

2025 LONE STAR P.E.T.S.



February 28-March 2, 2025

PRESIDENTS-ELECT
FACILITATOR GUIDE

Goal: To prepare incoming Club Presidents to become leaders of Vibrant Rotary clubs

Dear Rotary Club Leaders,

Congratulations on your selection as the 2025 President and President-Elect 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 Lone Star P.E.T.S. However, we cannot be your only training resource. 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.

This workbook is the product of many volunteer hours. After numerous planning sessions with your District Governors-Elect, Curriculum/Training Chair PDG Mary Ann McDuff, Jim Reed, and George Ritcheske, have put together an outstanding program from which you may use to learn and plan. Please thank them. It was truly a labor of love.

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 Stephanie Macchina
2025 Operating Chair
Lone Star P.E.T.S., Inc.

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Club Presidents and Presidents-Elect will have an enhanced view of their role and function as club key leaders of Vibrant Rotary Clubs.

MODULE A-2 STRIVING TO BE A VIBRANT ROTARY CLUB

Club Presidents and Presidents-Elect will have tools to develop plans for building multiple-year momentum.

MODULE A-3 GROWING AND ENGAGING YOUR CLUB MEMBERSHIP

Club Presidents and Presidents-Elect will possess tools needed to champion effective membership action plans for their respective clubs.

MODULE A-4 INCREASING HUMANITARIAN SERVICE BY SUPPORTING OUR FOUNDATION

Club Presidents and Presidents-Elect will possess tools necessary to increase humanitarian service accomplished by their clubs by developing club member support for The Rotary Foundation.

MODULE B-5 REACHING OUT THROUGH SERVICE

Club Presidents will have the skills necessary to guide club members in planning, implementing, and evaluating effective service projects.

MODULE B-6 BUILDING SUCCESSFUL FUNDRAISING STRATEGIES

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

MODULE C-7 SHINING A SPOTLIGHT ON YOUR ROTARY CLUB

Club Presidents will be able to provide leadership to enhance the public image of Rotary in their respective communities.

MODULE C-8 IDENTIFYING AND LEADING CHANGE FOR PROGRESS SAKE

Club Presidents will have insight about assessing and leading needed change within their respective clubs in relation to Vibrant Club culture.

Module A-1 Becoming A Vibrant Club Leader (60 minutes)

	Step?	We want to accomplish?	How Long?
1.	Introduce Topic and Presenter(s)	Direct attention to the PETS Workbook, A-1: Becoming A Vibrant Club Leader. Refer to the five learning objectives. Introduce presenter(s).	3 min
2.	Main Room/ Content Overview	1st Learning Objective: Identify District and RI resources to help the Club President identify and manage risk factors affecting a club. Presentation of key content (slide deck can serve as outline and handout for notes). Be sure to cover District and RI resources so PEs/PNs will connect with/access them. Refer participants to the Learning Center, Learning Events, and Newsletters handouts in PETS Workbook.	10 min
3.	Breakouts/ Discussions	2nd Learning Objective: List specific responsibilities of the Club President and Club President-Elect. 3rd Learning Objective: Discuss how the Club President can support the structure of a vibrant Rotary club including collaborative efforts with the Club President-Elect. 4th Learning Objective: Discuss the importance of a strong leadership team and committee structure in building a vibrant and impactful Rotary Club. 5th Learning Objective: List specific elements of an engaging and successful Club experience at a vibrant and impactful Rotary Club. See Breakout Discussion Questions	30 min
4.	Sharing Back	Ask for good ideas to share and takeaways.	10 min
5.	Q & A	Ask for any questions and respond briefly (repeat question before answering).	5 min
6.	Wrap Up and Evaluation	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	2 min

Lone Star P.E.T.S. 2025

P R E S I D E N T S - E L E C T / P R E S I D E N T S - N O M I N E E W O R K B O O K

FRIDAY, FEBRUARY 28, 2025

MODULE A-1

BECOMING A VIBRANT CLUB LEADER

GOAL

Club Presidents and Presidents-Elect will have an enhanced view of their role and function as club key leaders of Vibrant Rotary Clubs.

OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Identify district and RI resources available to help the Club President identify and manage risk factors affecting a club.
2. List specific responsibilities of the Club President and Club President-Elect.
3. Discuss how the Club President can support the structure of a vibrant Rotary club including collaborative efforts with the Club President-Elect.
4. Discuss the importance of a strong leadership team and committee structure in building a vibrant and impactful Rotary Club.
5. List specific elements of an engaging and successful Club experience at a vibrant and impactful Rotary Club.

REFERENCE MATERIALS

Learning Center
Rotary Learning Events
Newsletters
Rotary Code of Policies
Be A Vibrant Club: Your Club Leadership Plan
Creating Your Club Leadership Plan
Impact Begins With You

Recommended Rotary Club Bylaws
Rotary Basics
Rotary Manual of Procedure
Standard Rotary Club Constitution

Module A-1: Becoming A Vibrant Club Leader

Breakout Discussion Questions

1. What excites you most about your presidential year?
2. What is your biggest concern for the next year?
3. Refer to the Rotary Code of Policies handout. What are the three most important responsibilities of a President? For a President-Elect? Share the reasons for your choices.
4. Refer to the Be A Vibrant Club and Impact Begins With You brochures. Discuss both the elements of a vibrant club and characteristics of impactful club leaders.
5. Refer to the Be A Vibrant Club framework. How do collaborative efforts between a President and President-Elect strengthen and build a vibrant and impactful club?
6. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
7. What is your **primary takeaway** from the Vibrant Club Leader session?
8. Any other question(s)?

ROTARY LEARNING CENTER COURSES

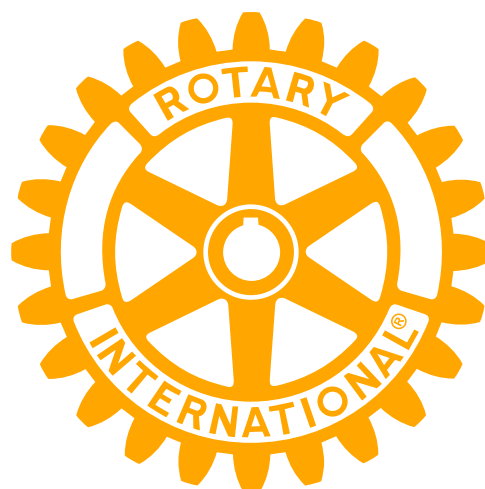
Learn everywhere and anytime with Rotary's Learning Center. Take courses, find resources, connect with an online community, and track your progress. Sign in with your My Rotary account at rotary.org/learn, or find the link on My Rotary under the Knowledge & Resources tab. Courses are grouped by topic. You can filter by topic to find courses when you are in the Learning Center.

Courses marked with a ▲ symbol are available to non-members.

Courses marked with a 🍷 symbol have discussion guides.

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Code	Language	Code	Language	Code	Language	Code	Language	Code	Language
EN	English	JA	日本語/Japanese	AR	Arabic	KN	Kannada	RU	Russian
DE	Deutsch/German	KO	한국어/Korean	BG	Bulgarian	LI	Lithuanian	SE	Serbian
ES	Español/Spanish	PT	Português/Portuguese	CZ	Czech	NL	Dutch	TA	Tamil
FR	Français/French	SV	Svenska/Swedish	HU	Hungarian	PL	Polish	TH	Thai
IT	Italiano/Italian	ZH	中文/Chinese	IS	Icelandic	RO	Romanian	UK	Ukrainian



ROTARY LEARNING EVENTS

ROLE-BASED LEARNING EVENTS CONVENED BY THE GOVERNOR-ELECT

LEARNING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
District Team Learning Seminar February	Assistant governors and district committee leaders learn about their roles and set goals with the district leadership team.	District learning committee	Learning facilitators Assistant governors Committees
Presidents-elect Training Seminar (PETS) February or March	Club presidents-elect learn about their role, and work with assistant governors to set goals.	District learning committee	Learning facilitators Presidents (Basics)
District Training Assembly March, April, or May (after PETS)	Club presidents-elect develop leadership skills; other incoming club leaders learn about their roles; together, club leaders set goals.	District learning committee	Learning facilitators Presidents Secretaries Treasurers Committees

TOPIC-BASED LEARNING EVENTS CONVENED BY THE GOVERNOR

LEARNING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
District Vibrant Club Workshop Determined by district	Club presidents, club membership committee chairs, club Rotary Foundation committee chairs, and interested Rotarians learn how membership, the Foundation, and public image work together to help fulfill Rotary's Action Plan.	District Rotary Foundation committee District membership committee District public image committee District learning committee	Learning facilitators
Grant Management Seminar Determined by district	Club presidents-elect (or appointees) learn how to manage Rotary grants.	District Rotary Foundation committee District learning committee	Learning facilitators (for in-person seminars) Learning facilitators (for virtual seminars) Participants
Rotaract Club Officer Preparation Anytime after club open elections and before 30 June	Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and non-Rotarians learn about Rotaract.	District Rotaract representative	Learning facilitators Participants

Newsletters

Our newsletters help you stay current on the topics that interest you most. Anyone can subscribe once they create an account and sign in.

End Polio Now

Receive regular updates on Rotary's polio eradication efforts from inspiring member stories to the latest news.

Giving & Grants

Information to help you support Rotary's work through contributions and grant-funded activities.

Learning in Action

Find new resources and materials, helpful tips, and the best practices to create effective Rotary learning experiences.

Membership Minute

Information about the latest membership trends, strategies, best practices, and resources.

Peace in Action

News and updates about the Rotary Peace Centers and information for the Rotary peacebuilding community.

Rotary Leader

Practical information to help club and district leaders achieve success.

Rotary Service

Information to help Rotary members plan effective and inspired service projects.

Rotary in Review

An update on news and information for Rotary members, as well as developments from around the Rotary world.

Rotary Youth Exchange News

Information and updates on current Youth Exchange events and resources.

The Rotary magazine Newsletter

Highlights from this month's issue of the Rotary magazine.

Young Leaders in Action

News and developments about Rotary's youth and young adult programs: Interact, RYLA, and New Generations Service Exchange.

Visions

Information about the benefits of charitable estate and financial planning. Primarily intended for a U.S. audience.

4. possess a working knowledge of the club constitution and bylaws
5. have attended one or more district conferences and international conventions.

(November 2004 Mtg., Bd. Dec. 59)

Source: January 1947 Mtg., Bd. Dec. 164; April 1971 Mtg. Bd. Dec. 231.

See Also January 1963 Mtg. Bd. Dec. 112

10.030. Duties of Club President

The club president has the following duties:

1. presides at meetings of the club
2. ensures that each meeting is carefully planned, opening and adjourning on time
3. presides at regular meetings (at least once a month) of the club board of directors
4. appoints club committee chair and members who are qualified for the jobs assigned
5. ensures that each committee has definite objectives and each is functioning consistently
6. attends the district conference
7. cooperates with the governor and assistant governor in various club and district Rotary matters
8. supervises the preparation of a club budget and the proper accounting of club finances, including an annual financial review
9. ensures that a comprehensive learning program is implemented by the club and may appoint a club learning facilitator (s) to carry out the learning, if needed
10. ensures that important information from the Governor's "Monthly Letter," and other bulletins and literature from the Secretariat and governor are passed on to the club members
11. submits each June a comprehensive report to the club on the status of club finances and the extent to which the club has achieved its objectives for the year
12. works cooperatively with the president-elect before leaving office to ensure the smooth transition of authority, including the transfer of all relevant records, documents, and financial information
13. arranges a joint meeting of the incoming and outgoing club boards to ensure the success of the new administration and to provide continuity of administrations.

(April 2023 Mtg., Bd. Dec. 106)

Source: January 1947 Mtg., Bd. Dec. 164; November 2004 Mtg., Bd. Dec. 59;

Amended by November 2006 Mtg., Bd. Dec. 104; January 2008 Mtg., Bd. Dec. 142; October 2013 Mtg., Bd. Dec. 31.; April 2023 Mtg., Bd. Dec. 106

See Also Jan 1951 Mtg. Bd. Dec. 53; February 1923 Mtg. Bd. Dec. VIII(z)

10.040. Duties of Club President-elect

10.040.1. Appointments for Club Committees

Incoming club presidents-elect shall complete their appointments of club committee chairs no later than 31 March. (*November 2004 Mtg., Bd. Dec. 59*)

Source: October-November 1977 Mtg., Bd. Dec. 123;
Amended by November 2004 Mtg., Bd. Dec. 59

10.040.2. Annual Fund Goal-Setting by Clubs

The club president-elect oversees the Annual Fund goal for the club for implementation during his or her term as president. (*November 2004 Mtg., Bd. Dec. 59*)

Source: May 2003 Mtg., Bd. Dec. 321;
Amended by November 2004 Mtg., Bd. Dec. 59

10.050. Duties of Club Secretary

The club secretary is responsible for timely membership reporting to Rotary International in addition to any other duties included in the club constitution and bylaws. The club secretary must report the incoming club officers for the next Rotary year to Rotary International no later than 1 February. (*January 2014 Mtg., Bd. Dec. 96*)

Source: January 2014 Mtg., Bd. Dec. 96

10.060. Club Officer Disputes

If there is a dispute within a club as to which members have been duly elected as the club's officers, the general secretary shall request the district governor to investigate the dispute. The governor shall notify the general secretary which of the members should be properly recognized as the club officers. Until the dispute is resolved, the general secretary may rely upon the findings of the governor as to which club members should be recognized as club officers for RI's administrative purposes. (*November 2007 Mtg., Bd. Dec. 98*)

Source: November 2007 Mtg., Bd. Dec. 98



BE A VIBRANT CLUB

NORTH AMERICA

YOUR CLUB LEADERSHIP PLAN

Rotary





We started with a strategic planning session to improve our club's public image, increase membership, and boost member participation and attendance. As a result, we made several changes to become more innovative and flexible while maintaining our values of service, global reach, community, fun, and friendship.

HOW WE DID IT

We rewrote our values statement.

The updated language — which calls us “a service club of inspired individuals whose contributions improve lives in communities locally and worldwide” — unified our members, inspired prospective members, and generated interest in our community work.

We introduced creative meeting formats.

Our club provides innovative and flexible, cost-free meeting options:

Speed networking. This helps our members build relationships and rapport.

Service first Thursdays. On the first Thursday of each month, we meet at the public library to clean books and prepare and inventory multimedia materials.

1905 meetings. Our 1905 meetings honor the early days of Rotary tradition. Like the first Rotarians, we meet in small groups. Members can participate remotely by meeting at designated locations closer to their workplaces. We use Facebook Live to tune in simultaneously to our club president for the first half of the meeting. For the second half, we break into small groups to discuss a video presentation on the theme of the month.

The varied formats increased member engagement in a way that wasn’t possible with traditional meetings alone. Even former Rotarians started to re-engage. While our weekly attendance may be around 60 members per meeting, our real-time Facebook Live videos that broadcast our 1905 meetings and traditional meetings have generated over a thousand views.

Our experience has taught us that it is possible to make changes in the spirit of innovation and flexibility yet maintain Rotary values. We discovered that there are many fun ways to serve and promote fellowship with Rotarians.

We relaxed attendance guidelines.

While we are committed to making our meetings more accessible to working members, we also wanted to continue regular meetings, because they foster the fellowship and camaraderie that our members enjoy. We revised guidelines to require only 50 percent attendance at the weekly meetings. Missed meetings can be made up at other Rotary meetings or by participating in a service activity.



START YOUR CLUB ON A PATH TO VIBRANCY

Vibrant clubs engage their members, conduct meaningful projects, and try new ideas. List the new ideas your club wants to try, and create a plan to increase community interest and attract more members.

As you develop your plan, use these tips and ideas, and let your club evolve.

Decide what you'd like your club to be like in three to five years.

- Plan an annual visioning session, and use the **Rotary Club Health Check** to identify your club's strengths and areas that need improvement.
- Use the **Strategic Planning Guide** to set long-term goals.

Decide on your annual goals, and enter them into Rotary Club Central.

- Focus on something your club is good at, and make it something your club is great at.
- Update committees once a month on your goal progress.

Hold club meetings that keep members engaged and informed.

- Conduct the **Member Satisfaction Survey** to find out what your members like and don't like about your club, and create a plan for implementing changes.
- **Vary your meeting format** to include a mix of traditional and online meetings, service projects, and social gatherings.

Communicate openly in your club.

- Share information at club meetings, on your club website, and through social media, and check regularly to see how members are feeling.
- Use the templates and resources in the Rotary **Brand Center** to create your club brochures and newsletters.

Prepare members for future roles to smooth leadership transitions.

- Ensure continuity by making appointments for multiple years, having a current, incoming, and past chair on each committee.
- Conduct on-the-job training for incoming club officers, and have job descriptions for each officer.

Adapt your club's bylaws to reflect the way the club works.

- Involve your members when you review your club's bylaws every year.
- Edit the **Recommended Rotary Club Bylaws** template to reflect new practices and procedures.

Develop strong relationships within your club.

- Find suggestions in **Introducing New Members to Rotary**.
- Sit with different people at each meeting.

Make sure all members are involved in activities that genuinely interest them.

- Conduct a member-interest survey, and use the results to plan projects, activities, and engaging meetings.
- Get new members involved early by learning their interests and giving them a role in the club.

Coach new and continuing members in leading.

- Appoint a club training committee to oversee training for members.
- Use the **Leadership in Action guide on starting a program** to develop members' leadership skills.

Create practical committees for your club.

- Small clubs: Consider how you can combine the work of committees.
- Large clubs: Create additional committees to get all members involved.

CREATING YOUR CLUB LEADERSHIP PLAN



Use this worksheet to start developing a plan that works for your club.
Add strategies to meet **your club's needs**.

Rotary Club of

Rotary Year

- ☐ Our club has a strategic plan that reflects what we want our club to be like in three to five years
- ☐ Our club is engaging. We use the following meeting formats:
 - ☐ Traditional meetings: /month
 - ☐ Online meetings: /month
 - ☐ Service meetings: /month
 - ☐ Social events: /month
 - ☐ Other:
 - ☐ Other:
- ☐ Our club ensures continuity:
 - ☐ Members prepare for leadership positions
 - ☐ Past, present, and future leaders participate in making decisions
- ☐ Our club has fun social activities planned for the year:
 - ☐ Networking and socializing events
 - ☐ Events that welcome families
- ☐ Our club has a comprehensive training plan that includes:
 - ☐ District conference
 - ☐ District membership seminar
 - ☐ District public image seminar
 - ☐ District Rotary Foundation seminar
 - ☐ New member orientation
 - ☐ Online courses on the Learning Center
 - ☐ Club Officers Basics course
 - ☐ Membership online course
 - ☐ Presidents-Elect training seminar

- ☐ Our club has entered its annual goals in Rotary Club Central
- ☐ Our club has a communication plan for members and for the community:
 - ☐ We use social media tools like Facebook
 - ☐ Our club website is active and current
 - ☐ Other:
 - ☐ Other:
 - ☐ Other:
- ☐ Our **club's bylaws are current and** reflect our structure and practices
- ☐ Our club has strategies for keeping all members active in the club:
 - ☐ Members are involved in projects
 - ☐ New members are assigned mentors
- ☐ Our club has committees that support our needs:
 - ☐ Administration
 - ☐ Membership
 - ☐ Public relations
 - ☐ Rotary Foundation
 - ☐ Service
 - ☐ Other:
 - ☐ Other:
 - ☐ Other:



CONNECT WITH A ROTARY CLUB TODAY

Rotary members join clubs by invitation. Let us help you connect with a club that may be right for you. With 35,000 clubs around the world, and others that meet online, Rotary makes it easy to get involved and start making a difference today.

Be a part of the Rotary difference. Bring your passion, your perspective, and your purpose to Rotary.

To connect with a club in your area and learn more, visit us at www.rotary.org/join.



Rotary

One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
www.rotary.org

CONNECT WITH US:



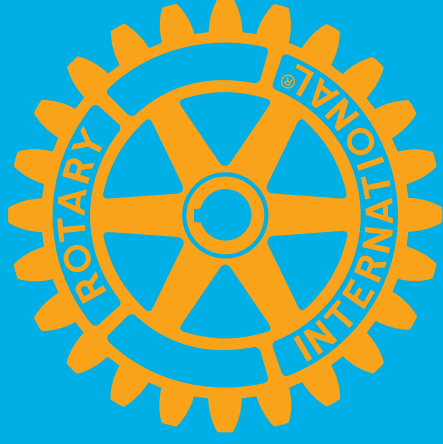
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IMPACT BEGINS WITH YOU



Rotary



THE ROTARY DIFFERENCE

Rotary is more than a service organization that's making a difference in your community.

We're an international membership organization made up of people who share a passion for and commitment to enhancing communities and improving lives across the world. The difference we make starts with our members.

IMPACT ACROSS THE WORLD



With more than **1.2 million members** in clubs in almost every country, **we are improving communities around the globe**. As a member of Rotary, you'll have opportunities to change lives locally *and* to connect with other clubs to work on **international projects that address today's most pressing humanitarian challenges**, including fighting disease, providing clean water, supporting education, and promoting peace.

Our largest and proudest effort to date is our work to eradicate polio. We initiated the audacious polio eradication campaign in 1979, by vaccinating children in the Philippines. **With the help of our partners, we have since reduced polio cases worldwide by 99.9 percent.**



WE SEE DIFFERENTLY:

We are problem solvers working together to achieve a better world. Our members are deeply ingrained in the communities in which they live and serve, affording them insight into local challenges and access to the leaders, resources, and networking opportunities needed to strategize and take action to make lasting change.



WE THINK DIFFERENTLY:

Rotary clubs reflect the diversity of our communities and the breadth of viewpoints that comes from our members' varied professional and personal experiences. For more than 100 years, we have been applying different perspectives to create innovative, sustainable solutions that address the needs and challenges affecting our communities.

HOW ARE WE DIFFERENT?



WE LEAD DIFFERENTLY:

As Rotary members we hold ourselves to the highest ethical standards. Community members, community leaders, and other organizations seek us out because they know they can trust us to be effective partners and deliver on our promises.



OUR ACTIONS MAKE A DIFFERENCE:

Harnessing our unique perspectives and ideas gives us a shared purpose — one that compels us to take action. We roll up our sleeves, leverage our personal relationships with local partners and businesses, and apply our leadership skills as a way to get the job done and bring to life the changes we envision.



IMPACT BEGINS WITH OUR LOCAL CLUBS

The impact our members make takes shape at Rotary club meetings and activities. These gatherings allow you to join other passionate, visionary women and men regularly to discuss and act upon community needs. Rotary club meetings are also a place to strengthen connections to friends and neighbors and form meaningful relationships that last a lifetime.

And just as Rotary helps you invest in your community, it gives you an opportunity to invest in yourself. Many clubs offer continuous learning opportunities, with a broad range of workshops, conferences, guest speakers, and more — all aimed at helping you grow personally and professionally.

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