG by 31<sup>st</sup> March 2015
- Other Reports – as and when required





# Governor's Official Visit

- Important to respect the office
- **DO NOT** have a guest speaker on this night
- Encourage member attendance to hear important messages

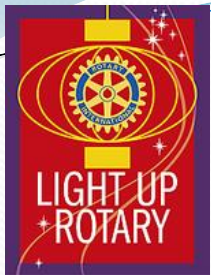


# Communication

## District to Club and vice versa

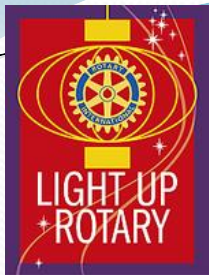
- Ensure responses to District are provided by RSVP date:
  - e.g. Resolutions, Club Electors
- Utilise email for speedy communication
- Prompt responses:
  - avoids follow-up by District personnel
  - ensures deadlines are met





# Resources - RI, RDU, District

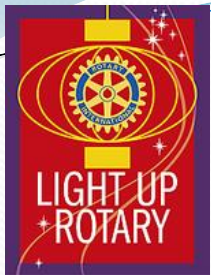
- RI & website, Manual of Procedure (2013)
- RI Office at Parramatta
- RDU & website
- RDU Merchandise and Promotions
- Pre-PETS, PETS and District Assembly
- District website
- District Governor, DG Elect, DG Nominee
- Past Governors and Assistant Governors
- District Officers



# Resources - Club

- Roadside signage
- Promotional brochure/s
- Local newspaper/s
- Banners & pull-up Banners
- Website
- Social Media
- 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.**