

Rotary
OMR PETS



President-Nominee Curriculum Materials



BE THE INSPIRATION

March 9-10, 2018

Session 1: Leadership – It's Not About You

(55 Minutes)

1. What are important leadership skills for your role?
2. What is the vision of your Rotary club? If you don't have a club vision, who is responsible for establishing a vision?
3. What strategies will you use to keep club members motivated?
4. How will you select and prepare your club leadership team?
5. What committees does your club have?
6. What concerns do you have about working with other club leaders?
7. How will you handle disagreements between club leaders?
8. What will you do to ensure continuity of leadership?

Leadership

Finger #1: Hold the Vision

Building a business takes skill, work, and capital resources. But those are details. More than anything else, building a business—really, building anything—is an act of faith. Because you’re creating something out of nothing. You are moving into the future on invisible wires, without a net.

It’s easy to say, “Hold a vision.” The hard part isn’t the vision. Anyone can come up with a vision. The hard part is the holding.

The single biggest challenge to any organization is the constant cloud of fear and doubt that swirls around the heads of the people involved. As a leader, your job is to hold fast to the big picture, to keep seeing in your mind’s eye, with crystal clarity, where it is you’re going—that place that right at this moment exists only in your mind’s eye. And to keep seeing that, even when nobody else does. Especially when nobody else does. Your people count on you to do this. It’s the biggest job you have.”

Finger #2: Build Your People

Time was, people in a business were often viewed as “workers,” as if, out of the entirety of a person’s being, that which was relevant to the business could be reduced to a single function. Not anymore. Increasingly we’ve come to realize that people are people, and every person in a business is a universe of talents, skills, and potential value. Good businesses look to hire competent employees. Great businesses hire people and then commit to bring out their latent greatness through continual investment.

Finger #3: Do the Work

Great leaders don’t expect anyone else to do anything they haven’t done themselves. They get dirt under their nails and mud on their boots. Abraham Lincoln knew law. He’d practiced it in freezing-cold, bare-floored small-town courtrooms. So did Gandhi. They both emancipated millions—but only because they knew the feel of the craft in their hands. Before he was a great general or the nation’s first (and arguably greatest) president, George Washington worked as a land surveyor. He knew the land he would later govern. As a boy, Sam Walton milked the family cow and sold the surplus milk to neighbors. Bill Gates spent thousands of hours as a teenager programming computers.

This is one of most great leaders’ greatest success secrets: whatever field they are in, whatever business empire they run, the chances are excellent they have done it at

some point with their own hands, learning it nuts and bolts, from the ground up.

Finger #4: Stand for Something

Leadership is not something you can put on and take off, like a set of clothes. Your capacity to influence is not something you can rehearse, like a speech in a play. People, contrary to popular belief, are not fools. No matter what front you put on, they will read you, consciously or unconsciously—the you behind the words.

It's not that what you say isn't important. It is. That's just not where the source of your power lies. What you have to give, you offer least of all through what you say; in greater part through what you do; but in greatest part through who you are.

Competence counts—but character matters more. If you want people to follow you, they need to trust that you know what you're doing. But that's the smaller part of it. Competence is simply the baseline, the thing that puts you in the game. Character, though, is a precious gem, and anyone who possesses it is worth a great deal to the world around him.

You can lead only as far as you grow.

Thumb: Pass the Mantle

So there you have it. Leaders hold a vision. Leaders care about their people. Leaders get their hands dirty and their boots muddy, do the work and make the tough decisions. And leaders stand for something.

It's about all those things. But at the same time, it isn't about any of those things. Because you can hold the biggest vision, care about all your people, do all the work, and stand for something until the end of days — and it's still you, you, you.

Here is the heart of the contradiction that is great leadership: great leadership isn't a place you arrive, it is a place into which you disappear.

Great parenting is not about the parent; great teaching is not about the teacher. And great leadership? Whatever it truly is, it's not about you.

Resources and References

Rotary Club Central: <http://www.rotary.org/ClubCentral> (requires login to MyRotary)

Rotary Governance documents: <https://www.rotary.org/myrotary/en/learning-reference/policies-procedures/governance-documents>

Rotary Council on Legislation: www.rotary.org/col

Rotary monthly theme calendar: <https://my.rotary.org/en/news-media/calendar>

Be a Vibrant Club: Your Club Leadership Plan:
<https://www.rotary.org/myrotary/en/document/be-vibrant-club-your-club-leadership-plan-north-america-245en>

Rotary Brand Central: MYROTARY ☐MANAGE ☐BRANDCENTER Rotary

Videos: <http://vimeopro.com/rotary/rotary-videos>

Rotary Images: <http://rotary.org/images>

Club Officers & Committee Chairs

President

President-Elect

President Nominee

Immediate-Past President

Vice-President

Secretary

Treasurer

Sergeant-at-Arms

Rotary Foundation Chair

Fundraising Chair

Service Projects Chair

Membership Chair

Programs Chair

Others

Session 2: Building the Ideal Rotary Club

(55 minutes)

Who, When, Where, What and How?

1. WHO are ideal Rotarians and where do you find them?
 - a. Does your club reflect your community in age, gender, race, religion, and classification?
 - b. How do you recruit new members?
2. WHEN is the best time for these Rotarians to meet?
3. WHERE is the ideal meeting place?
4. WHAT does an ideal Rotary club do?
5. HOW in the world can we get it all done?



Membership Goal Worksheet 2018-2019

Club Name _____

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

My club's **Annual Attrition Rate** (3-year average): _____

My club's **Annual Attraction Rate** (3-year average): _____

Success Targets

Attrition less than 15%

(July 1 membership x .15)

Attraction greater than 20%

(July 1 membership x .20)

The problem we need to solve is:

- ☐ **Low Retention** -- Our Attrition Rate Exceeds 15%
- ☐ **Insufficient New Member Attraction** - Our Attraction Rate is lower than our Attrition Rate OR Below 20%
- ☐ **Neither** - We need to build on our current membership growth culture and strategies

Membership History

Club Year	Members at start of year (July 1)
2017-2018 (current year)	
2016-2017	
2015-2016	
2014-2015	
2013-2014	
2012-2013	

2018-2019 Membership Goal Setting

Starting Membership July 1, 2017	
Current Membership (1/1/2018)	
Estimated Membership July 1, 2018	(a)
Membership Goal July 1, 2019 (July 1, 2018 Start + Growth)	(b)
Net Membership Growth Challenge = 10% or 10 members	(c=b-a)
Average Annual Attrition to Replace (Greater of Actual or 10% = World Class)	(d)
New Members Needed (Growth + Attrition)	(c+d)

Commit

At least 3 dedicated Rotarians must commit to making membership a priority. Are you ready to re-dedicate to the work of Rotary? If you don't believe in Rotary, potential members won't believe in you.

Know Your Numbers

Review how many Rotarians your club has lost through attrition over the last 3 years and calculate an average attrition loss. Then add 20% to that number for contingencies. Then know how many members you would like to have at the end of the year. Use the worksheet on page 7.

Re-evaluate / Change

Is the club attractive as is, or is there a need for change. What do you want your club to become?

Membership Goals

Have a membership drive with specific, attainable goals.

Materials & Websites

Hand-out materials and an updated website are important for reference. Be ready to answer the questions: What is Rotary? What does Rotary do?

Prospect Identification

Target specific people using a classification list, Chamber Directory, Yellow Pages, email lists, Facebook friends.

Recruit

Recruit constantly when you meet any potential Rotarian. Invite them to have a meal with you and meet your Rotary friends.

Prepare for Their Visit

Be ready when they visit to welcome them and make them feel important. Let them speak about themselves. All members can say "Welcome Bob!"

Invitation

Don't delay in inviting them to join, and approving them for membership.

Club Meetings

Meetings & Programs must be upbeat and entertaining when they visit and after they join to add value for their time.

Involvement

Involve new members with simple tasks like leading the Pledge or blessing the meals. Find out what their interests are and assign them to a committee.

Family

Family of Rotary events are important to create friendships as often as possible.

Leadership

Leadership is important now and for years to come. Who's going to step up to grow club membership? Who's going to keep it going?

Club Flexibility – Recent Changes

Research and our members' experiences have shown that when clubs have more freedom to decide how and when they hold their meetings, who they'll invite to become members, and what member engagement means, their ability to attract new members and keep current members motivated increases.

The 2016 [Council on Legislation](#) voted to give Rotary clubs more flexibility than they've ever had. The changes in policy affect when, where, and how clubs meet and the types of membership they offer.

Five ways to use the new flexibility

It's up to your club to decide how — and if — you want to use the new options. Start by reviewing the updated [Standard Rotary Club Constitution](#) to see which guidelines are flexible. Once you've decided what changes would benefit your club, edit your club bylaws to reflect them, and try them out. If you decide they aren't working, try something else.

Here are some examples of how your club can apply the new flexible options:

1. Change your meeting schedule. Your club can vary its meeting days, times, and frequency. For example, you could hold a traditional meeting on the first Tuesday of the month to discuss business and service projects and get together socially on the

last Friday of the month. You just need to meet at least twice a month.

2. Vary your meeting format. Your club can meet in person, online, or a combination, including letting some members attend in-person meetings through the Internet.

3. Relax attendance requirements. Your club can ease attendance requirements and encourage members to participate in other ways, such as taking a leadership role, updating the club website regularly, running a meeting a few times a year, or planning an event. If your club is dynamic and offers a good experience for members, attendance won't be a problem.

4. Offer multiple membership types. Your club could offer family memberships to those who want to bring their families, junior memberships to young professionals with leadership potential, or corporate memberships to people whose employers want to be represented in the club. Each type of membership can have its own policies on dues, attendance, and service expectations. Rotary will count these people in your club membership and will consider them active members if they pay RI dues.

5. Invite Rotaractors to be members of your club. You can invite Rotaractors to join your club while remaining members of their Rotaract clubs. If your club chooses to, it can make special accommodations for these members, such as relaxed attendance requirements or reduced fees, as long as they are reflected in the club bylaws.

Resources & Reference

- <https://my.rotary.org/en/club-flexibility>
- [Rotary's governance documents](#)
- [Start Guide for Alternate Membership Types](#) (includes sample bylaws)
- [Start Guide for Flexible Meeting Formats](#) (includes sample bylaws)
- [Club meeting flexibility and format](#) (video)
- [Membership types and attendance flexibility](#) (video)
- [Membership Flexibility Overview](#)
- [Membership Best Practices Discussion Group](#)

Session 3: Financial Responsibilities

(60 minutes)

1. Who's Responsible for Club Finances and Budgeting?

Responsibilities of the Club President, Secretary, Treasurer, Board of Directors, and Executive Committee

2. Where Are We Going?

Developing or updating a strategic plan for our club that charts our course for the upcoming and next few years?

3. Got a Budget?

Developing an annual financial plan

4. Where's the Money Come From?

Other than member dues, how many other ways can my club gain revenue?

5. Where Does the Money Go?

What do our dues and other revenue pay for? Who determines where our charitable funds go?

6. Who Needs to Know About Club Finances?

Communication Counts

Sample Rotary Club Budget

Club Charities Highlighted

Income	Projected	Actual/Est.	Due Date	Paid Date
Cash on Hand	8000			
Dues @ \$50 x 40 Members	24,000	24,000	Monthly	Monthly
Wine Tasting (Avg.\$6,000)	8,000	10,000	October	October
Spring Fund Raiser (Yard Sale)	TBD		May	May
Salv. Army Bell Ringing (non-deposit)	(2500+)	8,852	December	December
Dist.Simplified MatchingGrant	1,500	Missed	Fall	N/A
Raffle (PolioPlus & Permanent Fund)	1,000	1000 est.	Weekly	Weekly
Happy Dollars (C.A.R.T. Fund)	1,000	1,184	Weekly	Weekly
Harvest Festival Pizza Sale	200	100	September	September
Matching Grant - Water Project	N/A	N/A	N/A	N/A
Misc. Income (Haiti Donations)	0	2,100	January	January
Total Projected Income	46,900	<u>47,236</u>		

Expenses

Meals \$7 @ 70% Attendance	9,800	10,000	Weekly	Weekly
Rotary Int. Dues \$35x40x2	2,800	2,551	July/Jan.	Paid
District 7710 Dues \$15x40x2	1,200	1,006	July/Jan.	Paid
President Elect Training Sem.	800	830	January	Paid
District Conference Club Fee	100	100	July	Paid 7/10
Property Tax Forest Park Lot	150	150	August	Paid
Miscellaneous Club Expenses	500	TBD	TBD	All Yr.
The Rotary Foundation Gift to APF	4,000	2,464	Dec./June	Paid 12/21
TRF Permanent Fund (Raffle)	1,000	2,000	Dec./June	Paid 12/21
Scholarships - CHS (4)	4,000	3,000	July/Aug.	Paid Aug.
Dist Simplified Matching Grant	3,000	Missed	Fall	N/A
Salv. Army Bell Ringing (dir. deposit)	(2500+)	8,852	December	Paid 12/10
Stop Hunger Now / Haiti	2,000	6,950	January	Paid 1/10
C.A.R.T. Walter F. Johnson	1,000	1,184	March	Paid 03/10
YMCA - We Build People	1,000	1,000	November	Paid 12/10
PolioPlus Gates Challenge	1,500	1,000	Dec./June	Paid 12/21
Rotary Youth Scholar Awards	550	(4) 1,160	December	Paid 1/10
Boys & Girls Home Furniture	500	500	July	Paid 7/09
4-Way Test Prints Project	500	LYR	Spring	LYR
Awards, Plaques, Pins, Etc.	500	TBD	TBD	All Yr.
Wall Street Journal - Library	350	364	January	Paid 1/10
Salvation Army Thanksgiving	200	200	November	Paid 11/09
R.A.D. Drug Essay Contest	175	200	February	Paid 1/10
Harbor House (car seats)	0	150	April	Paid 4/10
International Water Project	2,000	0	TBD	N/A
4-Way Test Essay Contest	Too Late	0	Aug. Dec.	N/A
Discretionary Funds	8,075		TBD	N/A
Total Projected Expenses	46,900	<u>43,611</u>		

Notes

Cash on Hand	8,009	7,323
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Session 4: Rotary – Doing Good in the World

(55 minutes)

1. What is a foundation? When you hear the word “foundation” do any foundations come to mind?
2. What happens to the money given to The Rotary Foundation? Does any of the money come back to your district? Can you designate where the funds go and for what purpose?
3. What programs or projects have your club participated in that were funded in whole or part by the Rotary Foundation?
4. Does anyone know anything about the Rotary Peace Centers, Vocational Training Teams, Polio Plus, and Global Grants?
5. What does it mean to become a Paul Harris Fellow? Do you have to stop giving to The Rotary Foundation when you become a Paul Harris Fellow? What is a Major Donor?
6. Does your club have a Foundation chair? Does your club set and achieve its Foundation giving goal each year?
7. What resources do you have to learn more about the Rotary

Foundation? How can you share knowledge with your club?

Session 5: Building Relationships – Joint Meeting with Assistant Governors

(55 minutes)

Building Relationships – Getting to Know Each Other.

Rotary Club Central

Rotary International Support

What can your Assistant Governor do for you?

What can you do as President-Nominee to prepare for your year as President?

[illegible]

[illegible]

[illegible]

[illegible]