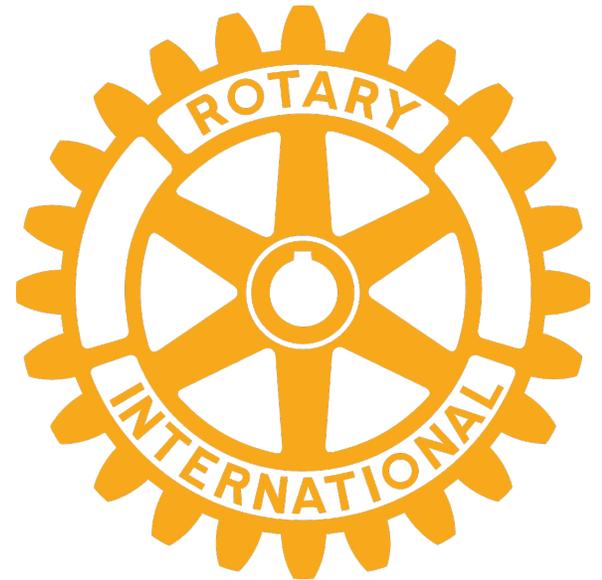


# PETS 2021



## MID-NORTHEAST PRESIDENTS-ELECT TRAINING SEMINAR 2021

President-Elect Work Session Summaries  
March 2020



**Mid-Northeast PETS**  
Presidents-Elect  
Training Seminar

### 2020-21 District Governors

D7210 Mike Polasek  
D7230 George McKinnis  
D7255 Mary Ellen Ellwood  
D7410 Mary Ellen Bentler  
D7475 Shelby Rhodes  
D7490 John Susani

# Rotary

## Mid-Northeast PETS



### WELCOME!

Congratulations on stepping forward as President-Elect of your Club! President-Elect is a critical leadership role, and you have an opportunity to make a positive difference for you and your club. There will certainly be challenges that lie ahead of you, but you have the support of the entire Rotary International organization behind you.

In November we made the decision for PETS to be held virtually. We know... some of us are all “Zoomed” out! We would have all preferred to be together in-person but unfortunately that is not possible. Our Mid-Northeast PETS team has been working hard to make sure that you have an experience that is not only informative, but FUN!

We decided to spread the learning experience out over several weeks rather than try to accomplish all learning in one day online. PETS will take place every Tuesday in March from 7:00pm – 8:15pm. Our curriculum is as follows:

March 2	Planning & Leading Your Club
March 9	Running Your Meetings & Club
March 16	Strengthening Your Membership
March 23	The Rotary Foundation
March 30	Fundraising

The courses are designed to give you an overview of the tools that you will need to make your year as a Club Leader one of the most exciting and fulfilling years of your life. Prior to each week you will be required to complete a series of Learning Center Courses that will introduce you to the weekly topic. Each PETS session will include a speaker followed by breakout rooms. The breakout rooms will give you the opportunity to collaborate and share ideas with your fellow Presidents-Elect. So, it is important that you complete the courses ahead of time. As for Assistant Governors, your breakout rooms will allow you the unique opportunity for discussions with Senior Rotary Leaders.

Our team is here to help you be successful. In addition to your Club, your District, Trainers and your class of other Presidents-Elect, will be a powerful resource to ensure success. Every President-Elect with whom you train brings their personal strengths and unique experiences to this shared journey. Some of your richest and most memorable experiences will come from getting to know your fellow PEs even on Zoom. The friendships created at PETS often last a lifetime and these relationships and networks are one of the greatest strengths of the Rotary organization.

Looking forward to seeing you soon.

Yours in Rotary,

MNE PETS Team



# Mid-Northeast PETS Presidents-Elect Training Seminar

2021-22 District Governors

D7210 Mike Polasek  
D7230 George McKinnis  
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## PETS 2021 Presidents-Elect Work Session Summary

**Planning & Leading Your Year:** *Lead Your Club – President 2019-22 manual, Chapters 1&2*

Week #1 – March 2, 2021

**Featured Speaker – RI President Elect Shekhar Metha** (*Calcutta Mahanagar Rotary, India*)

**Learning Center Courses** <https://learn.rotary.org/members/learn/catalog>

*\*Required to be completed prior to March 2, 2021 (week #1)*

- **Getting Started with the Learning Center** (15 min)
- **Get Ready: Club President** (45 min)
- (optional) **Essentials of Understanding Conflict** (30 min)
- (optional) **Leading Change** (30 min)

**Reading Material** <https://my.rotary.org/en/document/lead-your-club-president>

### 1. Your Job as Club President

- President-Elect Responsibilities
- President Responsibilities

### 2. Planning Your Year

- Rotary's Guiding Principles & Vision Statement
- Strategic Planning
- Setting and Evaluating Annual Goals
- Rotary Citation

### 3. Working with Your Leadership Team & Club Members

- Club Board Officers & Elections
- Club Committees & Chairs
- Leadership Development & Succession
- Member Education, Motivation & Recognition

### Additional Resources

- My Rotary: <https://my.rotary.org/en>
  - Club President: <https://my.rotary.org/en/learning-reference/learn-role/president>
  - Club Secretary: <https://my.rotary.org/en/learning-reference/learn-role/secretary>
  - Club Treasurer: <https://my.rotary.org/en/learning-reference/learn-role/treasurer>
  - Club Committee: <https://my.rotary.org/en/club-committee>
  - Membership: <https://my.rotary.org/en/learning-reference/learn-topic/membership#assess>
  - Rotary Citation: <https://my.rotary.org/en/news-media/office-president/presidential-theme>
  - Rotary's Guiding Principles: <https://my.rotary.org/en/guiding-principles>
  - Rotary International's Strategic Plan: <https://my.rotary.org/en/learning-reference/about-rotary/strategic-plan>
  - Rotary Presidential theme resources: <https://my.rotary.org/en/news-media/office-president/presidential-theme>
- Rotary Club Central: <https://rcc.rotary.org>



# Mid-Northeast PETS Presidents-Elect Training Seminar

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## PETS 2021 Presidents-Elect Work Session Summary

**Running Your Meetings & Club:** *Lead Your Club – President 2019-22 manual, Chapters 3&4*

Week #2 – March 9, 2021

**Featured Speaker – RI Director Valerie Wafer** (*Collingwood South Georgian Bay Rotary, Ontario Canada*)

**Learning Center Courses** <https://learn.rotary.org/members/learn/catalog>

*Required to be completed prior to March 9, 2021 (week #2)*

- **My Rotary: Club Administration** (15 min)
- **Preventing and Addressing Harassment** (45 min)
- (optional) **Protecting Personal Data** (30 min)
- (optional) **Rotary Club Central Resources** (15 min)

**Reading Material** <https://my.rotary.org/en/document/lead-your-club-president>

### 1. Creating an Engaging Club Experience

- Club Health and Member Satisfaction
- Flexibility in Meetings (Meeting Formats), Membership Types and Attendance
- Club Assembly & Governor Visits
- Rotary Year Calendar
- Club Administration Committee

### 2. Rotary's Online Tools

- My Rotary website
- Rotary Club Central
- Learning Center
- Club Management System (ClubRunner, etc.)

### 3. Running an Efficient & Effective Club

- Rotary Minimum Standards
- Club Constitution & Bylaws
- Reporting Requirements
- Working with the District
- Risk Management

### 4. Financial Management

- Dues and Fees (including Rotary International Dues Invoice)
- IRS Reporting
- Fundraising

### Additional Resources

- My Rotary: <https://my.rotary.org/en>
  - Club Administration: <https://my.rotary.org/en/manage/club-district-administration/club-administration>
  - Club Flexibility: <https://my.rotary.org/en/club-flexibility>
  - CDS Representatives: <https://my.rotary.org/en/contact/representatives>
  - Calendar: <https://my.rotary.org/en/news-media/calendar>
  - Membership Dues: <https://my.rotary.org/en/membership-dues>
  - Club Liability Insurance Program: <https://my.rotary.org/en/node/13381>
  - Rotary International Club Dues Invoice FAQ: <https://my.rotary.org/en/club-invoice-faq>
  - Rotary Brand Center: <https://brandcenter.rotary.org/en-GB>



## PETS 2021 Presidents-Elect Work Session Summary

### **Strengthening Your Membership:** *Lead Your Club – President 2019-22 manual, Chapter 5*

Week #3 – March 16, 2021

**Featured Speaker – Herb Klotz, 2019-20 District Governor 7430** (*Allentown West Rotary Club, PA*)

#### **Learning Center Courses** <https://learn.rotary.org/members/learn/catalog>

*Required to be completed prior to March 16, 2021 (week #3)*

- **Online Membership Leads** (30 min)
- **Best Practices for Engaging Members** (10 min)
- **Committing to Diversity, Equity & Inclusion** (15 min)
- (optional) **Building a diverse Club** (45 min)

#### **Reading Material** <https://my.rotary.org/en/document/lead-your-club-president>

##### **1. Membership Responsibilities & Resources**

- Club President-Elect & Club President responsibilities
- Club Membership Committee & Goals

##### **2. Assessing Your Club**

- Member Satisfaction
- Club Flexibility
- How does your Club appear to a non-member?

##### **3. Engaging Your Club's Members**

- New Member Orientation
- Enhancing the Club Experience
- Committee Involvement & Leadership Development
- Hands-on Service by all members

##### **4. Attracting New Members**

- Implement innovative new projects in your community
- Promoting Rotary in your community
- Attracting young professionals
- Managing Membership Leads from RI
- Mentoring New Clubs/Satellite Clubs/Passport Clubs

##### **5. Diversity, Equity & Inclusion**

- Implement innovative new projects in your community

#### **Resources**

- My Rotary: <https://my.rotary.org/en>
  - Membership: <https://my.rotary.org/en/learning-reference/learn-topic/membership#assess>
  - Club Flexibility: <https://my.rotary.org/en/club-flexibility>
  - Engaging Younger Professionals: <https://www.rotary.org/en/engaging-younger-professionals-toolkit>
  - Satellite Clubs: <https://my.rotary.org/en/nofollow/cda-link/208976>
  - DEI Assessment: <https://my-cms.rotary.org/en/document/diversifying-your-club-member-diversity-assessment>
  - Rotary Brand Center: <https://brandcenter.rotary.org/en-GB>



# Mid-Northeast PETS Presidents-Elect Training Seminar

2021-22 District Governors

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## PETS 2021 Presidents-Elect Work Session Summary

**Service & The Rotary Foundation:** *Lead Your Club – President 2019-22 manual, Chapters 7&8*

Week #4 – March 23, 2021

**Featured Speaker – TRF Trustee Ian Riseley** (*Sandringham Rotary, Victoria Australia*)

**Learning Center Courses** <https://learn.rotary.org/members/learn/catalog>

*Required to be completed prior to March 23, 2021 (week #4)*

- Rotary Foundation Basics (45 min)
- Rotary Club Central Resources (15 min)
- Rotary Direct Giving Guide (3 min) <https://youtu.be/U8aJw-EWIso>

**Reading Material** <https://my.rotary.org/en/document/lead-your-club-president>

### 1. Your Service Projects

- Club President-Elect & President responsibilities
- Service Projects Committee & Goals
- Community Needs Assessment
- Rotary's five Avenues of Service
- Rotary's seven Areas of Focus
- Rotary Showcase & Rotary Ideas

### 2. Rotary Grants and Programs

- District Grants
- Global Grants
- Rotary Programs for Young Leaders
- Rotary Peace Centers & Fellowships

### 3. The Rotary Foundation

- Club Rotary Foundation Committee & Goals
- Rotary Foundation Fund types
- Annual Fund-SHARE grant funding model
- Club and Individual donor recognition
- District Support

## Resources

- My Rotary: <https://my.rotary.org/en>
  - Rotary Direct Tutorial: <https://youtu.be/U8aJw-EWIso>
  - Take Action: <https://my.rotary.org/en/take-action>
  - Our Causes – Areas of Focus: <https://www.rotary.org/en/our-causes>
  - Rotary's Guiding Principles: <https://my.rotary.org/en/guiding-principles>
  - Empower Leaders: <https://my.rotary.org/en/take-action/empower-leaders>
  - Youth Programs: <https://www.rotary.org/en/our-programs/youth-programs>
  - Rotary Grants: <https://www.rotary.org/en/our-programs/grants>
  - Project Lifecycle Resources: <https://my.rotary.org/en/take-action/develop-projects/project-lifecycle-resources>
  - Rotary Showcase: [https://map.rotary.org/en/project/pages/project\\_showcase.aspx](https://map.rotary.org/en/project/pages/project_showcase.aspx)
  - Rotary Ideas: <http://ideas.rotary.org/>
  - Donor Recognition: <https://www.rotary.org/en/donate/recognition>



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## PETS 2021 Presidents-Elect Work Session Summary

### Fundraising

Week #5 – March 30, 2021

**Featured Speaker – Sonia J. T. Saleh, DGN District 7255** (*JFK Airport Rotary, NY*)

**Learning Center Courses** <https://learn.rotary.org/members/learn/catalog>

*Required to be completed prior to March 30, 2021 (week #5)*

- Fundraising Basics (15 min)
- Managing your Foundation Activities: Club Rotary Foundation Committee (15 min)

1. **What we did in 2020**
2. **Moving Forward** – How to take an in-person event and pivot

### Resources

- Fundraising Ideas: <https://rotary6330.org/page/fund-raising-ideas>
- Eventgroove Blog: <https://eventgroovefundraising.com/blog>
- Creating & Promoting Events: <https://www.eventgroove.com/blog/>
- Rotary Fundraising Guide: <https://my.rotary.org/en/learning-reference/learn-topic/fundraising>