



## FACILITATOR GUIDE

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

**February 29 – March 3, 2024**



Dear PETS Facilitators,

Thank you for the important service you provide as you facilitate modules to the participants at the 2024 Lone Star PETS. The facilitated learning sessions for Presidents-Elect, Presidents-Nominee, and Assistant Governors will help them prepare for their future leadership roles as well as provide them will opportunities to exchange best practices with their peers.

This Guide contains three distinctive sections.

- Section 1. Relates to Modules A-1, A-2, A-3, and A-4. These modules will be covered in the Friday, March 1, 2024, district specific sessions. Presidents-Elect, Presidents-Nominee, and Assistant Governors who attend Lone Star PETS will participate in these sessions.
- Section 2. Relates to the President-Elect Modules that will be presented on Saturday, March 2, 2024, to groups of Presidents-Elect from various districts based on club size.
- Section 3. Relates to President-Nominees Modules that will be presented on Saturday, March 2, 2024, to groups of Presidents-Nominee from various districts based on club size.

Workbook materials for each of the facilitated learning sessions are posted on the Lone Star PETS website. Please note that training resources are available via links provided at the end of each workbook module. It is important that you familiarize yourselves with access to these resources to determine whether you will rely on electronic downloads or prefer to print any materials for reference or exercise activities.

This guide provides sample timelines that include suggested activities for each module. You may wish to customize your timeline using the Excel template included as one of the “tools” available for you under the Training Resources tab item for Facilitators. Another tool you may wish to use is a PowerPoint template which can be used to identify module objectives, provide facilitator contact information, and highlight other discussion points you wish to emphasize during the learning facilitation process. You are encouraged to customize these modules in any way you deem appropriate to accomplish each module’s stated objectives.

This guide is the product of many volunteer hours contributed by the Subcommittee on Curriculum and Facilitators. We sincerely appreciate your volunteer role in facilitating the learning process for our Lone Star PETS participants.

Yours in Rotary,

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

# Section 1

Friday, March 1, 2024

Core Modules - District Specific Sessions

## Module A-1 – Becoming a Vibrant Club Leader (60 Minutes)

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

### Objectives:

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.

### Sample Time Line

<b>Introductions</b>	<b>Facilitator Introductions. Direct attention to Workbook Module A-1.Introduce topic.</b>	<b>3</b>
<b>Objectives</b>	<b>Review Session Objectives</b>	<b>2</b>
<b>Resource Review</b>	<b>Refer to reference materials: ·Preparing to be a Club President ·Creating Your Club Leadership Plan</b>	<b>5</b>
<b>Individual Activity</b>	<b>Worksheet Preparation: Creating Your Club Leadership Plan</b>	<b>10</b>
<b>3 or 4 Breakout Groups</b>	<b>Each Group Discuss Questions In Workbook. Each Group Reports out.</b>	<b>25</b>
<b>Share Back, Q/A</b>	<b>Ideas to Share and Takeaways Questions Unanswered</b>	<b>10</b>
<b>Evaluation</b>	<b>Use Whova App to Complete</b>	<b>5</b>

## Module A-2 – Developing a Vibrant Rotary Club (60 Minutes)

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

### Objectives:

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.

### Sample Time Line

Introductions	<b>Facilitator Introductions.</b> <b>Direct attention to Workbook Module A-2.</b> <b>Introduce topic.</b>	<b>3</b>
Objectives	<b>Review Session Objectives</b>	<b>2</b>
Resource Review	<b>Refer to reference materials:</b> <ul style="list-style-type: none"><li>• <b>Action Plan Flyer</b></li><li>• <b>What Clubs Can Do Flyer</b></li></ul>	<b>5</b>
4 Breakout Groups	<b>Assign One Priority to each Group to Discuss goals or activities their clubs have that relate to that priority.</b> <ul style="list-style-type: none"><li>• <b>How does the club support it?</b></li><li>• <b>What more can be done to support it?</b></li><li>• <b>How can success be measured?</b></li></ul> <b>Report Out.</b>	<b>20</b>
General Discussion of questions	<b>Refer to Questions in the Workbook.</b>	<b>15</b>
Share Back, Q/A	<b>Ideas to Share and Takeaways Questions Unanswered</b>	<b>10</b>
Evaluation	<b>Use Whova App to Complete</b>	<b>5</b>

# Checklist

- Develop PowerPoint Slide(s) to list objectives, etc.
- Develop Timeline (Excel Document) to plan use of time allocated for session.
- Use Breakout Discussion Questions provided in participant workbooks.
- Access Resource Materials (links provided at end of each module in participant workbooks) or on website under Training Resources Tab.
- Conduct Session Evaluation

## Module A-3 – Growing and Engaging Club Membership (60 Minutes)

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

### Objectives:

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.

### Sample Time Line

Introductions	Facilitator Introductions. Direct attention to Workbook Module A-3. Introduce topic.	3
Objectives	Review Session Objectives	2
Resource Review	Refer to reference materials: <ul style="list-style-type: none"><li>• Strengthening Your Membership</li><li>• Connect for Good</li></ul>	5
Individual Activity	Complete Your Membership Plan Worksheet	10
3 or 4 Breakout Groups	Each Group Discuss Questions In Workbook. Each Group Reports out.	25
Share Back, Q/A	Ideas to Share and Takeaways Questions Unanswered	10
Evaluation	Use Whova App to Complete	5

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## Module A-4 – Understanding and Supporting Our Rotary Foundation (60 Minutes)

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

### Objectives:

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.

### Sample Time Line

<b>Introductions</b>	<b>Facilitator Introductions. Direct attention to Workbook Module A-4. Introduce topic.</b>	<b>3</b>
<b>Objectives</b>	<b>Review Session Objectives</b>	<b>2</b>
<b>Resource Review</b>	<b>Refer to reference materials:</b> <ul style="list-style-type: none"><li>• Rotary Foundation Reference Guide</li><li>• Rotary's Areas of Focus</li></ul>	<b>5</b>
<b>Individual Activity</b>	<b>Select an Area of Focus and describe how a project in this area of focus creates local and/or global impact.</b>	<b>10</b>
<b>3 or 4 Breakout Groups</b>	<b>Each Group Discuss Questions 1, 2, 4, &amp; 5 in the Workbook. Each Group Reports out.</b>	<b>25</b>
<b>Share Back, Q/A</b>	<b>Ideas to Share and Takeaways Questions Unanswered</b>	<b>10</b>
<b>Evaluation</b>	<b>Use Whova App to Complete</b>	<b>5</b>

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# Section 2

Saturday, March 2, 2024

President-Elect Modules

## 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?

## Module B-5 – Developing Effective Service Projects (90 Minutes) 8:15-9:45 a.m.

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

### Objectives:

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

### Sample Time Line

<b>Introductions</b>	<b>Facilitator Introductions.</b> <b>Direct attention to Workbook Module B-5.</b> <b>Introduce topic.</b>	<b>3</b>
<b>Objectives</b>	<b>Review Session Objectives</b>	<b>2</b>
<b>Resource Review &amp; Discussion</b>	<b>Planning &amp; Organizing</b> <ul style="list-style-type: none"><li>• Use District's Local Expertise</li><li>• Conducting Assessment</li><li>• Setting Project Goals</li><li>• Working with Partners</li><li>• Creating Project Plan and Budget</li></ul>	<b>15</b>
<b>Resource Review &amp; Discussion</b>	<b>Acquiring Resources for Project</b> <ul style="list-style-type: none"><li>• Publicize Project Plan</li><li>• Participate in Project Fairs</li><li>• Secure Funding thru Rotary</li><li>• Secure Funding Outside of Rotary</li></ul>	<b>15</b>
<b>Resource Review &amp; Discussion</b>	<b>Implementing Your Project</b> <ul style="list-style-type: none"><li>• Communicate and Seek Feedback</li><li>• Raise Awareness About Your Work</li><li>• Ask Questions Along the Way</li></ul>	<b>10</b>

<b>Resource Review &amp; Discussion</b>	<b>Evaluating &amp; Promoting Project</b> <ul style="list-style-type: none"> <li>• Measure Results</li> <li>• Promote Project and Share Success on Rotary Showcase</li> <li>• Submit Report</li> </ul>	<b>10</b>
<b>3 or 4 Breakout Groups</b>	<b>Each Group Discuss Questions 1, 2, 3, &amp; 5 in the Workbook.</b> <b>Each Group Reports out.</b>	<b>20</b>
<b>Share Back, Q/A</b>	<b>Ideas to Share and Takeaways Questions Unanswered</b>	<b>10</b>
<b>Evaluation</b>	<b>Use Whova App to Complete</b>	<b>5</b>

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- Conduct Session Evaluation

## Module B-6 – Strategies for Successful Fundraising (90 Minutes) 10:00-11:30 a.m.

Club leaders will have the knowledge and insights required to effectively lead their respective clubs in fundraising strategies.

### Objectives:

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.

### Sample Time Line

Introductions	Direct attention to Workbook Module B-6. Introduce topic.	3
Objectives	Review Session Objectives	2
Resource Review	Fundraising   My Rotary	20
3 or 4 Breakout Group Discussions Questions	<ul style="list-style-type: none"><li>• What fundraisers has your club or district held, and how much money did they raise?</li><li>• What have you learned from holding fundraising events?</li><li>• How do you involve the community in giving to the PolioPlus Fund or to the areas of focus funds?</li><li>• How do other organizations you belong to raise money?</li><li>• What are best practices for soliciting contributions?</li></ul>	35
3 or 4 Breakout Groups	Each Group Discuss Questions 1, 2, 4, & 5 in the Workbook. Each Group Reports out.	25
Share Back, Q/A	Ideas to Share and Takeaways Questions Unanswered	10
Evaluation	Use Whova App to Complete	5

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- Conduct Session Evaluation



## Module C-7 – Enhancing the Public Image of Your Rotary Club (90 Minutes) 1:30-3:00 p.m.

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

### Objectives:

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.

### Sample Time Line

Introductions	Direct attention to Workbook Module C-7. Introduce topic.	3
Objectives	Review Session Objectives	2
Resource Review	<ul style="list-style-type: none"><li>• Rotary Talking Points</li><li>• Rotary New Year Check List</li><li>• Strategies for Promoting Club</li><li>• Promoting Club on Social Media</li><li>• Adding a Project to Rotary Showcase</li></ul>	5
Individual Activity	Create a short advertisement for the club to promote Rotary. Share out.	15
Individual Activity	Create a 30-second Rotary impact speech/story.	15
3 or 4 Breakout Groups	Each Group Discuss Questions 1, 2, & 3 in the Workbook. Each Group Reports out.	20
Individual Activity	Share individual club public image best practices.	15
Share Back, Q/A	Ideas to Share and Takeaways Questions Unanswered	10
Evaluation	Use Whova App to Complete	5

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- Conduct Session Evaluation

## Module C-8 – Moving Your Rotary Club Forward (75 Minutes) 3:15-4:30 p.m.

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

### Objectives:

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

### Sample Time Line

Introductions	Direct attention to Workbook Module C-8. Introduce topic.	3
Objectives	Review Session Objectives	2
Group Discussion	<ul style="list-style-type: none"><li>• Review and describe Flexible Options for Clubs</li><li>• Start New Type Club</li><li>• Offer Alternative Membership Types</li><li>• Change Meeting Format</li><li>• Reduce Attendance Expectations/Reduce Meeting Frequency</li></ul>	10
Individual Activity	Complete Diversifying Your Club: A Readiness Assessment.	10
Group Discussion	Review and Discuss Model for Change Planning and Leading Meaningful Change Resources	15
3 or 4 Breakout Groups	Each Group Discuss Questions: <ul style="list-style-type: none"><li>• Why is diversifying club format important?</li><li>• What specific ways has your club diversified?</li><li>• How should you update your club bylaws?</li><li>• Why are member diversity and inclusion important?</li></ul>	20
Share Back, Q/A	Ideas to Share and Takeaways Questions Unanswered	10
Evaluation	Use Whova App to Complete	5

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- Conduct Session Evaluation

## **C-9 - Your PETS Experience: Final Takeaways (30 Minutes) 4:30-5:00 p.m.**

### **Objectives:**

1. List 3 Takeaway Strategies for Your Club
2. List 3 Takeaway Strategies for Yourself as Club President
3. What is the Most Impactful Takeaway?

Wrap Up and Evaluation

# Section 3

Saturday, March 2, 2024

President-Nominee Modules

## 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?

## Module B-5 – Re-Energizing My Rotary Club (80 Minutes) 8:15-9:35 a.m.

Club leaders will have insight to assess and lead change within their Rotary Club.

### Objectives:

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.

### Sample Time Line

Introductions	Facilitator Introductions. Direct attention to Workbook Module B-5. Introduce topic.	3
Objectives	Review Session Objectives	2
Resource Review	Refer to reference materials: <ul style="list-style-type: none"><li>• Flexible Options for Clubs</li><li>• Club Types, Models, and Formats</li><li>• A Model for Change Planning</li></ul>	5
3 or 4 Breakout Group Discussions Questions	Discuss: <ul style="list-style-type: none"><li>• How does a satellite club work?</li><li>• What are the benefits of creating a satellite club?</li></ul>	15
Group Discussion	What membership types exist and how do they work? <ul style="list-style-type: none"><li>• Corporate</li><li>• Family</li><li>• Young Professional</li><li>• Other</li></ul>	15
3 or 4 Breakout Groups	Each Group Discuss Questions 1 & 3 in the Workbook. Each Group Reports out.	25
Share Back, Q/A	Ideas to Share and Takeaways Questions Unanswered	10
Evaluation	Use Whova App to Complete	5



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## Module B-6 - Increasing Humanitarian Service (50 Minutes) 9:50-10:40 a.m.

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

### Objectives:

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.

### Sample Time Line

<b>Introductions</b>	<b>Direct attention to Workbook Module B-6. Introduce topic.</b>	<b>3</b>
<b>Objectives</b>	<b>Review Session Objectives</b>	<b>2</b>
<b>Resource Review</b>	<b>Refer to reference materials:</b> <ul style="list-style-type: none"><li>• Community Assessment Tools</li><li>• Our Causes</li></ul>	<b>5</b>
<b>Individual Activity</b>	<b>List ways that service projects provide value to club, impact community, and enhance membership experience.</b>	<b>10</b>
<b>3 or 4 Breakout Groups</b>	<b>Each Group Discuss Questions 2 &amp; 3 in the Workbook. Each Group Reports out.</b>	<b>15</b>
<b>Share Back, Q/A</b>	<b>Service Project Ideas to Share and Takeaways Questions Unanswered</b>	<b>10</b>
<b>Evaluation</b>	<b>Use Whova App to Complete</b>	<b>5</b>

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- Conduct Session Evaluation

## Module B-7 - Attracting Members (40 Minutes) 10:40-11:20 a.m.

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

### Objectives:

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

### Sample Time Line

<b>Introductions</b>	<b>Direct attention to Workbook Module B-7. Introduce topic.</b>	<b>3</b>
<b>Objectives</b>	<b>Review Session Objectives</b>	<b>2</b>
<b>Resource Review</b>	<b>Refer to reference materials:</b> <ul style="list-style-type: none"><li>• Finding New Club Members</li><li>• Diversifying Your Club</li></ul>	<b>5</b>
<b>3 or 4 Breakout Groups</b>	<b>Each Group Discuss Questions 1, 2, &amp; 3 in the Workbook. Each Group Reports out.</b>	<b>25</b>
<b>Share Back, Q/A</b>	<b>Ideas to Share and Takeaways Questions Unanswered</b>	<b>10</b>
<b>Evaluation</b>	<b>Use Whova App to Complete</b>	<b>5</b>

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- Conduct Session Evaluation

## Module C-8 - Engaging and Retaining Members (60 Minutes) 1:30-2:30 p.m.

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

### Objectives:

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.

### Sample Time Line

Introductions	Direct attention to Workbook Module C-8. Introduce topic.	3
Objectives	Review Session Objectives	2
3 or 4 Breakout Groups	<p><b>Case Study: The Rotary Club of Yula has 39 members. The club has a strong core group of 15 members who keep rotating through the leadership positions. Over the past year, the other club members have not participated much and have started to leave. The incoming club president noticed that many members are not attending meetings. After reviewing the membership reports, they found that the club had 54 members three years ago and has lost members each year. They know they need to address the declining membership.</b></p> <p>What's the first thing you would do to address this issue? What other steps would you take? What changes would you make after looking into this issue? What steps would you take to make these changes? How would you handle members who don't agree with the changes? How does this apply to changes needed in your own club?</p>	25

<b>Designate two breakout groups</b>	<ul style="list-style-type: none"> <li>• <b>Group 1: Discuss Workbook Question 2</b></li> <li>• <b>Group 2: Discuss Workbook Question 3.</b></li> </ul> <b>Each Group Reports out.</b>	<b>15</b>
<b>Share Back, Q/A</b>	<b>Ideas to Share and Takeaways Questions Unanswered</b>	<b>10</b>
<b>Evaluation</b>	<b>Use Whova App to Complete</b>	<b>5</b>

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- Conduct Session Evaluation

## Module C-9 - Promoting Rotary (90 Minutes) 3:00-4:30 p.m.

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

### Objectives:

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.

### Sample Time Line

Introductions	Direct attention to Workbook Module C-9. Introduce topic.	3
Objectives	Review Session Objectives	2
Resource Review	<ul style="list-style-type: none"><li>• Rotary Talking Points</li><li>• Rotary New Year Check List</li><li>• Strategies for Promoting Club</li><li>• Promoting Club on Social Media</li><li>• Adding a Project to Rotary Showcase</li></ul>	5
Individual Activity	Create a short advertisement for the club to promote Rotary. Share out.	15
Individual Activity	Create a 30-second Rotary impact speech/story.	15
3 or 4 Breakout Groups	Each Group Discuss Questions 1, 2, & 3 in the Workbook. Each Group Reports out.	20
Individual Activity	Share individual club public image best practices.	15
Share Back, Q/A	Ideas to Share and Takeaways Questions Unanswered	10
Evaluation	Use Whova App to Complete	5



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- Conduct Session Evaluation

## **C-10 - Your PETS Experience: Final Takeaways (30 Minutes) 4:30-5:00 p.m.**

### **Objectives:**

1. List 3 Takeaway Strategies for Your Club
2. List 3 Takeaway Strategies for Yourself as Club President
3. What is the Most Impactful Takeaway?

Wrap Up and Evaluation