

Rotary Carolinas' PETS



President Nominee Curriculum Materials



CREATE HOPE
in the **WORLD**

March 16-18, 2023

President Nominee Discussion Materials

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All materials utilized or referred to at Carolinas’ PETS are available: carolinaspets.org



SESSION ONE

“Leadership – Making it Fun!”

“It’s Not About You”

Why is it not about you?

Reference: *It’s Not About You* by Bob Burg and John David Mann

1. Holding the Vision
What is the vision of a great Rotary club?
2. Building your People
Who can you depend on to support the Vision?
3. Do the Work
How do you get your members to do the work?
4. Stand for Something – How about Rotary?
Do your members really understand and believe in the missions of Rotary?
5. Pass the Mantle
Does your club properly prepare incoming leaders?



SESSION ONE, continued

Leadership

Here are five descriptions of what great leaders do, what we call “Five Keys to Legendary Leadership.” The first four are all essential — and are completely contradicted by the fifth. Yet somehow, the first four don’t seem to work without the fifth. They are the four fingers and thumb of leadership.

Finger #1: Hold the Vision

Building a business takes skill, work, and capital resources. But those are details. More than anything else, building a business—really, building anything—is an act of faith. Because you’re creating something out of nothing. You are moving into the future on invisible wires, without a net.

It’s easy to say, “Hold a vision.” The hard part isn’t the vision. Anyone can come up with a vision. The hard part is the holding.

The single biggest challenge to any organization is the constant cloud of fear and doubt that swirls around the heads of the people involved. As a leader, your job is to hold fast to the big picture, to keep seeing in your mind’s eye, with crystal clarity, where it is you’re going—that place that right at this moment exists only in your mind’s eye. And to keep seeing that, even when nobody else does. Especially when nobody else does. Your people count on you to do this. It’s the biggest job you have.”

Finger #2: Build Your People

Time was, people in a business were often viewed as “workers,” as if, out of the entirety of a person’s being, that which was relevant to the business could be reduced to a single function. Not anymore. Increasingly we’ve come to realize that people are people, and every person in a business is a universe of talents, skills, and potential value. Good businesses look to hire competent employees. Great businesses hire people and then commit to bring out their latent greatness through continual investment.



SESSION ONE, continued

Finger #3: Do the Work

Great leaders don't expect anyone else to do anything they haven't done themselves. They get dirt under their nails and mud on their boots. Abraham Lincoln knew law. He'd practiced it in freezing-cold, bare-floored small-town courtrooms. So did Gandhi. They both emancipated millions—but only because they knew the feel of the craft in their hands. Before he was a great general or the nation's first (and arguably greatest) president, George Washington worked as a land surveyor. He knew the land he would later govern. As a boy, Sam Walton milked the family cow and sold the surplus milk to neighbors. Bill Gates spent thousands of hours as a teenager programming computers.

This is one of most great leaders' greatest success secrets: whatever field they are in, whatever business empire they run, the chances are excellent they have done it at some point with their own hands, learning it nuts and bolts, from the ground up.

Finger #4: Stand for Something

Leadership is not something you can put on and take off, like a set of clothes. Your capacity to influence is not something you can rehearse, like a speech in a play. People, contrary to popular belief, are not fools. No matter what front you put on, they will read you, consciously or unconsciously—the you behind the words.

It's not that what you say isn't important. It is. That's just not where the source of your power lies. What you have to give, you offer least of all through what you say; in greater part through what you do; but in greatest part through who you are.

Competence counts—but character matters more. If you want people to follow you, they need to trust that you know what you're doing. But that's the smaller part of it. Competence is simply the baseline, the thing that puts you in the game. Character, though, is a precious gem, and anyone who possesses it is worth a great deal to the world around him/her.

You can lead only as far as you grow.



SESSION ONE, continued

Thumb: Pass the Mantle

So there you have it. Leaders hold a vision. Leaders care about their people. Leaders get their hands dirty and their boots muddy, do the work and make the tough decisions. And leaders stand for something.

It's about all those things. But at the same time, it isn't about any of those things. Because you can hold the biggest vision, care about all your people, do all the work, and stand for something until the end of days — and it's still you, you, you.

Here is the heart of the contradiction that is great leadership: great leadership isn't a place you arrive, it is a place into which you disappear.

Great parenting is not about the parent; great teaching is not about the teacher. And great leadership? Whatever it truly is, it's not about you.

Club Officers & Committee Chairs

President

President-Elect

President Nominee

Immediate-Past President

Vice-President

Secretary

Treasurer

Sergeant-at-Arms

Rotary Foundation Chair

Fundraising Chair

Service Projects Chair

Membership Chair

Programs Chair

Others _____

SESSION ONE, continued

Presidential Priorities

- ✓ People first! Surround yourself with a capable team.
- ✓ Learn Rotary at every level - embrace electronic Rotary resources.

learn.rotary.org

carolinaspets.org

dacdb.com

- ✓ Define Rotary as it should exist in your club today.
- ✓ Play by the Rules - Update and enforce your bylaws and constitution.

[Governance Documents on My Rotary](#)

- ✓ Formulate/Review an annual budget and long-range plan.
- ✓ Prepare an effective weekly meeting agenda and program.
- ✓ Create a Membership Action Plan for attraction and retention.
- ✓ Plan effective service projects and fundraisers.
- ✓ Support The Rotary Foundation with pledged gifting and grant participation.
- ✓ Establish an effective community PR campaign.

brandcenter.rotary.org

- ✓ Promote attendance to district training opportunities.
- ✓ Cultivate a diverse, equitable, and inclusive culture where your members unite and take action.
- ✓ Collaborate with area clubs and utilize your Assistant Governor.
- ✓ **Get up, and Go for it - Rotarians are People of Action!**



SESSION TWO

“Building the Ideal Rotary Club”

Who, When, Where, What and How?

1. WHO are ideal Rotarians and where do you find them?
2. WHEN is the best time for these Rotarians to meet?
3. WHERE is the ideal meeting place?
4. WHAT does an ideal Rotary club do?
5. HOW in the world can we get it all done?

Commit

At least three dedicated Rotarians must commit to making membership a priority. Are you ready to re-dedicate to the work of Rotary? If you don't believe in Rotary, potential members won't believe in you.

Know Your Numbers

Review how many Rotarians your club has lost through attrition over the last three years and calculate an average attrition loss. Then add 20% to that number for contingencies. Then know how many members you would like to have at the end of the year. Use the worksheet on page eight.

Re-evaluate / Change

Is the club attractive as it is or is there a need to consider a more flexible membership model. What do you want your club to become?

Membership Goals

Have a membership drive with specific, attainable goals. Offer equal opportunities for fellowship and service. Give all members something meaningful to do. Create a diverse and inclusive culture with your club and you will be stronger.

SESSION TWO, continued

Membership Goal Setting Worksheet

This worksheet will help you set your membership growth goals and calculate the number of new members needed to reach your goal. ***Be intentional and focus on Attrition & Attraction!***

My club's Annual Attrition Rate (3-year average) _____%

My club's Annual Attraction Rate (3-year average) _____%

My club's Annual Net Growth Rate _____%

Success targets include:

- Attrition less than 15% (July 1 membership x .15)
- Attraction greater than 20% (July 1 membership x .20)

The problem we need to solve is:

- Low Retention (Attrition Rate exceeds 15%)
- Insufficient New Member Attraction
 - Attraction Rate is lower than our Attrition Rate or Below 20%
- Neither; we need to build on our:
 - current membership growth culture and
 - strategies

Club Membership Tools, Forms, Checklists, Reports, Videos and more:

rizon33-34.org/club-membership-committee/

SESSION TWO, continued

Membership Goal Setting Worksheet, continued

Actual Club Data can be researched at: RIZones33-34.org

Login and search for Zone33MGI; then find your District and Club

Membership History:

Club Year Members at start of year (July 1)

2021-22 _____

2020-21 _____

2019-20 _____

2018-19 _____

2017-18 _____

2023-2024 Membership Goal Setting:

Starting Membership July 1, 2022 _____

Current Membership Jan. 5, 2023 _____

Estimated Membership July 1, 2023 _____ a

*Membership Goal July 1, 2024 _____ b

Net growth (b-a=c) _____ c

Average Annual Attrition to Replace _____ d

New Members Needed (c+d) _____ *



SESSION TWO, continued

Materials & Websites

Hand-out materials and an updated website are important for reference. Be ready to answer the questions: What is Rotary? What does Rotary do?

Prospect Identification

Target specific people using a classification list, Chamber Directory, Yellow Pages, email lists, Facebook friends. Conduct a Club Assembly asking “Who do you know?”

Attract!

Attract others when you meet any potential member by telling your Rotary story. Invite them to come visit and meet your Rotary friends.

Prepare for Their Visit

Be ready when they visit to welcome them and make them feel important. Let them speak about themselves. All members can say “Welcome Bob!”

Invitation

Don't delay in inviting them to join, and approving them for membership.

Club Meetings

Meetings & Programs must be upbeat and entertaining when they visit and after they join to add value for their time.

Engagement

Engage new members with simple tasks like leading the Pledge or blessing the meals. Find out what their interests are and give them something meaningful to do.

Family

Family of Rotary events are important to create friendships as often as possible.

Leadership

Leadership is important now and for years to come. Who's going to step up to grow club membership, enhance the Foundation giving, create a public image campaign, & lead important service projects? Who's going to keep it going?



SESSION TWO, continued

Club Flexibility

Research and our members' experiences have shown that when clubs have more freedom to decide how and when they hold their meetings, who they'll invite to become members, and what member engagement means, their ability to attract new members and keep current members motivated increases.

The 2016 [Council on Legislation](#) voted to give Rotary clubs more flexibility than they've ever had. The changes in policy affect when, where, and how clubs meet and the types of membership they offer.

my.rotary.org/en/learning-reference/about-rotary/councils

my.rotary.org/en/learning-reference/about-rotary/governance-documents

Five ways to use the new flexibility

It's up to your club to decide how — and if — you want to use the new options. Start by reviewing the updated Standard Rotary Club Constitution to see which guidelines are flexible. Once you've decided what changes would benefit your club, edit your club bylaws to reflect them, and try them out. If you decide they aren't working, try something else.

Here are some examples of how your club can apply the new flexible options:

1. Change your meeting schedule. Your club can vary its meeting days, times, and frequency. For example, you could hold a traditional meeting on the first Tuesday of the month to discuss business and service projects and get together socially on the last Friday of the month. You just need to meet at least twice a month.
2. Vary your meeting format. Your club can meet in person, online, or a combination, including letting some members attend in-person meetings through the Internet.
3. Relax attendance requirements. Your club can ease attendance requirements and encourage members to participate in other ways, such as taking a leadership role, updating the club website regularly, running a meeting a few times a year, or planning an event. If your club is dynamic and offers a good experience for members, attendance won't be a problem.

SESSION TWO, continued

4. Offer multiple membership types. Your club could offer family memberships to those who want to bring their families, junior memberships to young professionals with leadership potential, or corporate memberships to people whose employers want to be represented in the club. Each type of membership can have its own policies on dues, attendance, and service expectations. Rotary will count these people in your club membership and will consider them active members if they pay RI dues.
5. Invite Rotaractors to be members of your club. You can invite Rotaractors to join your club while remaining members of their Rotaract clubs. If your club chooses to, it can make special accommodations for these members, such as relaxed attendance requirements or reduced fees, as long as they are reflected in the club bylaws.

Find examples of bylaw amendments that clubs might use to offer these new flexible options and review our frequently asked questions for more information.

Resources & Reference

- my.rotary.org/en/club-flexibility
- [Frequently asked questions](#)
- [Rotary's governance documents](#)
- [Start Guide for Alternate Membership Types](#) (includes sample bylaws)
- [Start Guide for Flexible Meeting Formats](#) (includes sample bylaws)
- [Club meeting flexibility and format](#) (video)
- [Membership types and attendance flexibility](#) (video)
- [Membership Flexibility Overview](#)

Still trying to figure out how to make these changes? Join the [Membership Best Practices Discussion Group](#), an online forum where Rotarians from around the world share tips and examples on attracting and engaging current and prospective members. Try posting questions or ideas relating to club flexibility and connect with members who can offer feedback and guidance.



SESSION THREE

Officer Responsibilities & Financial Considerations

1. Who's in Charge?

Responsibilities of the Club President, Secretary, Treasurer, Board of Directors, and Executive Committee

2. Where Are We Going?

Developing or updating a Strategic Plan for our club that charts our course for the upcoming and next few years?

3. Got a Budget?

Developing an annual Financial Plan

4. Where's the Money Come From?

Other than member dues, how many other ways can my club gain revenue?

5. Where Does the Money Go?

What do our dues and other revenue pay for? Who determines where our charitable funds go?

6. Who Needs to Know About Club Finances?

Communication Counts

Sample Rotary Club Budget

Club Charities Highlighted

Income	Projected	Actual/Est.	Due Date	Paid Date
Cash on Hand	8000			
Dues @ \$50 x 40 Members	24,000	24,000	Monthly	Monthly
Wine Tasting (Avg.\$6,000)	8,000	10,000	October	October
Spring Fund Raiser (Yard Sale)	TBD		May	May
Salv. Army Bell Ringing (non-deposit)	(2500+)	8,852	December	December
Dist.Simplified MatchingGrant	1,500	Missed	Fall	N/A
Raffle (PolioPlus & Permanent Fund)	1,000	1000 est.	Weekly	Weekly
Happy Dollars (C.A.R.T. Fund)	1,000	1,184	Weekly	Weekly
Harvest Festival Pizza Sale	200	100	September	September
Matching Grant - Water Project	N/A	N/A	N/A	N/A
Misc. Income (Haiti Donations)	0	2,100	January	January
Total Projected Income	46,900	47,236		
Expenses				
Meals \$7 @ 70% Attendance	9,800	10,000	Weekly	Weekly
Rotary Int. Dues \$35x40x2	2,800	2,551	July/Jan.	Paid
District 7710 Dues \$15x40x2	1,200	1,006	July/Jan.	Paid
President Elect Training Sem.	800	830	January	Paid
District Conference Club Fee	100	100	July	Paid 7/10
Property Tax Forest Park Lot	150	150	August	Paid
Miscellaneous Club Expenses	500	TBD	TBD	All Yr.
The Rotary Foundation Gift to APF	4,000	2,464	Dec./June	Paid 12/21
TRF Permanent Fund (Raffle)	1,000	2,000	Dec./June	Paid 12/21
Scholarships - CHS (4)	4,000	3,000	July/Aug.	Paid Aug.
Dist Simplified Matching Grant	3,000	Missed	Fall	N/A
Salv. Army Bell Ringing (dir. deposit)	(2500+)	8,852	December	Paid 12/10
Stop Hunger Now / Haiti	2,000	6,950	January	Paid 1/10
C.A.R.T. Walter F. Johnson	1,000	1,184	March	Paid 03/10
YMCA - We Build People	1,000	1,000	November	Paid 12/10
PolioPlus Gates Challenge	1,500	1,000	Dec./June	Paid 12/21
Rotary Youth Scholar Awards	550	(4) 1,160	December	Paid 1/10
Boys & Girls Home Furniture	500	500	July	Paid 7/09
4-Way Test Prints Project	500	LYR	Spring	LYR
Awards, Plaques, Pins, Etc.	500	TBD	TBD	All Yr.
Wall Street Journal - Library	350	364	January	Paid 1/10
Salvation Army Thanksgiving	200	200	November	Paid 11/09
R.A.D. Drug Essay Contest	175	200	February	Paid 1/10
Harbor House (car seats)	0	150	April	Paid 4/10
International Water Project	2,000	0	TBD	N/A
4-Way Test Essay Contest	Too Late	0	Aug. Dec.	N/A
Discretionary Funds	8,075		TBD	N/A
Total Projected Expenses	46,900	43,611		
Notes				
Cash on Hand	8,009	7,323		

SESSION FOUR

“Rotary is a Membership Organization & “Service Is What We Do” Rotary International’s “Five Avenues of Service”

How many service opportunities can you list in each category?

Club Service

Vocational Service

Community Service

International Service

Youth Service



SESSION FOUR, continued

Model Rotary Club	
<u>Club</u>	<u>Vocational</u>
Active Board of Directors	Promote Member Vocations
Up-to-Date By-Laws & Constitution	Promote Four-Way Test / Ethics
Strategic Plan	Scholarships
Membership Development	Young Professionals Summit
Effective Meeting Agendas	Informative Club Programs
Leadership Development/Transition	Leadership Development
Effective Committee Structure	Chamber of Commerce Alliance
<u>Community</u>	<u>International</u>
Review Service Projects Annually	Support Our Rotary Foundation
Effective Fundraising	Pursue District & Global Grants
District Grants	District & Zone Member Participation
Boys & Girls Home	District Conference Attendance
C.A.R.T.	R.L.I. & District Training Assembly
Public Image – Tell Your Story	Rotary International Convention
	Duke-UNC Peace Center
<u>Youth Service</u>	
Interact	
Rotaract	
Youth Exchange	
R.Y.L.A.	
Rotary Against Drugs / Four-Way Test	
Alumni	



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Resources

Rotary International

Rotary.org
my.rotary.org/en
my.rotary.org/en/learning-reference

Home page
My Rotary
Learning Center

Carolinas' PETS

carolinaspets.org/resources
carolinaspets.org/curriculum

Resources
Curriculum

Your District's Website

Your Club's Website

Rotary Carolinas' PETS



Arden, Asheville, Asheville Breakfast, Asheville-Biltmore, Asheville-Metro, Asheville-South, Asheville-West, Assistant Governor, Avery County, Black Mountain, Blowing Rock, Boone, Boone Sunrise, Brevard, Bryson City, Burke-Sunrise, Burnsville, Caldwell County, Cashiers Valley, Catawba Valley (Conover), Clay County, Denver/Lake Norman, Discussion Leader, District Governor 2021-2022, District Governor 2022-2023, District Governor 2023-2024, District

Secretary, Franklin, Franklin Daybreak, Granite Falls, Haywood County (Canton), Hendersonville, Hendersonville-Four Seasons, Hickory, Hickory Sunrise, Highlands, Highlands-Mountaintop, Lake Hickory (Hickory), Lenoir, Lincolnton, Lincolnton-Sunrise, Madison County, Marion, Morganton, Murphy, Newton-Conover, PETS Staff, Pisgah Forest, Sherrills Ford-Terrell, Spruce Pine, Sylva, Tryon, Valdese, Waynesville, Waynesville-Sunrise, Albemarle, Alleghany County, Alleghany County Evening, Ashe County, Ballantyne, Belmont, Boiling Springs Area, Cabarrus County, Charlotte, Charlotte Dilworth South End, Charlotte International, Charlotte North, Charlotte Providence, Charlotte South, Charlotte South Park, Charlotte Top-of-the-Week, Charlotte West, Cherryville, China Grove, Concord, Concord Afton-Sunset, Davidson, Gaston Breakfast, Gastonia, Gastonia East, Gastonia Evening, Greater Statesville, Hamlet, Huntersville Happy Hour, Kannapolis, Kings Mountain, Lake Norman-Huntersville, Marshville, Matthews, Mecklenburg County-South, Monroe, Monroe-Union Breakfast, Mooresville, Mooresville-Lake Norman, Mount Holly, North Mecklenburg County, North Wilkesboro, Rockingham, Rowan County, Salisbury, Shelby, Shelby Breakfast, Southwest Cabarrus, Statesville, Statesville/Fourth Creek, Taylorsville, The Queen City, Top of the Lake-Mooresville, Troutman, Union West (Indian Trail), Wadesboro, Waxhaw-Weddington, West Stanly, Alamance (Burlington), Archdale-Trinity, Asheboro, Burlington, Carthage, Clemmons, Crescent, East Greensboro, Eden, Furnitureland, Gate City, Global Trekkers, Graham, Greensboro, Greensboro Airport, Guilford, High Point, Jamestown, Jonesboro, Kernersville, King, Lexington, Liberty, Madison-Mayodan, Mebane, Midstate, Mocksville, Mount Airy, Pinehurst, Pittsboro, Randolph, Reidsville, Reynolda, Sandhills, Sanford, Siler City, Southern Guilford, Southern Pines, Stoneville, Stratford, Summit, Surry Sunrise, Thomasville, Troy, Western Forsyth, Winston-Salem, Yadkin Valley, Yadkinville, Angier, Apex, Apex Sunrise, Capital City, Cary, Cary Central, Cary MacGregor, Cary-Kildaire, Cary-Page, Central Johnston County, Chapel Hill, Chapel Hill-Carrboro Sunrise, Clayton, Clayton Mid-Day, Cleveland School, Crabtree, Dunn, Dunn-Erwin, Durham, Durham Sunrise, East Chapel Hill, E-Club of D7710, Fuquay-Varina, Fuquay-Varina Downtown, Garner, Garner Mid-Day, Henderson, Hillsborough, Holly Springs, Knightdale, Lillington, Morrisville, North Raleigh, Oxford, Raleigh, Raleigh Midtown, Raleigh/Cary Parkside, Research Triangle Park, Roxboro, South Granville County, Southwest Durham, Wake Forest, Wakefield/Wake Forest, Warrenton, Wendell, West Raleigh, Zebulon, Ahoskie, Ayden, Belhaven-Pantego, Bethel, Columbia, Currituck Wild Goose, Edenton, Elizabeth City, Elizabeth City Morning, Elm City, Farmville, First Flight (Kill Devil Hills), Fremont, Goldsboro, Goldsboro-Three Eagles, Greater Wilson, Greenville, Greenville (Morning), Greenville Noon, Havelock-Cherry Point, Hertford, Kitty Hawk, Manteo, Mount Olive, Murfreesboro, Nash-Rocky Mount, New Bern, New Bern-Breakfast, North Banks (Kill Devil Hills), Oriental, Roanoke Rapids, Rocky Mount, Tarboro, Vanceboro, Washington, Washington (Noon), Williamston, Wilson, Windsor, Beaufort-Ole Towne, Bladenboro, Burgaw, Clinton, Clinton-Sampson County, Coastal Pender, District Governor 2022-2023, Duplin, Elizabethtown, Fair Bluff, Fairmont, Fayetteville, Jacksonville, Jacksonville Breakfast, Jacksonville South, Kinston, La Grange, Laurinburg, Leland Area, Liberty Point, Lumberton, Maysville, Morehead City, Morehead City After Hours, Morehead City Navigators, Morehead City-Lookout, Morehead City-Noon, Morehead City-Soundview, New River (Onslow County), Newport, Passport, Pollocksville, Red Springs, Richlands, Shallotte, Sneads Ferry, South Brunswick Islands, Southport, Southport Evening, Surf City, Swansboro, Trenton, Wallace, West Fayetteville, Whiteville, Wilmington, Wilmington Cape Fear, Wilmington Central, Wilmington East, Wilmington South, Wilmington West, Abbeville, Aiken, Aiken Sunrise, Anderson, Batesburg-Leesville, Blacksburg, Chester, Clemson, Clemson-Calhoun, Clinton, Clover, District Administrator, District Trainer, Easley, E-Club of the Carolinas, Emerald City, Fort Mill, Fountain Inn, Gaffney, Golden Strip Sunrise, Greater Anderson, Greenville, Greenville Breakfast, Greenville City Center, Greenwood, Guest of District Governor, Indian Land, Indian Land Lunch, Inman, Lake Wylie, Lancaster, Lancaster Breakfast, Laurens, Mauldin, Newberry, North Augusta, North Spartanburg, Pickens, Pleasantburg, Reedy River Greenville, Rock Hill, Seneca, Seneca Golden Corner, Simpsonville, Spartan West, Spartanburg, The Foothills, Travelers Rest, Twin City Batesburg-Leesville, Union, Walhalla, Westminster, Winnsboro, York, Manning [SC], Rumford - River Valley [ME], Exhibitor, Guest Speaker, RI Director, RI Past Director, RI Past Vice President, RI Staff - Club & District Support, RI Staff - Membership Officer, RI Staff - Rotary Foundation, RI Staff - Service & Engagement, Rotary Coordinator, Rotary Foundation Alumni, Rotary Public Image Coordinator, Rotary Regional Foundation Coordinator, Rotary Regional Membership Coordinator, Sergeant-At-Arms, Vendors