

# Pre – PETS Training



Section 1 – Rotary International

Section 2 – The District

**Section 3 – Being President**

Section 4 - Membership

D7780 - Dick Hall

D7850 - Mike Carrier

D7870 - John Siemienowicz

D7890 - Joanne Alfieri

D7910 - Cliff Rober

D7930 - Terry Rezendes Curran

D7950 – William “Billy” Roberts

D7980 - Jeff Krause



# Pre-PETS OBJECTIVES

1. Being Presidential
2. What goals do you need to set in Club Central?
  - a. Membership & Engagement
  - b. Service
  - c. Foundation Giving
  - d. Young Leaders
  - e. Public Image
3. Building your Leadership Team
4. Planning your Club's calendar
5. Planning a good meeting
6. Virtual Fundraising
7. Service Projects



# Power In Our Connections 1:10



# Being Presidential



2021-2022 Theme



# YOUR JOB AS CLUB PRESIDENT



As president you lead your club, engage and inspire members, and promote Rotary in your community.

Find detailed information in [Lead Your Club: President](#).

# As President-Elect

- Consult the president on decision affecting the club
- Serve as a director of your club's board
- Appoint committee chairs and a trainer for your year
- Supervise preparation of the club budget
- Encourage incoming club officers to attend District Training Assembly (DTA)
- Create an Attend your President Elect Training Seminar (PETS), DTA and District Conference
- Create an account on Rotary.org
- Set and track goals for your club in Rotary Club Central at Rotary.org





# As President.....

As president, you **lead and motivate your club**, ensuring that club members feel valuable, inspired, and connected to each other.

## What you do

- Preside over club and board meetings
- Appoint committee chairs and members
- Conduct club assemblies
- Create a budget and manage club finances, including an annual audit
- Develop a safe environment for youth participants
- Work with your district governor and assistant governor

[See full job description.](https://my.rotary.org/en/learning-reference/learn-role/president)

<https://my.rotary.org/en/learning-reference/learn-role/president>



# As President.....

## SWOT Analysis

Strengths

Weaknesses

Opportunities

Threats

## How to prepare

The year of **planning** before you take office is crucial to **achieving the objectives you set out for your club**. As president-elect, you work with your assistant governor and incoming leadership team to set annual goals that support your club's strategic plan. In this year you should:

- Assess your club's **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats (risks) in order to set goals
- Develop an **action plan for your annual goals**, which support long-term achievements
- Appoint committee chairs
- Ensure continuity in leadership and service projects
- Attend presidents-elect training seminar
- Attend district training assembly
- Take online courses in the Learning Center





# As President.....

## Resources & reference

- [Lead Your Club: President - Club President's Manual](#)
- [Be a Vibrant Club: Your Club Leadership Plan](#)
- [Membership Growth and Retention Support](#)
- [The Rotary Foundation Reference Guide](#)
- [Standard Rotary Club Constitution](#)
- [Recommended Rotary Club Bylaws](#)



# As President.....

## Tools

- [Pay or view your club invoice](#) (Rotary International dues and fees)
- [Update your club membership data](#)
- [Add club officers](#)
- Set and track goals in [Rotary Club Central](#)
- Take a course in the [Learning Center Club President Basics](#)
- Register for a [webinar](#)
- Check our [discussion groups](#)

## Rotary support

- Immediate past president
- Assistant governor
- District leaders



# As President (Continued)

- **Set goals for each committee.** Encourage communication between club and district committees.
- **Review activities,** goals, and expenditures, and participate in decisions.
- **Supervise the preparation of a club budget** and proper accounting practices, including an annual financial review
- Make sure your **secretary and treasurer have an account on My Rotary** to update membership and club data regularly. In RIBI use the Data Management System (DMS).
- **Collaborate** with the governor and assistant governor on club and district matters
- **Communicate** important information from the governor and Rotary International to club members
- Prepare for the district governor's required visit
- Follow Rotary's youth **protection policies** and the Statement of Conduct for Working With Youth, and implement the requirements for the Youth Exchange program
- Plan and lead monthly board meetings



# As President (Continued)

- Plan and lead **interesting and relevant club** meetings, and organize fun social events
- Ensure that comprehensive **training** is conducted for club members, as needed
- **Involve members** in carrying out your club's goals, outlined in Rotary Club Central.
- Track your club's goals in Rotary Club Central.
- **Encourage** members to attend district meetings, and promote the Rotary Convention
- **Attend** the district conference
- Submit an annual report to your club on the club's status before leaving office
- Work with your successor before leaving office
- Arrange for a joint meeting of the incoming board of directors with the outgoing board



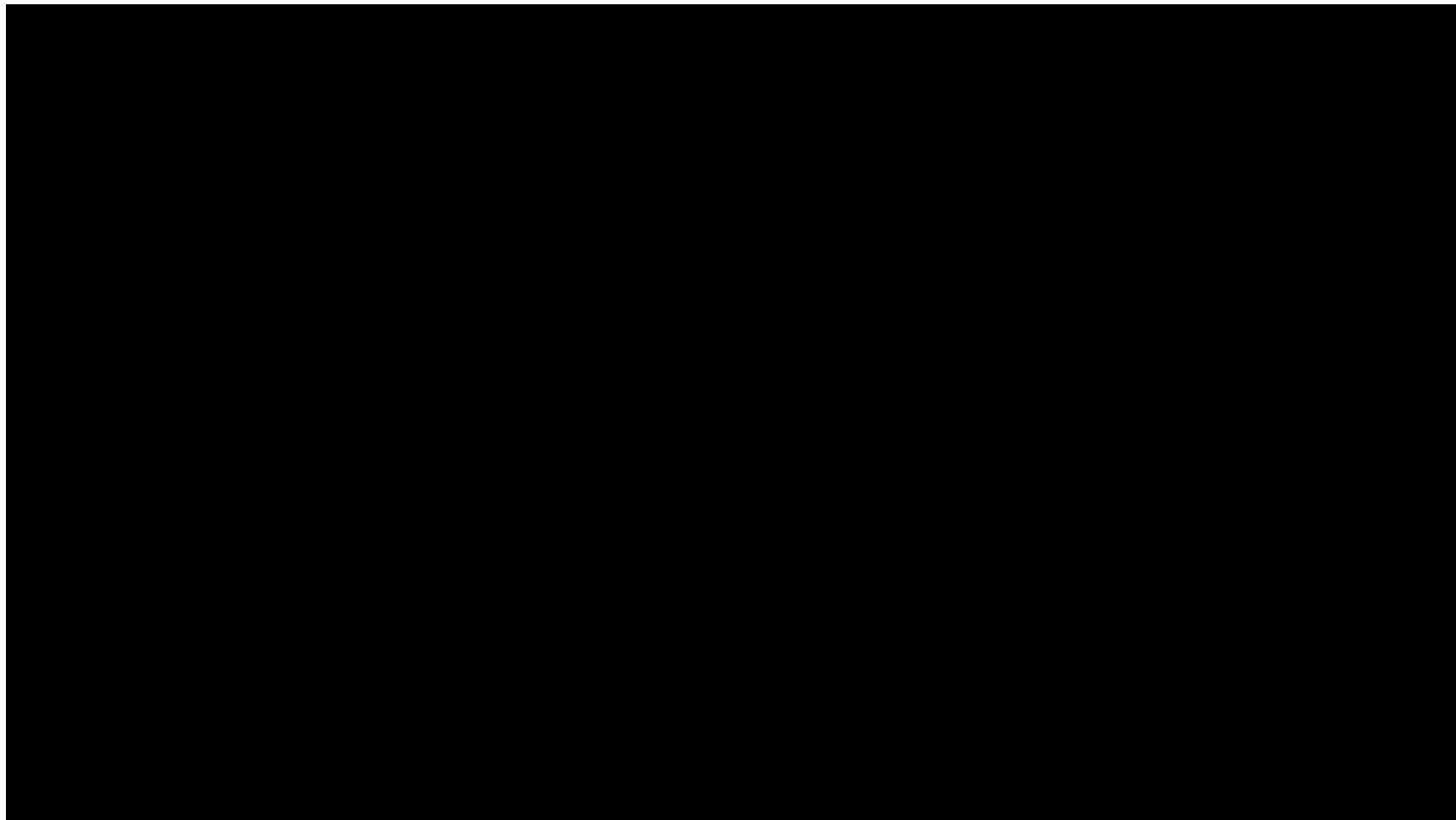


# Being Presidential

- Build a Culture of Collaboration with your Board
- Set a positive tone
- Create a welcoming culture
- Be Efficient and Productive
- Implement and regularly evaluate your club's progress toward its goals
- Inspire every club member to participate in club activities
- Celebrate accomplishments



# What is Rotary 31 Seconds







## Rotary Clubs

While Rotary clubs are grounded in the same values, no two are the same, because each community has its own unique needs. At club meetings in communities across the globe, our members come together to strengthen their connections to friends and neighbors and their commitment to improving lives.



## Rotaract Clubs

Rotaract clubs bring together people ages 18-30 in communities worldwide to organize service activities, develop leadership skills, and socialize.

[Learn more >](#)



## Interact Clubs

Through Interact clubs, people ages 12-18 connect with others in their community or school and learn about the world through service projects and activities.

[Learn more >](#)



# WE ARE ALL WELCOME

**All** ages

**All** sizes

**All** races

**All** abilities

**All** religions

**All** ethnicities

**All** nationalities

**All** sexual orientations

**All** immigration statuses

**All** socio-economic backgrounds

**All** gender expressions & identities



# Be a Leader... but remember to have fun

## Good Leaders

- Set the direction for their organizations
- Identify tasks to achieve goals
- Delegate responsibility
- Establish accountability
- Follow up
- Give credit where credit is due





**ROTARY ISN'T JUST A CLUB TO JOIN,  
BUT RATHER AN INVITATION TO  
ENDLESS OPPORTUNITIES.**



# We're Rotary - There's No Limit To What We Can Do

1:16





## Effective Clubs are able to

**Sustain and  
Increase  
Membership**

**Implement  
Successful  
Service  
Projects**

**Support  
The Rotary  
Foundation**

**Develop  
Leaders  
Beyond  
Club-Level**

**Club Leadership Plan**

**Four Avenues of Service**



# Planning for a Great Club Meeting

Prepare an agenda

- Use a standard timed agenda
- Include topics and time required
- Have a backup agenda (e.g. speaker no-show)
- Follow the agenda – Start and end on-time



# Before a Great Club Meeting

- Confirm speaker, bio, a/v needs, timing, handouts, etc.
- Send a meeting reminder: speaker & topics
- Seek member input for club business, projects, updates, etc.
  - Confirm time requirements
- Plan for/coordinate new member installation
- Arrive early
  - Check room layout, A/V set-up, etc.
  - Greet speaker



# Club Expectations

## DO BETTER THAN THE STATUS QUO

- Membership
- The Rotary Foundation
- Service Projects
- Sustainability



# Have Fun...



# Setting Goals Club Central



# Your Role as President Elect

## Set GOALS for your year:

1. **Membership & Engagement** – Membership, participation in service and Rotary events
2. **Public Relations** – Strategic plan, Online presence, Social Activities, Website, Media stories, branding
3. **Service** – which service projects do you want to do next year? Do you want to consider doing something new/different to meet a new need in your community?
4. **Young Leaders** – Rotaract, Interact, RYLA, Exchange Students
5. **Foundation** – level of foundation giving to Annual Fund and Polio, Major gifts, Bequest Society, Benefactors



# Setting Goals ....



**Fosters continuity in leadership**



**Enables clubs to track their progress**



**Creates transparency**



**Showcases important work of Rotary Clubs**

**Rotary**



# Rotary.org

Do you have a personal log-in on [rotary.org](https://rotary.org) to access "My Rotary"?

If yes, how do you use it?

- Check on Foundation Giving
- Set/monitor Club Goals in Rotary Club Central
- Download logos/Brand Center
- Training info
- Read articles, get news

# ROTARY CLUB CENTRAL



**Centralizes information**



**Eliminates paper forms**



**Fosters continuity in leadership**



**Enable clubs to track their progress**



**Creates transparency**



**Showcases the important work that Rotary clubs do worldwide**

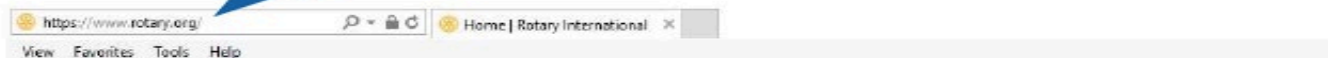
**Rotary**



# HOW TO CREATE A MY ROTARY ACCOUNT



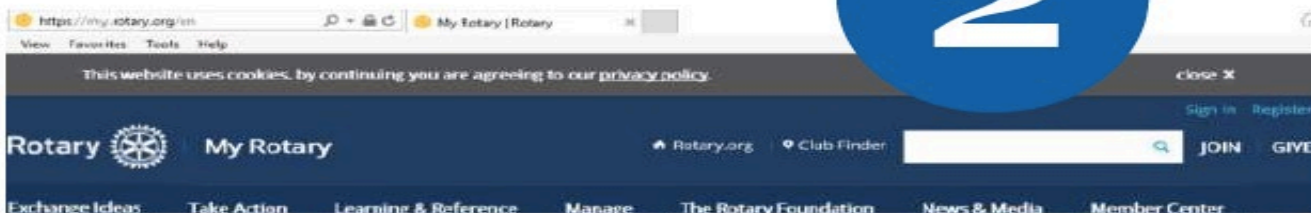
First go to [www.rotary.org](https://www.rotary.org).



1

Then click on My Rotary.

2



# How to Access Club Central

1

Go to My Rotary and select **Sign In** or **Register**. Or go to [rotary.org/clubcentral](http://rotary.org/clubcentral) to reach the site directly. You'll be prompted to sign in to My Rotary or create an account if you haven't already.

Sign In Register

JOIN | GIVE

Foundation

News & Media

Member Center

SIGN IN

SIGN-IN EMAIL \*

Forgot email? [?](#)

PASSWORD \*

Forgot password?

REMEMBER ME [?](#)

SIGN IN

WHY CREATE AN ACCOUNT?

Signing in to My Rotary gives you access to customized tools and resources.

Anyone can create an account. Existing members can log in with their My Rotary ID and password. New members can register for an account and receive a My Rotary ID and password.

CREATE AN ACCOUNT

Select Member Center

SIGN IN TO MY ROTARY

REGISTER FOR AN ACCOUNT

spotlight



Rot

This website uses cookies, by continuing you are agreeing to our [privacy policy](#).

Profile Delegation Account Settings Sign Out(lkforbish@mac.com)



Rotary.org Club Finder

- Exchange Ideas
- Take Action
- Learning & Reference
- Manage
- The Rotary Foundation
- News & Media
- Member Center



**Rotary monitors the global coronavirus crisis**

Rotary is closely monitoring updates and recommendations from the World Health Organization (WHO) and the U.S. Center for Disease Control and Prevention (CDC) to ensure the safest and most appropriate actions are taken for our members. [Read the latest](#) on how the COVID-19 outbreak is impacting Rotary operations, events, and members.

Consider giving to the [Disaster Response Fund](#) to help Rotary clubs lead disaster recovery efforts, including projects related to COVID-19.

Screenshot



**Rotary Spotlight**





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[Profile](#) [Delegation](#) [Account Settings](#) [Sign Out\(lkurbish@mac.com\)](#)



Rotary.org | Club Finder  [JOIN](#) [DONATE](#)

[Exchange Ideas](#) [Take Action](#) [Learning & Reference](#) **Manage** [The Rotary Foundation](#) [News & Media](#) [Member Center](#)

**Club & District Administration**

- Club Administration
- District Administration
- Contributions
- Reports

> [Rotary Club Central](#)



**Community Marketplace**

- Official Rotary Apps
- Club Management Systems & Website Providers
- Marketplace Resources

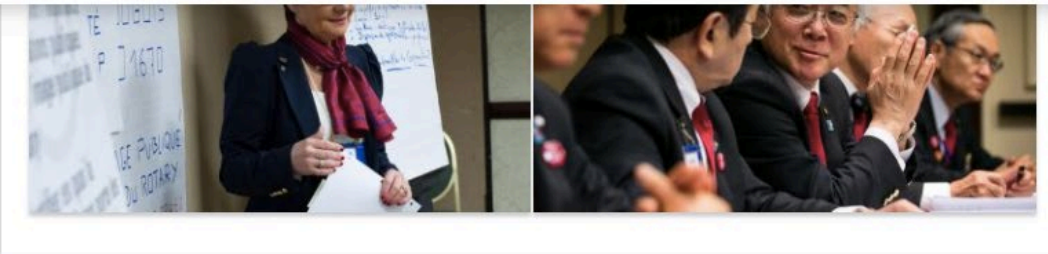
**Brand Center**

- Our Story
- Guidelines
- Logos
- Materials
- Ads
- Images & Video
- Strengthening Rotary Resources

**Products & Services**

- Licensed Vendors
- Special Offers
- Rotary Global Rewards

**Travel & Expenses**



I want to...

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Consider giving to the [Disaster Response Fund](#) to help Rotary clubs lead disaster recovery efforts, including projects related to COVID-19.

## Why do I need to sign-in?

The page you're accessing may contain sensitive information AND we need to validate your identity. If it's been a while since you signed in, we ask you to enter your password to keep this information safe.

**Email Address \***

lkfurbish@mac.com

**Password \***

**SIGN IN**

Please help us improve. Was this page helpful?

YES

NO



# How to Set a Goal

1

NAVIGATE  
TO GOALS

The screenshot shows the Rotary Club dashboard interface. On the left is a dark navigation menu with the following items: Dashboard, Goal Center (circled in red), Global View, Service Activities, Resources, Reports, and Contact Us. Below these is a 'SETTINGS' section with a 'Language' dropdown. The main content area has a blue header with the text: 'Welcome to Rotary Club Co. Explore data and trends related to your goals and tracking progress. Explore data and trends related to your goals, project activities, and more. Please note: data reported in other Rotary systems and third party vendor systems will be delayed for at least 24 hours.' Below the header are tabs for 'Global', 'My', 'My District', 'All Club groups', and 'All Clubs'. The 'Global' tab is selected, showing a 'Global' section with a 'Membership Trends' bar chart. The chart displays membership data for the years 2012-13, 2013-14, 2014-15, 2015-16, and 2016-17. A blue callout box with a white border points to the 'Goal Center' menu item, containing the text: 'Select Goal Center from the navigation menu on the left'.

- Dashboard
- Goal Center
- Global View
- Service Activities
- Resources
- Reports
- Contact Us
- My Rotary
- SETTINGS
  - Language

All Districts All Club Groups All Clubs

Search clubs...

# Rotary Club of Sanford-Springvale

2 OF 11 ACHIEVEMENT

< 2019-20 >



Choose the correct year

Members & Engagement

Rotary Foundation Giving Service Young Leaders Public Image Rotary Citation All

EDIT

The goals you select will appear below. To report progress or add, remove, or edit a goal, select EDIT.

## Club membership

Show goal details and history

ACHIEVEMENT	OF	GOAL
31		41
As Of 29-Apr-20		

- Dashboard
- Goal Center
- Global View
- Service Activities
- Resources
- Reports
- Contact Us
- My Rotary
- SETTINGS
  - Language

# Rotary Club of Sanford-Springvale

2020-21

PRINT

0 OF 0 ACHIEVEMENT

Members & Engagement   Rotary Foundation Giving   Service   Young Leaders   Public Image   All

Which goals will your club track this year? Browse goals by category and select only those you plan to pursue. Then save.

Sort selected goals

Club membership  
Show goal details and history

Enter Membership Goal



ACHIEVEMENT	OF	GOAL	SELECT GOAL
-		<input type="text" value="-"/> Enter Goal Value	<input type="checkbox"/>

Service participation  
Show goal details and history

ACHIEVEMENT	OF	GOAL	SELECT GOAL
<input type="text" value="-"/>		<input type="text" value="-"/> Enter Goal Value	<input type="checkbox"/>

ACHIEVEMENT	OF	GOAL	SELECT GOAL
-------------	----	------	-------------

2020-21 Sanford-Springvale Goals

Select Foundation Tab

- Members & Engagement
- Rotary Foundation Giving**
- Service
- Young Leaders
- Public Image
- All

Which goals will your club track this year? Browse goals by category and select only those you plan to pursue. Then save.

Sort selected goals

	ACHIEVEMENT	OF	GOAL	SELECT GOAL
<b>Annual Fund contributions</b> <a href="#">Show goal details and history</a>	- USD As Of 29-Apr-20		- Enter Goal Value	<input type="checkbox"/>
<b>PolioPlus Fund contributions</b> <a href="#">Show goal details and history</a>	- USD As Of 29-Apr-20		- Enter Goal Value	<input type="checkbox"/>
<b>Major gifts</b> <a href="#">Show goal details and history</a>	- As Of 29-Apr-20		- Enter Goal Value	<input type="checkbox"/>
<b>Donor Goals</b>				

- Dashboard
- Goal Center**
- Global View
- Service Activities
- Resources
- Reports
- Contact Us
- My Rotary
- SETTINGS
  - Language



# Virtual Fundraising





# Rotary Fundraising

## How can I fund my project?

You may be able to pay for your project entirely through fundraising events, such as charity dinners, walkathons, or online auctions. These events will not only help you raise money for your project, but also awareness for Rotary and The Rotary Foundation. Some possible fundraiser events are:

- \* Skip a meal at your club meeting and donate the cost
- \* Organize a walkathon, bike-a-thon, or skate-a-thon
- \* Honor a special person in your life with a memorial or tribute gift
- \* Collect pennies to [end polio](#)
- \* Organize a purple pinkie project to end polio



# Rotary Fundraising

## Creating a fundraising plan

Before hosting a fundraiser, you should create a plan.

Establishes a budget

Considers and addresses local laws for fundraisers

Outlines the event's logistics (such as selecting the location, ordering supplies, and arranging for set up and tear down)

Considers how to publicize the event

Add/Edit Account	Account Type	Go To Register	Account Name	Register Balance	Goal Setting - Lowest Limit	Goal Setting - Goal to Reach
A/E	Asset	1	Checking Account 1	\$3,475.00	\$0.00	\$10,000.00
A/E	Asset	2	Checking Account 2	\$2,795.00	\$0.00	\$5,000.00
A/E	Liability	3	Credit Card Account 1	-\$400.00	-\$800.00	\$0.00
A/E	Liability	4	Credit Card Account 2	-\$1,000.00	-\$1,500.00	\$0.00
Total Assets				\$6,270.00		
Total Liabilities				-\$1,400.00		
Net Amount				\$4,870.00		

Expense Categories to Watch					
Month-Yr	Last 6 Months	Category	Actual	Budget	Difference
May-2010		Restaurants/Dining	\$80.00	\$120.00	\$40.00
May-2010		Groceries	\$300.00	\$500.00	\$200.00
May-2010		Entertainment	\$45.00	\$80.00	\$35.00
May-2010		Clothing/Shoes	\$70.00	\$100.00	\$30.00
May-2010		Personal Care - Products	\$30.00	\$40.00	\$10.00
May-2010		See All Expenses - Budget vs Actual	05/20/2010	05/31/2010	11 full days left in month



# Rotary Fundraising



Golf Tournaments  
Festivals and Fairs  
Dinners  
Lobster Bakes  
Road Races  
Auctions / Raffles  
Comedy Nights  
Bingo  
Handbag Bingo



001

WASHINGTON HIGH SCHOOL'S  
ANNUAL BREAST CANCER AWARENESS

**50/50 RAFFLE**

50 percent of proceeds go to the Breast Cancer Awareness Association. Winner will receive the other 50 percent. (keep this coupon)

Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Address 1: \_\_\_\_\_  
Address 2: \_\_\_\_\_  
Email: \_\_\_\_\_

001

[www.washingtonhigh.com/awareness](http://www.washingtonhigh.com/awareness)

A hand holding a \$50 bill with a pink ribbon tied around it, symbolizing breast cancer awareness.

VectorStock® VectorStock.com/21849458



# Virtual Fundraising

Due to social distancing policies, many Rotary Clubs have had to cancel, postpone, or rethink fundraising events that they depended on to keep their doors open.



Social distancing, excessive hand washing, and Zoom birthdays might have become our new normal, but that doesn't mean fundraising is doomed.

Virtual fundraisers aren't just workable alternatives to in-person events. They can actually be more effective, as well as easier to organize than in-person fundraisers.



# Virtual Fundraising (Cont'd)



**THE DUCKS ARE THROWING A  
VIRTUAL POOL PARTY!  
SEPTEMBER 5 @ 4:00PM**

**DUCK TICKETS \$5.00  
QUACK PACK 5 for \$20.00  
10 CASH PRIZES TOP PRIZE \$250.00**

**ALL PROCEEDS BENEFIT THE  
BOONE AREA LIBRARY**

**Tickets available at the library  
or through Eventbrite**

**Follow the fun on FB for chances to win prizes before the party!**

To start with, virtual fundraising events are usually less expensive to put on and more accessible to a greater number of people. With the help of modern technology and a little creative thinking, there are still plenty of ways for your Rotary Club to raise money.

Before getting started with virtual fundraising, in whatever shape or form, it's crucial to ensure you have a robust on-line donation platform and a compelling, functional website.

Create a dedicated landing page for your virtual fundraiser with a single focus or goal, known as a call to action (CTA).

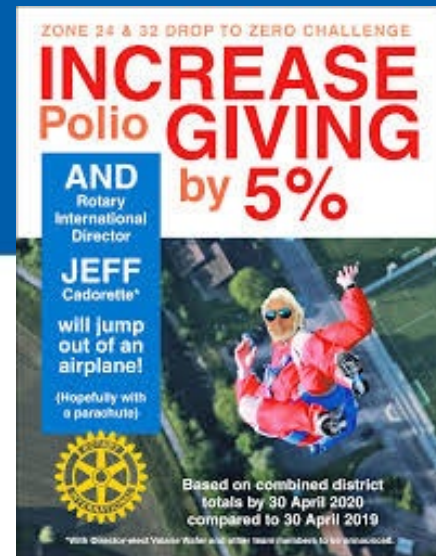


Flags for  
Heroes at the  
Maine Mall



# Virtual Fundraising (Cont'd)

To create a high-performing donation landing page, write an attention-grabbing headline, use compelling visuals, and lead with a clear explanation of your work and your mission.



Testimonials and impact statistics can also help boost your credibility and build trust.

Many of the traditional fundraisers can be adapted to the virtual world such as auctions, bingo games, raffles, virtual walks or runs, etc. Lobster Fests, Food items can be reserved and paid for on a virtual platform where clubs can arrange a pick up time for contributors to pick up their food.

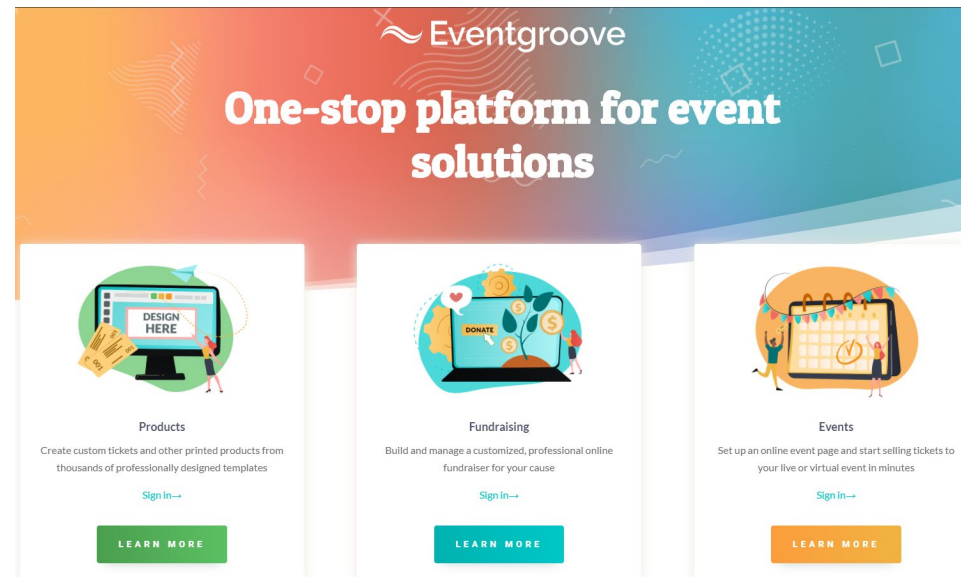


# Virtual Fundraising (Cont'd)

There are several on-line platforms that can meet the needs of your Rotary Club

There are many more platforms including Facebook and other social media platforms and gofundme pages.

District 7980 uses the EventGroove platform  
<https://eventgroovefundraising.com/>



The banner features the EventGroove logo and the text "One-stop platform for event solutions". Below the banner are three white cards with colorful illustrations and text:

- Products:** Illustration of a computer monitor with "DESIGN HERE" and tickets. Text: "Create custom tickets and other printed products from thousands of professionally designed templates". Includes a "Sign In" link and a green "LEARN MORE" button.
- Fundraising:** Illustration of a laptop with "DONATE" and a plant growing from a coin. Text: "Build and manage a customized, professional online fundraiser for your cause". Includes a "Sign In" link and a teal "LEARN MORE" button.
- Events:** Illustration of a calendar and a person. Text: "Set up an online event page and start selling tickets to your live or virtual event in minutes". Includes a "Sign In" link and an orange "LEARN MORE" button.



# Service Projects



# SERVICE PROJECT EXPECTATIONS

- Worthy of the name “Rotary”
- Do substantial good
- Justify the time and effort of members
- Provide personal satisfaction



Members **ENGAGED** and having **FUN** being Rotarians





# Service Projects

- On-going projects
- Project partners
- Matching District Designated Funds or cash from previous grants
- (from previous grant participation with another club(s) if appropriate)



# Resources

*Rotary:* business and professional leaders aged 18 and upwards [www.rotary.org](http://www.rotary.org)

*Rotaract:* young adults ages 18-30

<https://www.rotary.org/en/get-involved/rotaract-clubs/details>

Video- [Join Rotaract](#)



*Interact:* students 12-18 year olds

<https://www.rotary.org/en/get-involved/interact-clubs>



*Earlyact:* students ages 5 to 13.

<http://www.earlyact.com/>



Rotary





# NEPETS Resources

- <https://rotarynepets.org/> NEPETS Webpage
- <https://nepets.ticketspice.com/ne-rotatry-pets-2021> NEPETS Registration
- <https://www.facebook.com/RotaryNortheastPETS/> NEPETS Facebook
  
- <https://nepetshof.org/> NEPETS House of Friendship
- <https://forms.gle/qqqPbu3bTqNNU7bC6> Google Form link House of Friendship
  
- <https://drive.google.com/drive/folders/16MPYYUjGF4fTVZgxYPolZW8ye-GmkQJh?usp=sharing> Thumb drive, full address
  
- <http://fa.lk/NEPETS2021Thumbdrive> [bit.ly](https://bit.ly) shortened link to thumbdrive



# QUESTIONS



# Let There Be Peace on Earth - PS22 Chorus 1:59

