



PRESIDENT-ELECT WORKBOOK

Goal: Prepare incoming club Presidents to become leaders of vibrant Rotary clubs.

February 29 – March 3, 2024



Dear Rotary Club Leaders,

Congratulations on your selection as the 2024-25 President of your Rotary Club or your Rotaract Club. Our goal at Lone Star P.E.T.S. is to assist you in the preparation for your presidential year. You are already off to a good start by attending and participating in Lone Star P.E.T.S.; however, there are additional resources available to you that will be important to enhance what you learn at PETS. We encourage you to incorporate the following learning opportunities in your preparation.

1. Reach out to the former Presidents in your club. They can assist you as mentors.
2. Develop a good relationship with your Leadership Team. Working together you can develop a continuity of programs and goals for your club.
3. Participate in each of your district's various training sessions and events. You will develop a broad knowledge of the many Rotary programs in which your club members may wish to participate.
4. Visit other clubs and see how they operate. Every Rotary club is different. You may see how other clubs solved a problem your club might be facing.
5. View the Learning Center training videos on the Rotary International website.
6. Very importantly, take every opportunity to communicate with your District Governor-Elect and attend all training and information sessions provided by your District Governor-Elect.

This workbook is the product of many volunteer hours. The Curriculum/Facilitators Subcommittee has put together an outstanding program which you may use to learn and plan your leadership year. I encourage you to take full advantage of this learning experience. Develop relationships with your fellow Rotary leaders. Ask questions of your facilitators. Visit the vendors and exhibitors in the House of Friendship. Be inspired by our speakers. Complete the evaluations.

May the next two years be your best years in Rotary yet. And, most importantly, HAVE FUN!!!!

Yours in Rotary,

PDG Art Zeitler
2024 Operating Chair
Lone Star P.E.T.S., Inc.

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FRIDAY, MARCH 1, 2024

MODULE A-1 BECOMING A VIBRANT CLUB LEADER

GOAL: Club leaders will enhance their skills using targeted resources and tools, empowering them to emerge as vibrant and effective leaders.

RELEVANCE: Club presidents motivate members to reach goals, recognize club members with awards, communicate with club and district leaders, and listen to all members to ensure that their needs are met.

OBJECTIVES

At the end of the session, club leaders will have learned and be able to:

1. List characteristics of and resources available for developing a vibrant leader.
2. List specific responsibilities of the Club President and Club President-Elect.
3. Explain how the club President and President-Elect work collaboratively with club leaders to support the structure of a vibrant Rotary Club.
4. Discuss the importance of a strong leadership team and committee structure in building a vibrant and impactful Rotary Club.

REFERENCE MATERIALS

- [Be a Vibrant Club](#)
- [Rotary Citation | My Rotary](#)
- [Creating Your Club Leadership Plan](#)
- [Preparing To Be A Club President](#)

Module A-1: Becoming A Vibrant Club Leader

Breakout Discussion Questions:

1. List characteristics of a vibrant leader.
2. What resources are available to assist you in becoming a vibrant leader?
3. What most excites you about being your club's President?
4. List specific responsibilities of the club President and President-Elect.
5. What most concerns you for next year?
6. Refer to Be a Vibrant Club. How do collaborative efforts between President and President-Elect strengthen a club?
7. See Creating Your Club Leadership Plan in **Reference Materials**. Discuss the importance of a strong leadership team and committee structure for a vibrant, impactful club.
8. Take a few minutes to write action ideas on the Notes page at the end of this module.
9. What is your primary takeaway from the Vibrant Club Leader session?
10. Any other question(s)?

FRIDAY, MARCH 1, 2024

MODULE A-2 DEVELOPING A VIBRANT ROTARY CLUB

GOAL: Club leaders will master the resources and tools necessary to establish comprehensive multi-goals and strategies, ensuring a thriving vibrant Rotary Club.

RELEVANCE: By understanding trends, strengths, and opportunities, presidents can help clubs set short-term goals that align with Rotary's Action Plan.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Explain the benefits of strategic planning to maintain a vibrant club.
2. Outline the planning process to set multi-year goals and develop an action plan for the club.
3. Describe how to use the Rotary citation to list your goals in Rotary Club Central.

REFERENCE MATERIALS

- [Action Plan page on My Rotary Action Plan | My Rotary](#)
- [Rotary Citation | My Rotary](#)
- [Club Health Check](#)
- [Strategic Planning Guide](#)

Module A-2: Developing a Vibrant Rotary Club

Breakout Discussion Questions:

1. Refer to the Strategic Planning Guide in **Reference Materials**. What are the benefits of a three-year strategic plan to maintain a vibrant club?
2. What are the benefits of good financial management? What ways ensure good stewardship of club funds?
3. How does your club reflect Rotary's vision statement?
4. What steps help create meaningful goals and effective action plans for your Rotary Club?
5. How far have you progressed in setting club goals for the coming year?
6. See Rotary Citation Goals and Instructions in **Reference Materials**. Describe how to use the Rotary Citation to plan and list goals in Rotary Club Central.
7. Take a few minutes to write action ideas on the Notes page at the end of this module.
8. What is your primary takeaway from the vibrant Rotary Club session?
9. Any other question(s)?

FRIDAY, MARCH 1, 2024

MODULE A-3 GROWING AND ENGAGING CLUB MEMBERSHIP

GOAL: Club Leaders will acquire tools to craft robust membership strategies for the club's growth and vitality.

RELEVANCE: By getting to know members well, club presidents can engage them in ways that tap into their unique skills and interests, creating a more meaningful membership experience. When club presidents create an inclusive club culture, then develop and implement innovative strategies to attract diverse participations, they strengthen their own clubs and Rotary.

OBJECTIVES

At the end of the session, club leaders will have learned and be able to:

1. Describe how a Club President can create a club atmosphere welcoming to all.
2. Share strategies and best/worst practices to attract, engage, and retain members.
3. List key elements of club membership health.

REFERENCE MATERIALS

- [Membership | My Rotary](#)
- [Membership Assessment Tools](#)
- [Strengthening Your Membership: Creating Your Membership Plan](#)
- [Connect for Good](#)
- [Improving Your Member Retention](#)
- [Creating a Positive Experience for Prospective Members](#)
- [Impact Begins With You](#)
- [RI Code of Conduct - Harassment Policy](#)

Module A-3: Growing and Engaging Club Membership

Breakout Discussion Questions:

1. What helped you get engaged in your club?
2. Refer to Rotary International Code of Conduct Harassment Policy in the **Reference Materials**. How can you as President create a club atmosphere welcoming to all?
3. Refer to Impact Begins with You in the Reference Materials. What can your club do differently to attract/ retain Rotary members who can make an impact?
4. What strategies have you used to attract new members?
5. What are keys to member engagement from your perspective?
6. Refer to Club Health Check, Creating Your Membership Plan, and other membership assessment tools in your **Reference Materials**.
7. Take a few minutes to write action ideas on the Notes page at the end of this module.
8. What is your primary takeaway from Membership session?
9. Any other question(s)?

FRIDAY, MARCH 1, 2024

MODULE A-4 UNDERSTANDING AND SUPPORTING OUR ROTARY FOUNDATION

GOAL: Club leaders will gain skills to cultivate member support and foster a deep understanding of The Rotary Foundation among their club members.

RELEVANCE: The Rotary Foundation helps advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty throughout the world.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Explain how participation in programs of The Rotary Foundation attract, engage, and retain members.
2. Explain how your club goals and support for The Rotary Foundation fund local and international projects.
3. Discuss the importance of a trained Foundation Chair and Committee to the club's impact in communities.
4. Identify types of individual and club recognitions for giving to our Foundation.

REFERENCE MATERIALS:

- [Rotary's Areas of Focus](#)
- [Rotary Foundation Reference Guide](#)

Module A-4: Understanding and Supporting Our Rotary Foundation

Breakout Discussion Questions:

1. How does participation in Rotary Foundation programs attract, engage, and retain members?
2. Explain how your club goals and support for The Rotary Foundation fund local and international projects.
3. What is some work accomplished through our Foundation? Refer to Rotary's Areas of Focus in the **Reference Materials**.
4. Discuss the importance of a trained Foundation Chair and Committee to the club's impact in communities.
5. What are some individual and club recognitions for giving to our Foundation (Sustaining Member, Paul Harris Fellow, Paul Harris Society, etc.)? Refer to Individual and Club Recognitions on pages 19-26 of Rotary Foundation Reference Guide in **Reference Materials**.
6. Take a few minutes to write ideas on the Notes page at the end of this module.
7. What is your primary takeaway from The Foundation session?
8. Any other questions?

Icebreaker and Midway Review Questions:

Icebreaker

Implement an Icebreaker, with each participant sharing the following points:

- a. Name
- b. Role at PETS
- c. Club
- d. City
- e. Most important characteristic for a Rotary leader
- f. Desired individual takeaway from PETS

Midway Review

What is your *primary takeaway* from PETS thus far?

1. Take a couple of minutes to jot down action ideas on the notes page at the end of this module.
2. Any other question(s) or comments?

SATURDAY, MARCH 2, 2024

MODULE B-5 DEVELOPING EFFECTIVE SERVICE PROJECTS

GOAL: Club leaders will acquire the skills necessary to guide club members in the planning, execution, and assessment of impactful service projects.

RELEVANCE: To promote effective projects, club and district leaders ensure that organizers conduct a needs assessment, develop a plan, carry out the plan, and evaluate success. Partnering with other organizations, community members, or beneficiaries can foster sustainability and local ownership of the project.

OBJECTIVES

At the end of the session, club leaders will have learned and be able to:

1. Discuss the value of building a balanced approach to local and international service projects, based on club members' interests.
2. Define key elements of an effective project.
3. Identify key club members who have leadership and passion for various projects.

REFERENCE MATERIALS

- [Community Assessment Tools: A Resource For Rotary Projects](#)
- [Developing Effective Projects | My Rotary](#)
- [Our Causes | Rotary International](#)
- [How to Add Project to Rotary Showcase](#)

Module B-5: Developing Effective Service Projects

Breakout Discussion Questions:

1. What is the value of local service projects?
2. What is the value of international service projects?
3. How would you decide the best mixture for your club?
4. See Developing Effective Projects in **Reference Materials**. What elements make an effective project? Which element is most important? Which element(s) in your club's project needs your leadership as President?
5. What is a key service project in your club? How do you discover who has leadership and passion for service projects? Who would make a good service chair?
6. Take a few minutes to write action ideas on the Notes page at the end of this module.
7. What is your primary takeaway from the Service session?
8. Any other question(s)?

MODULE B-6 STRATEGIES FOR SUCCESSFUL FUNDRAISING

GOAL: Club leaders will possess knowledge and insight about how to lead their respective clubs in effective fundraising strategies.

RELEVANCE: Clubs and districts often ask their members to contribute to The Rotary Foundation and hold fundraising events to support projects or polio eradication.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Identify the roles of the President and President-Elect in club fundraising.
2. Identify fundraising purposes and best practices.
3. Create a successful fundraiser.

REFERENCE MATERIALS:

- [Planning Fundraising Events](#)
- [Signature Projects](#)
- [Fundraising | My Rotary](#)

Module B-6: Strategies for Successful Fundraising

Breakout Discussion Questions:

1. As President, how will you engage members to create a successful fundraiser to increase funds and membership in your club?
2. What are current fundraising purposes and best practices in your club? Which fundraisers raise most money for the work of Rotary in your community? How can you increase Rotary awareness and measure the impact of a fundraiser in your community?
3. See Signature Projects in **Reference Materials**. Which of your clubs has a signature project and what is it? How do signature projects and fundraising foster ongoing awareness of impact of Rotary in your community?
4. What best practices and steps are involved in creating a successful fundraiser?
5. How might you manage risk in your club fundraiser?
6. Take a few minutes to write action ideas on the Notes page at the end of this module.
7. What is your primary takeaway from the Fundraising session?
8. Any other question(s)?

SATURDAY, MARCH 2, 2024

MODULE C-7 ENHANCING THE PUBLIC IMAGE OF YOUR ROTARY CLUB

GOAL: Club leaders will acquire strategies to enhance the public image of Rotary within their community.

RELEVANCE: To help expand our reach, one of Rotary's strategic priorities, clubs should develop a plan to promote their activities and projects.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Identify the roles of club president, public image committee, and individual Rotarians in enhancing the local image of Rotary.
2. Identify public image purposes, best practices, and impacts of your Rotary Club.
3. Evaluate public image strategies, talking points, and your 30-second Rotary impact speech.

REFERENCE MATERIALS:

- [Key Points for Talking About Rotary](#)
- [Rotary Talking Points](#)
- [Rotary New Year Check List](#)
- [Strategies for Promoting Your Club](#)
- [Promoting Your Club on Social Media](#)
- [How to Add a Project to Rotary Showcase](#)

Module C-7: Enhancing the Public Image of Your Rotary Club

Breakout Discussion Questions:

1. Identify the roles of club President, public image committee, and individual Rotarians in creating a successful public image campaign to enhance the local image of your Rotary Club. How can the club President engage members to create a public image campaign?
2. What are methodologies/tools/elements of a public image campaign?
3. Identify public image purposes, best practices, and impacts of your Rotary Club. What public image practices most promoted Rotary in your club and community?
4. Create a short advertisement for your club to promote Rotary.
5. Evaluate public image strategies, talking points, and your 30- second Rotary impact speech.
6. What are your own public image best practices?
7. What is your own 30-second Rotary impact story?
8. Take a few minutes to write action ideas on the Notes page at the end of this module.
9. What is your primary takeaway from the Public Image session?
10. Any other question(s)?

SATURDAY, MARCH 2, 2024

MODULE C-8 MOVING YOUR ROTARY CLUB FORWARD

GOAL: Club leaders will gain the insight needed to evaluate and effectively lead positive change within their Rotary Club.

RELEVANCE: Being a diverse, equitable, and inclusive organization will enhance the experience that members have in Rotary, allow us to carry out more meaningful and effective service efforts, and create open, welcoming environments that appeal to people who want to connect with us.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Recognize the Club President's role in leading changes to be a vibrant club.
2. Diversify the club format.
3. Diversify club membership.

REFERENCE MATERIALS:

- [Be a Vibrant Club](#)
- [Flexible Options for Clubs](#)
- [Leading Meaningful Change](#)
- [A Model for Change Planning](#)
- [Member Diversity Assessment](#)
- [Diversifying Your Club](#)
- [Rotary Diversity, Equity, and Inclusion Policy](#)
- [Diversifying Your Club - Readiness Assessment](#)

Module C-8: Moving Your Rotary Club Forward

Breakout Discussion Questions:

1. Refer to Leading Meaningful Change and A Model for Change Planning in the PETS Resource Reference. As President, list 3 critical areas and an action step for change needed in your club. How can you inspire change to build diverse and club membership to impact your community?
2. Diversify the club format. Refer to Be a Vibrant Club and Flexible Options for Clubs and Club Models handouts in the PETS Resource Reference. Why is diversifying club format important? What specific ways has your club diversified? How might you use new Rotary flexible options to increase diversity and variety in club meetings? How should you update your By-laws to reflect changes in your club?
3. Diversify club membership. Refer to Rotary Diversity, Equity, and Inclusion Policy, Diversifying Your Club, and diversity and classification assessment tools in your PETS Resource Reference. Why are member diversity and inclusion important? What groups in your community are lacking from your club? What ways can your club use to diversify membership? What new membership types might your club consider?
4. Give participants a few minutes to write action ideas on the Notes page at the end of this module.
5. What is your primary takeaway from the Moving Your Club Forward session?
6. Any other question(s)?

Module C-9: Your PETS Experience: Final Takeaways

Following the conclusion of all PETS sessions, answer the questions as you continue to plan an impactful year as Club President.

Discussion Questions

Takeaways for Your Club:

1. List three takeaway strategies for your Club.
 - a.
 - b.
 - c.
2. Which strategy is most critical for vibrancy of your Club?

Takeaways for Yourself:

3. List three takeaway strategies for yourself.
 - a.
 - b.
 - c.
4. Which strategy is most critical to your vibrancy as Club President?

Most Impactful Takeway:

