

## PRESIDENT-NOMINEE WORKBOOK

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

**February 29 – March 3, 2024**



Dear Rotary Club Leaders,

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 on **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 | 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 Policy - 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 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 in the **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 RE-ENERGIZING MY ROTARY CLUB**

**GOAL: Club leaders will possess insight to assess and lead change within their Rotary Club.**

**RELEVANCE: Adaptation to new club formats and membership models will strengthen a club's vibrancy.**

### **OBJECTIVES**

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

1. Recognize the club President-Elect's role in helping lead changes toward becoming a more vibrant club.
2. Diversify the club format.
3. Diversify the club membership.

### **REFERENCE MATERIALS**

- [Be a Vibrant Club](#)
- [Flexible Options for Clubs](#)
- [Club Types, Models and Formats](#)
- [Leading Meaningful Change](#)
- [A Model for Change Planning](#)
- [Rotary's Diversity, Equity, and Inclusion Policy](#)
- [Diversifying Your Club](#)
- [Diversifying and Classification Assessment Tool](#)

## Module B-5: Re-Energizing My Rotary Club

### **Breakout Discussion Questions:**

1. Refer to Leading Meaningful Change and A Model for Change Planning in the **Reference Materials** . As President-Elect, list 3 critical areas and an action step for change needed in your club.
2. Refer to Be a Vibrant Club, Club Flexibility, and Club Models in the **Reference Materials**. Why is diversifying club format important? How might you use new Rotary flexile options to increase diversity and variety in club meetings? How would you engage your leadership team to explore flexible club options?
3. Refer to Rotary Diversity, Equity, and Inclusion Policy, Diversifying Your Club, and diversity and classification assessment tools in the **Reference Materials**. Why are member diversity and inclusion important? How can you involve your leadership team in evaluating need for diversity in your club? What groups in your community are lacking from your club? What strategies can your club use to diversity membership? What new membership types might your club consider?
4. Take 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 Re-energizing session?
6. Any other question(s)?



## MODULE B-6 INCREASING HUMANITARIAN SERVICE

**GOAL:** Club leaders will acquire skills necessary to guide members in strategizing, executing, and evaluating projects with a focus on expanding humanitarian service.

**RELEVANCE:** Club service projects strengthen membership connections, and enhance Rotary's public image while contributing to the betterment of community, locally and globally.

### OBJECTIVES:

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

1. Discuss how service projects can impact retention of Rotary Club members.
2. Identify community needs of local agencies and organizations using community assessment tools.
3. Identify how to evaluate a service project to determine its success and whether to continue the project in the future.

### REFERENCE MATERIALS:

- [Community Assessment Tools: A Resource For Rotary Projects](#)
- [Developing Effective Projects](#)
- [Our Causes | Rotary International](#)
- [Adding Projects on Rotary Showcase](#)

## Module B-6: Increasing Humanitarian Service

### Breakout Discussion Questions:

1. What is the value of service projects to a club?  
What are good service project ideas?  
What types of impact do service projects have in the club and community?
2. What are community assessments important?  
What is good methodology of a successful community assessment? (See Community Assessment Tools in the **Reference Materials**).  
What are the characteristics of community organizations that make good project partners?
3. What are warning signs of a service project that needs to be evaluated?  
What are some valid reasons to discontinue a service project?
4. Take 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 Service session?
6. Any other question(s)?



**SATURDAY, MARCH 2, 2024**

## **MODULE B-7 ATTRACTING NEW MEMBERS**

**GOAL: Club leaders will develop innovative strategies to significantly grow and expand their membership base.**

**RELEVANCE: Vibrant Rotary clubs are strengthened through the attraction of new members of good character and reputation in their business or community.**

### **OBJECTIVES:**

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

1. Use membership assessment tools to attract new members.
2. Outline ways to include non-Rotarians in club projects and meetings.
3. Identify prospective groups and individuals in the community with interest in connecting with a Rotary Club.

### **REFERENCE MATERIALS:**

- [Finding New Club Members](#)
- [Identifying Prospective Members Worksheet](#)
- [Diversifying Your Club](#)
- [Representing Your Community's Professions](#)
- [Occupation and Professional Expertise Survey](#)
- [Classification Audit, Worksheet and Action Plan](#)

# Module C-7: Attracting New Members

## Breakout Discussion Questions:

1. How can you use the membership assessment tools to attract new members?
2. Outline ways to include non-Rotarians in club projects and meetings. (Refer to Finding New Club Members in the **Reference Materials**.)
3. Discuss the type of groups your club works with on service or fundraising projects. How can your relationships with the groups lead to attracting new members? Identify prospective groups and individuals in your community with interest in connecting with your Rotary Club.
4. Take 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 Attracting Members session?
6. Any other question(s)?





**SATURDAY, MARCH 2, 2024**

## **MODULE C-8 ENGAGING AND RETAINING MEMBERS**

**GOAL:** Club leaders will formulate a strategy aimed at engaging and retaining members through active participation in various activities including training and development programs.

**RELEVANCE:** The more your members know and get involved, the stronger your club will be.

### **OBJECTIVES:**

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

1. Use membership assessment tools discussed earlier to engage and retain members.
2. Identify key benefits of attending District events and seminars that impact membership engagement and retention.
3. Explain the value of a comprehensive membership engagement and retention strategy for their Rotary Club.

### **REFERENCE MATERIALS:**

- [Enhancing the Club Experience](#)
- [Member Satisfaction Survey](#)
- [Member Retention Chart](#)
- [Improving Your Member Retention](#)
- [Understanding Why Members Leave](#)
- [Exit Survey](#)

## Module C-8: Engaging and Retaining Members

### **Breakout Discussion Questions:**

1. Refer to Finding New Club Members, Diversifying Your Club, and Representing Your Community's Professions (in the **Reference Materials**.) How can you use membership assessment tools discussed earlier to engage and retain membership?
2. Identify how key benefits of attending District events and seminars impact membership retention. How can having your club members attend the events assist in engaging and retaining new members? In what ways can a President-Elect effectively promote District events? How can members who attend District events and seminars be engaged in club activities so their experience at the event helps the club as a whole?
3. Outline steps to design a comprehensive membership engagement and retention strategy for the Rotary Club. See Improving Your Members Retention in the **Reference Materials**. Discuss issues for time categories of when club members leave a club. Develop 3 action steps with other information to fill in the Improving Your Member Retention chart in the **Reference Materials**. Encourage use of the exit survey in Understanding Why Members Leave in the **Reference Materials**.
4. Take a few minutes to write action ideas on the Notes page at the end of this module.
5. What is your primary takeaway from Engaging Members session?
6. Any other question(s)?



**SATURDAY, MARCH 2, 2024**

## **MODULE C-9 PROMOTING ROTARY**

**GOAL:** Club leaders will review and plan activities to enhance public (external) and club (internal) awareness of Rotary's impact.

**RELEVANCE:** The club's public image can affect the credibility of the club, as well as its membership.

### **OBJECTIVES:**

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

1. Identify the roles of club President-Elect, 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](#)
- [Strategies for Promoting Your Rotary Club](#)
- [Club, District, and Zone Websites](#)
- [Promoting Your Club on Social Media](#)
- [How to Add a Project to Rotary Showcase](#)
- [Speaking Engagements](#)
- [Your Logos at a Glance](#)

## Module C-9: Promoting Rotary

### **Breakout Discussion Questions:**

1. Identify the roles of club President-Elect, 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-Elect help 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 sessions



# Module C-10: 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:



# Notes

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