



**ROTARY FLORIDA PETS
OPERATIONS MANUAL**

Spring, 2016

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ROTARY FLORIDA PETS

Rotary Florida PETS is the state-wide training organization for Presidents Elect in the (8) eight Rotary Districts in Florida. The Executive Committee, composed of the Chair, Chair-Elect, Secretary/Promotions, Treasurer, and Training Officer, is responsible for ensuring a high quality, smooth running event focused on primarily, the training of the PEs, but also offering training for Assistant Governors, Rotaractors, and Partners/Spouses.

This is a manual designed to provide a working 'job description' for each of the committee and subcommittee chairs outlining their key responsibilities, timelines, and resources needed. Each year, the PETS Committee strives to improve efficiencies and implement best practices. This manual should be reviewed at the conclusion of each PETS to confirm and update the information for the next year's committee chair.

Established in 2004, Rotary Florida PETS is continually evolving based upon the experience of each successive PETS event. The overall organization consists of the following positions:

Executive Committee and Committee Chairs:

- Chair
- Chair-Elect
- Secretary
- Treasurer
- Training Coordinator
- Operations Chair
- Registrar
- Executive Administrator

Sub-Committee Chairs include:

- VIP Coordinator
- Palace Guard Chair (sgt-at-arms)
- House of Friendship
- Rotary Store
- Hotel Liaison

- Production Chair
- Rotaract Chair
- Partner/Spouse Chair
- Equipment Coordinator

An organizational chart of the Rotary Florida PETS organization can be found in Appendix A.

Following are job descriptions and responsibilities of each of the key positions required to manage a successful PETS.

Rotary Florida PETS General Chair

Duties:

In collaboration with the Board of Directors (current year's District Governors Elect) and Executive Committee, the Chair is responsible for the management of planning and producing the training event for all of Florida's Rotary Clubs' Presidents-Elect and their partners, Assistant Governors, Rotaract leadership and any other Rotary identified target audience as determined by the Board.

The Chair sets the meetings schedule for the year. There are usually (4) four meetings scheduled:

- a. During the PETS event, the current Board meets on Friday with the primary responsibility of selecting the Chair-Elect for the following year. [Exec Committee + Board]
- b. During the PETS event, the incoming Board will meet 1-3 times at the discretion of the Chair-Elect to begin their planning. [Exec Committee + Board]
- c. The second meeting is generally held in the summer; dates TBD by the Chair/Board. [Exec Committee + Board]
- d. The third meeting is held during the Zone Institute, typically on Saturday when the Institute activities break for the day. [Exec Committee who will be at Zone + Board]
- e. The fourth meeting is held within the first weekend of January, prior to the DGEs participation in International Assembly. [EC/All Committee Chairs + Board + Discussion Leaders + District Trainers]

General Duties of the Chair:

March:

The Incoming Board and Executive Committee will convene at PETS to discuss speakers for the coming year and securing their commitments as early as possible, any changes in schedule, Rotary groups to be trained, and considerations about selections of Operating Committee posts and Discussion Leader requirements for the next year.

In addition, recommendations and/or concerns about the venue, possible suggestions for key Executive Committee members, and any direction for future contract negotiations may also be covered.

The Chair should set the dates for the planning meetings throughout the year and work with the Hotel Liaison to secure the appropriate meeting rooms at the hotel for those dates.

The Chair should identify a webmaster who can update the web content as needed.

April-June:

Secure speakers for next year's PETS, if possible. Identify open PETS positions and solicit recommendations from the Board and the Executive Committee. The priority is to identify the best individual for the position, with a strong recommendation that every attempt be made to have each district represented. The Chair should make the final decision to ensure a team that works well together and is focused on implementing an exemplary event.

Working with the Treasurer, the Chair will recommend a budget for Board formal approval at the summer meeting. The recommended budget should be sent to the Board approximately 2 weeks prior to the meeting for their review.

Confirm the hotel is ready to honor their commitments to PETS in price, meeting space availability, food selections/food pricing, and room rates/availability. Discuss prior to summer with the hotel's point person what other conventions might be competing for space during the PETS weekend so that we can be prepared for other groups in the hotel.

Study the evaluations from the previous PETS and make them available to the Board for their review. Prepare any recommendations or observations from these evaluations to be shared at the summer meeting.

Make reservations for attending the Multi-District PETS Alliance meeting in Evanston, IL in July. Make sure the key members of your team attend. There are no requirements for who should attend. In years past, it has been the Chair and Chair-Elect, the Operations Chair, Secretary, Training Chair among others. Our current budget generally allows for 3 -5 people to attend; however, the Chair may elect to split the allocated amount amongst several possible attendees. Others may attend if they are willing to pay their own way and have the approval of the Chair.

June-August:

At the summer meeting, the following should be discussed:

- Budget should be discussed and approved;
- Operations Committee appointments approved; by this time personnel should be in place.
- Discuss and finalize what Rotary groups should be trained at PETS (Partners, Rotaract, AGs, others). Confirm the Training Coordinator is prepared to appoint facilitators or leads for each Rotary group. Review any training issues to be addressed by the Training Coordinator.
- At this point, possible speakers who have been suggested by the Board should have been contacted. While Florida PETS will not secure the participation of the RIPE every year, it is important to contact RI early (identify the RIPE's support personnel) and confirm request for the RIPE. This individual will be the President during the Board's Governor year. They are usually named in late Spring or early summer, but

their scheduling secretary at RI may already be appointed and sending an invitation even prior to their selection is encouraged. Confirm with the Board.

- Plenary sessions should be finalized (how many and when on the schedule).
- Training Coordinator should discuss selections for Discussion Leaders and request a list of suggested DLs from each of the DGEs. The Training Coordinator will develop a recommended list of DLs that will be distributed to the DGEs. Each DGE will have the opportunity to review, make recommendations, and/or edit the list from the Training Coordinator. The Training Coordinator makes the final selection from the list approved by the DGEs. No selection from any district should be made without that district's DGE approving the list from which they are chosen.
- Results of the evaluations should be discussed and any changes should be reviewed and approved at the meeting.
- Discuss any other "hot button" issues which may have arisen among the Board or which they or the Executive Committee feel need to be discussed.
- Set the expectations of the Board for the decisions they will need to make this year: The primary appointment the Board will make is the nomination/selection of the Chair-Elect
- Discuss who is going to the Alliance meeting. The Chair should be prepared to make the recommendations.

September - December:

- Contact the Zone Institute Chair and request space for a Florida PETS meeting, usually held during the free time at Zone on Saturday afternoon. May need to also make arrangements for lunch.
- Secure the speakers for PETS. By the time of the Fall Meeting, all speakers should be in place and confirmed. Confirm RI President-Elect's acceptance or rejection.
- Discuss Chair's Expectations with each of the key personnel (if not done already).
- Request that a Vendors List for the HOF be created, based upon the past year and any recommendations from the Board. Develop materials order for Rotary Store.
- Confirm Discussion Leaders for PETS and invite them to the January meeting. Confirm and invite the Operations team to the January meeting and advise them they are to report on their area in January.
- Discuss with Training Coordinator what the expectations are for the Discussion Leaders and the curriculum changes based on what the Board desires.
- Make sure that Exec Administrator has clear idea of what items to order (and orders them) for PETS.
- Encourage the VIP Coordinator to stay in touch with the speakers. Send a note to them every 2-3 months about something involving Florida PETS. This helps them to tailor their remarks to Florida but also reminds them that we are counting on them to give us their best.
- Work with Registrar to resolve any issues or obstacles that come up.

- Make sure that the Secretary and Registrar sends out email to all DGEs and other participants reminding them that registration is open.
- Update Rotary Florida PETS website with as much of the new information as possible. This will now be an ongoing process that should be completely finished by the January meeting.

Fall Meeting:

- Present any Operations appointments made since the last meeting for approval.
- Present the candidates from all districts for Discussion Leader to the Board for discussion and approval. Discussion Leaders will need to be invited to serve shortly after this meeting so they can plan for the January meeting.
- Key items for discussion at this meeting include:
 - Changes to the budget that may be needed;
 - Final speaker's list and plenary session lineup;
 - Items that are to be purchased and distributed at PETS, e.g., padfolios or other items. Once approved, the Exec Administrator is responsible for ordering.
 - Registration procedures for each of the training groups and any visiting President Elects. Registration should already be open (approximately September 1).
 - Training Coordinator: Pre-PETS and recommendations on what should be covered. Some districts begin their pre-PETS in November so this is critical information for them to have.
 - The agenda for the January meeting (training DLs and Dist. Trainers and Rotaract trainers). Make sure everyone knows that this is an "all hands" meeting.

January: (Final meeting prior to PETS – This is an "All Hands on Deck" meeting)

- Conduct meeting with Executive Committee and hotel key staff day before PETS meeting *if needed*;
- The Thursday Optional Sessions, the Plenary Sessions, and the GBO/DBO schedule should be finalized.
- Review any budgetary, hotel, or personnel issues. Confirm that each district has paid its bill to PETS.
- Review and hand out copies of Hotel Expense Policy to remind each DGE who PETS pays for and who the districts pay for.
- Have Executive Administrator and Registrar report on their areas and staffing needed at Registration. **All DGEs should have pictures and bios to Executive Administrator after the summer meeting.** The website needs to be refreshed for the coming year.
- Have every Committee Chair report on their tasks and progress made or needed. Make needed changes at the meeting.

- There will be some last minute requests for help from some areas. Make sure someone is appointed and given a time-line to resolve those requests.
- Ask the Executive Committee to copy the chair on all PETS related memos starting at the January meeting. While time consuming, is a great way to understand what is working well and what areas need some assistance.

January-March:

- Final preparations are made.
- Confirm with Executive Administrator the ordering schedule and the program print date. The Executive Administrator and the Webmaster must have speaker bios, pictures and schedule for PETS to go to press. Chair needs to know that deadline.
- Develop schedule and rooms assignments for PETS, beginning with the Optional Sessions on Thursday. Give this information to the Executive Administrator and the Training Coordinator. Approve the menus with the hotel.
- Confirm the setup arrangement with the hotel for each type of room: District Breakout, PE Breakout, Thursday optional sessions and plenary sessions.
- Work with Hotel Liaison to determine what VIPs get assigned to what rooms (some VIPs may prefer lesser room in main building so you need to ask that question of each of them). Hotel Liaison will help determine how many comped rooms we have, reserved suites, etc. Work with them to determine who gets comped rooms. Prepare with him/her the Hotel Master Housing List and provide to the hotel. The hotel likes to provide something nice in the rooms for the VIPs and Exec. Committee.
- Give Treasurer a list of who is to be included on the Master Billing for the hotel. This is the group that PETS pays for per the Hotel Expense Policy.
- Refer to Appendix B re: the master list and PETS financial responsibilities.
- Confirm with the hotel when meeting spaces should be available to PETS (this changes each year due to other conferences they may have at the same time). Provide this information to Operations Chair, Exec. Committee, Registrar, and Executive Administrator.
- Review the following:
 - Vendors and Projects in the HOF;
 - A/V requirements in each District breakout room;
 - Surveys prepared with the Chair-Elect's approval;
 - Rotary Store material has been ordered and chairperson has materials needed to provide PEs with a "goody bag" of literature.
 - Signage needs to be ordered by February 1, if needed. All the signs and banners have been made by Signs by Tomorrow in Jacksonville (ask for Stephanie). They have the logos and background we have used since we have been at the BVP Hotel.

- Handle all issues brought up by the DGEs.
- Work with Chair-Elect to prepare a detailed agenda for PETS. This includes ALL activities, starting on Wednesday, including dinners prior to PETS and who is invited, all preparatory meetings and who needs to be there. It includes the scripts used at the Plenary Sessions. Chair-Elect will assign 2 DGEs to each meal plenary session to host, based on personality, relationship to the VIP they might introduce, or other whatever criteria you think is important to have the plenaries move along smoothly.
- If a Rotary Foundation officer is coming, request a signed tie or scarf to auction off. Decide who is to do the auction. The highest ranking VIP may want to auction those off on Friday night.
- Ensure the Treasurer has paid the hotel all of the deposits they require.
- Ensure the Treasurer and Registrar will be prepared by Saturday at PETS to present each district with their final billing.
- Discuss with the Palace Guard Chair the pre-conference events he/she wants to have prior to the beginning of PETS. The schedule timeframe for this is generally a lunch on Thursday. This is a very valuable event to set the expectations of the DGNDs as to what they will learn at PETS and why. In addition, this is an excellent opportunity for the DGNDs to meet with Zone Coordinators and/or their Associates to learn more about Zone Resources.
- Make sure the Chair-Elect and/or designate has the storage locker key and plans to bring all materials to PETS by Wednesday morning or whenever the Chair determines they are needed.
- A full meeting with the Executive Committee and the Hotel will be held on the Thursday morning of PETS.
- Plan for the final “all hands on deck” meeting with ALL staff at some point on Thursday morning.

General Comments:

1. The Chair-Elect should be included on all emails; other positions that might be affected by the information should be included as needed. This is a team effort.
2. Always remember to invite the DGNs and DGNDs to the meetings where the DGEs will be. Include them in your emails to the DGEs so they can see some of the issues they will be facing in the future.
3. For any VIPS who are available, plan a dinner on Thursday night for the DGNs and/or DGNDs offering an opportunity for the incoming Governors to meet/socialize/discuss issues with our Rotary VIPs.
4. Exec. Committee should arrive at PETS on Wednesday afternoon. A dinner that night seemed to be a good tool for setting the tone for the days ahead.
5. Keep the hotel informed of changes in schedules. They have been very collaborative and like to know what is coming up.
6. Have one-on-one phone calls with the DGEs during the year. This goes a long way to heading off any problem issues before they get out of hand.

7. **Be ready and willing for last minute changes. They happen each year. Keep them in a small circle of the people that need to know. Make a commitment to try and keep these out of view of the PEs.**
8. **MAKE PETS FUN!! This can be a stressful task but if everyone comes in with a good attitude and smiles on their faces, it makes a world of difference.**

Chair-Elect

The Chair-Elect should shadow the Chair in preparation for the year for which they will be responsible. The primary responsibility will be the development of the “script”, but may assume other responsibilities depending upon the Chair.

The Chair-Elect will take the lead, but work closely with the Chair to prepare a detailed agenda for PETS. This includes ALL activities, starting on Wednesday, including dinners prior to PETS and who is invited, all preparatory meetings and who needs to be there. It also includes the scripts used at the Plenary Sessions. Chair-Elect will assign 2 DGEs to each meal plenary session to host, based on personality, relationship to the VIP they might introduce, or other whatever criteria is deemed to be important to have the plenaries move along smoothly.

The Chair-Elect will work with the DGNs to prepare them for their role with Rotary Florida PETS.

In addition, the Chair-Elect should be prepared to back-up any specific area that needs additional support.

Evaluations

The Evaluations Committee conducts (2) types of evaluations: a) a quick snap evaluation of the optional sessions on Thursday; b) a more thorough survey of the total event. The quick snap is done on Thursday after the session. At this point, Florida PETS is using software that will provide instantaneous feedback. Since software continues to change, it is recommended that any Evaluation Chair closely follow how data has been collected considering ease, access, and useful feedback.

Shortly following the event, preferably on the Sunday after the close of PETS, a link to a survey is distributed to all participants. Collecting demographics will assist the incoming Board, Chair and Committee in identifying what worked/didn't for the target audience (Presidents Elect) and the sub-target audiences (Partners; Rotaractors; AGs). The evaluation document should be re-evaluated each year to ensure the PETS BOD and Committee are getting information that is actionable – whether by the hotel or the committee. The current software being used is Survey Monkey.

Secretary/Promotions

The Secretary generally serves a two-year term and is responsible for recording and maintaining the minutes at each of the (4) Board meetings, as well as any other meetings of the Board and/or Executive Committee and distributing them to the Board and Executive Committee. [NOTE: The Secretary and Treasurer, while both serving 2 years, who be appointed to serve staggered terms.]

In addition, the Secretary is also responsible for the promotions for Rotary Florida PETS, which includes:

- Rotary Florida PETS website (www.rotaryfloridapets.org)
- (4) emails from the Chair to the President Elects [Updates]
- (4) emails from the Training Coordinator to the President Elects [Training Matters]

While the Chair and Training Coordinator will be responsible for the content of the emails, the Secretary will review/edit and send out. The emails will be sent on Mondays, starting (8) weeks from the event with the last email arriving on the Monday of Rotary Florida PETS.

Treasurer

The Treasurer is responsible for preparing the budget and reviewing it initially with the Chair. Then the Treasurer will forward the budget to the Board for presentation and approval. The Treasurer must maintain records of all deposits and expenditures and will provide a monthly budget update to the Board, Executive Committee, and future boards (DGNs and DGNDs when selected). Expenditures can only be made with the authority of the Treasurer, the Chair, and during PETS, the Hotel Liaison.

PETS finances are self-supporting and the Treasurer should carefully monitor the monies to ensure this.

The Treasurer is responsible to:

- invoice and collect all district fees
- collect all vendor fees
- maintain the bank account
- ensure timely preparation and filing of all appropriate tax returns
- confirm the event insurance and any other insurance approved by the Board is paid and up-to-date
- prepare and distribute monthly financial statements to the Board and Executive Committee
- deliver final report of revenue and expenses

Training Coordinator

Overview:

The Rotary Florida PETS Training Coordinator serves on the Rotary Florida PETS Executive Committee for a two-year term and is responsible for the coordination of all training activities at PETS, in cooperation with the General Chair and with the best interests of the Board of Directors (DGEs). The Training Coordinator position is unique in that it is not an elected or appointed position. The Rotary Florida PETS bylaws state that the RLI Sunshine Division Chairman (or its representative) will serve as the Training Coordinator and use the best faculty (Discussion Leaders) of the RLI Sunshine Division available to serve as PETS Training Leaders.

The Rotary Florida PETS Training Coordinator will oversee and be responsible for the following:

- 1) Selection of Training Leaders and Alternates
- 2) Thursday "optional" Sessions
- 3) Assistant Governor "Institute" or "Sessions"
- 4) General Breakout (GBO) Curriculum
- 5) GBO Room assignments and setup
- 6) Equipment Coordination with Districts (laptops, projectors, presenters, etc.)
- 7) Four Self-Study Assignments for PEs via email prior to PETS
- 8) Preparation of Training Leaders and District Trainers at Organizational Meeting in January prior to PETS

1 – Selection of Training Leaders and Alternates

Following the June/July Board Meeting, the Training Coordinator will request the DGEs to recommend RLI Sunshine Division Discussion Leaders within their District to serve as potential PETS Training Leaders. The Training Coordinator will review the recommendations and determine who the best sixteen (16) Training Leaders are according to their past performance/evaluations as RLI Discussion Leaders. An effort may be made to spread out the Training Leaders by District but it is not a requirement. The objective is to have the best PETS trainers possible regardless of District. An

additional six (6) potential Training Leaders should be chosen in the event one or more of the original sixteen (16) are unable to serve for any reason.

At the Board Meeting at the Zone Institute, the list of Training Leaders and Alternates is submitted to the Board for approval. Once approved, an invitation to serve is sent to each of the potential Training Leaders. Timeliness is very important here; they should be asked quickly so plans can be confirmed. They are informed that a prerequisite for acceptance and approval is that they MUST attend the PETS Organization Meeting in January. If they can't commit, an alternate will be invited to serve in their place.

Following the acceptance of all sixteen, the final list of Training Leaders and any remaining Alternates are submitted to the General Chair and DGEs. Any remaining Alternates should be contacted at this time and invited to serve as an Alternate and requested to attend the January meeting so they may be ready to step in.

2 – Thursday “Optional” Sessions

The Thursday Sessions have been a staple at Rotary Florida PETS for many years and are held in the afternoon. Different subjects with different presenters have been covered in past years and each year the DGEs are encouraged to recommend specific subjects they wish to be covered during these sessions as per their areas of focus during their year.

The timing is typically three hours (2:00p – 5:00p) but can be started a little earlier if there are more sessions needed. These are general sessions, not breakouts and everyone is welcome to attend so these sessions need to have presentations which are broad based and provide an overview to the subject matter; enough information to motivate the attendee to seek more specific information on the subject.

The General Chair and Training Coordinator may make recommendations for session subjects to the DGEs but ultimately it is their decision. The Thursday Session's subjects should be finalized by the Zone Institute Board Meeting. Following this decision on the Session subjects, the Training Coordinator will secure qualified presenters, provide them with the Session time allotment and the goals/objectives of the session. The Training Coordinator will work with the Operations Chair on all logistics for the Thursday Sessions.

3 – Assistant Governor “Institute”

In past years, PETS held Assistant Governor “Training” Sessions. As it is the responsibility of each District to “train” their AGs; we prefer to refer to these sessions for the AGs as an Assistant Governor or AG Institute.

There are four opportunities to have the AGs alone at PETS while the PEs are in the GBOs. Historically, approximately eighty (80) AGs register for PETS. This number has been consistent for several years. We therefore can divide them into four groups for breakout sessions at the same time with a Training Leader who will facilitate a discussion based upon a curriculum which has been developed to review basic AG fundamentals and discuss common case studies of typical AG problem solving.

The Training Coordinator will assign four PDGs who are experienced RLI Sunshine Division facilitators to work in these AG Breakout Sessions, but they cannot be one of the sixteen Training Leaders. It would be ideal to use a PDG who has another role at PETS and is available during that time period.

In some PETS events, the AGs can attend only two small breakout sessions and use the third session to meet as a group and/or attend a panel discussion about the bigger picture of Rotary. The panel will typically be made up of the Rotary VIPs who are attending PETS and who are our Plenary Keynote Speakers.

The Training Coordinator may organize this event and serve as moderator. However, any well-qualified RLI Discussion Leader, who is available at PETS, may also serve this role.

4 – General Breakout (GBO) Curriculum

The GBO Curriculum is the core of the Rotary Florida PETS Curriculum. There are four GBO sessions at PETS: two on Friday afternoon and two on Saturday morning. These Sessions cover four specific areas of Club President best practices, not about Rotary or TRF programming, which is left up to each individual District. The current curriculum was initiated in 2013 with minor updates/changes. 2013 saw a significant overhaul to the GBO curriculum.

The current curriculum was put together after a review of several other multi-district PETS curriculum. It would be a best practice to have the Training Coordinator, General Chair and Chair-elect review the curriculum every two years to determine if any fundamental changes need to be made.

At the January Organizational Meeting, the Training Leaders, Alternates and District Trainers receive the curriculum on flash drives or by Dropbox link so they can prepare for their assigned sessions at PETS. Each slide has facilitator notes that serve as their guide to the session. The District Trainers receive the curriculum so they are aware of what the PEs will be learning in the GBOs to avoid duplication of training at the District level.

5 – GBO Room Assignments and Setup

At the January Organizational Meeting, the Training Coordinator will hand out the GBO Session and Room assignments to each of the Training Leaders. The Training Leader must secure the names of each of the Breakout Rooms for the sixteen GBOs, four AG Sessions, Rotaract Sessions and Partner Sessions.

Either the Hotel Liaison or Operations Chair should provide the room names to the Training Coordinator for assignment to all the facilitators. The Training Coordinator will work with Operations on the room setup, typically involving the U-Shape tables, screen and flip charts.

More on curriculum assignments in Section 8.

6 – Equipment Coordination with Districts (laptops, projectors, presenters)

The Training Coordinator needs to have an assistant to assist with training logistics, such as room setup (section 5) and other areas of support. The ideal person to serve as Assistant Training Coordinator is the RLI Sunshine Division Chair-elect since that person will be the next to serve as PETS Training Coordinator.

All of the PETS Training Leaders need to coordinate with their respective RLI District Directors, DGEs and District Trainers to bring their District's equipment to PETS. The Rotary Florida PETS organization has (2) projectors, usually kept by the Training Coordinator. It is also recommended the Training Coordinator check the recorders (ppt clickers) and/or have a store of batteries.

Each RLI Director has at least one RLI/PETS projector and the District typically has one or more. The District Trainers are responsible to provide one projector for their individual District Breakout (DBO). The Assistant Training Coordinator should organize with the PETS Trainers/Facilitators all of the equipment logistics for the GBOs, AG, Rotaract and Partner Sessions, which includes projectors, laptops, presenters and flip charts. The District Trainers take care of their DBOs.

7 – Four Self-Study Assignments for PEs prior to PETS via Email

Another staple of Rotary Florida PETS, the Self-Study Assignments are an important Pre-PETS activity for the PEs. Each of the eight weeks leading up to PETS, an email is sent out to each of the PEs promoting PETS and providing information so the attendees can better prepare for this event. Four of these emails are informational only and the other four are called "*Training Matters*", the Self-Study Assignments for the PEs. The eight emails alternate each week.

The purpose of the Self-Study Assignment is to encourage the PE to begin preparing for PETS. Giving them an idea of what to expect and asking them to complete a "real-world" assignment – something they will need to do as President -- beforehand will engage them and have them ready for their training.

Each of the assignments is directly tied in with the GBO Curriculum, so when they complete the self-study assignment and bring it with them, they will be prepared to share and discuss within their group.

The Training Coordinator is responsible for creating these Self-Study Assignments and submitting them to the PETS Secretary at least two weeks in advance of going out to the PEs. The PETS Secretary is responsible for creating the email and sending it out to the PEs. The Training Coordinator is responsible for all content. Also, after each assignment is emailed, the assignment must be posted on the PETS website so anyone can go there to get it if they didn't receive it successfully by email or if a PE is somehow not on the PE email list.

8 – Preparation of Training Leaders and District Trainers at Organizational Meeting in January prior to PETS

At the January Organization Meeting, the Training Coordinator will meet with all Training Leaders, Alternates, AG Facilitators, District Trainers, Rotaract Facilitators and Partner Session Facilitators to go over all training & logistical aspects of the Rotary Florida PETS event in March.

There will be a joint session with everyone to clarify and address any training overlap. Following the joint session, the group will split up and break out. The Training Leaders and Alternates will work specifically on the GBO Curriculum, and the District Trainers will break out to work on what they need to do back in their Districts leading up to PETS. The Rotaract and Spouse Session facilitators can choose which breakout they wish to participate in.

9 – Partner/Spouse Program

To encourage partner support, a Partner/Spouse program is offered to all participating partners and/or spouses. A Partner Chair is identified; a co-chair is recommended. The Chair and Co-Chair should be or have been the partner/spouse of a Rotarian. It is also possible they are a Rotarian which will add to their knowledge. The Partner/Spouse program is designed to educate the participants as to the role they could be playing during the coming Rotary year as the partner/spouse of a Club President. During this training, the focus is also to educate the participants as to the multiple programs Rotary offers throughout the world.

Registrar

The Registrar is responsible for registering all of the participants for Rotary Florida PETS and must attend the three scheduled meetings [July, Zone – if possible, January] plus the Rotary Florida PETS meeting. This individual should be very familiar with DacDb and Excel, very organized and able to communicate in a timely manner to both those registering and the Executive Committee. The Registrar works closely with the Chair, Executive Administrator, Hotel Liaison, and Treasurer before and during PETS. During the Registration period (September – February), the Registrar will work closely with DGEs to keep them informed of Registration Counts and any issues their PEs might have. Specifically the Registrar is responsible for:

- Create online registration system in DACdb for Florida PETS registrants (and partners as needed) and a hotel link for that registration on the DACdb calendar. The registration system should be active by September or as directed by Chair.
- Create a paper version of Registration for Out-of-State PEs and a second one for Rotaractors. Provide both forms to Web Master to post on PETS website. Should be ready at same time as online registration is activated. Those applicants must submit paper form and payment to Registrar. Registrar keys this info into DACdb.
- It is critical to follow-up quickly on all emails and phone calls. Must be organized and well-versed in DACdb and Excel.
- Must be present at PETS in March. Handles on-site registration and payments for all last minute attendees. Will be asked to update counts and meal counts daily – includes specialty meal counts. Also have to produce last minute check-in lists for Registration use on Thursday and Friday. Thursday's check-ins are posted in an Excel recap so that Friday's check-in lists only contain those not checked in as yet.
- Respond promptly to all Registration questions and issues – either via phone or email.
- Produce Registration Reports/Counts periodically to DGEs once Registration opens; recommended frequency is once every two weeks until January. Starting January 1, DGEs should get a weekly update on registrations.
- During Registration period, Registrar needs to periodically review registrations to correct mistakes found in names, positions/titles, meals, etc. PEs will indicate they are registering a spouse/partner, but neglect to pay so Registrar has to contact PE and follow-up.
- Also, starting weekly in January prior to the event, Hotel Liaison will provide hotel rooming lists to Registrar. Registrar cross-references them with DACdb registrations and advises DGEs of those who have registered for PETS, but have no hotel room and vice versa. DGEs follow-up on this info with their PEs. Note that some PEs will share rooms, stay at other hotels or may not need a hotel room if local.
- Chair needs to advise Registrar of all VIPs so that the Registrar can input them into DACdb. Information needed includes full names, spouse/partner name if applicable, email address, and specific meals they will be present for.
- Registrar is responsible for assigning each PE to a classroom. Chair will advise if the current format to do these assignments changes – i.e. mix of club size is prior method – current method was to be assigned by same club size, etc. Registrar's job is to ensure that the data in DACdb is ready so that the Executive Administrator can produce their credentials.
- On last day of PETS (Saturday), the Registrar will produce all final registration recaps and reports needed by Treasurer and Chair.
- At end of event, the DacDb administrator clone's this year's PETS Registration in DACdb for the next year.
- Sample reports and recaps provided.

Executive Administrator

The position of Executive Administrator is one of considerable pre-planning, working with and taking direction from the PETS Chair, PETS Operations Chair, Registrar and to a lesser degree, the PETS Training Officer and the Board.

The job description for this position may also change each year, depending upon the plans of the PETS Chair and/or the Board.

The following represents the basic job requirements:

1. Ordering of PE gifts, gift bags, tent cards, name badges and holders
2. Preparation and printing of name badges, insertion into holders
3. Preparation and printing of tent cards
4. Supply, open and maintain a PETS office
5. Prepare for printing of the PETS Agenda Booklet
6. Preparation of table seating tickets for all banquets
7. Assist Registrar as needed
8. Prepare signage as needed

April – in year prior to PETS

Early in April of the year prior to the PETS meet with the PETS Chair to determine if they have any specific wishes on what will be ordered for the coming PETS. Have quotes available prior to the June meeting to share with the chair, before presentation is made to the Board of Directors. This list will include:

- PE gifts (usually padfolios)
- Gift bags or totes
- Badge holders
- Anything else the Chair/Board would like to present to the PEs

June – in the year prior to PETS

At the meeting of the Board of Directors, present the quotes and ask for a quorum vote to approve the expense. Be sure to ask the Board if they would like anything else. Merchandise should be ordered prior to December 31. If the Exec Administrator has sufficient space to store the materials and the ability to transport to the Buena Vista Palace for PETS, the approved order can be sent to their home. [For example, the padfolios order is normally shipping in 34 boxes.] Otherwise, the merchandise will need to be shipped to the hotel and there might be a charge for the hotel to hold it until the event.

Ask each DGE to send their bio for presentation in the PETS handbook – absolutely no longer than 250 words.

October – in the year prior to PETS

There is a meeting of the PETS committee each year at the Zone Institute which can be scheduled any time from early September to the first of December. Though it is not necessary to attend, be sure to have someone ask the DGEs if they would like anything else as they will often get ideas after speaking with their classmates at Zone. Remind the DGEs to send their bios to you.

December – in the year prior to PETS

Order all PETS merchandise prior to December 31, as often there are price changes after the New Year. When ordering, be sure to let the PETS treasurer know how much and how you paid for the merchandise. Be sure the treasurer receives a copy of all invoices.

Check in with the PETS Chair to see if there is anything they would like to be handled or to make changes in the handbook. Remind the PETS Chair that they need to write the welcoming letter to the PEs for the front of the handbook.

January – prior to PETS

Plan to attend the PETS meeting in January. Remind the DGEs they must send their bios no later than the following week because after that, they are in San Diego, they have their own Pre-PETS, budget meetings etc, and the handbook must be ready for print by February 10th.

Ask the PETS Chair/Hotel Liaison to confirm with the Hotel, the designated office space will be available from Tuesday to Saturday of the week of PETS.

Start watching the sales each week to stock the office. Items include:

- Minimum of 4 reams of 20# white paper
- 1 ream of 20# colored paper
- Bankers boxes – store brand is fine – usually sold as 10 in a package, will need 3 packages
- 8 boxes black permanent markers
- 16 flip charts – check with Operations as they often order these.
- Stapler/staples – I bring from my personal office
- Pens – I bring from my personal office
- 2-3 rulers - personal office

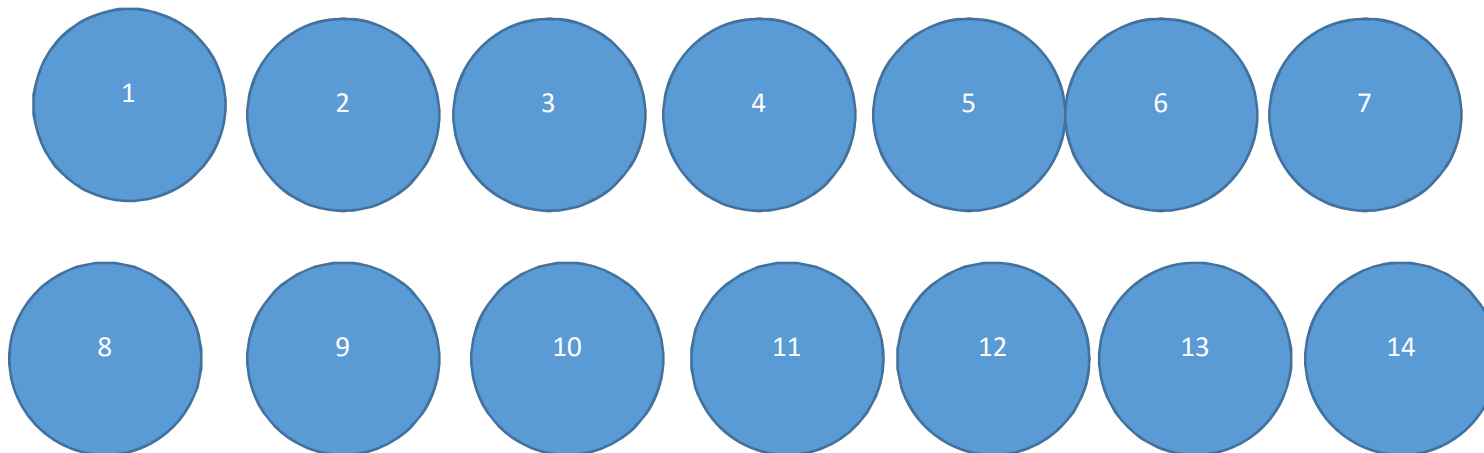
- 1 box of white board markers
- Rubber bands
- Medium size/large size plastic bags
- Colored envelopes – comes in bold colors of 5 colors and 8 in each color – will need two boxes for the tickets for the banquet meals
- Business card stock – 500 count, minimum for the tickets.
- Large white tent card – 2 packages
- Batteries – large packages of AA and AAA, I try to keep 1 package of C, but have seldom had a need
- High speed printer/scanner – I bring my personal Epson WP-4530
- 4 cartridges of black ink, 3 cartridges of blue, 2 each of magenta and yellow

Watch registration: check the current registration vs the number of clubs in each district to know how much registration is completed. Discuss with Registrar if anything should be done to complete registration for the stray districts. As of January 1, registration should be 90% completed. This is important because registration information for tent cards needs to be sent out by February 10th, and name badges will be printed by February 20th – 22nd.

Try to have the final agenda and room placements by the end of January so the handbook can be completed and sent for printing by February 10th.

February – prior to PETS

By now you should have the final agenda for the handbook as well as the detailed agenda that is sent only to the DGEs. From this you can determine which DGE is hosting each meal. You will also need to check with the VIP coordinator as to when each of the VIPs are arriving and departing. Also, if it has not been forwarded to you, get a banquet table layout either from the Hotel Liaison or directly from our hotel representative. With all this information, you can create the seating chart. The hotel will normally set 7 tables in the front 3 rows. Each table seats 10.



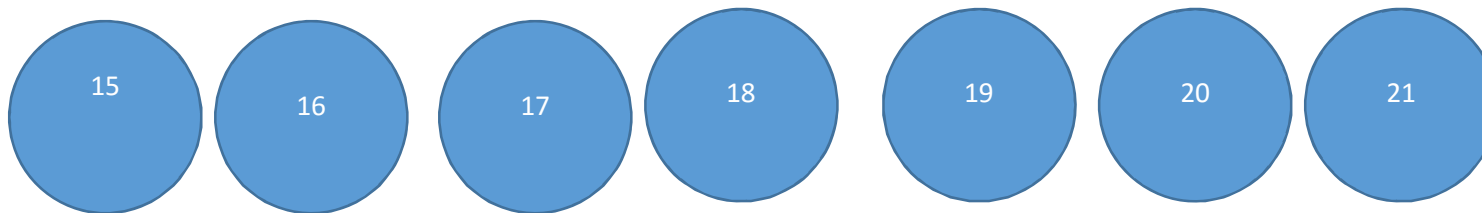


Table 4 is the “head table.” The seats will be assigned to the 2 DGEs and possibly their partners, The PETS Chair and spouse, the main speaker which leaves 3 chairs that are assigned 2 to one DGE and 1 to the other.

Tables 1,2,3,5,6,7 are assigned to a district, hosted by the DGE and may possibly include a VIP for each meal, so each of these tables will have 9 seats or less, depending upon the seating of the VIPs and whether the DGE has a spouse.

Tables 8 and 9 are assigned to PETS staff so that they are served early and can quietly leave early if necessary.

Tables 10 and 11 are assigned to the district that is seated at the head table so that they may have 10 people each sitting close to the front when their Governor is hosting. The DGE should appoint someone as host to make sure each person is sitting properly in the ticketed area.

Tables 15 and 16 are reserved for Palace Guards and one seat is reserved at table 21 for the Producer. Tables 17 and 18 are reserved for the DLs. These tables can just be marked with table tents and tickets are not necessary.

The districts are rotated through the table for each meal. With this information you can create a chart for each table, for meal, and district as to how many tickets are available for that table, and print those tickets and place into a colored envelope to give to the DGEs at the Thursday meeting of PETS. Do not leave this job for last minute because it will take twice as long than you think it should.

It is important that a minimum of 2 Palace Guards be assigned to check the tickets of the attendees to assure that they have been invited by their DGE for special seating. Surprisingly this is an issue each year with some districts. Table tents are also prepared to indicate the table number as well as special ticketed seating. You must go to the Banquet room at least one hour before each meal to set the district numbers at each table and

the reserved signs. It is not recommended to give this to the Palace Guards as they have too many other items to take care of and they may not understand the seating chart or the need for it.

Handbook:

Verify there are all up to date bios for the VIPs and DGEs and have inserted them into the handbook template. Double proof the agenda for corrections and verify each room assignment. Send the handbook to the PETS chair and/or others for a final proof before sending it to the printer by February 10th.

Name Badges:

Print name badges the week of February 20-22. It is recommended to go to each district and print the name badges directly from the district so that another district member cannot get mixed into the group. As each name badge is pulled up from the DACDB, verify the information is correct, the district and club have printed properly and removed any titles or initials after a name, such as CPA, CFP or MD. Also check the names as some clubs will put in nicknames for names which may be inappropriate for the occasion.

Put each name badge into the appropriate colored badge holders. To continue with the current badge holder the colors selected are:

6890 Khaki

6930 Purple

6940 Forest Green (dark green)

6950 Navy or royal blue

6960 Orange

6970 Red

6980 Black

6990 lime green

Rotaract – turquoise

Staff – gold

Box when completed for transport to PETS. The badge holders are ordered from a non-Rotary sanctioned dealer but the price break we receive justifies their usage.

The last week of February, check with the Operations Chair to see if any signage needs to be printed. Each location has preprinted PETS signs with a 8.5 x 11 insert area for more information. This can also be completed when on site.

Print 400 flyers on colored paper for the PEs to trade into a bag with free materials at the Rotary store in the vendor area.

March – PETS month!

Tuesday: Arrive at the hotel between 2-4pm on Tuesday of PETS week. Get the keys to the office from the hotel staff in banquet services as well as the keys for the registration area. Have a bellman unpack the van and deliver everything to the office. I would strongly suggest you tip at least \$80 to \$100 if you wish to get good service throughout the week. Set up office according to chart if it is not already set up by the hotel staff. Unpack the boxes and create the desk area for the Exec Administrator. Have tent cards ready for all the names who will be in the office such as the registrar, treasurer, hotel liaison, PETS chair and chair elect. The Operations Chair and the Palace Guards will each have their own rooms, close to the office. Hopefully the hotel will have provided a small refrigerator to save on the cost of water and soda for personal use of the office staff only.

Wednesday:

This day is used to prepare each box for the districts with the appropriate number of padfolios equal to the number of PEs, AGs, and/or Rotaractors registered, as well as bags and any other items being given out such as the luggage tags. These boxes will be delivered to each district room by the Palace Guard early on Friday as DGEs prepare their rooms for the DBOs.

If the name badges have not yet been stuffed in the badge holders, then this job will be completed and placed in baskets in alpha order for distribution at registration on Thursday afternoon or Friday morning. The handbook will also be given out at registration so the participants will have the agenda as well as the map of the hotel.

Prepare any signage as needed

Prepare name badges and tent cards for late registrants.

Prepare tent cards for partners.

Give the Registrar the previously prepared Friday Banquet to the PEs who purchase the one meal tickets of \$75 each. The decision to offer single ticket purchase is made annually by the sitting BOD.

Thursday:

Registration will open at 12 noon- 5pm. Be sure signage for each district is hung above the registration area to help the PEs to know where they are going.

Meet with the Registrar to get the information for the late registrants and print badge holders and tent cards, which will be available for pick up the next morning at registration.

Friday:

Registration is open from 7:30am – 9:30am. Any materials not picked up will be boxed and taken to the office for later pick up. Let the Registrar know the materials are there so she can prepare the meal count.

Print badges and tent cards for the late registrants – give to registrar for distribution in case you are not in the room.

Be sure to be in the Banquet room no later than 11am to set the room signage for assigned seating.

Have lunch and take a deep breath.

Friday afternoon is used to clear any loose ends, verify with the Governors if someone had registered a spouse for a Friday banquet so they can adjust their ticket distribution.

Set table signage 1 hour prior to the banquet.

Saturday:

Be in banquet room by 6:30am at the latest to set table signage.

Be available to take care of needs that arise. Start packing up the office with material to go to storage or to go back with you. If materials are going to storage, be sure to take an inventory and count to assist with ordering the next year.

Try to clean up the office by 5pm.

Congratulations on a successful PETS!

Operations Chair

The duties of the Operations Manager of PETS encompass all phases of the logistics of putting on PETS. This ranges from hotel preparation (rooms and food), signage, VIP's, House of Friendship, Palace Guard, and any other activity that is required for the successful production of a PETS event.

To accomplish these duties, there are committee chairs, which are assigned to these tasks:

1. Hotel Liaison: This person is responsible for making sure the event hotel has the space available for both plenary and breakout sessions. S/he is responsible for ensuring the A/V requirements are met in every room based on either past experience or the desires of the DGE's for their District's needs. S/he ensures that the banquet manager is prepared and ready for each and every meal and other food event. The Operations Manager and Chairman of PETS will work with this person to coordinate numbers for the guarantee and food selection and quality.
2. House of Friendship: This chair is responsible for inviting vendors and other projects to participate in PETS each year. Vendors are "sold" tables and this chair is responsible for collecting the funds from each vendor/project and getting the funds to the Treasurer for a proper accounting. This person oversees the setup, operation and functionality of the House of Friendship during the hours it is open. Invitations should be sent out and confirmed by mid October or early November.
3. Signage: The Operations Chair makes sure that the banners and signs for all of PETS events are in place and printed properly; the Palace Guards make sure signage is placed appropriately during the PETS event. Banners are hung in the plenary sessions by the hotel staff on the day before PETS. Palace Guards are responsible for placing signs in front of every breakout room before each session. The Exec Administrator or alternate is designated to print the sign inserts based on the room assignments.
4. VIP's: This committee chair is responsible for identifying and contacting each visiting VIP at PETS. They are responsible for airport pickup, room reservation and aide assignment for each VIP who needs one. This chair makes sure each VIP is returned to the airport as needed and coordinates with the office manager to make sure the "gifts" for the VIP speakers are prepared (typically donations to the Rotary Foundation) and certificates are created.
5. The Rotary Store: This chair person, using information from the previous year, makes sure that Rotary materials are ordered and delivered to PETS and set up for PE's to examine and/or purchase. This chair is responsible for returning to Rotary International any unused product and receiving the proper refund. This chair needs to coordinate with the Operations Chair to work out details about accepting credit cards.
6. Production Manager: This person is responsible for the sound, video or projection of speakers, and slide deck at each plenary session. Speakers have been recorded in the past, but that decision may be budget driven; if there is recording, the Production Manager oversees this process. S/he will work with the hotel A/V provider to make sure the proper equipment is in place and operational.
7. Palace Guard: This chair is responsible for all SSgt-at-arms duties and setup of breakout rooms. Using the current DGND class, this chair will make sure they understand the layout of the hotel, have room breakout signs in place at each change of session and coordinate the

admission of all participants at the Plenary Session. Additionally, this chair will coordinate a training program for the DGND's to help them better understand what is coming up for them as a future DG. This session generally takes place on the Thursday of PETS (lunch) and the Training Coordinator and Zone Coordinators provide a brief overview of resources available. This chair makes sure that the vests of the Palace Guard are collected and cleaned prior to and after use as needed.

Hotel Liaison

The role of the Hotel Liaison is to coordinate with the hotel, arranging hotel stays and luncheons for the PETS preparatory meetings in July* and January*. In addition, if there are any A/V requirements for either of the meetings, this individual will make coordinate arrangements with the hotel. Typically there are no A/V requirements for July; the Training Coordinator usually requires A/V to review the GBO training slides at the January meeting.

While the Hotel Liaison will maintain communication with the key hotel representatives throughout the year, regular, if not daily, communication will begin the January preceding PETS (in March). It is imperative to review the BEOs (Banquet Event Orders) and the AV requests thoroughly. There are many moving parts and it is important these details are accurate.

Each District Breakout room and General Breakout for Presidents Elect requires an LCD package and a screen. Computers are provided by the Districts, Discussion Leaders and Exec Committee (as needed).

*Note: Key Executive Committee members who have a distance to travel are covered by the PETS budget for the Friday night stay prior to the meeting. Those positions are noted in Appendix B; the Chair may amend as needed.

House of Friendship

The goal of the house of friendship is to expose the Club President Elects, Assistant Governors, and Rotaractors to the opportunities available to them for projects, information and supplies for their upcoming year of leadership. The House of Friendship is also the location of the coffee breaks. A suggested timeline follows:

September/October

- Be familiar with the HOF location and past diagrams of vendor location
- Contact the previous year's vendors/participants and any new that have been identified and send a "save the date" with this year's form
 - Ask them to provide a Raffle Item - \$50.00 Value.
 - From the major vendors – Purchase \$100.00 Gift Card [NOTE: At previous PETS, each district has contributed \$\$ toward these gift certificates. If this approach is used, it should be proposed and confirmed at the July meeting.]
- Each vendor receives a roll (about 100) tickets. Each time a Rotarian visits or purchases from them they give them a chance to win a door prize; the more visits a Rotarian makes, the better chances are to win a door prize.
 - A large container is kept at the entrance to the HOF so the Rotarian can put 1 of the paired tickets in the bowl for the next drawing.
- Rental tables ARE NOT provided by the hotel. Any vendors, such as the rental company, can be found in Appendix D.
 - The company should be willing to deliver, set up and take down the tables.
 - Delivery should be EARLY 8AM Thursday morning.
 - Take down/pick up should be mid-afternoon Saturday; nothing after 5pm per the Hotel.

November

- Send out another reminder to the contact list. The list constantly has to be updated as contacts change.
- Create a spreadsheet to track the HOF participants and the fees. The only COMP tables (approved by Chair and normally approved are:
 - The Rotary Foundation
 - The Rotary Store
 - Gerry White – if he does the pins for the year. Please note that he must update the pins to the current branding while monitoring the budget.
- Create Invoice template – many vendors will require an invoice to process payment.

- a. Suggestion is to put the coffee in the middle to far end of the room – thereby getting the PE's to interact with the "vendors". In addition – it typically doesn't need electric – so you are good there.

- b. ALTERNATE Vendor / Project / Vendor / Project ... That keeps everyone mingling.
- c. Rotate which vendor gets to be at the very front..
 - i. 2014 it was Russell Hampton on the Left and Award4U on the Right... So 2015 they should move down and it might be Gerry White and Pinnacle Awards... and so on..
 - ii. Ask again about giving Door Prizes...

January

- Make sure that the person doing the "Script" (Chair-Elect) has put DOOR PRIZE into the Agenda for each meal.
- Confirm the tables with the vendor: Delivery/Set up and Take Down/Pick up.
- Give any funds collected to the Treasurer. Make copies of all transactions for HOF Chair files and Treasurer files.
- Review and confirm open/close times; make sure the decided upon times are in the PETS booklet:
 - Thursday, 8 am → HOF open to receive tables and for vendor set up
 - Soft open at 11; hard open at 12N.
 - Closing time decided by HOF Chair/Ops Chair.
 - Friday: 8 am to 6 pm
 - Saturday: 8 am to 11:45/12N
- Identify signage that will be needed in the HOF.

February

- Last CALL for Vendors (but always be ready for the last minute vendor participants)
- Complete and confirm the layout.
- Confirm the Door Prizes with each Vendor
- Give a bi-weekly update to the Chairman and OPS Chair.
- Clarify with hotel:
 - Security: times you MUST have the door(s) locked and STAY locked.
 - Earliest and latest on the loading dock hours
- Send instructional E-mail to all confirmed vendors with a copy of the lay out. Make sure HOF Chair contact information is included.

March – PETS:

Pre-Event Set-Up:

- Make copies of the layout for the Chair, Chair-Elect, Ops Chair
- Make several copies of the vendor list with contact information.
- Make sure all vendor fees are paid and submitted to the Treasurer.
- Make table tent for each vendor and attach HOF Chair contact info; this will help during set up if/when you have to be out of the room.
- Checklist:
 - Table Delivery – Make sure you are there when they arrive. Table vendor should place tables in the area for each vendor.
 - Coffee/break location within the area
 - Security
 - Signage
 - Bowl for gathering door prize ticket at the HOF Door
 - When Vendors arrive - THANK THEM for coming – be enthusiastic!!!
 - Through-out the weekend – check with them all frequently.. BE VISABLE so if they have issues/feedback they can find you.

During Event:

- EACH MEAL:
 - Retrieve the tickets from the HOF entrance and ADD them to the tickets from the last meal.
 - Have a “Blurb” about the vendor of the door prizes being given out. This is their opportunity for a mini-marketing push.
- POST EVENT:
 - Send vendors a “thank you” e-mail for their participation and provide them with the dates of the next Rotary Florida PETS, as well as the HOF Chair (if it is known).
 - Collect any outstanding funds
 - Make sure that all bills are paid

Rotary Store

The Rotary Store provides Rotary literature and resources that are available to Rotary leaders. Managed by the HOF Chair and the Operations Chair, at least (2) individuals should be appointed to set up and staff the booth during the HOF hours. Set-up and breakdown times should coincide with the HOF established hours for all vendors.

Resources and materials are ordered from Rotary International. Materials with an associated cost will be ordered for “display only”; how to order information will also be available. Any items offered are available from shop.rotary.org. Items with a fee are sold for the same fee at the Rotary Store. RI will not allow “returns”, so any unsold items will be stored to be available during the next PETS. A PETS Paypal account for all credit card payments has been established with a charge of 2.75-3%.

Materials that can be ordered in bulk and given away will be available to participants. While we have packed bags in the past with free materials, it is recommended to display the materials so participants may peruse and take what’s of interest (less waste).

Recommendations on orders from Rotary International may be found in Appendix D.

VIP Coordinator

The VIP Coordinator is responsible for all aspects of the identified VIPs for the PETS event. The VIPs generally include the (5) speakers [keynote + 4 plenary speakers], PDG Milt and Alice Jones [founder of Rotary Florida PETS], any RI Staff that are participating, and any others identified by the Executive Committee. VIPs are extremely important to the success of the PETS event and may serve in a variety of capacities. They have served in the following roles determined by each PETS Board of Directors:

- General session speaker
- VIP Panel for Assistant Governor session
- Thursday optional session presenter
- Participate/visit Partner/Spouse breakouts or Rotaract breakouts
- Visiting District Breakouts on request to address the Presidents Elect in smaller groups
- Visit hospitality suites

Once the Chair has confirmed the attendance of the VIPs, they are immediately provided the VIP Coordinator’s contact information. From that moment on, the VIP Coordinator is the primary contact for Rotary Florida PETS with the VIPs. This reduces confusion for both the VIPs (and/or their representatives) and the Executive Committee. All major speakers and visiting staff should be confirmed no later than mid-fall prior to PETS.

The VIP Coordinator will be responsible for the following:

- Confirm all arrival/departure times for the VIPs and any “needs” they might have, e.g., special diet, etc.;
- Identify appropriate aides who will manage their time with Florida PETS; VIP Aides should be sitting DGs, PDGs, or Partners who will already be participating in PETS. Their specific duties include:
 - pick them up at the airport [recommended signage should be made];
 - make sure they get to all events in a timely manner;
 - escort them to meals, and generally take care of the VIPs during their time with PETS;
 - if the aides have to purchase any items for the VIPs, keep receipts for reimbursement from PETS;
- Work with the Hotel Liaison to identify the best room/suite options for the VIPs; the Hotel Liaison will confirm the hotel provide an upgraded amenity (cheese, wine, fruit, etc) provided to each VIP room. The VIP Coordinator will provide the arrival times of the VIP to the Hotel Liaison so the amenity can be placed in the room in a timely manner;
- Confirm any a/v requests they might need and communicate that to the Hotel Liaison and Operations Chair.

Communication and diplomacy is key to this position. The VIP Coordinator will be working with Rotary dignitaries who are often attending more than one PETS event during a given weekend.

SERGEANT-AT-ARMS (Palace Guards)

The Chair of the Palace Guards oversees the Palace Guards who serve as the Sergeants-at-Arms for PETS. In that role, the responsibilities include:

1. Guide, train, and coordinate the DGNDs (or their designate as designated by the DGE in the absence of the DGN) as they perform Sergeant-at-Arms duties;
2. Sort and set up signage from signs provided by Operations for classrooms, registration, dining areas and common areas;
3. Set up and deliver easels, paper, pens and materials to all District Break out rooms;
4. Deliver district banners, house of friendship and other banners or hanging signs to the hotel liaison to be hung by hotel engineering on Wednesday afternoon;
5. Continue to monitor, rotate and verify signage for changes in room usage when rooms are converted from District Rooms to Classrooms and back to District Rooms;

6. Deliver materials to District Breakout rooms as requested by Operations for the current year i.e.,(padfolios, notebooks, End Polio items, etc) prior to sessions.
7. Facilitate meeting between DGND's and PETS senior staff and Rotary International representatives for a luncheon and Q&A of the Governor Corp process at PETS to discuss their role this year and the coming years as they prepare to be the Board of Directors for All Florida PETS;
8. Maintain order, decorum and dignity inside and outside event areas, to allow for a smooth flow of activities and to minimize disturbances and distractions;
9. Maintain presence during/prior/following registration for assistance to PETS Exec Administrator and Registration Desk for materials and the locking of the gates as dictated by the official agenda;
10. Inspect event spaces prior to events;
11. Control entrances to events, verifying proper credentials. Move attendees into meeting spaces prior to event start time. Identify available seating for late arrivals and assist in seating them expeditiously. Assist and insure proper seating at head tables, in coordination with the chairperson. Guards should be on station a minimum of 30-45 minutes prior to opening of the doors depending on event. Meals should be 1 hr prior;
12. Encourage attendance at all events. Clear the House of Friendship and common areas during program events;
13. Immediately following the end of events, check meeting rooms for glasses, purses, notebooks, etc., and turn in any forgotten items to the PETS office (Lost & Found), unless otherwise announced;
14. Recover all easels, paper, pens from the District Breakout rooms and classrooms as they are completed the final day and return to Palace Guard room;
15. Following end of Saturday lunch, work with hotel to recover all hanging materials with coordination of hotel liaison and hotel engineering staff;
16. All items are to be stacked neatly on the first floor near registration counter for pick up by Operations to return to the storage unit;
17. Conduct head counts at every meal event and verify agreement with the hotel staff head waiter for each meal and then report count to the PETS Hotel Liaison and Operations Chair. Head counts are especially important at meal sessions as they impact total billing with the facility.

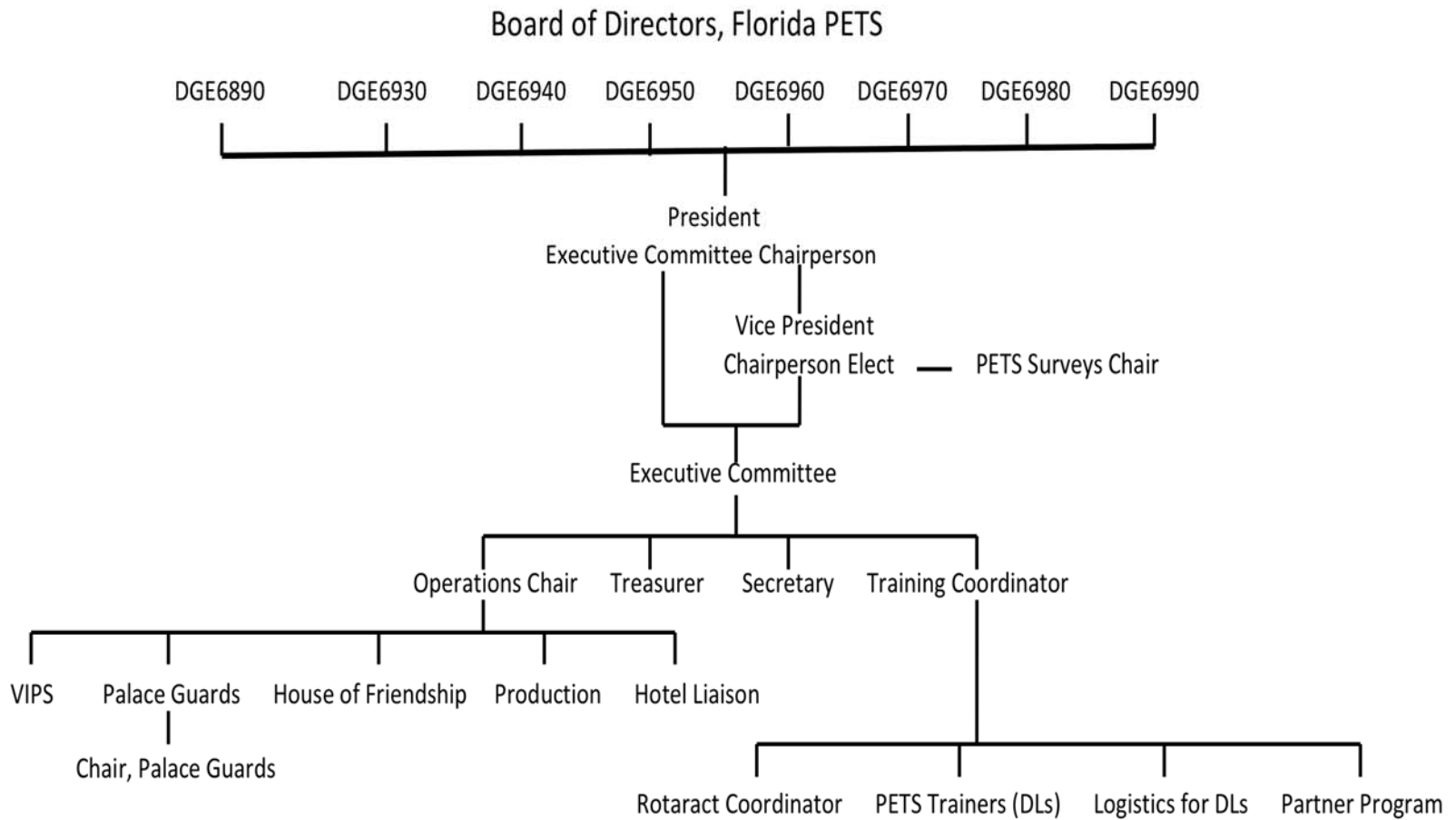
Production Manager

“Production” is a term that is a ‘catch-all’ for the individual who manages the background and AV for the plenary sessions. The specific expectations may change, but the following are a listing of the possibilities:

- Prepare a song list for music as participants come into the Plenary Session and find their seat. This music should be upbeat and energetic. Music may play in the background during the meals, but the focus is on fellowship, so must be non-invasive.
- Manage the slide deck for each Plenary Session. The slide deck should mirror the script, highlighting all who are introduced from the podium. The slide deck should be reviewed by the Chair, Chair Elect, and Operations Chair for accuracy.
- Specialty music might be requested depending upon the DGE class and/or the VIPs.
- Some years, Plenary Session #1 (Keynote Speaker) has launched with a Parade of Flags from RYE students. Recommended music for the flag ceremony is marching music or anthem-type music.
- Manage video camera so the Speakers on stage can be seen by all in the hall. Video recording has been done in the past, but is dependent upon the cost and wishes of the BOD. If recording is requested, the Production Manager will make sure the recording is put together in a format that is able to be shared with the PETS participants.

APPENDIX A

Florida PETS Organization Chart



APPENDIX B

Planning Meetings for Rotary Florida PETS

Meetings During PETS

The first meeting of the Board/Executive Committee of each Rotary Florida PETS event is to select the Chair-Elect who will serve in 2 years. After that, the Chair-Elect of the next year's Executive Committee/Board determines how many meetings to convene during the PETS event. Generally, 2 are scheduled, but the final decision is up to the Chair and Board.

Meetings During the Year

The PETS Exec Committee/Board will meet (3) additional times for planning throughout the coming year.

- The summer meeting is usually in July or August and totally dependent upon the participants' schedules.
- The fall meeting is held at Zone Institute (Saturday at noon after the Institute program is over for the day). Chair must make arrangements with Institute Logistics Chair.
- January meeting is generally held the 2nd weekend of the month.

Hotel Accommodations

The summer and January meetings may require selected members of the Exec Committee to come in early one night due to distance or other responsibilities. The Chair confirms who will be covered by the master account.

PETS Master List

The following positions are covered by the master account; any delineations from this list are approved by the Chair.

- Chair 4 nights

- Chair-Elect 4 nights
- Exec Admin 4 nights
- Registrar 4 nights
- Operations Chair 3 nights
- Treasurer 3 nights
- Hotel Liaison 3 nights
- Training Coordinator 3 nights
- Secretary 2 nights
- HOF Chair 3 nights
- Rotary Store 2 nights
- Production Chair 2 nights
- Palace Guard Chair 3 nights
- VIP Coordinator 2 nights
- Rotaract Chair 2 nights
- Partner Chair 2 nights
- Discussion Leaders 2 nights

APPENDIX C

Storage Unit

Rotary Florida PETS has a storage unit at 7660 Majorca Place, Orlando, FL. There are 2 keys to the unit. One key should be held by the Operations Chair; the 2nd by the Chair-Elect.

Directions: I-4 to West Sand Lake Road, go west for one block (1st light) and turn on Turkey Lake Place. Drive 1-2 blocks and you should find Majorca Place on the left. The building is partially hidden (behind another building). Unit 2031; code to get in the gate is 20310904*.

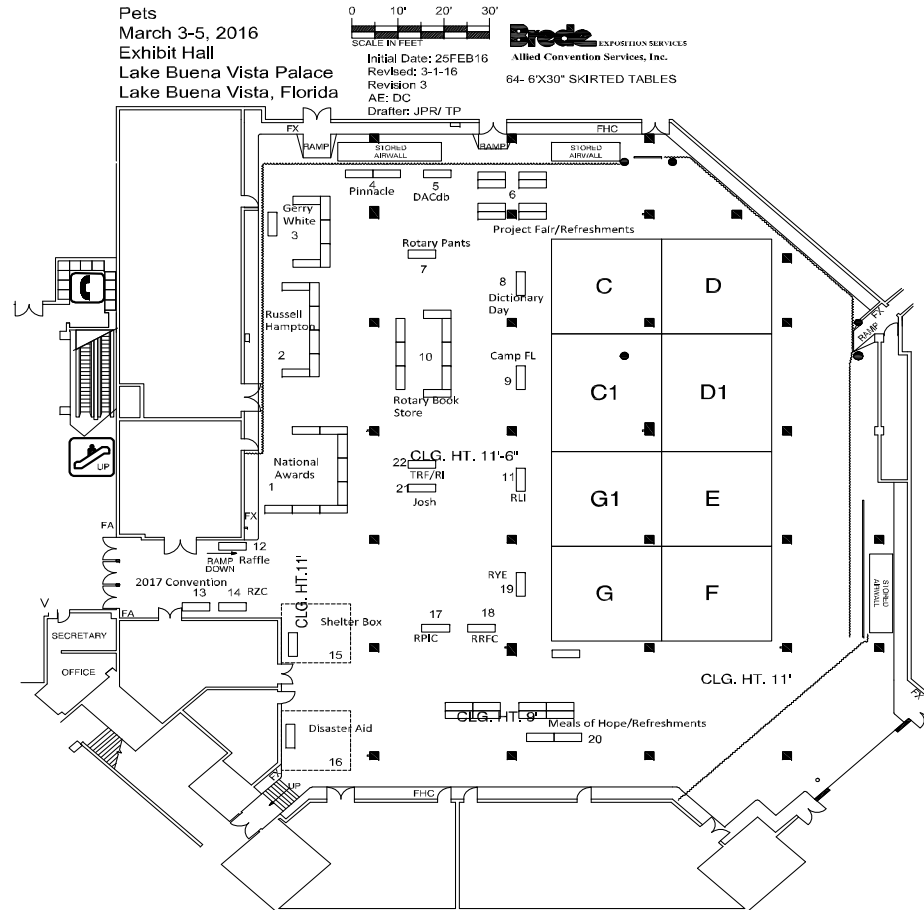
Appendix D Vendors

Vendor Company Name	Contact	Phone	Email
National Awards 4 U	Nancy Varn	850-878-7187	nancyvarn@hotmail.com
Camp Florida	Ed Johns		EdJ5628@aol.com
Rotary Club of Dingle	John Foley	850-259-8880	jcrf@mail.com
Gerry White Pin Co b	Bob Agnew		bpagnew@mail.com
Josh The Otter – Water Safety Program	Laura Thomas	402-297-4126	laura@joshuamemorial.org
Pinnacle Awards & Promotions	Zack Hussain	407-681-1111	zack@mypinnacleonline.com
Rotary Book Store	Tekoa Bean	727-743-1531	Tekoa Bean <tekoa.bean@yahoo.com>
Russell Hampton	Jesse Dahlin	(913) 254-0500	jesse@ruh.com
ShelterBox USA	Sarah Shelton	941-907-6036	sshelton@shelterboxusa.org
Disaster Aid USA,	Arthur Hodge	772-643-6343	bigavol@bellsouth.net
Water One World Solution	Kenn Visser	808-233-9624	kennv@comcast.net
The Rotary Foundation/Rotary Service 2017 International Conf.	Liz Lazar/Chelsea Mertz	847-866-3429	Chelsea.Mertz@rotary.org
Rotary Pants	Marshall Butler		mbutler@rotary6970.org
Rotary Youth Exchange	TERI WESTCOTT		Terri Wescott <tmwescott@yahoo.com>
RRFCs	Ivan Johnson		
RPIC	Betsy Owen	561-251-3582	pdgbetssyowen@gmail.com
Rotary Zone Coordinators	Art MacQueen		
The Dictionary Project	Mary French	843-856-2706	mary.french@dictionaryproject.org
Wheelchair Foundation	Steve Agius	(239) 513-0200	steve@ctc-naples.com
Project Fair- Reserved			
Project Fair - Rotary Feed America	Brice Wolford	813-951-0899	rotary@suncoastsspecialtyprinting.c

Project Fair - Honduras Water Project	Christopher Jones	813-267-0107	om fishhawkriverviewrotary@gmail.com
Project Fair - Guatemala Literacy	Harvey Baxter	352-339-3813	m hb964@hotmail.com
Project Fair - Living Well Nicaragua	Erick Palacios	386-341-8985	Erick@xcelwealth.com
Project Fair - Law & Order Ball	Gerry Poppe		
Project Fair - Guatemala Clean Water	Sally Smith	239-206-7083	salpalsss@hotmail.com
Meals of Hope Spouses Project	Steve Popper	239-537-7775	steve@mealsofhope.org
DACdb	Mark Landmann	303-883-6196	mldmann@q.com
Raffle Table	Pete Doragh		
Rotary Leadership Inst.	Lou Venuti		<a href="mailto:Louis Venuti <louisvenuti@gmail.com>">Louis Venuti <louisvenuti@gmail.com>

Appendix E

Suggested HOF Layout (this may change)



Appendix F Rotary Store Recommendations

	Rotary International Available Publications					
	ALL Florida P.E.T.S. Rotary Store					
	Order as of 2-3-2016					
FREE ITEMS					ACTUAL	TOTAL
Item Status	Title	SKU	UOM	Price	2016 ORDER	COST
Ordered	Rotary Peace Center Program Guide		EA	\$0.00	400	\$0.00
Ordered	Multiple Donor Form		EA	\$0.00	400	\$0.00
Ordered	The Rotary Foundation Contribution Envelope, The - USA (send with 102EN)		EA	\$0.00	400	\$0.00
Ordered	Paul Harris Society Brochure		EA	\$0.00	400	\$0.00
Ordered	Rotary Foundation Facts (W)		L10	\$0.00	400	\$0.00
Ordered	Ways to Give (W)		EA	\$0.00	400	\$0.00
Ordered	Rotary International and Foundation Annual Reports		EA	\$0.00	400	\$0.00
Ordered	Lead your Club: Rotary Foundation Committee		EA	\$0.00	400	\$0.00
Ordered	Leadership Development: Your Guide to Starting a Program		EA	\$0.00	400	\$0.00
Ordered	Your Rotary Legacy - Bequest Society Brochure		EA	\$0.00	400	\$0.00

Ordered	Rotary Peace Centers:Making Peace a Reality		EA	\$0.00	400	\$0.00
Ordered	End Polio Now Poster		EA	\$0.00	400	\$0.00
Ordered	End Polio Now - Make History Today flyer		EA	\$0.00	400	\$0.00
Ordered	Every Rotarian, Every Year Brochure		EA	\$0.00	400	\$0.00
Ordered	Connect for Good (formerly Rotary Basics)		EA	\$0.00	400	\$0.00
Ordered	Be A Vibrant Club		EA	\$0.00	400	\$0.00
Order#2	Lead Your Club: Membership		EA	\$0.00	400	\$0.00
Order#2	Lead Your Club: Public Relations		EA	\$0.00	400	\$0.00
Order#2	Lead your Club: Foundation Committee		EA	\$0.00	400	\$0.00
Order#2	Lead your Club: Service projects		EA	\$0.00	400	\$0.00
SALE ITEMS					ACTUAL	TOTAL
Item	Title	SKU	UOM	Price	2016 ORDER	COST
In Inventory	A Century of Service The Story of Rotary (Softcover)		EA	\$15.00	3	\$0.00
In Inventory	A Century of Service The Story of Rotary CD		EA	\$5.00	2	\$0.00
In Inventory	After Katrina: Rotary Stories from the Gulf Coast DVD		EA	\$5.00	1	\$0.00
In Inventory	An Introduction to New Generations Service		EA	\$2.00	14	\$0.00
In Inventory	An Introduction to Vocational Service		EA	\$2.00	3	\$0.00
In Inventory	Areas of Focus Guide		EA	\$2.00	36	\$0.00
In Inventory	Conquering Polio CD		EA	\$5.00	2	\$0.00
In Inventory	End Polio Now Album		EA	\$16.00	1	\$0.00

In Inventory	End Polio Now Video and Digital Resources		EA	\$10.00	7	\$0.00
In Inventory	Interact Promo Postcard (W)		EA	\$0.20	1	\$0.00
In Inventory	Primer for Host Families, A (W)		EA	\$1.50	1	\$0.00
In Inventory	Proud Member Window Cling		L5	\$5.00	35	\$0.00
In Inventory	Rotarian's Greater Goods Catalog		L10	\$2.50	8	\$0.00
In Inventory	Rotary Anthem - Excerpt form Beethoven's Egmont Overture Op. 84		EA	\$3.00	1	\$0.00
In Inventory	Rotary Code of Conduct (W) Certificate		EA	\$1.00	1	\$0.00
In Inventory	Rotary Community Corps (RCC) Brochure (W)		EA	\$0.50	1	\$0.00
In Inventory	Rotary Notecards (set of 10)		EA	\$10.00	5	\$0.00
In Inventory	Rotary's US\$100 Million Challenge Pins		L100	\$50.00	2.5	\$0.00
In Inventory	RVM: Collection 3 (2007-08)		3DVD	\$10.00	1	\$0.00
In Inventory	RVM: Collection 4 (2008-09)		3DVD	\$10.00	1	\$0.00
In Inventory	RVM: The Rotarian Video Magazine subscription (2009-10) Vol. 5		3DVD	\$10.00	1	\$10.00
In Inventory	Songs for the Rotary Club		EA	\$5.00	7	\$0.00
In Inventory	Strengthening your membership		EA	\$2.50	175	\$0.00
In Inventory	The ABCs of Rotary		EA	\$3.75	19	\$0.00
In Inventory	Youth Exchange Poster		EA	\$3.00	1	\$0.00
Order#2	2015 International Assembly Speeches	SPEE CHE	EA	\$20.00	2	\$40.00

		S16				
Order#2	A Guide to Global Grants	1000	EA	\$1.00	25	\$25.00
Order#2	Connect for Good (formerly Rotary Basics)	595	EA	\$1.00	50	\$50.00
Order#2	End Polio Now Pins		L100	\$50.00	1	\$50.00
Order#2	Interact Handbook (W) SKU 654	654	EA	\$3.50	25	\$87.50
Order#2	Lead Your Club: President	222	EA	\$3.00	10	\$30.00
Order#2	Lead Your Club: Secretary	229	EA	\$3.00	30	\$90.00
Order#2	Lead Your club: Treasurer	220	EA	\$3.00	30	\$90.00
Order#2	Manual of Procedure (W)	035	EA	\$8.00	10	\$80.00
Order#2	Meeting Kit Folder Blue (plus 1 in inventory)		EA	\$2.00	20	\$40.00
Order#2	My Rotary Moment	405	EA	\$10.00	3	\$30.00
Order#2	New Member Orientation (W)	414	EA	\$1.00	25	\$25.00
Order#2	RI Certificate Holder		EA	\$10.00	1	\$10.00
Order#2	Rotary Peace Centers Pins		L100	\$50.00	3	\$150.00
Order#2	Rotary Youth Leadership Awards (RYLA) Handbook (W)	694	EA	\$1.50	10	\$15.00
Order#2	Roteract Handbook SKU 562	562	EA	\$3.50	25	\$87.50
Order#2	Strategic Plan report	440	L25	\$5.00	1	\$5.00
Order#2	Strengthening your membership	417	EA	\$2.50	25	\$62.50
Order#2	The ABCs of Rotary	363	EA	\$3.75	30	\$112.50
Order#2	The Rotary Foundation Reference Guide	219	EA	\$1.00	25	\$25.00
Order#2	What's Rotary?	419	L50	\$4.00	100	\$400.00

Order#2	Youth Exchange Handbook (W)	746	EA	\$2.00	5	\$10.00
					GRAND TOTAL	\$1,525.00