



2017 WORKBOOK

PACIFIC NORTHWEST PRESIDENTS-ELECT TRAINING SEMINAR

Welcome

Congratulations on your important decision to step forward as President-Elect of your club! President-Elect is a critical leadership role. You have an incredible opportunity to make a positive difference for you and for your club. Ahead of you lie a few very exciting years.

Nerves and doubts are normal and healthy – everyone has them at one time or another. Remember that you are here because a core group of people has confidence in your ability to succeed; you are not alone!

We're here to help you be successful. This course is designed to help you identify your personal leadership strengths, and make your year one of the most exciting and fulfilling years of your life. Perhaps you will be inspired to take on even greater challenges – in life, in work, in Rotary.

Your Club, your District, your trainers, and your vintage of President-Elects will be a powerful resource to ensure your success. Every President-Elect you meet brings their personal strengths and unique experiences to this shared journey. Some of your richest and most memorable experiences will come from getting to know your fellow PEs and from the creation of valuable support networks. The friendships created at PETS often last a lifetime and these relationships and networks are one of the greatest strengths of the Rotary organization. You are now a vital piece of this framework. Trust us when we say that it will be one of the best experiences of your life!

Looking forward to seeing you soon.

Yours in Rotary,

PNW PETS Leadership Team

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Please add your name and club number to the workbook:

Name: _____

Club Number: _____

Introduction

This President-Elect Personal Workbook is designed to be a cornerstone of your success. This Workbook is designed to help you get to know yourself, recognize your own strengths, identify support people, set goals, develop plans, and realize success. We are focused on helping you become the best possible President-Elect, but the skills we share can be applied broadly in your life.

This Workbook can help ensure that you have the training, resources, vision, and strategy to ensure that you are ready for your year as President – that you come in with the skills and knowledge needed to have an incredible year.

Workbook Outline

This workbook is broken down into modules for ease of learning and as a planning tool for your upcoming year. It consists of the following:

Pre-Work: This module is designed to help you understand your existing assets. Every person has a unique perspective and set of skills. You will be asked about your personal strengths, your support network, and your goals.

Goals & Outcomes: This module helps you brainstorm and crystalize the goals and outcomes you would like to achieve.

Measurement: This module helps you form some concrete points on how you will measure and evaluate your goals.

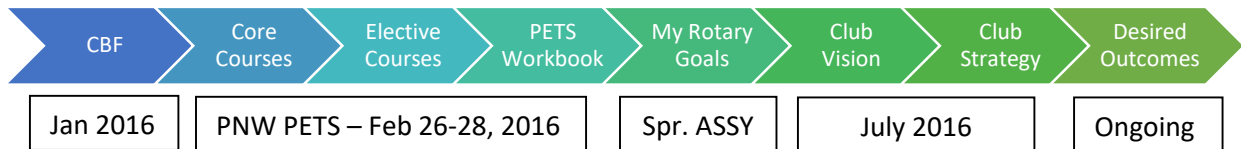
Vision: Now your challenge is to help your club create a compelling vision of the future that is better because goals are being achieved. This is where you engage your club in creating a vision of an extraordinary future. It's exciting and inspirational, and can serve as a way of building a strong team consensus of where the club wants to go. This module is designed to help you with the work to create this motivating approach and lead the club into a strategic planning exercise.

Strategy & Planning This module will help you engage your club's support to develop a strategy for enacting your goals. "A goal without a plan is just a wish".



Training Framework

This following timeline outlines our recommended training and transition process. As each District may vary, it's important that we work together to ensure that you receive as much training as is available:



January: Once you have received your workbook you will be able to begin working on the first module in preparation Pre-PETS. These tools will help you to grow into the best President-Elect possible. We recommend you share your findings with your incoming District Governor, one of your greatest allies, so that they can understand how to best support you.

February: This workbook, in both its online format and hard-copy, comes with you to PNW PETS. Our instructors will refer to it regularly throughout your training sessions. We have left space to record notes, thoughts, and contacts. The goal and planning process in the workbook will form a firm foundation for your year as President.

Spring: Spring Assembly or other local District training will continue your leadership journey. We will provide new tools such as MY ROTARY and CLUB CENTRAL. These tools will help translate your goals into written objectives to share with Rotary International and your Club so that you can work together to achieve remarkable things.

July: Congratulations on your first day as President! With the work you have put into this program, you are able to step forward with confidence, passion, and enthusiasm to share your Vision for the year ahead. You have already identified your key support networks and together you have the plan in place to accomplish great things. It's your time to create the membership experience we all crave, to engage our membership, and to ensure a vibrant club where every member and guest feels welcome, valued, and special.

Fall: Fall Assembly, or other local District training, is where you will begin to learn about the transition to the next step in your leadership journey. You will be mentor to the incoming PE. This is a time to reflect on your learning and what you can do to best support your successor. What has been accomplished in your year? What is still outstanding? Time to ensure that you have strong communication with your PE to ensure you have a concurring vision of the future, and a goal to achieve your Vision together.

June: Thank you for your leadership! You have had incredible experiences and learned something about yourself and your world. It seems so long ago that you read through this book and wondered about all the things ahead of you. Now you look back with fond memories and realize that stepping forward as PE was one of the most enriching decisions you could have made.

Competency-Based Framework

Our training model, The Competency-Based Framework, is based on the theory of strengths-based leadership. This theory supposes that people are far more successful when focusing on their natural strengths instead of areas in which they are less proficient.

You, as the Club President, are at the center of your Club's success. Supporting your success are your core competencies, leadership, personal development, relationships and networking, and planning and goal setting. Individuals have varying proficiencies at all of these skills so critical to the success of your club. Reflecting on your strengths can help you develop support systems for areas in which you are less comfortable, ensuring a vibrant and well-rounded club.

If a Club President understands these core competencies, has identified his/her strengths and developed the systems and people to support them in the other areas, then the desired outcomes occur seamlessly – you have engaged members, increasing membership, successful projects, a vision and plan, a vibrant and fun club – and you are able to successfully deliver through whichever Avenue of Service your Club chooses.



LEGEND

1. Starts with Club President.
2. Second circle is the Core Competency Training required for Club President to be able to deliver desired outcomes.
3. Desired outcomes that are within the broad goals of Rotary. *These are examples - more can be added or changed by local clubs.*
4. The final circle/boxes represent the Avenues of Service that the outcomes are expressed through.

The Four Core Competencies Explained:

<p style="text-align: center;">Leadership</p> <p>The ability of an individual to engage others to work towards a common goal and vision with compelling purpose and engagement. Positive leadership skills include the following:</p> <ul style="list-style-type: none"> • Interpersonal Skills • Vision – ability to craft and share a compelling and inspiration vision of the future • Organization – clear purpose, direction, motivation, delegation, and follow-up 	<p style="text-align: center;">Personal Development</p> <p>The ability of a leader to be self-critical to ensure their personal health, wellness and success. Personal Development includes:</p> <ul style="list-style-type: none"> • Self-reflection and self-awareness of your own strengths and weaknesses • Knowing and understanding how you learn • Time-management • Recognizing your own ‘sweet spot’ and stressors
<p style="text-align: center;">Planning and Goal Setting</p> <p>The ability of a leader to translate challenging goals into manageable smaller tasks and to ensure both short-term ‘wins’ and long-term successes. Planning and Goal Setting includes:</p> <ul style="list-style-type: none"> • Important Club planning processes, such as: <ul style="list-style-type: none"> ○ Strategic planning (3-5 year planning) ○ Succession Planning ○ Annual Planning ○ Project and Fundraising planning ○ Budgets and financial planning 	<p style="text-align: center;">Relationship Building and Networking Skills</p> <p>The ability of a leader to engage in interactions with others that results in positive outcomes for both parties. This includes the use of:</p> <ul style="list-style-type: none"> • Self-Awareness – understanding how you are perceived by others • Empathetic and Active listening skills – seeking to understand every point of view • Contextual understanding of the situation, relationship and other person’s needs

These are examples of how these Core Competencies relate to you, as your role as Club President:

1. Leadership:

- Understanding and owning your own leadership style
- Strong understanding of the difference and purpose of inspiration versus motivation
- Building capacity in your club through the use of mentorship
- Effective delegation and follow-up techniques

2. Personal Development

- Sharing what you are comfortable with in the role as President and where you will need support
- Managing your own time. Your role of Club President can consume you if you don’t manage yourself. This is about learning to ask for help and not being afraid to delegate

3. Relationships and Networking:

- Networking – how to connect with others for the benefit of both parties
- Communication – how to communicate effectively with others and understand your audience:
 - Honest feedback
 - Conflict resolution skills
- Story-telling – how to effectively use storytelling to convey a powerful and inspirational message

4. Planning and Goal Setting

- Setting challenging yet attainable goals
- Creating strategic and tactical plans to ensure success
- The value of, and how to create – small wins to maintain momentum

MODULE ONE – Pre-Work

Personal Competency Assessment

This self-assessment can be used to better understand your strengths as a leader. It is important to truly be self-reflective when you complete this. There are no wrong answers – it is simply a measure of your own strengths at this time. Many PE’s may never have had the opportunity to develop or utilize these competencies. This will serve as starting point for you to help identify your own strengths and begin to develop the resources necessary to be successful outside of your core competencies.

Your Network (360 Degree Feedback)

If you are comfortable, it’s highly recommended that you select a minimum of three people within your immediate network who you trust would be willing to help ensure your success. They will assess you using the same survey. By completing the same competency assessment, they can offer a new perspective on your strengths. It is recommended that you entrust one of the participants to distribute, collect, and compile the survey data so that it’s returned to you anonymously.

This exercise helps to provide safe feedback on how you are perceived by others. Many times people will have blind spots and areas of hidden strength.

Rating Scale:

Please use the following scale to rate yourself on the Personal Competency Assessment Exercise:

Rating	Rating Explanation
0	No experience – never been exposed to these skills or competency
1	Very limited experience and exposure. May have heard about the skills but has rarely or never had a chance to put them into use.
2	Limited experience and exposure. Has had some training or opportunities to employ the competencies; may have observed others using them, understands what is expected, and had applied them occasionally in their work/life.
3	Solid understanding of the competency – uses it in their work/life process regularly and comfortably.
4	Highly skilled in the competency – uses the skills effectively and regularly at work/life. Has been recognized as being competent in this area by others
5	Mastered the competency. Well regarded in work/life for their skills in this competency; held positions that require this competency on a regular basis, or has been asked to mentor or teach this competency to others.

Again, this rating scale is not indicative of your ability to gain competency, but rather creates a baseline of where you currently are in your personal development. All scores are valid and you are encouraged to honestly and accurately reflect their experience to date. Note: scores of 4 or 5 indicate that someone is working with this competency on a regular basis and has well developed skills.

Personal Competency Assessment Exercise:

Competency	Skills/Attributes	Score
Relationship Building and Networking Skills	I am comfortable approaching others and working collectively with others to realize opportunities for everyone	
	I can share a compelling story to engage others	
	I can help others craft their own compelling stories	
	I actively listen and am engaged without distraction	
	I offer honest and straightforward feedback about an issue – not a person	
	I can manage conflict to ensure the issue gets addressed and all parties have the chance to be involved in the successful outcome	
Leadership	I clearly understand my own leadership style	
	I understand the purpose of and difference between inspiration and motivation	
	I use mentorship effectively for my own growth and that of others	
	I assist others in their personal growth and development so that they can best contribute to our club.	
	I am a clear communicator who effectively uses delegation and follow-up techniques.	
Planning and Goal Setting	I am comfortable creating 3-5 year strategic plans with input of others.	
	I can set goals that are inspirational, challenging, and attainable.	
	I build tactical or annual plans to accomplish established goals.	
Personal Development	I am self-aware of, and can self-reflect on, my own strengths, areas for improvement, and skills and abilities.	
	I have effective personal time-management skills	
	I can identify when personal development training is needed and follow-up on it.	
	I understand when I need help and ask for it.	

This is not a test; it is a benchmark for your own use. If you have given this survey to other people, then compare their feedback, looking for similarities and differences, to identify your blind spots or hidden strengths.

You now have a baseline for moving forward. You have identified your personal strengths and those areas where you may elect to improve, or may search for help from others. The next few exercises and pages are designed to help provide additional exercises, tools and resources to help you succeed.

Personal Leadership

Leadership has broad definitions and may mean different things to different people. To help you succeed, a brief lesson in leadership theory may be valuable. Leaders can broadly be defined into four key categories based on their personal leadership traits and their strengths. Although there are different names or classifications, regardless of the name given, the traits are surprisingly similar. The reality is that there are pros/cons of every style. Although some styles may be better suited to a given situation, 'perfect leaders' are difficult to find. A leader's style is generally a combination of their personality, their personal experiences, and their past experience.

Leadership Exercise:

Think of a leader who you have met or worked with who inspired you, engaged you, or helped you reach your fullest potential. Please answer the following questions:

Who was this person? _____

What was the situation where you worked with them? _____

What specific traits did they have that you admired? _____

What traits or skills did they employ in this situation to help ensure a successful outcome?

What specifically did they do to engage you? To help you succeed? _____

Why is this memory so powerful for you? _____

After working with them, did you try to copy or emulate any of their style? Did it work? How successful was it? _____

Leadership Exercise:

Complete the following leadership exercise will help you determine your own leadership style. Understanding your leadership style is the first step in your success. Learning to identify the strengths and weaknesses of your natural leadership style will help you adapt to different circumstances. After you understand your own style you are able to assess the leadership styles of others and adapt your communication to best utilize their natural talents. Together this helps you assemble your support team that will help make your year one of your most memorable and enjoyable years of your life.



Leadership Style Survey

This is an informal survey, designed to determine how you usually act in everyday related situations. The idea is to get a clear description of how you see yourself. Circle A or B in each pair of statements below, which shows the one that MOST, describes you.

1. A) I actively seek out new people with whom I can establish relationships.
 B) I usually prefer to remain within my trusted circle of relationships.
2. A) I usually act deliberately.
 B) I usually react quickly.
3. A) I'm careful where I spend my time.
 B) I'm usually open to other people's use of my time.
4. A) I usually introduce myself at social gatherings.
 B) I usually wait for others to introduce themselves to me at social gatherings.
5. A) I usually focus my conversations on the interests and relationships of the people involved.
 B) I usually focus my conversations on the task, facts or topic at hand.
6. A) I'm usually diffident, and I can be patient with a slow pace.
 B) I'm usually assertive, and at times I can be impatient with a slow pace.
7. A) I usually make decisions based on facts or evidence.
 B) I usually make decisions based on feelings, experiences or relationships.
8. A) I contribute frequently to group conversations.
 B) I contribute infrequently to group conversations.
9. A) I prefer to work with and through others, providing support when possible.
 B) I usually prefer to work independently or dictate how others are involved.
10. A) I usually ask questions or speak tentatively and indirectly.
 B) I usually make direct statements or directly expressed opinions.
11. A) I usually focus primarily on ideas, concepts, or results.
 B) I usually focus primarily on persons, interactions, and feelings.
12. A) I often use gestures, facial expression, and voice intonations to emphasize points.
 B) I rarely use gestures, facial expressions, and voice intonations to emphasize points
13. A) I usually embrace others' points of view.
 B) I usually interpret others through my own point of view.
14. A) I usually respond to risk and change cautiously.
 B) I usually respond to risk and change dynamically.

15. A) I usually prefer to keep personal feelings and thoughts private.
B) I find it natural and easy to share and discuss my feelings with others.
16. A) I usually seek out new or different experiences and situations.
B) I usually choose known or similar situations and relationships.
17. A) I'm usually responsive to others' agendas, interests, and concerns.
B) I'm usually focus on my own agendas, interests and concerns.
18. A) I usually respond to conflict slowly and indirectly.
B) I usually respond to conflict quickly and directly.

Use the Answer Sheet below to record whether you choose A or B for each question. Circle your answer to each question.

ANSWER SHEET

O	G	D	I
1A	1B	2B	2A
3B	3A	4A	4B
5A	5B	6B	6A
7B	7A	8A	8B
9A	9B	10B	10A
11B	11A	12A	12B
13A	13B	14B	14A
15B	15A	16A	16B
17A	17B	18B	18A

TOTALS _____ _____ _____ _____

Total the numbers of items circled in each column and write it on the spaces above. Now, compare the "O" column with the "G" column and circle the letter that has the highest total - O or G. Then compare the "D" column with the "I" column and circle the letter that has the highest total - D or I

Results:

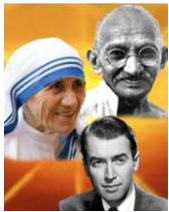
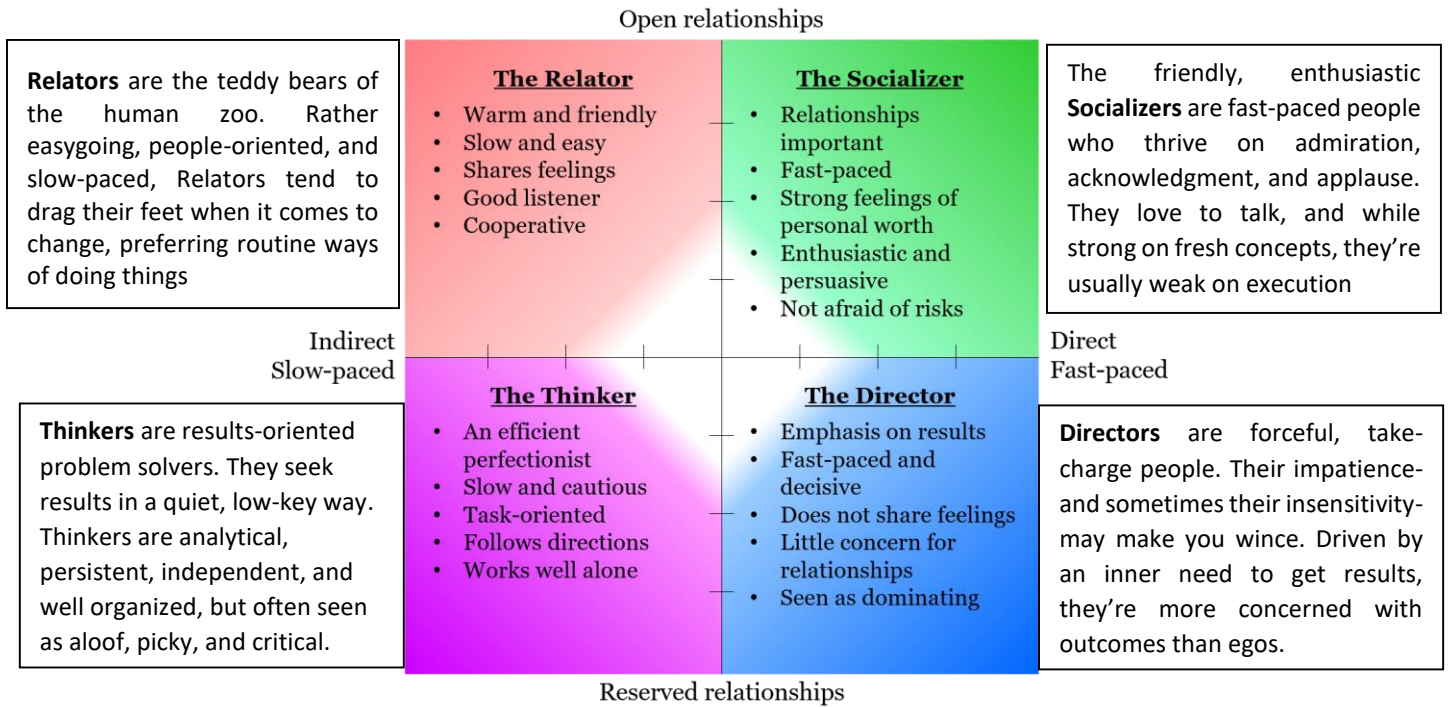
If you circled the G and D, you tend toward being a **Director**.

If you circled the O and I, you're predominantly a **Relator**.

If you circled the O and D, you show many qualities of a **Socializer**.

If you circled the G and I, you have lots of **Thinker** characteristics.

Analysis of Your Leadership Style



Relator

When Talking with Others: Asks more questions, listens, and reserves his /her opinions, less verbal communication.

Verbal Identifiers: Warm less forceful talk, lower volume, and slower speech.

Visual Identifiers: Intermittent eye contact, gentle handshake, slower movements, patient.

Famous Relators: Mother Teresa, Gandhi, Jimmy Stewart, Mr. Rogers, Nelson Mandela



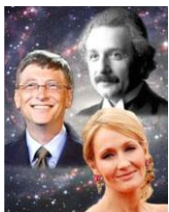
Socializer

When Talking with Others: Talks a lot, tells stories, shares feelings and opinions openly, and informal.

Verbal Identifiers: Loud, fast voice with lots of voice inflection, dramatic.

Visual Identifiers: Animated, spontaneous, hand and body movement, and spontaneous.

Famous Socializers: Bill Clinton, Will Smith, Robin Williams, Oprah Winfrey, Richard Branson.



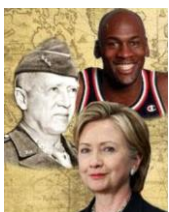
Thinker

When Talking with Others: Formal and proper, focused with facts, doesn't share feelings.

Verbal Identifiers: Less vocal variety, very steady with lower volume and speed.

Visual Identifiers: Less facial expressions and gestures, does not initiate contact.

Famous Thinkers: Bill Gates, Albert Einstein, JK Rowling, Tiger Woods, Thomas Edison.



Director

When Talking with Others: Tells more than asks, not a great listener, abrupt and to the point.

Verbal Identifiers: More vocal variety and forceful tone with high volume and speed.

Visual Identifiers: Steady eye contact, firm handshake, body gestures and impatient.

Famous Directors: Hilary Clinton, Michael Jordan, General George Patton, Margaret Thatcher.

Write down some thoughts on leadership styles in general, and your leadership style in particular. What was one new thing you learned about yourself from this exercise?

Understanding Leadership Styles

Now that you have a better understanding of the types of leadership styles, think back to the leader who you selected in the previous exercise. From what you have learned, consider the following:

What was their leadership style? _____

Why was it effective with you? _____

Now, think about your Club, and identify some key leaders or influencers in your Club. What is their leadership/communication style? When is it most effective? Least effective?

Name	Style	Most Effective	Least Effective
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Adapting Your Leadership Style

Now consider these leadership styles against your own and think about how you, as Club President will communicate with these key people in your Club. Understanding them and having them support your efforts is critical. Here's a few tips for communicating with the various styles

<p>RELATOR</p> <p>To connect most effectively with a Relator:</p> <ul style="list-style-type: none"> • Use less intense eye contact • Speak in a moderate pace with a softer voice and moderate tone • Seek their opinions and ideas, then listen • Try not to counter their ideas with logical arguments • Allow time for them to make a decision to reduce pressure • Encourage them to express their concerns without getting upset with them • Aim for mutual agreement on work goals and completion dates 	<p>SOCIALIZER</p> <p>To connect most effectively with Socializer:</p> <ul style="list-style-type: none"> • Make direct eye contact • Speak in an energetic and fast paced manner • Support your ideas with the opinions of people they respect • Confirm any agreements made; follow up with a brief "to do" list so they remember what they agreed to do • Allow some socializing time in meetings • Talk about experiences, people, opinions and facts • Ask about their "gut" feel • Maintain balance between fun and achieving results
<p>THINKER</p> <p>To connect most effectively with a Thinker:</p> <ul style="list-style-type: none"> • Be more formal in your speech and manner • Don't speak in a loud or fast paced voice • Present the pros and cons of an idea along with options • Follow up in writing • Be punctual • Present information in an organized, planned and comprehensive manner • Accept that plans requiring risk-taking options are generally not welcomed 	<p>DIRECTOR</p> <p>To connect most effectively with a Director:</p> <ul style="list-style-type: none"> • Get to the point quickly in a clear and succinct manner • Speak in a fast pace • Be specific and don't over-explain or repeat yourself • Make direct eye contact • Minimize small talk • Be organized and well prepared • Focus on results to be achieved • Be punctual and stick to guidelines

Leadership Tip: The most important thing to remember about communication styles is that the differences are real and largely unconscious. Railing against someone else's communication style or expecting everyone to interact in your preferred style seldom leads to a positive outcome. Highly effective communicators learn to recognize and adapt to different communication styles; both when they're receiving and interpreting information from others and when they share information with others.

Building Your Team

One of your tasks as President-Elect will be to ensure that you have a high-functioning, well-organized and skilled team around you. This team will not only help make your life easier, but it helps ensure sustainability, continuity and vibrancy in your Club. Depending on the size of your Club and how you do things, these roles may vary, but here's a summary of the key roles you need to be thinking of:

Vice-President or President-Elect Nominee – if you are fortunate to have a Club that is able to plan 3+ years ahead. If not, we're going to help you and your Club get there. Your Club should really have a three-year succession plan whenever possible. This allows the Past-President, the current President and you, as the PE, the chance to make and follow evolving 3-year plans.

Secretary – there is no question that a great Secretary will make your life easier. They help the Club run smoothly and seem to be the resource that anyone can go to. If you have a Secretary in place – great. If not and you need to find one, then consider everything you will need from the person. Ideally a Club Secretary should have the following key characteristics:

- Detail orientated
- Organized with great time management skills
- Computer and tech-savvy
- A good understanding of Rotary International, the District, and how the Club operates
- Be willing to attend Secretary Training

Treasurer – a vital role to keep your Club on a solid financial footing. A good Treasurer will take a keen interest in the finances of the Club and be excellent at keeping records. They will be able to provide the Club with regular updates on the financial status of the Club and any potential issues or pending concerns. The Treasurer may need to be strong-willed and able to defend a financial decision or opinion about an outcome that has a financial impact.

Membership Chair – A valuable role and yet, often one that is misunderstood. Often Clubs mistake that a Rotarian who is good at attracting new members will make a great membership chair. While this sometimes may be the case, the role of the Membership Chair goes far beyond simply attracting new members. The number one role of the Membership Chair is to **engage the membership**. With engaged members comes a vibrant club and a natural outcome of increased membership. When you think about this person – they want to be personable, engaging – often Socializers or Relators make great Membership Chairs. You want someone who can connect with people – both in the Club and outside, someone who has a natural tendency to make people feel comfortable and special. **Cautionary Note** – just remember that a person who has these skills may not be the same person comfortable with asking people to join Rotary. It's important to separate the two and to have the honest conversation with your potential Membership Chairs.

Public Image Chair – focused on the presenting the very best your Club has offer to the community, the PI Chair is about showing the world what a great experience it is to join your Club. Remember – to those around you, Rotary is most likely YOUR CLUB. That’s what people see, and it’s what they relate to – they don’t yet understand Rotary International – and that’s ok! A great PI Chair leaves people asking the question – ‘why am I not in that Club?’ Social media, advertising, event planning are all great skills for this role, but the number skill is the ability to PRESENT, not sell, your Club’s experience.

Foundation Chair – this role is beyond the person who just gives out the Paul Harris Fellow pin or other Foundation acknowledgements. It’s someone who has a deeper interest and understanding the role of the Foundation and how valuable it can be to the Club. This person has to have the ability to create a very personal connection between Rotarians, your Rotary Club, and the Rotary Foundation. A good Foundation Chair makes the Foundation interesting to the rest of the Club. Being a strong foundation supporter is not sufficient qualification to be a strong Foundation Chair.

Leading and Engaging the Team

Your job as Club President revolves around your ability to provide leadership and to help ensure that each member of your team is able to do their best work. You will need to understand their leadership style and how it reacts with yours. What do they need to do their best work? Appointing the Chair is only the first step. When you are asking them, you may need to work with them to set joint goals. Share your vision and ideas and ensure that potential team member buys in. Ensure that targets and plans are in place to see the goals achieved. Give them milestones, responsibility and accountability.

Addressing Conflict and Conflict Resolution

When you are considering the team, you have to really think about the skills the Club needs in the position and how well that person will interact with the balance of the Club. This process can be fraught with personality challenges which is why understanding different leadership styles is so vital. Think of the following situations that you could easily encounter in your club:

1. You may have a person who has taken on a certain role for a long-time, but is either not as effective in the role as the Club needs, or is blocking another member from engaging more

Think about ways that you can address the issue without impacting the person. They are a great Club member and a great Rotarian, and you want to keep them engaged and don’t want to lose them. It could be a difficult conversation. This is a great conversation to have at PETS with your fellow PEs.

2. Effective Board Meetings. Board meetings can sometimes be a mix of divisive and strong opinions. Your job as President is to ensure these Board Meetings are productive and valuable. That begins with understanding the people at the table, how they react to certain situations and how to best leverage their leadership styles. Managing conflict can be difficult – avoiding addressing the issue can be disastrous.

Think about how you can leverage your own leadership style in these types of situations. What are you going to do when your traditional approach isn’t working? Again, this is a great conversation to have at PETS with your fellow PEs.

Building Positive Relationships and Networking (Liggy Webb)

One of the greatest skills that we have as human beings (besides having thumbs) is an ability to engage and form bonds with others. It's one of the core reasons people join Rotary – for fellowship – the opportunity to be part of a like-mind group of people working together. How do you create the experience you want in your club – one that is welcoming and engaging? Here's a few tips to help you and your Club build and maintain positive relationships:

Leadership Tip:

The most important single ingredient in the formula of success is knowing how to get along with people. —Theodore Roosevelt

1. Accept and celebrate differences. One of the biggest challenges we experience in relationships is that we are all different. We can perceive the world in many ways but we inherently feel more comfortable when we feel that people “get” us and can see our point of view. Life, however, would be very dull if we were all the same and, while we may find it initially easier, the novelty of sameness soon would wear off. So accepting, encouraging and celebrating diversity and differing opinions in your Rotary Club is a great first start.

2. Listen effectively. Listening is a crucial skill and understanding what others communicate to us is the most important part of successful interaction and vice versa. Active listening is the single most useful and important listening skill as we are genuinely interested in understanding what the other person is thinking, feeling, wanting, or what the message means, and we are active in checking out our understanding before we respond with our own new message.

3. Give people your time. In a world where time is of the essence and we are trying to fit in more than one lifetime, we don't always feel we have the time to give. People understand this, which is why giving time is such a huge gift.

4. Develop your communication skills. Communication occurs when someone understands you, not just when you speak. One of the biggest dangers with communication is that we can work on the assumption that the other person has understood the message we are trying to get across.

5. Learn to give and take feedback. Feedback is the “food of progress”, and while it may not always taste great, it can be very good for you. The ability to provide constructive feedback to others helps them to tap into their personal potential and can help to forge positive and mutually beneficial relationships. From your own personal perspective, any feedback you receive is free information and you can choose whether you want to take it on board or not. It can help you to tap into your blind spot and get a different perspective.

7. Develop empathy. There is a great expression: “*People will forget what you said, people will forget what you did, but people will never forget how you made them feel.*” Empathy builds connection between people. It is a state of perceiving and relating to another person's feelings and needs without blaming, giving advice, or trying to fix the situation.

Relationship and Networking Building Exercises

Take a moment and think back to a person who you met who has made you feel truly valued or special.

Who was that person? _____

What did they DO to make you feel significant? _____

When you approach someone, how are you going to engage with them? What could you do to create that same feeling that the person above created for you? _____

Now, think about your Club. Who are two or three key people in your club who have a natural gift for connecting with others? Who are they and what do they do to create a connection with others?

Name	Connecting Gift
_____	_____
_____	_____
_____	_____

Now, think about their current engagement in the Club. What role are they currently serving (if any)? Are their skills – their competencies being best used? Knowing your leadership style, their communication style and using the tips from above, create three asks of them to help make your year and the Club most successful. Consider these potential openings:

NAME, I notice that you seem to really have a gift for _____.

How do you do that? (Active Listening).

With my year coming up, I'd like to see us focus on _____.

I believe you'd be a great fit for that, how would you like to help me out? (Active Listening)

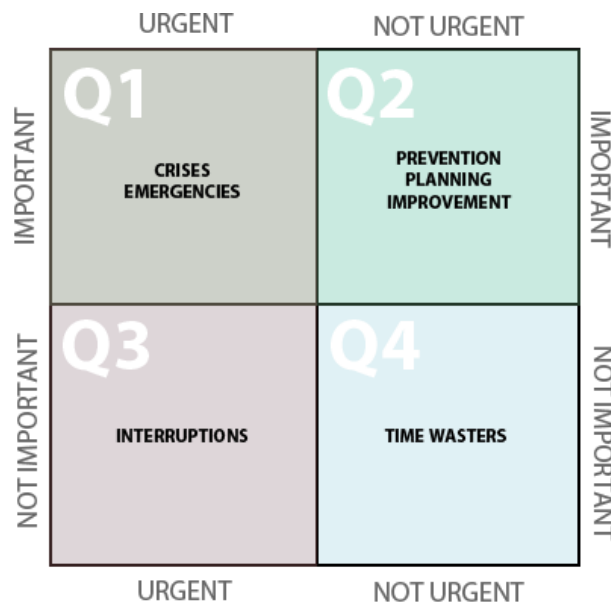
NAME, I notice that you have an incredible ability to connect with people and you seem to know just about everyone. As part of my year, I'm thinking about who we'd like to see join our Club. I'd like to brainstorm an idea of prospective members, I thought you'd be just the right person for that. What do you think? (Active Listening). If you are onboard, I'd love to see you come up with 10-12 names from the community that we could take back to the Club by July. How do you feel about helping me out with this?

Time Management Strategies

Doing good work is self-reinforcing – the more you do, the better you feel, the greater the urge to keep doing more. This can be a positive feedback loop.

As a PE and future President, you are probably concerned with balancing priorities, conflicting schedules and finding enough time to do everything well. Our goal is to help provide some time-tested time management strategies that you can use in your life and Rotary. Based off of Stephen Covey's 7 Habits, these strategies have been used effectively around the world for years and can help you work efficiently and find the time to keep doing good work.

Covey's Four Quadrant Time Management Principal



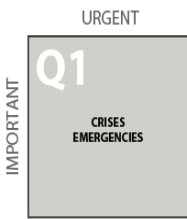
Everything you do in life can be classified by its urgency (Urgent or Not Urgent) and by its importance (Important or Not Important). This creates the matrix illustrated above with four quadrants:

- **Important and Urgent** – Crises and Emergencies
- **Important but Not Urgent** – Prevention, Planning, and Improvement
- **Not Important but Urgent** – Interruptions and Busy Work
- **Not Important and Not Urgent** – Time Wasters

We often spend our lives focused on the Urgent things instead of the Important things. In Rotary as in life it is extremely important to ask yourself: “Am I doing this because it is truly important or am I doing this because it is urgent?”

Important and urgent things should not be ignored: Crises and emergencies. However, the more time you can spend on the non-urgent but important things (prevention, planning, and improvement) the less crises and emergencies you will experience.

Quadrant 1 - Important and Urgent



This is effectively known as ‘fire-fighting’ and consists of crises, hard deadlines, health and family emergencies, etc.

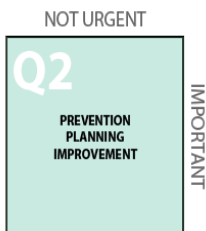
These are urgent and important things that you should not ignore. However, spending too much time in fire-fighting mode will lead to stress and burn out. You will be caught in a never-ending cycle of crisis management.

The only way to reduce the time you spend in this quadrant is to be proactive and to spend more time on the important things **BEFORE** they become emergencies.

Quadrant 1 Example:

Dealing with a crying baby is an Urgent and Important problem that cannot be ignored.

Quadrant 2 - Important but not Urgent



This is all about proactivity and where you should spend most of your time.

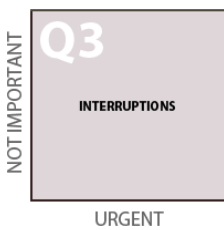
Quadrant 2 is all about planning, prevention, capability improvement, relationship building, recognizing new opportunities, etc.

Spending time on these important things should lead to clear vision and a balanced life, discipline, control, and fewer and fewer crisis situations.

Quadrant 2 Examples:

- This workbook
- Project or Fundraising planning
- Relationship building
- Spending time on things that inspire and uplift you

Quadrant 3 - Not Important but Urgent



Many of us spend a big portion of our time in this Quadrant confusing the Urgent things for the Important things.

Interruptions, ringing phones, most emails, etc.... Spending too much time on the unimportant urgent things leads to a very short-term focus with continual crisis management. Your plans and goals will seem increasingly useless since you are unlikely to have time to devote to them. Your relationships and reputation will suffer.

Quadrant 3 Example:

You are about to have a meeting with one of your core team members and your phone is ringing. Although the ringing phone is insistent, it’s likely neither urgent nor critically important

Quadrant 4 - Not Urgent and Not Important



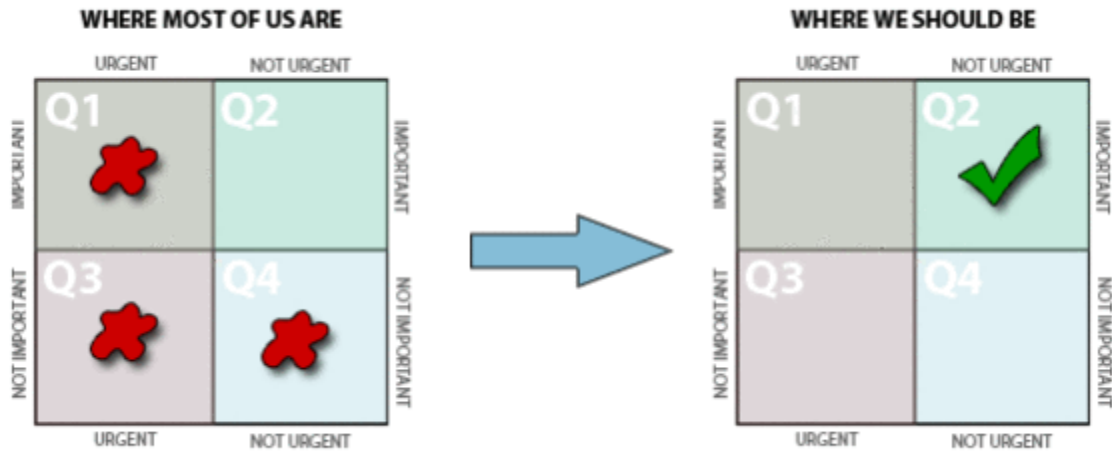
These are the time wasters in your life.

Spending too much time on non-urgent and not important things leads to increased time pressures, frustrations and fatigue

Quadrant 4 Examples:

- Trivial busy work or mindless web surfing

Using this Time Management Strategy



- **Identify Quadrant 2 activities.**
 - Write down all the Quadrant 1 and 3 activities you routinely do (all the Urgent stuff)

 - Write down how you can prevent these things from reoccurring or from becoming emergencies in the first place _____
- **These are your new Quadrant 2 activities.**
- **Free up time for Quadrant 2 activities**
 - Look at all the things in Quadrant 4 and **STOP DOING THEM!**
 - Look at all the things in Quadrant 3 and stop doing them too. This is more difficult as it often involves saying NO to people.
 - You should now have time to spend on Quadrant 2
- **Schedule time for Quadrant 2**
 - Schedule time to do Quadrant 2 activities. (Put them in your calendar just like a Rotary meeting).
 - Do the things you schedule
- **Reduce Quadrant 1**
 - The beauty with spending more time in Quadrant 2 is that it should slowly chip away at all your Quadrant 1 activities.
 - As you reduce your Quadrant 1 activities you have more time for Quadrant 2 – this creates a smooth and ongoing time management process

Planning and Goal Setting

As both a PE and as a President, it's important that you set goals that are both challenging and attainable. For many people setting the goal is easy; charting a path to ensure success is a more difficult skill to master. To help you succeed we have adopted a goal setting and planning process based on of Kotter's 8 Step Change Model.

Step One – Identify the Importance of the Goal

Establishing a goal is easy. Communicating the **value** of the goal may be more difficult. Psychology tells us that most people will change their behavior for one of two very primal reasons: seeking pleasure or avoiding pain. When setting goals, it's important to remember this basic psychology and identify proper motivating factors.

Take a common Rotary theme – increasing membership. Many attempts have been made to increase membership in Rotary with limited success. If this is your goal this year, consider what factors you can employ to best engage your Club Member's pleasure centers in their brains and encourage them to recruit more members?

When accomplishing a goal, what is most enjoyable? i.e. - Sense of accomplishment? Engaging a team? Working together? Celebrating success? Public recognition? Sense of doing good for others? Something else? _____

What does your Club most enjoy? _____

Define a time when your Club was most engaged? _____

Step Two – Build a Powerful Coalition

Rome wasn't built in day and neither was it built by one person. It's not your role as PE or President to do it all. It's important that you build a strong team to support the goal. This team should be comprised of influential people who are emotionally committed to the goal.

Identify 3-6 key and influential people in your Club that you would need to engage or would want to engage in order to ensure a goal is achieved.

Step Three – Create and Communicate a Powerful and Inspirational Vision of the Goal

As Simon Sinek says, it's not the what, it's the WHY. Why are you proposing this goal? What's the motivation? People don't change because of what you're saying, they change because of WHY you're doing it. Simon Sinek's video can be viewed here:

https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action?language=en

Why is it important you achieve this goal? _____

Why should I get involved? _____

Why does it matter? _____

Step Four – Identify and Removal the Obstacles

Motivational Speaker Jack Canfield summed it up clearly when he writes and speaks about goal-setting. "No matter what goal you seek to achieve, along the way there are going to be hurdles, roadblocks, obstacles, or someone standing in your way". The point is to acknowledge that this is part of the process; don't give up. A healthy plan will identify potential hurdles, recognize there will be hiccups, and will have strategies to overcome them.

What common hurdles or obstacles do you face in achieving goals? _____

What common hurdles does your Club face in achieving goals? _____

Who is your greatest ally to assist when obstacles arise? _____

What are three key attributes of your most successful project or goal? _____

Step Five – Create Short Term Wins

Everybody loves a winner and nothing breeds success like more winning. Building in small wins to any goal, objective, or project is critical. Without small wins, people get discouraged; with steady small wins, people stay encouraged, the team feels more engaged, successes come more easily, and more people will buy in. Understanding the value of small wins in any process cannot be overstated.

In your mind, what’s a small win? _____

Think of a goal or project you have been involved in. What were some small wins? _____

What are some easily obtainable small wins on any project or goal? _____

Step Six – Anchor the Goal

Many goals or projects don’t succeed long term because people declare victory too early. In any goal or project, it’s important that the true measure of success has been determined. With a fundraising goal this is easy to identify - in making changes within a Club it can be significantly more difficult. The best example of this is weight-loss. Someone may set a goal to achieve a desired weight and succeeds. Without a conscious change in behavior to maintain that weight there’s a high risk of putting the weight back on. It’s important that you clearly identify what the actual outcome is and how you know it has been achieved.

Provide an example of a goal that was celebrated too soon _____

What could have been done differently in the above to ensure lasting success? _____

Step Seven – Celebrate your Success

It's too often that we complete one goal and turn our focus on to the next. This is often attributable to the good feelings running through the team and the desire to keep up the good work. Unfortunately, this is not always sustainable and can lead to burnout or volunteer fatigue. It's important to recognize and reward those pleasure centers in the brain that were activated when the goal was first established. It's important that you stop and celebrate your success as a team.

What are some ways to celebrate completion of your goal? _____

Different team members may want to see the success recognized in different ways. Consider your club and identify the various people and how they best celebrate success.

Name	Celebration Style
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

MODULE TWO – PNW PETS – Establishing Goals and Outcomes

At PNW PETS, you will be exposed to four core courses and your choice of electives. This module is designed to help you get the most of those training sessions. Core Courses have been included in this section. Elective courses are part of a separate printing.

Core Courses are:

- **Dynamic Leadership**
- **Growing Vibrant Clubs**
- **Our Foundation and Community Impact**
- **Tell Rotary’s Story – Public Image**

Elective Courses are:

- **Club Operations and Administration**
- **Effective Club Meetings**
- **Leading and Motivating Volunteers**
- **Planning and Goal Setting: Engaging Vision**
- **Planning and Goal Setting: SMART Goals**
- **Revitalizing Your Club**
- **Rotary 101**
- **Rotary Voice**
- **Successful Fundraising**

Now that you have completed your Pre-Work, including your own competency assessment and Leadership Style Assessment, it is our hope that you have a strong foundation and understanding of the core competencies of a Rotary Club President. With this knowledge, we hope we have helped to prepare you to make knowledgeable decisions in selecting the electives that will best help you in your year ahead.

From your Pre-Work, please remind yourself:

1. What skills do you already have? _____
2. What do you already do well? _____
3. What do you need to better understand about Rotary or your role? _____
4. Who is going to help you succeed? _____
5. What are you most excited about? _____
6. What is your greatest fear? _____
7. How can we help you overcome that fear? _____

Core Courses:

Dynamic Leadership

As the President of your Rotary Club you will be responsible for ensuring your club has a clear vision of the future, developing that strategic vision into SMART Goals, and tactical actions. This session will develop your mastery of using the strategic planning process, helping you provide motivated and effective leadership.

There are four Key Outcomes of this training:

- 1. Create a Vision
- 2. Create SMART Goals
- 3. Explain the importance of strategic planning
- 4. Explain the importance of engagement

What is a vision?

What makes a goal into a SMARTER Goal?

Imagine you are 5 years in the future. List 3 things that your club has accomplished during that time:

Why is Strategic Planning important?

How will you engage your club with Strategic Planning?

Goal Setting #1:

What items do you want to see accomplished as part of your club's Strategic Plan?

Idea

Outcome

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<hr/>	<hr/>
<hr/>	<hr/>

Goal Setting #2:

Who in your club, district, or elsewhere could help you construct your strategic plan?

Person

Reason

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
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Use the following to record key notes or concepts about Dynamic Leadership:

Growing Vibrant Clubs

You want to create an inviting club, where members and potential members share the best experience possible. A Club where people feel welcomed and valued, where diversity is appreciated and people come together in fun and fellowship and complete amazing projects.

There are two Key Outcomes of this training:

1. Identify changes made during the 2016 Council on Legislation and outline why this matters to Clubs
2. Identify new ways to create a positive membership experience

List three changes in the 2016 Council on Legislation that could have a positive impact on your club:

Why did you join Rotary? Why did you choose your club?

Ideas for creating the best membership experience:

Ideas for making members feel special and valued:

How can inductions be personalized?

What actions are you going to take to increase membership in your club?

Goal Setting #1:

How will you create the best membership experience possible for potential, new and existing members?

Idea

Outcome

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<hr/>	<hr/>

Goal Setting #2:

What will you do to make each member, new and seasoned, feel valued and special?

Idea

Outcome

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Use the following to record key notes or concepts about Membership:

Our Foundation and Community Impact

Your Foundation – how much do you know? What is it? How does it work? How can you use it to help make your year that much more successful?

There are three Key Outcomes of this training:

1. Explain the importance of *Your* Rotary Foundation
2. Explain how *Your* Rotary Foundation works
3. Identify how to access and use Foundation funds to meet club objectives

If one of your Rotary Club members wants to donate an Expectancy who would you refer them to?

How can you communicate to your club the importance of “Every Rotarian Every Year”?

In your own words, what are some key differences between the Annual Fund and the Endowment Fund?

Who can you talk to, within your district, to get help procuring a grant?

Name

Position

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
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Who can you talk to outside of your district (perhaps someone you met at PETS)?

Name

Position

<hr/>	<hr/>
<hr/>	<hr/>
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Goal Setting #1:

Knowing what you now know about the Foundation, based on the training provided and the small group activity, how can you use this information in your Club? Write down some potential ideas or goals.

Idea

Outcome

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Goal Setting #2:

You have just learned that the Foundation is an incredible source for funds for your Club to complete amazing projects or to partner with other Clubs. Using the training provided or the small group activity, set some goals. How do you best leverage the Foundation to support, engage, grow or inspire your Club?

Idea

Outcome

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<hr/>	<hr/>
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Other notes or concepts about The Rotary Foundation:

Tell Rotary's Story – Public Image

Rotary has spent a lot of time redeveloping its Brand and Image to help make your life easier as President. How do you leverage this to help your year get easier? At its center, Rotary is a **people** organization. People join Rotary because of the work that gets done by your Club in your community.

There are two Key Outcomes of this training:

1. Present your club to new and existing members
2. Create your Rotary Story and help our members do the same

How well does your club fit the Siegel-Gale survey? How can you use this to engage your club members?

Having watched the Lingenbrink video (<https://www.youtube.com/watch?v=RFfh9rsKErg>), what are the key aspects of a Rotary Moment?

What is the Vibrant Club Model? How does it fit with your Club? What parts can you use? How do you adapt it into your Club? Who do you know who would love to do this?

What other tools can you use out there to promote Rotary in your community?

Write down a Rotary Moment

Goal Setting #1:

What does your club look like to someone on the outside? Are you presenting the best your Club has to offer? How can you utilize the resources you received today to create a more inviting club?

Idea	Outcome
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Goal Setting #2:

How are you going to share your Rotary Story? How are you going to help others create and share their stories? How are you going to encourage your Club to share stories? How does Rotary Voice fit in?

Idea	Outcome
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Other notes or concepts about Public Image:

MODULE THREE – Goals, Outcomes and Measurement

In advance of Spring Assembly, or at Spring Assembly, depending on your District's preference, it's critical that you have crystalized your Goals and Outcomes for your year and to help ensure success of subsequent years.

Please review your club and this workbook and identify between 6-10 KEY goals for your year. It's important that you determine how this goal will be measured, and by whom.

For example:

Goal #1

To adopt the Vibrant Club and Priority #1 models to help re-engage our Club so that we can stop losing members and attract new members who want to feel part of the Club and engaged. We will have an increase of membership of one person every 3 months. I will induct my first new member on July 1 or sooner.

Goal #1 – Using the Foundation – what are you going to do, how and when?

Goal #2 – Presentation of Your Club - what's working, what isn't. What's it going to look like and by when?

Goal #3 – Engaging Membership – what's your plan to engage your members? What will it look like? How will it be done? By when?

Goal #2 – Lead Leaders – what is your first step to creating a Vision that reflects your Club? How will you ensure it reflects your Club's priorities? Who will you ask for help?

Goal # _____ – what’s your plan? What will it look like? How will it be done?
By when?

Goal # _____ – what’s your plan? What will it look like? How will it be done?
By when?

Goal # _____ – what’s your plan? What will it look like? How will it be done?
By when?

MODULE FOUR – Vision

Your year is getting ready to start, and you want to be prepared. As important, your club wants to know that you have goals and thoughts for the future. Creating a strong vision is a key element of strategic planning, and creating one with your club (or working to update it if you already have one) will be a hallmark of success as you start your year.

Creating a Strong Vision:

The following elements will help you as you work with your club to create a compelling image of the future for the club. Here are 10 key characteristics that should be included:

Future Focused: Provides a clear picture of what you hope your Club will look like in the future – not just a year from now, but 3-5 years from now as a result of sustained Club effort and the Presidents working together for the betterment of the Club.

Directional: Provides a clear direction for where the Club is going in your year to help achieve the overall long-term vision

Clear: Provides guidance for the decisions of the Club. It provides a framework on the allocation of Club energy and resources

Relevant: Grounded in the past and uses the successes of the past as a spring-board for the future

Purpose-Driven: A clear and compelling statement that is a call to action and allows club members to feel they are part of something bigger than just themselves

Values Based: Tied to the values of the Club and of the people who will achieve the Vision

Challenging: A goal that challenges us, stretches us to think beyond what is possible, today or even tomorrow; invites greatness

Vivid: Describes the future in a way that is easy to imagine

Inspiring: Inspires commitment, invites attention, and touches the hearts and minds of people

Help Writing Your Vision

The following will help you as you (or a facilitator) lead your club's vision process:

Step One – Record your own thoughts:

Future Focused - what is the future you see? Describe it in 10-20 words:

Example: a vibrant club, full of energy and great people, recognized for their commitment to doing great things

Your Words:

Directional - set the tone for your year. What do you want to see in your year?

Example: fun and welcoming, open doors with engaged members and new people looking to join

Your Words:

Provide clarity – what does it look like?

Example: focused on creating a Club that people want to be part of – because it's fun and we make a difference

Your Words:

Provide relevance – tie it back to your history

Example: building on our past successes and recognizing all the good work we have done to date

Your Words:

Purpose Driven – a clear call to action

Example: it's our turn to shine, to make difference in the world we leave so that we can great a brighter future for the next generation

Your Words:

Values-driven – what values are you trying to convey?

Example: built on commitment to serving others and doing good in the world

Your Words:

Challenging – throws down the gauntlet for the seemingly impossible – but achievable

Example: 60 members strong, raising well over \$100,000 a year and recognized in the District as the 'Little Club that Could'

Your Words:

Vivid – easily imaginable, touching the mind and soul

Example: the premier service club in the area

Your Words:

Inspiring – grabs your heart and commands attention

Example: we can do this because there is no one better suited to this challenge. We have the very best this community has to offer and together we have proven that we can accomplish the improbable.

Your Words:

Step Two: Summarize your Thoughts

Summarize your notes and thoughts on a vision for your club will be a great asset to you as President, whether you translate them in support of your club's current vision or work with your club to write a new vision for the club that will become part of its strategic plan.

Example:

A vibrant club, full of energy and great people, recognized for their commitment to doing great things. Known for being fun and welcoming, with open doors with engaged members and new people looking to join. Focused on creating a Club that people want to be part of – because it's fun and we make a difference by building on our past successes and recognizing all the good work we have done to date. For it's our turn to shine, to make difference in the world we leave so that we can great a brighter future for the next generation built on or proven commitment to serving others and doing good in the world.

I see a Club that is 60 members strong, raising well over \$100,000 a year and recognized in the District as the 'Little Club that Could' and the premier service club in the area

We can do this because there is no one better suited to this challenge. We have the very best this community has to offer and together we have proven that we can accomplish the improbable.

Step Three – Revise your Thoughts:

Work on it until you are happy. It's a process that can take some time. Don't be afraid to leave it and come back to it.

Example:

I have a vision of what this Club will look like in the future...

I see a vibrant club, full of energy and great people who are recognized for their commitment for accomplishing amazing things. Our Club is fun and welcoming with engaged members and a continual list of new people looking to join. Our track record and all the good work we have done speaks for itself but I challenge you - it's time to raise the bar. For it's our time to act, to move together to create a lasting difference in the world so that we can leave a brighter future for our children and grandchildren – a world where they can build on our commitment to serving others and doing good in the world.

I see a Club of 60 members strong, representing the very best of our community. We are raising well over \$100,000 a year, recognized in the District and around the world as the 'Little Club that Could'

I know we can do this because when I look around the room, I see the faces and hearts of some of the most amazing and dedicated people I have ever met. I know we can do this because there is no one better suited to take on this challenge. You are the very best the community has to offer and together, I have seen you do amazing things. It's time to step it up, to bring out your very best and create the future we all dream of. It's your turn to shine!

MODULE FIVE – Strategy and Planning

With your vision thoughts now in place, it's time to put things altogether with your club, to achieve the goals that you wish the club to achieve, and to develop the club's strategic and tactical plans that you will follow as you work through your year. If your club has a strategic plan in place, you will have come to PETS with much of this already started. If your club does not have a strategic plan, then you need to work to develop one with your club. Many Districts have strategic planning or visioning teams to help you develop this important roadmap with your club.

Now it's time to lead them and motivate them to do their very best work. Your club will be looking for your leadership now and for your hand to guide them. But remember, leadership is not from the front, it's from the back, supporting each of them as they move forward.

We encourage you to look back at your competency assessment, perhaps have a conversation with your District Governor or your Club Executive about moving forward with the goals. Consider your leadership style and the communication styles of those in the Club because execution is everything. People will follow a leader with a plan and you're about to draft some plans that will positively change your Club forever.

Step One: Re-Establish Your Goals

Review and refine your goals. Ensure the goal is still relevant and will provide value to the Club, District and Rotary

Step Two: Define and Refine the Goal

Compare it against the SMART metric. Is the goal....

Specific – who, what, how and why

Measurable – how will it be measured; how will you know you're done?

Actionable – what is the step-by-step process?

Realistic – Is it both practical and ambitious?

Timed – what's the deadline?

Evaluate – how did you do?

Reward – Celebrate!



“What gets measured gets done, what gets measured and fed back gets done well, what gets rewarded gets repeated” – John E. Jones (Leadership Trainer)

What is the Goal?

Why are we doing it? (Remember Simon Sinek)

How will it be achieved?

Who will be on the team to see it through?

When will it be done by?

Step Three - Follow the Planning Process (this can be led by a strategic planning or visioning facilitator or by you, as President)

1. Assemble your team - ideally include three years of Presidential leadership, board members, key committee chairs, etc. depending on your club size.
2. Conduct a SWOT exercise to determine the current state of your club
3. Craft the compelling vision of the future that can be shared and supported
4. Identify the key goals that you developed at PETS
5. Identify actions to achieve them - work to create small wins
6. Set up the ongoing performance tracking and club operational management using the plan
7. Celebrate success

Step Four - Communicate and Explain the Plan and your Goals to the club

The best time to start this is during your initial few days and as you work on the strategic plan. Tie this into your visioning or planning exercise, or at other times that you can communicate with the club such as an installation dinner and at your board or executive meetings. The important thing is that you get your message to the Club members as early and as often as possible in your term.

Step Five – Implement the Plan

Using your identified leadership team, implement the plan. Ensure that everyone is clear of their roles and the SMART objectives. Set some initial timelines, ensure the small wins are in place and support your team as they move forward together towards success.

Step Six – Celebrate

Congratulations, you are well on your way to having an incredibly successful year. We at the PNW PETS Training Team are pleased to be here and to support your journey. If you need anything, please do not hesitate to contact any one of us. It's going to be an amazing year and we look forward to hearing about your successes. Feel free to reach out to share them. We're here waiting.

Your PNW PETS Training Team

Leadership Tip: Your new role is to lead people, not try to carry the load yourself. People are looking to for leadership and guidance – give it to them. Trust them. Mistakes will be made, but likely not fatal. Remember – “leadership is about getting results through people.”

Suggested Calendar

This checklist is designed to help the Rotary Club president plan and, thereafter, monitor Club activities on a monthly basis. It also serves as a monthly reminder of activities and deadlines.

The purpose of this checklist is to be a starting point for YOUR planning as YOU personalize it to your district and your club. In other words, convert this calendar/ checklist into your checklist. Just start here with this calendar and tailor it to make it your own. These samples have specific details and dates that may be different from your club or district. Don't let that throw you!

Now, don't forget about the sitting 2016-17 club president. It is important that some of your planning activities be coordinated with your current club president. Two examples are requests to meet with your new officers or to hold a club retreat before you take office. During your year as president, you will not want members unduly distracted from tasks they agreed to do for you. Naturally, you will want to extend that same courtesy to your current 2016-17 club president. Be your current club president's supporter through the end of June 2017. They'll be an important supporter for you during your year.

At Pacific NW PETS, you learned the importance of providing leadership & vision, setting & achieving short and long term goals, communicating with your club members and the community at large, and engaging all your Rotarians in meaningful service. Please refer to your notes from Pacific NWPETS and your own goals as you modify this calendar for your own purpose.

Remember the message from Siegal + Gale: People stay in Rotary for a sense of community and to make a difference in their communities.

As 2017-2018 Club President

Prior to July 2017

Get your goals, plans and team in place

- ✓ Select your leadership team/ Select committee chairs
 - Draw up your list of open positions and suitable members for each position. Remember to create a balance with experience, those who are keen to contribute and first-time leaders in the club. Have a clear understanding of the role and outcomes you want achieved in each position.
 - You may have already invited some people to be on your leadership team, to maintain their current positions for the next year with you, or have them in position on succession/strategic plans.
 - Fill vacancies using leadership insights gained at PNWPETS and from club leaders
 - Approach identified members in a timely manner.

- Ensure that those accepting your invitation to serve have key dates of District Conference, and District Training Assembly diarised & committed.
 - Ensure that your Rotary Foundation Chair has all the details of seminars and accreditation events at which their attendance with you will be expected.
- ✓ Set 2017-18 club goals in consultation with your Board and key committee Chairs. For example, set a percentage of retained members as a strategy for growth; along with a specific plans to reach out to them (i.e., identifying members at risk and why); Reduce Number of Members Terminated between May 1 and June 30th; set a goal of 100% of members giving to the Rotary Foundation.

Meet with the Club’s Rotary Foundation Chair:

- Discuss and agree on giving goals to be recommended (annual fund, Paul Harris Society, permanent fund in the form of Bequest Society, Polio giving)
- Ensure TRF qualification Memorandum of Understanding has been signed and returned
- Share Rotary Foundation project ideas with your Board/Club.
- Develop a plan for implementation.
- Develop the requisite grant application for the District Foundation Chair by the District’s published due date.

Meet with Club’s Membership Chair:

- Discuss and agree on membership net growth, new members and retention goals.
 - Which tools from Priority #1Plus and Membership Matters will they be using and do they recommend you use.
- ✓ Lead the Club board in setting and approving the 2017-18 Budget.
- ✓ Provide training for your new club Board---so all board members understand their roles, responsibilities and obligations.
- ✓ Hold a planning retreat with your 2017-18 Leadership Team, to set goals and action plans for the year. Invite club members to attend.

Consider three opportunities for positive change:

- ✓ Will your club modify its Bylaws to give it the flexibility granted by the 2016 Rotary Council on Legislation regarding membership, attendance and more? Something to discuss with your new board and at a Leadership Team retreat.
- ✓ Is your club celebrating the **30th Anniversary of women in Rotary US of A**? This seminal event is May 5, 2017. If nothing happening before July, plan a celebration during the remainder of 2017. Celebrate your women members, invite your former women members, and use it as a recruiting effort to bring in more women.
- ✓ How about surveying your club members? Find out what members love, what turns members off ask questions such as their recommended “3 things to improve the club experience (increase value of club to our Customers – club members)”.

Get your systems in place

- ✓ Assign someone up update the Club website and your club Facebook presence—so it is ready for new Rotary year.
- ✓ Meet with the people who prepare the club bulleting to discuss any improvements you might like to see implemented. For example, some club presidents write a weekly message in the club bulletin. If you are going to do this, start planning your messages.
- ✓ If your club has a tax-exempt Foundation or a Charity, meet with the elected leadership to make sure you understand their processes and key reporting dates. You and your club are relying on them to manage your club foundation/charity in accordance with state/provincial and national reporting requirements. *For example, in Washington State, Club Foundations must submit 990 Tax Returns to the IRS by Nov 15h, a non-profit corporation report by November 30, and Charitable Trust Renewal & Charitable solicitations registration by May 31 annually.*

Synch your calendar with your District's key events and dates

- ✓ District Leadership Assembly (sometimes called DTLA). Attend it with your club committee chairs. Invite newer members to attend. Have someone organize a carpool? Schedule a Lunch with your team?
- ✓ The District Conference
- ✓ District Foundation Training
- ✓ District Membership seminars,
- ✓ Special Membership Training (**Priority#1Plus** in zone 25 and **Membership Matters** in Zone 24)
- ✓ Social events held for presidents by the Governor and AG's,
- ✓ Special Rotary Foundation events.
- ✓ The date when your District Foundation Chair/District Governor is requiring your club to submit its MOU (Memorandum of Understanding). This document is an agreement between the club and its district: a commitment to implement the Rotary Foundation grant financial and stewardship requirements and to ensure proper implementation and management of Rotary Foundation Global and Package Grant funds and any District Grant Funds. By executing this document, the club agrees that it will comply with all Foundation and District requirements.
- ✓ District Grants Management Seminar (attendance of certain # of persons from your club is required as part of the MOU process). Have at least one club member attend the District Grant Seminar (in order to become qualified to receive Rotary Foundation Global or District Grants). Promote attendance by leaders/members of International and community service committees at the District Grant Seminar.
- ✓ Watch for Zone webinars, especially about membership retention. Get your membership committee members to attend.

Get inspired

- ✓ If you can, attend the 2017 Rotary International Convention in Atlanta, GA (June 10-14).
www.RIConvention.org

Key dates for the Club Secretary:

- ✓ Your Club Secretary should have already informed RI about Club officers!
- ✓ The Club Secretary updates Club membership on DaCdb and online with RI before July 1. Note, if you do not have DACdb, you may substitute Club Runner as to location to which you update your club membership. Club membership as of June 30 is the basis for Rotary's invoicing your club/club treasurer for Rotary Semiannual dues (SARS).

July 2017 – Your First Month

- ✓ Plan an outstanding first meeting! Start with a bang!
- ✓ Have some fun, and set the tone for the year.
 - This first meeting *could be* an interactive Club assembly to discuss the 2017-18 goals, club strengths and opportunities from recent club surveys or just brainstorm other topics of interest to your club.
- ✓ **As President, on July 1, enter your club goals onto Rotary Club Central.**
 - Sign in at www.Rotary.org/MyRotary/en/secure/13301
 - Your club members will see your club goals & accomplishments on their own *MyRotary*. Your DG and AG can access your club's goals and understand where your club is heading for the new Rotary year. Make sure you include goals that permit your club to achieve the RI 's Presidential Citation.
 - *Don't forget to update with actual accomplishments through your Rotary year.*
- ✓ Make sure that committee descriptions handed out along with cards for members to sign up for 2017-18 Committees (by end of July). *Full engagement means more satisfied members.*
- ✓ Encourage and support your program chair/committee in planning and promoting interesting and diverse programs for your Club. Ask all members to submit ideas to your program chair.
- ✓ Plan and conduct monthly board meeting—your first official board meeting of the year!
- ✓ Ask your Membership Committee to initiate its club 2017-18 Membership Retention & Recruitment Plans. Use tools from Priority#1Plus and Membership Matters.

Examples include: fielding club surveys (with examples provided by Priority#1Plus and Membership Matters); implement personalized and more meaningful inductions; Ask for Vocational Interviews of newer members; implement meaningful ceremonies to move from new member status (red to blue badge); establish a team to develop individual development plans for our newer members...what else?

- ✓ Recruit club members to volunteer at your Rotary Booth during any summer community activities.
- ✓ Lead by example and encourage every Rotarian to make a personal contribution to The Rotary Foundation at the first meeting of the new Rotary year or in the month of July. Encourage the use of Rotary Direct—set a monthly amount that is charged automatically to meet your personal commitment to The Rotary Foundation.
 - my.rotary.org/en/document/rotary-direct-rotarys-recurring-giving-program-form

- ✓ Ask your Committee Chairs and officers to register and log onto MY ROTARY, my.rotary.org/, to create their profile and to watch the progress towards the goals of the Club. Make sure that all NEW members are given assistance in creating a profile on MY ROTARY.
- ✓ Have a knowledgeable person in the Club demonstrate to Committee Chairs and officers how to log on to Rotary Club Central to create their profile and to watch the progress towards the goals of the Club.
- ✓ Host outbound summer youth exchange student & parents at Club.
- ✓ Hold a summer picnic or some other social.
- ✓ Announce upcoming International Trips being led by people in the district or in the zone (including Polio NID's, International hands on projects.). Don't know? Have your International Services Chair find out.

Key dates for the Club Secretary and Club Treasurer:

- ✓ Ensure that the semi-annual Club Report with invoice has been received by the Club secretary and/or Treasurer. Assure that the Club pays these dues to RI. Submit district per capita dues, as well.

August - Membership and New Club Development Month

- ✓ Initiate your Rotary Foundation Centennial PR campaign among your members and in your community. Piggy back onto the District's PR effort.
- ✓ Plan and conduct your monthly board meeting.
- ✓ Publish 2017-18 Club Roster (with updated information about Club members' vocations). Provide information about the club's international projects, community service projects, educational awards, current and past club officers).
- ✓ Attend socials or get togethers for newer members.
- ✓ Conduct Club activities to support membership engagement & recruitment efforts.
- ✓ Log on to **Rotary Club Central** and download TRF contribution and recognition reports. This task can also be assigned to the Club secretary, treasurer or Club Foundation chair.
 - Sign in at www.Rotary.org/MyRotary/en/secure/13301
- ✓ Revisit the Club's VISION and start execution of plan to implement that vision. If your club developed a multi-year plan using "Club Visioning", move to the next steps through the "Vision to Action" program
 - rivationfacilitation.org/vision-to-action-plan/
- ✓ Ask the Club Secretary, Membership Chair or attendance chair to give you (and New Member Chair) a heads-up above people who missed a number of meetings in the prior month or those whose

attendance/engagement has fallen below 50%. This gives you an opportunity to reach out to members who have been missing meetings. Suggest you do this regularly.

September – Basic Education and Literacy Month

- ✓ Plan and conduct the monthly board meeting.
- ✓ How are your Club meetings going? Making sure your programs are interesting will keep your attendance up and members happy! Are they exploring worthwhile business topics? How about a quarterly Club member evaluation of speakers? If members are bringing guests, it is a good sign that your meetings are fun and your Club programs interesting. No guests? Take a hard look at your meetings to see if improvement is needed.
- ✓ How is your member engagement? This may be a time when Club members are ready for new activities—school is back in session and fall is in the air. Do you have service project or social activity planned?
- ✓ Attend and take your Membership Committee and Chair to the district-sponsored membership training: **Priority #1** (in Zone 25 districts) and **Membership Matters** (in Zone 24 Districts).
- ✓ If your club gives scholarships, hold a ceremony to award the scholarships before the students leave for college or community college. (*Good opportunity for press coverage!*).
- ✓ Organize a networking event in which Club members can meet other local professionals and introduce them to Rotary. (*Perhaps business owners & professionals?*).
- ✓ Make sure your club International Services Chair/committee submits applications for Rotary Foundation District Grant proposals to the District. *Note: this timetable & process may vary by District.*
- ✓ Consider a **Rotary Conversation Café**: my Rotary Story. (*This could be a club assembly*), Tables have 2 rounds passing “talking stick” where each person at table speaks in turn—telling their Rotary Story.
- ✓ Prepare a quarterly progress report in meeting 2017-18 goals, communicate to your Club. Enter info on Rotary Club Central. (*End of month*).
- ✓ Host inbound summer youth exchange student and their host family at Club meeting. Highlight and promote youth-related activities and programs and celebrate Club success in Interact, Rotaract, RYLA, and Rotary Youth Exchange.

- ✓ Does your club distribute dictionaries to school children? Is this the month?

October – Economic and Community Development Month

- ✓ Plan and conduct monthly board meeting—you are already into your second quarter. Do you report back to the Club about what happens at the board meetings?
 - ✓ Monitor progress in achieving Membership Retention & Recruitment goals.
 - ✓ October or November is often when the District holds District Foundation Seminars. If this is the case, promote attendance. *Certainly you, your Club foundation chair, and your Club president elect will want to attend. Do you have any new members who are interested in getting involved in the Foundation for your Club*
 - ✓ Hold a 2nd Conversation café: Club Service Club service leaders share and discuss what they do.
 - ✓ Continue Vocational interviews of newer members.
 - ✓ Celebrate World Polio Day (October 24) at your club meeting that same week. *For example: hold a special club program, members wear End Polio Now pins all week and club members participate in any District activities.*
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November - Rotary Foundation Month

- ✓ Plan and conduct monthly board meeting.
 - ✓ Guided by your club Bylaws convene a Nominating Committee, to select 2019-20 Club president and 2018-19 Board members. *(This assumes your club selected the 2018-19 President in either late 2016 or early 2017).*
 - ✓ Encourage Club members to participate on Polio NID trip.

 - ✓ Set the stage for Foundation Annual Fund Giving through programs and stories about Foundation-funded projects. Remind Club of 100% giving goal for 2017-18.
 - ✓ Recognize the Club’s Major Donors, Bequest Society Members, Benefactors, Paul Harris Society members, and Paul Harris Fellows with special acknowledgement during Rotary Foundation Month.
 - ✓ Schedule a brief Rotary program about planned giving (the benefit of making a gift to the Rotary Foundation beyond a person’s lifetime). They could become benefactors or Bequest Society members. Have your club Foundation Chair order “Your Rotary Legacy” brochures (330EN) and hand them out at this meeting----to make it easy for members to make a planned gift.
 - shop.rotary.org/your-rotary-legacy-330

 - ✓ Ask Rotarians to visit a Rotaract meeting and to consider volunteering as mentors.
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December – Disease Prevention and Treatment Month

- ✓ Plan and conduct the monthly board meeting.
- ✓ Club members distribute dictionaries to elementary schools

- ✓ Plan a family friendly Holiday program/ event to include spouses and family of your Club members. Strengthening our Family of Rotary is always a priority with special focus during this month. Include Rotaractors? Include grandchildren?
- ✓ Assess the progress of Club projects and provide progress reports for Humanitarian Grants as required by the Rotary Foundation.
- ✓ Hold the annual Club election in early-Mid December (no later than 31 December) for the 2018-19 President and new 2018-19 Board members. Hold Club election of Club Foundation officers and board members (If your club has a separate 501(c) 3 foundation).
- ✓ Schedule periodic meetings in the 2017 year with your 2017-18 President-elect and 2018-19 President elect. This is a great way to assure continuity of leadership as well as continuity of significant club project.

- ✓ Attend District Holiday Party/event if such an event occurs in your District.

Key date for the Club Secretary:

- ✓ Secretary to report monthly membership and attendance via DaCdb or ClubRunner no later than 15 days after the last meeting of the month.
 - ✓ Secretary to make sure that membership is updated online with Rotary International before January 1st.
 - ✓ Deadline for reporting next year's Club president and secretary to the district and entering the information into the DaCdb. (By December 31).
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January 2017 – Vocational Service Month

- ✓ Plan and conduct monthly board meeting.
- ✓ Re-energize your Club after the holidays! Start off with a great meeting!

- ✓ Prepare 6-month progress report in meeting 2017-18 goals. Enter info on Rotary Club Central. Remind all committee chairs to “Share Our Success”. Ask them to compile information for recognition of your Club members and their great work! Communicate success to the Club.
- ✓ Plan and conduct Club assembly to review club: What’s going well? What should be changed? How can we be “even better”?
- ✓ Conduct vocation-related activities and programs.
 - How can your members share information on their vocations?
 - Create a “yellow pages” so members can do business with each other.
 - Continue Vocational interviews of newer members.
 - Share your creative ideas for promoting Vocational Service with the district governor.
- ✓ Choose RYLA (Rotary Youth Leadership Awards) attendees. RYLA is a leadership program coordinated by your District. Each year, thousands of young people participate in this program. Young people ages 14–30 are sponsored by Rotary Clubs to attend this training.
- ✓ Any social events for newer members as well as seasoned members? If not, get scheduled for this year.
- ✓ Schedule mid-year visit with district governor and district governor elect and AG. Be sure to include your Club’s president elect.
- ✓ If it is the practice in your district, meet with AG and other area Club presidents. Look for collaborative opportunities.

- ✓ Key dates for club secretary and treasurer
- ✓ Verify with the Club secretary that the January semi-annual report (AR) has been received by RI and resultant invoice received by Club. Assure invoice has been paid. Submit district per capita dues, as well.

February – Peace and Conflict Prevention/Resolution Month

- ✓ Plan and conduct the monthly board meeting.
- ✓ Club’s nominated (and funded) students attend RYLA (*dates vary by District*)
- ✓ Promote attendance at the district conference (*Dates & locations vary by District*). On line registration is open on the District website.
- ✓ Monitor progress in achieving membership engagement & recruitment goals.
- ✓ Consider attending the Rotary Presidential Conference on Environmental Sustainability and Peace in Vancouver BC is slated for Feb 9/10 2018. It is one of six conferences around the World linking the Rotary areas of focus with Peace. - See more at:
 - rotary5040.org/Stories/vancouver-selected-as-a-site-of-2018-presidential-conference#sthash.cdgt8ABo.dpuf

- ✓ Promote attendance at the RI Convention in Toronto (June 24-17, 2018). *Perhaps appoint a Rotarian to be the promoter?*
 - ✓ PNWPETS –February 23-25, 2018. *Make sure your 2018-2019 club president-elect attends. Help them in any manner they might want—perhaps in setting initial goals.*
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March – Water and Sanitation Month

- ✓ Plan and conduct monthly boardmeeting.
 - ✓ Your Club president elect will return from PNW PETS energized! Give her/him some time at the podium? How can you use this enthusiasm to help finish out your year?
 - ✓ Promote attendance at the district conference.
 - ✓ Conduct literacy related activities and programs.
 - ✓ Recognize World Water day and club grants & activities to address water issues (March 22). Ask any club members to speak who are members of WASRAG (Water & Sanitation Rotarian Action Group). Encourage members to join.
 - ✓ 3rd Club Conversation Café: Community Service, Vocational Service and Youth service. Hear from those who lead these activities and have table discussions of what members can contribute and their hopes for the future.
 - ✓ (Club option) Select an individual Rotarian for the “Rotary Avenues of Service Citation”. This award permits a club to Honor a club member who for outstanding efforts in each of the five Avenues of Service: Club, Vocational, Community, International, and youth.
 - my.rotary.org/en/learning-reference/learn-topic/awards
 - ✓ Also ask your Foundation Chair to keep you AND the Club informed on your club’s annual, restricted and endowment fund giving as well as your club’s Every Rotarian: Every year (EREY) progress. Report progress/success to your club members.
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April – Maternal and Child Health Month

- ✓ Plan and conduct monthly boardmeeting.
- ✓ Ask committee chairs and Rotarians to attend the District Assembly (*Dates vary by District*). Assign a Rotarian to “sign up” attendees---including a special encouragement for newer to attend.

- ✓ Prepare a quarterly progress report in meeting 2017-18 goals; communicate to Club as a “Share Our Success”. Enter info on Rotary Club Central.
- ✓ Attend the District Conference. Celebrate with your club members.
- ✓ Recognize World Malaria Day and Club’s grants to address (April 25).
- ✓ Schedule RYLA participants to speak to the club about their experience(s).
- ✓ Support your PE and team in attending District Training Assembly to prepare for goals of next year.

May- Youth Service Month

- ✓ Plan and conduct monthly boardmeeting.
- ✓ Attend District Assembly (District Leadership Training Assembly)
- ✓ Hold College scholarship Awards ceremony at a club meeting
- ✓ Hold a 4-way test program at your local high school or middle school.
- ✓ 4th Club Conversation Café: International services (including those who lead international hands-on projects). Hear from those who lead these activities. Have table discussions of what members can contribute and how club members could be more personally involved.
- ✓ Monitor progress in meeting membership engagement & recruitment goals.
- ✓ Include your club’s President Elect (PE) in discussion of how to maintain the culture of engagement among your Rotary club members. Welcome the PE’s new ideas and enthusiasm to build on your success.

June - Rotary Fellowships Month

- ✓ International Convention in Toronto Canada (June 24-17, 2018).
- ✓ Report your club’s performance in meeting the 2017-18 Presidential Citation goals. This information is required to be entered online **by you** on **Rotary club Central** by June 30, 2018.
 - my.rotary.org/en/news-media/office-president/presidential-citation-rotary-clubs for more information about reporting.
- ✓ Review YTD Monthly Contribution Report (MCR) to determine your club’s success in meeting its Foundation giving goals (including 100% participation in giving to the Annual Fund). Ensure that all

contributions are sent in by 15 June to be credited in the current Rotary year. *Your club Foundation chair key in getting this done.*

- ✓ Recognize and thank donors for their support for The Rotary Foundation.
- ✓ Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.
- ✓ Confer with the president-elect to ensure a smooth transition. Support her/him in planning, goal setting, and selecting their team.
- ✓ Assure that your Club Foundation Chair and/or Club Treasurer submit final Rotary year contributions to The Rotary Foundation before 30 June.
- ✓ Monitor membership development initiatives and goals. Provide the Club with a final report on membership growth & retention, and progress in meeting other goals (increased membership of younger business people and women, for example). Identify areas requiring continued action.
- ✓ Celebrate your club and Rotarians achievements in 2017-18. Remind them of the good they have done.
- ✓ Schedule any special event your club holds to acknowledge the success of the 2017-18 Club President. Pass the baton to the PE, and take a moment to enjoy the knowledge that your Club had a great year. Plan a dignified ceremony for the installation of next year's Club officers.

- ✓ **The Club Secretary updates year end Club membership on DaCdb or Club Runner and online with RI before July 1.**

Have a GREAT LAST MEETING. You started with a BANG: now end with a BANG.

CELEBRATE! You've completed your year as Rotary Club President.

THANKS and KUDOS to you too!