

**IMAGINE  
ROTARY**

# **RI District 7680**

**Pre PETS  
Jan 29th, 2022**



# Ice Breaker

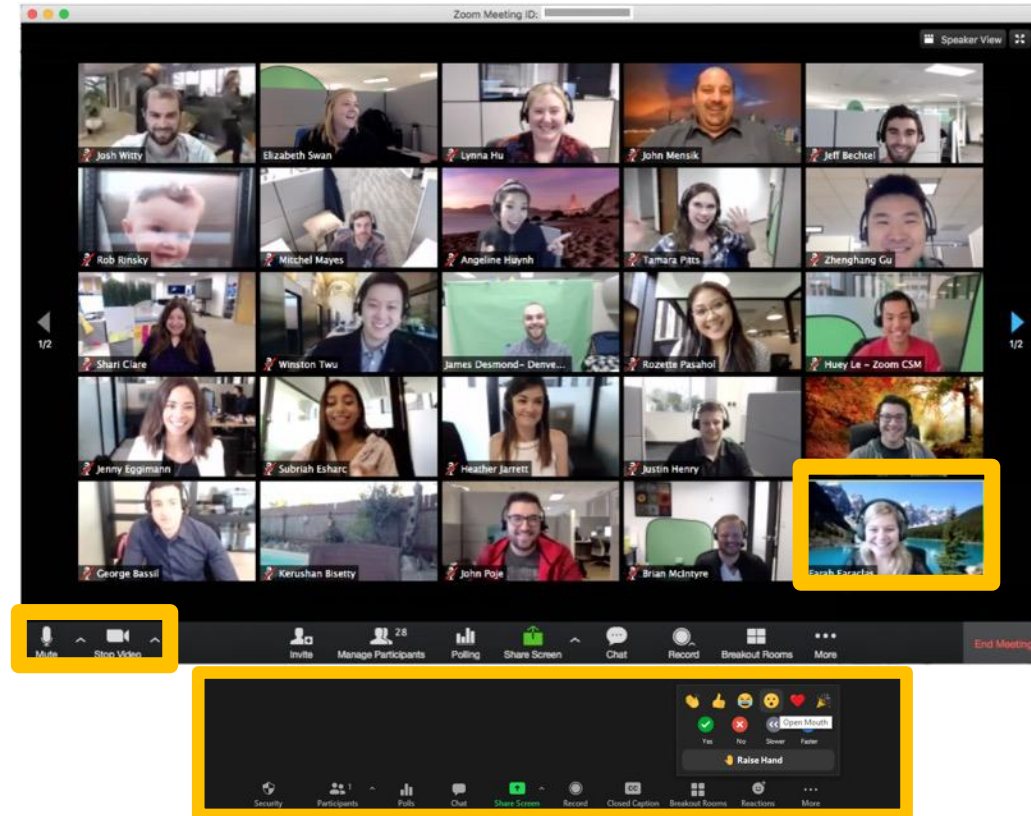


What are you most looking forward to in 2022?



# Zoom Overview

- Mute/Unmute
- Camera On/Off
- Reactions
- Rename
- Speaker/Gallery





# Agenda

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- Welcome and Introductions
- Guest Speaker - Julie Nee
- Preparation for Carolinas PETS
- Path to Club President
- Leading your Club
- Q&A

*If you have any questions on a specific topic, please raise your hand virtually through Zoom reactions or type your question in the chat window*

# Moment of Inspiration and Pledge







# Time and Talent Giveaways

- Cooking class with former White House Chef - Marti Mongiello
- How to be a great DJ - Matt Schrum
- Speak about Positivity - Julie Nee
- You break it, I help you fix it - Tech help with Kam
- Rotary Inspirational Moment ideas - Laurel Morris
- Jump Spark Your Club (I dare you!) Presentation - Debb Corbett





# Kamlesh (Kam) Chandan







*Thank  
you*





# Julie Nee



- CEO, aka Chief Energy Officer
- Leader, motivator and passionate teacher of all thing positivity
- Rotarian



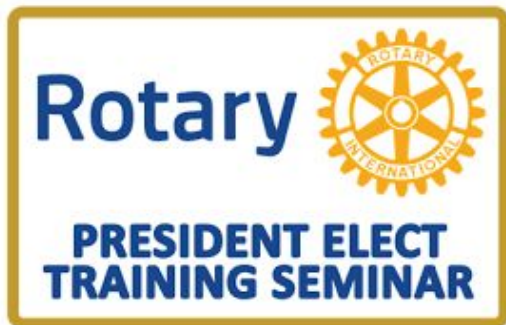
# 153

*"You have to dream before your dreams can come true." -- A. P. J. Abdul Kalam.*





# Preparation for Carolinas PETS



1. Club health check
2. Strategic Plan
3. Leadership in Action

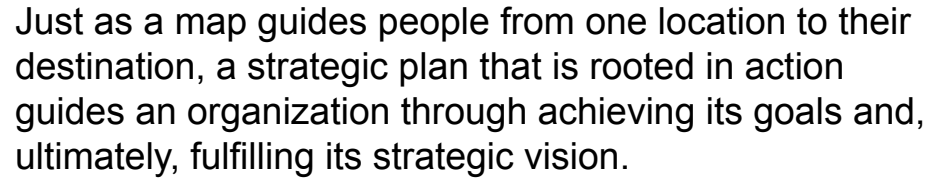
# 1. Club Health Check



- Traditions
- Members
- Events
- Partnerships
- Survey (<https://my-cms.rotary.org/en/document/rotary-club-health-check>)







Survey results have shown us that clubs that develop and follow a strategic plan are **stronger** than clubs that don't because they have **more satisfied** members who view their clubs and Rotary more **positively** overall.

<https://my.rotary.org/document/745>



## 2. Strategic Plan (continued)

### STRATEGIC PLANNING PROCESS OVERVIEW

<b>PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?</b>	<b>PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?</b>	<b>PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?</b>	<b>PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?</b>
<ul style="list-style-type: none"><li>• Identify strategic issues to address</li><li>• Determine club's strengths and weaknesses</li><li>• Assess member satisfaction and needs</li><li>• Identify opportunities and challenges in the community</li></ul>	<ul style="list-style-type: none"><li>• List five to seven characteristics you want your club to have</li><li>• Create a vision statement</li></ul>	<ul style="list-style-type: none"><li>• Set strategic priorities</li><li>• Set annual goals</li><li>• List the activities, timeline, and resources you'll need</li></ul>	<ul style="list-style-type: none"><li>• Monitor progress toward your annual goals</li><li>• If you missed your targets, determine why</li><li>• Adjust your action plans</li></ul>



## 2. Strategic Plan (continued)

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Be INTENTIONAL with your **TEAM**

**T**iming

**E**ngagement and Inclusivity

**A**ction Steps

**M**easure the impact and celebrate

# 3. Leadership in Action



Business and community leaders share a drive to continue developing new skills, both personal and professional. What if your club could offer those opportunities to members and other professionals in your community?



## ENGAGE CURRENT MEMBERS

Keep members' skills fresh by inviting them to get involved in your club's professional development program. Members can organize the event, lead sessions, or participate as learners.

Members who expand their knowledge can use their new skills to make meaningful change in their communities.



## ATTRACT COMMUNITY PROFESSIONALS

Consider offering training to community members to expose them to Rotary. Invite such prospective members as:

- + Young professionals
- + Rotaractors
- + Rotary alumni
- + Colleagues
- + Members' family and friends



## GET STARTED WITH YOUR PROGRAM

Download **Leadership in Action** from My Rotary. It's a new guide that makes it easy to develop your club's program.

It includes customizable curriculum on:

- Communication
- Leadership styles
- Mentoring
- Time management
- Goal setting
- Living our values
- Building consensus
- Teamwork
- Professional image
- Innovation



# “Imagine Rotary” in Action - 10 mins



## BREAKOUT:

- Introduce yourself - Name and Rotary Club
- What does the 2022-23 Rotary Theme mean to you?
- How will you bring it to life in your Club?
- Be prepared to share!



**IMAGINE  
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# Path to Club President



- ☐ Attend Mid-Year assembly on February 26th
- ☐ Attend PETS - March, 18th & 19th
- ☐ Attend Grants training to be eligible for District Grants - March, 26th
- ☐ Be technically competent with DACdb and my.rotary.org
- ☐ Build your team and setup roles in DACdb



# Why attend Carolinas PETS?

- ✓ Training and fellowship opportunity with Rotary Clubs in Carolinas - more than 360 Clubs
- ✓ A premier training event for Rotary leaders, Carolinas' PETS provides information, inspiration, and fellowship.
- ✓ Inspiring speakers and experienced discussion leaders
- ✓ Speakers include our RI President 22-23 Jennifer Jones, RI Staff and Zone and District leaders

**\* COVID Safety and Courtesy Protocols -**  
**<https://www.carolinaspets.org/pages#section2>**

# Who should attend Carolinas PETS?



# you

Every incoming President-Elect is required by Rotary International to attend PETS (in its entirety) in the spring immediately prior to taking office. Presidents-Nominee are encouraged, but their attendance is optional. The curriculum for the President-Elect is different from that designed for the President Nominee. Attendance at PETS by a President Nominee, does NOT satisfy the attendance requirement when later a President-Elect.

Register at <https://www.carolinaspets.org/pages/registration/getregistered>

# Purpose of District Grants



District Grants enable clubs to participate in projects that:

- Support the mission of the Rotary Foundation – advance world understanding, goodwill, and peace – humanitarian projects which improve health, support education, or alleviate poverty
- Have Rotarians involved
- Can be completed within the Rotary Year
- Address a local or global need





# Attend District Grants Seminar 3/26

One person from the Club needs to attend Grant Seminar

Dear Rotarian:

Welcome to the District Grants online zoom training which is set for;

Date: Saturday, March 26, 2022

Time: 9:00 AM to 12:00 AM

Moderators are: DGE Kam Chandan & District Grants Chair for 2022-2023 Luke Upchurch

Admin for zoom is District Secretary Wally Olson. If you have trouble logging onto zoom text or call me at 240-446-8411

After you register for this event the zoom link will be in your confirmation email and I'll also send reminders to all registered Rotarians.

**Register in advance for this meeting:**

**[https://us02web.zoom.us/join/zoom/register/tZlufuCtqT4pGdROI3ADs1SDY6\\_c5UH6PaVX](https://us02web.zoom.us/join/zoom/register/tZlufuCtqT4pGdROI3ADs1SDY6_c5UH6PaVX)**

**After registering, you will receive a confirmation email containing information about joining the meeting.**







# Introducing your new BFF: DACdb

[DACdb.com](http://DACdb.com) (pronounced DAK-DEE-BEE) is the database of our DISTRICT. It holds information on each of the Rotarians in each of the clubs within District 7680. It also holds details on club membership, projects, goals, grants and more, lets each of us send individual or group email to one another, send newsletters, announce events and other information to the rest of the clubs in District, register for classes and events, report make-ups, print a club roster, and much more.

Download the NEW mobile version from Apple App Store or Google Play Store

Lots of training available on DACdb. Contact District Secretary - Wally Olson.



# There are so many resources available to you at [my.rotary.org](https://my.rotary.org)



Rotary.org is the website for Rotary International. From there, we can log into [my.rotary.org](https://my.rotary.org), which is the RI database on clubs and members. It holds information on our projects, goals and members, and also allows us to showcase projects globally, or look for partners for global projects.

Rotary Club Central ([rcc.rotary.org](https://rcc.rotary.org)) is an online tool to help clubs set and track their goals and achievements. Club leaders, including the incoming, current, and past president, secretary, treasurer, executive secretary, Foundation chair, and membership chair can edit goals and achievements for their year in office.

Learning Modules for Club President and Officers-  
[https://learn.rotary.org/members/learn/learning\\_plan/view/2/club-president-basics](https://learn.rotary.org/members/learn/learning_plan/view/2/club-president-basics)



# BREAK TIME!



# Build Your Team



- ✓ Learn about their passion
- ✓ Know their vocation
- ✓ Have one-one conversations
- ✓ Set expectations
- ✓ Build a team



# Make Connections - How do you identify team members?

Bringing in new members	Coordinating youth activities	Fundraising	Connecting with alumni	Developing grants
Planning meetings and events	Managing financial documents	Planning awards ceremonies	Writing press releases	Foundation planning
Planning or conducting training	Creating an action plan	Cultivating new leadership	Strategic planning	Goal setting
Motivating others	Delegating tasks	Managing projects	Marketing and promotion	International service projects
Rotary Club Central	Problem solving	Public speaking	Group facilitation	Networking



# Lock down your Club Officers by 3/18

Have these key positions listed in DACdb by PETS (March, 18th)

1. President (P)\*
2. President Elect (PE)\*
3. Immediate Past President (IPP)\*
4. Secretary (S)\*
5. Treasurer (T)\*
6. Directors (D)\* - Optional
7. Vice President (VP)\* - Optional
8. Sergeant-at-arms (SAA) - Optional

\* Board members

Each officer and director shall be a member in good standing of this club..



# Next up: Fill in your Club Committees

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Have these positions listed in DACdb by PETS (March, 18th)

1. Youth Services Chair (YS)
2. Rotary Foundation Chair (TRF)
3. Membership Chair (M)
4. International Service Chair (INS)
5. Public Image Chair (PIC)
6. Community Service Chair (COS)
7. Program Chair (PC)
8. Club Trainer (CTR)



President \*  
Kamlesh  
Chandan (Kam)

# 2016-17



iPast  
President \*  
Charlie Curtis



Membership  
Chair  
Jack Simoneau



Foundation  
Chair  
Mike Hege



Club  
Service  
Chair  
Steve Kinzler



President  
Elect \*  
Tony Tascione



Youth  
Services  
Chair  
Henry Loudermilk



Sergeant  
At  
Arms \*  
John DeStefano



Club  
Trainer  
Chris  
Jones



President  
Nominee  
Programs  
Chair \*  
Shawn Barkley



Secretary \*  
Dan Mills



International  
Service  
Chair  
Rich Sampson



Public  
Relations  
Chair  
Anthony  
Cirillo



Event  
Sponsorship  
Drew Cody



Treasurer \*  
Bethany Welch



Vocational  
Service  
Chair  
Ron Gomilla



Community  
Service  
Chair  
Mike  
McDorman

\* Voting Board Members





# Leading your Rotary Club



1. Create a VIBRANT Club
2. Understand the club finances and prepare a budget
3. Build a strong succession plan
4. Attend Club Officers training for you and your team  
- April 23rd
5. Leverage communication channels
6. Get to know your District team



# 1. Create a VIBRANT CLUB



**BREAKOUT: 15 minutes in rooms, 10 minutes debrief**

Share your ideas and best practices on making your Club Vibrant in each of these areas.

**Your breakout room number indicates your topic!!**

1. Programs
2. Growing Membership
3. Service Projects
4. Engaging Youth
5. International Projects
6. Fun Meetings
7. Member Care and Engagement
8. Giving to Rotary Foundation





## 2. Understand your club finances and prepare budget



Club Presidents & Officers should be knowledgeable about club financial practices and ask questions when clarification is needed.

District team is here to help each club remain strong financially and answer any questions regarding budgeting and planning for a strong position to allow clubs to accomplish their goals and remain a strong community partner.

# 3. Build a Strong Succession Plan



- Have a joint meeting with your current leadership team and incoming leadership team
- Keep the President, President Elect and President Nominee in the loop
- Ensure continuity in leadership at every level
- Collaborate with area clubs and utilize your Assistant Governor
- Learn of the skills, ambitions or potential of members through offering development opportunity
- Make it mandatory to form a committee of at least two members

## 4. Attend Club Officers training - 4/23



- While the Club President sets the direction for the club, the Club Officers carry out the work. But where do you go to find out just what you should be doing?
- Attend the Club Officers training on April 23rd, 2022
- Zoom sessions for each Club Committee to meet with the District team
  - Collaborate
  - Share information
  - Ask questions

# 5. Leverage Communication Channels



Effective teamwork begins and ends with communication. It is important for District and Club leaders to keep the communication open, effective, collaborative and respectful. District and Club leaders are empowered to exchange ideas, ask questions, and contribute using appropriate channels.



**In Person** - One on one engaging dialogues



**Email/PMail (DACdb)** - Provide directional, important and timely information



**WhatsApp** - Encourage collaborative dialogue and information sharing between District and Club leaders



**Zoom** - For weekly, monthly or quarterly District wide meetings



**Text or Phone call** - We need your help or your attention to take timely action



**Facebook/Twitter/LinkedIn** - Like or Share your stories with your friends, community partners or public. Your participation will increase our engagement



# Use Existing PMail Distribution Lists

Committee Name
Club Presidents (P)
Club Community Service Chairs (COS)
Club Secretaries (S)
Club International Service Chairs (INS)
Club Membership Chairs (M)
Club Foundation Chairs (TRF)
Club Program Chairs (PC)
Club Public Image / Public Relation Chairs (PIC)
Club Treasurers (T)
Club Youth Service Chairs (YS)
Club Trainers (CTR)
Club Presidents-elect (PE)
Club President-Nominees (before becoming the PE) (PN)

# Join this WhatsApp group



7680 22-23 President & AG

WhatsApp group



Download WhatsApp app on your mobile device.  
Always keep the purpose of the group for Rotary  
matters only.





# Save these dates



Event	Date
Mid Year Assembly	Saturday - February 26th, Virtual
PETS	Friday and Saturday - March 18th and 19th, Sheraton Greensboro
Grants Seminar	Saturday - March 26th, Virtual
Club Officers Training	Saturday - April, 23rd, Virtual
DG and District Leadership Team Installation	Friday - June 24th, Northstone Country Club



# Know your Assistant Governor (Breakout) - 10 mins



1 Caroline Goins  
Anson/Richmond/Stanly County



2 Kevin Kendrick  
Mecklenburg County Center



2 Jerry Coughter  
Mecklenburg County Center



6 Laurel Morris  
Gaston County



8 Matt Schrum  
Ashe/Alleghany/Wilkes/Alex County



3 Peter Bagley  
Cleveland County



4 Paula Smith  
Union County



5 Rodney Holtzmuller  
Mecklenburg County South



7 Maureen Moore  
The Lake Area



10 Jeff Smith  
Central Iredell/Rowan County



9 Aimy Steele  
Cabarrus County



# Q&A





# Takeaways from Pre-PETS

**IMAGINE** starting the new Rotary year on July 1, 2022 (153 days from now)...

On a scale of 1 to 5,

1= not ready at all

2= ideas and wheels are turning

3= gaining traction

4= almost there

5= let's roll!

- I have **direction** and a plan for leading my club to thrive, make an impact, be successful, and grow
- I have **alignment** and the supporting resources and training to put my plan in action
- I have **commitment** and engagement from club members to make our plan come alive



*"Imagine, a world that deserves our best, where we get up each day knowing that we can make a difference." -- Jennifer Jones*