



RI District 7680 PETS March 18-19, 2022



Kamlesh (Kam) Chandan





Ice Breaker





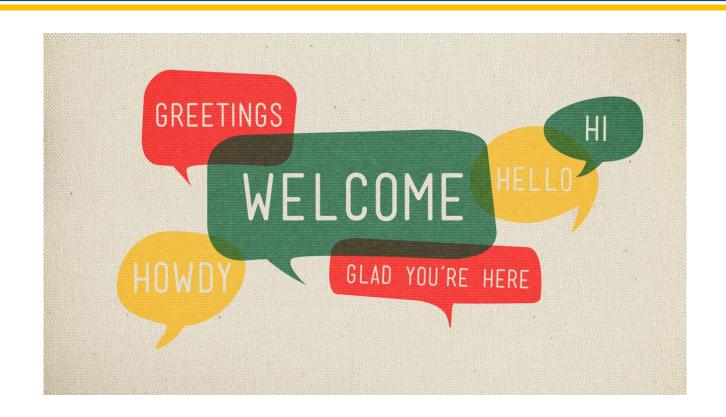


ROTAVERSARY



Agenda

- Welcome and Introductions
- What's new 2022-23 Rotary Year?
- District Goals
- Monthly Calendar and Events
- Membership
- The Rotary Foundation
- Areas of Service
- Rotary Citation
- 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

153 - 105



Feedback from PETS Survey

Opportunity to Network, Ideas to engage past members, How to build value in membership

Streamline club organizational structure

Get up to date on any Rotary International changes that have recently been implemented.

- (1) How to attract new members,
- (2) How to keep existing members engaged

District resources; District processes; Requirements of Club Presidents

Club member engagement or programs.

All things Foundation Related, District & International Grants, needlepoint

Self-care as a President with a full-time job.

How to maximize dollar value for global initiatives

Making contacts, International service opportunities, motivating/rejuvenating members and membership

How to optimize my time.

Ways to grow a struggling club.

PETS Manual

Rotary Oistrict 7680

Access the manual from District 7680 website -

https://tinyurl.com/7680resources

Imagine Rotary

Designed by Riki Salam, an Australian artist

Circle signifies connections to one another

7 dots represent people and seven areas of focus

Line represents digging stick and it is used when doing hard work

Purple for example stands for polio eradication

Green for the environment, the newest addition to our areas of focus

White for peace, our core mission.



Page # in manual for details

Name:

Rotary Club:

District 7680 2022-23 Resource Manual

Kamlesh (Kam) Chandan District Governor 2022-23

President Elect Training Seminar (PETS)

March 18-19, 2022



What's new for 2022-23 Rotary Year?

- 1. First Woman Rotary International President
- 2. Imagine Rotary 2022-23 annual theme
- 3. Annual goals
- 4. Rotaract Rising
- Imagine DEI



Jennifer Jones, RI President 2022-23

First Woman Rotary International President

Rotary Club of Windsor-Roseland Ontario, Canada

Rotary member since 1997

Founder and President of Media Street Productions Inc

Played a lead role in Rotary's rebranding effort

Co-chair of the End Polio Now Countdown to History Campaign Committee

Partner Nick Krayacich, DG 2024-25





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Theme Materials

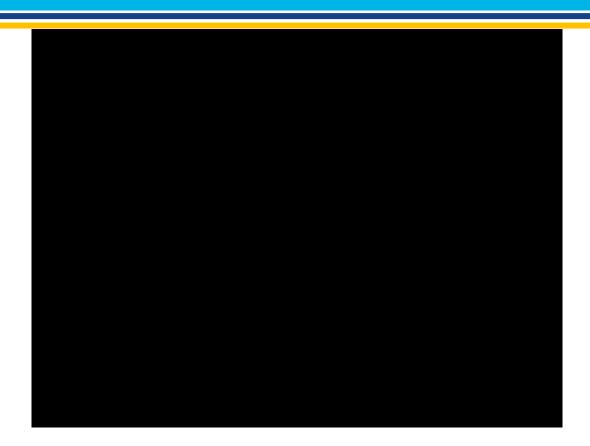
- Club Podium Banners
- Imagine Rotary Theme Pins
- Theme pins for your Club officers and members
- Gift for your 2021-22 Club President







People of Action



2022-23 Annual Goals

GOALS FOR PRIORITY 1 — INCREASE OUR IMPACT

- 1. Eradicate polio and highlight Rotary's role.
- 2. Increase contributions to the Annual Fund and PolioPlus while building the Endowment Fund to \$2.025 billion by 2025.
- 3. Develop new partnerships and showcase effective club, district, and international programs and projects particularly in Rotary's seven Areas of Focus.

GOALS FOR PRIORITY 2 — EXPAND OUR REACH

- 1. Elevate Rotary's global profile as people of influence, people of purpose, and people of action.
- 2. Start and nurture new, innovative clubs and participant engagement channels.

2022-23 Annual Goals

GOALS FOR PRIORITY 3 — ENHANCE PARTICIPANT ENGAGEMENT

- 1. Enhance member engagement tools that support Rotary's core values through personal growth, leadership development, service, and networking opportunities.
- 2. Increase collaboration between all participants particularly Rotary, Rotaract, and Interact clubs.

GOALS FOR PRIORITY 4 — INCREASE OUR ABILITY TO ADAPT

- 1. Support and encourage the use of virtual connectivity to optimize in-person meetings, training, fundraising, and service projects.
- 2. Further a commitment to Diversity, Equity and Inclusion at every level of leadership within the family of Rotary.
- 3. Review our service delivery and volunteer leadership structure to improve effectiveness, responsibility, and accountability.

Rotaract Rising

D7680 is **The Birthplace of Rotaract**

- 1. Rotaract is now a type of Rotary membership
- 2. New Rotaract clubs can form with or without a sponsor
- 3. Either a Rotaract club or a Rotary club can serve as a sponsor
- 4. Rotaract is open to all young adults ages 18 and over. There is no longer an upper age limit of 30
- 5. Rotaractors are now eligible to serve on district-level and RI committees
- 6. Rotaractors will enjoy greater support, training, and access to tools from Rotary
- 7. Beginning 1 July 2022, Rotaractors will pay annual per capita dues of either \$5 or \$8
- 8. Beginning 1 July 2022, Rotaract clubs will be able to serve as international or host sponsors of global grants, if they have previously partnered with a Rotary club on a global grant





Imagine DEI - 2022-23 Presidential Initiative

Diversity - Variety in a group of people's backgrounds, experiences, and identities, including their age, ethnicity, race, color, disability, learning style, religion, faith, socioeconomic status, culture, marital status, languages spoken, sex, sexual orientation, and gender identity

Equity - Differing levels of support, opportunities, and resources so all participants have a welcoming and productive experience according to their needs or circumstances

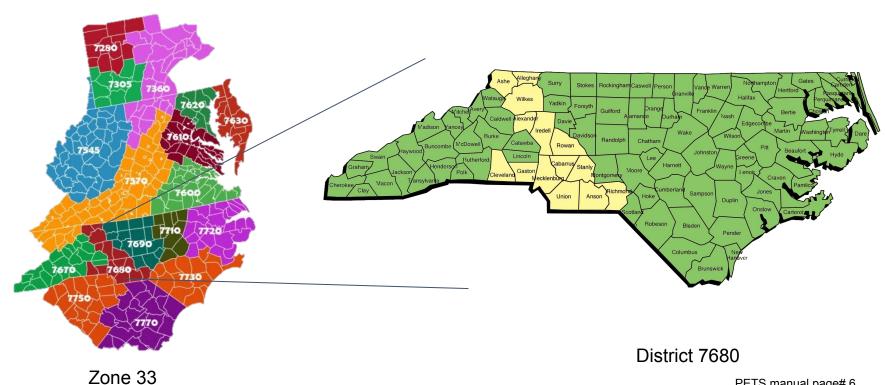
Inclusion - Creating experiences in which all people are welcomed, respected, and valued



Exemplify our commitment to DEI

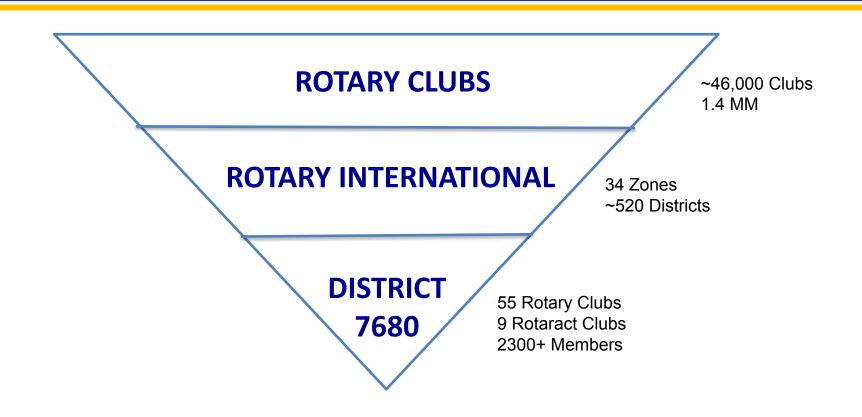
- Learning more about DEI in Rotary
- Determining why DEI matters in our own club and our own area, and how using these principles can help our club grow and make it stronger
- Raising awareness and increasing understanding about DEI
- Taking action on DEI in our clubs and in our communities
- Create opportunities for Rotarians, Rotaractors and Interactors to tell their own DEI stories
- Use inclusive language, photos, and videos in all your communications to show people from all groups that they have a place in Rotary and that their contributions are valued

District 7680



PETS manual page# 6

District 7680



District 7680 DG Chain



@dg2022-23 - Kam Chandan Rotary Club of Lake Norman-Huntersville



@dg2023-24 - Debb Corbett Rotary Club of Mecklenburg County South



@dg2024-25 - Kevin Kendrick Rotary Club of Charlotte Dilworth South End

Erika Erlenbach - Chief of Staff

Supports and works with District Governor

Be a resource, sounding board, and confidant to the District Governor

Assist and help develop Club Presidents, Assistant Governors, and the District Leadership Team

Schedule District Governor visits, one-one meetings, District meetings



Areas of District 7680

AREA

1

Anson/Richmond/Stanly County
Clubs

AREA
2
Ashe/Alleghany/Wilkes/Alex
County Clubs

AREA

3
Cabarrus County
Clubs

AREA

4
Cleveland County
Clubs

AREA

5
Gaston County
Clubs

AREA 6 "The Lake Area" Clubs

AREA
7
Central Iredell/Rowan County
Clubs

AREA
8
Mecklenburg County Center
Clubs

AREA
9
Mecklenburg County South
Clubs

AREA
10
Union County
Clubs

Assistant Governors



Caroline Goins
Anson/Richmond/Stanly County



Revin Kendrick
Mecklenburg County Center



S Jerry Coughter
Mecklenburg County Center



5 Laurel Morris Gaston County



2 Matt Schrum
Ashe/Alleghany/Wilkes/Alex County



Peter Bagley
Cleveland County



Paula Smith Union County



Rodney Holtzmuller
 Mecklenburg County South



Maureen Moore
The Lake Area



Jeff Smith
Central Iredell/Rowan County



3 Aimy Steele Cabarrus County

PETS manual page# 60

District Goals

- Consistent and moderate growth in membership, be intentional in trying new ideas
- Engage your club members
- Celebrate equity, diversity and inclusiveness in our Rotary clubs
- Grow clubs' international service by twinning, service projects and global grants
- Improve understanding of and passion for The Rotary Foundation
- Identify, involve and engage service minded young people in club and district activities
- Promote positive public image and share your Rotary stories
- Partner with organizations, corporations and other Rotary clubs to do good and make an impact in your local and global community

District Budget

Review and Approve District Budget

Review Monthly Calendar

Monthly Rotary themes

AG Visits - July/August

DG Visits - Starting September

District events

Monthly Submission for District Newsletter - 25th

Review and update club goals

Check **DACdb** for details



Your BFF's for 2022-23

















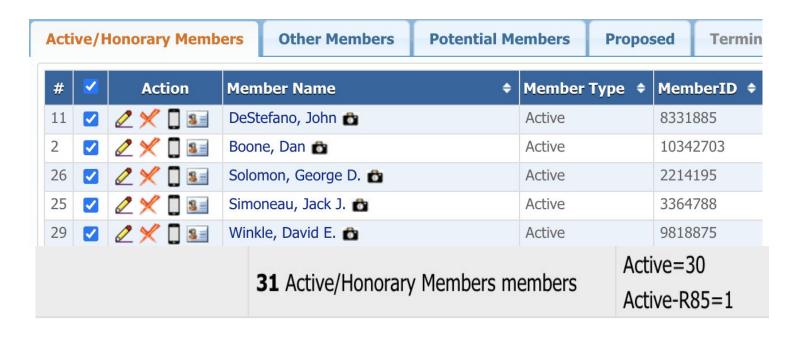
Membership - Value Proposition

- Making your club relevant
 - Host professional development opportunities;
 - Offer leadership development opportunities, including our partnership with Toastmasters;
 - Connect seasoned veterans with younger professionals in mentoring relationships;
 - Provide networking opportunities beyond your club;
- Making your club fun
 - Have engaging and fun social events;
 - Make our events easy to bring the entire family to attend
- Club and community engagement
 - Provide a variety of service projects both local and international;

Refer to the 20 Benefits of Rotary membership in your resource manual



Membership #s in DACdb



Verify and confirm your membership on **June 15th** and **June 30th**

Engagement - Recognize Rotarian of the Month

Some guidelines for your consideration. Ask members to vote end of each month.

- Rotarian Engagement Attend, lead or participate at club meetings, socials, event or fundraiser planning meetings and visiting other clubs. Bonus for posting selfie, share or like our Club's posts on social media.
- Membership brings a friend to our club meetings, attracts a new member, mentors a new member
- Programs brings in a Program Speaker
- Club Innovation an idea to improve our club
- Advances Leadership steps up during the next year for a leadership position
- Have Fun makes the club meeting fun for members and guests
- Support Rotary Foundation gives at least \$25 each quarter to the Foundation
- Attends District events Foundation Celebration, Assembly, District Conference etc.

Member Care

- Buddy for each member
- Follow up with a phone call or personal message if you don't see them at your club meeting
- Send flowers/card on special occasion
- When new members join Rotary Celebrate!
- When members give to the Foundation, recognize them at your club meeting
- Have socials with their family
- Encourage them to bring a guest at your club meeting

Work on your Membership Plan



Membership Goal Setting Worksheet

District 7680 Mecklenburg County-

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

 Annual Attrition Rate (3-year average):
 12.1%

 Annual Attraction Rate (3-year average):
 12.1%

 Annual Net Growth Rate:
 %

Success Targets

Attrition less than 15%

(July 1 membership x .15)

Attraction 5% greater than Attrition

The problem we need to solve is:

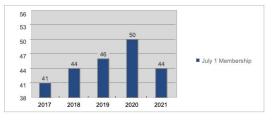
- Low Retention -- Our Attrition Rate Exceeds 15%
- Insufficient New Member Attraction Our Attraction Rate is less than 5% above our Attrition Rate
- Neither We need to build on our current membership growth culture and strategies

Membership History

2022-2023 M	Membership	Goal	Setting
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Club Year	Members at start of year (July 1)	
2021-2022 (Current Year)	44	
2020-2021	50	
2019-2020	46	
2018-2019	44	
2017-2018	41	

Starting Membership July 1, 2021	44	
Current Membership 2/1/2022	42	
Estimated Membership July 1, 2022		(a)
Membership Goal July 1, 2023 (July 1, 2022 Start + Growth)		(b)
Net Membership Growth Challenge = 10% or 10 members		(c=b-a)
Average Annual Attrition to Replace (Greater of <u>Actual</u> or <u>10% = World Class</u>)	6	(d)
New Members Needed (Growth + Attrition)		(c+d)



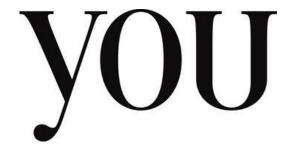
https://tinyurl.com/7680resources#mbr

Download Report - <u>7680 Membership Goal</u> <u>Setting w Current 2022-23.pdf</u>

Membership leadership by example

+1 June 30

+1 July-August





OUR Rotary Foundation

The Rotary Foundation transforms your gifts into service projects that change lives both close to home and around the world.





Making the difference - 2021 Annual Report

\$25 million+

awarded in grants to support COVID-19related service projects to meet immediate community needs

\$440.9 million

raised by The Rotary Foundation to support programs that spur positive, lasting change

117

Rotary Peace Fellows were selected to study at Rotary Peace Centers to become catalysts for peace 530

members of The Rotary Foundation Cadre of Technical Advisers helped Rotary members plan and review service projects and apply for Rotary Foundation grant funding

20%

of Rotary clubs helped drive our effort to expand our reach and increase our impact by participating in a Rotary Foundation global grant 4 stars

awarded to The Rotary Foundation by Charity Navigator, for the 13th year in a row — demonstrating our commitment to accountability and transparency

SUMMARY STATISTICS

Contribution summary	2020-21	All-time contributions
Annual Fund	\$139.4 million	\$3.0 billion
Endowment Fund	\$32.6 million	\$447.0 million
PolioPlus Fund	\$133.2 million	\$1.9 billion
Other*	\$49.4 million	\$327.7 million
Total outright contributions	\$354.8 million	\$5.7 billion
Total new commitments to the Endowment Fund	\$69.4 million	\$882.2 million
Polio transfers**	\$16.7 million	-
Grand total	\$440.9 million	÷
Program awards & operations	\$352.3 million	Since 1947: \$5.3 billion

Totals are rounded.

- * Cash contributions to global grants, directed gifts, and contributions to the donor advised fund
- ** District Designated Fund transfers and the resulting World Fund match to PolioPlus, affinity card royalties, and donor advised fund transfers to PolioPlus

Rotary Direct

Rotary Direct saves...

Time - Sign up once to give continuous support

Money - Lower administration costs means more money for programs

Lives - Give to The Rotary Foundation to do good in the world

ROTARY DIRECT
Rotary's recurring giving program

Happy Club Treasurer AND Happy Club Foundation Chair

Other ways to give share your \$\$









THE EASIEST WAY:

name us as a beneficiary of all or a portion of your existing life insurance policy



THE SECOND WAY:

Name us as owner & beneficiary of a policy you already own or a brand new policy.



Million Dollar Challenge

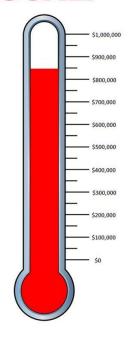
Raise a minimum of \$1,000,000 USD in new donations for programs of The Rotary Foundation from July 1st, 2022 to June 30th, 2023

Minimum donations of \$10,000 USD from each donor in cash, securities or a bequest

Recognize and Celebrate the Donors at Million Dollar Dinner



GOAL!



Celebrate and Recognize





100%

Foundation Giving Club Paul Harris Fellow Club Rotary's Promise Club Paul Harris Society Club Every Rotarian, Every Year









Let's do some classwork



Recap

- 1. What is our annual theme for 2022-23?
- 2. Who is point of contact for scheduling meetings, District Governor visits etc?
- 3. What is the website for 2022-23 resources?
- 4. What is the date to submit articles to District newsletter every month?
- 5. Where will you list the club officers for your club?
- 6. Where will you set the annual goals for your club?
- 7. What is the date to verify and confirm your membership numbers?
- 8. What is the 2022-23 Presidential Initiative?
- 9. How many clubs are there in our District?
- 10. Without _____ we cannot make an impact

International Service

International Service exemplifies our global reach in promoting peace and understanding.

We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more

International Service offers Rotarians an opportunity for international fellowship with an important difference - humanitarianism.



International Service - Opportunities

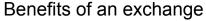
- Attend RI Convention in Houston
- Twin Club Program
- Rotary Youth Exchange
- Rotary Friendship Exchange
- Global Grants
- International Service projects https://my.rotary.org/en/exchange-ideas/project-fairs
- Include Interact and Rotaract clubs



Friendship Exchange

Friendship Exchange is an international exchange program for Rotary members and friends that allows participants to take turns hosting one another in their homes and clubs.

Participants may travel as individuals, couples, families, or groups, and may be Rotary members or not.



- Broaden international understanding
- Explore a profession or job in a different context
- Build enduring friendships
- Establish a foundation for peace and service
- Gain opportunities for active project involvement and support
- Learn about a region's people, food, languages, customs, and history
- Find partners for grants







Rotary Fellowships

Caravanning Bathhouse Cruising E-Club Surfing Fishing Internet Healthcare Professionals Beer Magicians Badminton Railroads Scouting Tennis Cricket Yachting Antique Automobiles ROTARY **FELLOWSHIPS** 90+ fellowships are active as of 2021 with more being formed each year. 130+ countries are home to fellowship members.



Find more information at rotary.org/fellowships.



Flying Executive Managers Cycling
Latin Culture Rowing Music
LGBT Genealogists Triathlon
Amateur Radio Editors and Publishers

Gourmet Cooking
Public Health
Marathon Running
Gin Bee Lawyers

Youth Programs

Rotary believes in developing the next generation of leaders. Our programs help younger leaders build leadership skills, expand education and learn the value of service



Rotary Youth Exchange



Interact Clubs (School and Community based)



SFTL - July 14-17, 2022

Supporting your Interact Club

Interact Advisers at school: Your Interact Champions

- Collaborate
- Guide
- Promote Service
- Learn Together
- Strengthen Connections
- Innovate
- Celebrate Successes









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/meeting/register/tZlufuCtqT4pGdROI3ADs1SDY6_c5UH6PaVX

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

Global Grant in D7680

- Have a long-term, sustainable impact
- Include activities that align with the goals of one of Rotary's areas of focus
- Have a minimum budget of \$30,000
- Address an important need identified by the community
- Strengthen the community's capacity to address its own needs
- April 1st Identify the project and get it approved by District team
- May 1st Write the grant and submit to Rotary Foundation GG Co-ordinator

District Designated Fund match up to 10,000 USD

Community Service

- Encourages and fosters the ideal of service to the personal business and community life of every Rotarian
- Opportunities for every Rotarian to exemplify "Service Above Self"
- A chance to respond to the needs of a local community
- Seen by community members
- Brings attention to your club
- Positively impacts the lives of Rotarians and non-Rotarians
- Consider partnering with other Rotary Clubs in your area or District





Projects ideas













Public Image / Public Relations

- Publicize your projects and activities to influence how your club is perceived
- Share stories about how your club's projects affect the lives of people in your community
- Present your club as vibrant and your members as people of action
- Get to know Reporters in your area
- Invite Journalists to your club projects and major events
- Share stories on social media and <u>blog@rotary.org</u>
- Submit by 25th of every month for District Newsletter https://tinyurl.com/7680districtnewsletter







Great Story - It's all about the message



Peace, Conflict Resolution and Prevention

- Become a Peacebuilding Rotary club
- Educate Rotarians about the "Pillars of Positive Peace" to implement peace building standards in their projects.
- Align the Pillars of Positive Peace with the Seven Areas of Focus of Rotary.
- Support Rotary's Peace Fellowship Program and Peace Centers







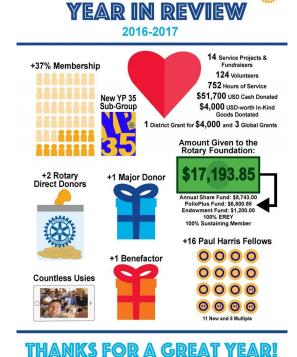
CART - Coins for Alzheimer's Research Trust

- Have an active CART program which encourages the ongoing support of CART
- Each club will actively solicit contributions to CART and will forward them to CART on a monthly basis
- Subscribe to the CART newsletter which comes by email
- The CART website is cartfund.org. Contributions can be made online through the contribution online portal which is mycartfund.org





Rotary Year - Year in Review



Rotary Club of Lake Norman-Huntersville (XX)

DG Installation

Date: Friday, June 24 2022



Membership, Foundation and Public Image Seminar

Date: Saturday, September 17 2022









Foundation Celebration and Service Project

Date: Friday, November 18 2022













Fun, Fellowship and More Service Projects

Date: Friday, May 5-7 2023













2022-23 Rotary Citation

The Rotary Citation recognizes a club's great work and achievements throughout the year.

Earning the Rotary Citation is easy for Rotary clubs:

- 1. Go to Rotary Club Central
- 2. Review the available goals
- 3. Set goals for more than half of the available goals (at least 51%)
- 4. Achieve those goals
- 5. Report your achievements in Rotary Club Central
- 6. Celebrate!

The Rotary Citation is electronic only

Clubs will have the entire Rotary year (from 1 July 2022 to 30 June 2023) to achieve Rotary Citation goals

Let's get this done in our District by May 1st, 2023



SAVE THE DATE: Save these dates

Event	Date
Grants Seminar	Saturday - March 26 Virtual
Club Officers Training	Saturday - April, 23 Virtual
DG and District Leadership Team Installation	Friday - June 24 Northstone Country Club, Huntersville
Membership, Foundation and Public Image Seminar	Saturday - September 17 TBD
Foundation Celebration	Friday - November 18 Great Wolf Lodge, Concord
Joint District Conference	Friday - May 5-7 2023, Le Méridien Charlotte, Charlotte

How will YOU measure a year?

How about love? How about love? How about love?

525,600

On July 1, the clock starts ticking.....how will YOU use these minutes?

Jennifer Jones

"Imagine Rotary" in Action

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

Be creative, think out of the box ideas -

- Membership
- Service projects local and global
- Partnerships
- Further a commitment to Diversity, Equity and Inclusion







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