

# Show Me Rotary President Nominee Training March 29-30, 2019

**WELCOME**



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# Journey to Leadership



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# The Rotary Story

- The Rotary Story
- My Rotary Story
- Your Rotary Story



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# Why I joined Rotary?

## And why I stayed?

- The Rotary Story
- The Invitation
- The Expectations
- Professional Networking
- Fellowship
- Service projects
- Community leader
- What Jazzes me about Rotary!



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And then  
comes  
LEADERSHIP!

- Opportunities
- Responsibilities
  
- Fun
- Challenge
- Journey



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Your  
Leadership  
Journey

- It is you, your style, your 'WHY', and your determination to make a difference.
- One journey, many paths
- INSPIRE others to take action



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## Leadership

- Your Style
  - Persuasive leader who gains followers
  - Direct and Deliberate
- Your Tribe
- Your WHY
- Then – 'Inspire'



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## Why I accepted the opportunity to Lead?

- Service to others
- Lead you club to greater heights
- Expand the clubs Vision
- Engage more members



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## The Object of Rotary

- The development of acquaintance as an opportunity for service;
- High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;
- The application of the ideal of service in each Rotarian's personal, business, and community life;
- The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.



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## As Club President

- **Inspire** your members and share your clubs vision.
- Roll up your sleeves and **work with your club**.
- **Demonstrate** your **enthusiasm** and desire to make the world a better place.
- **Engage** your members
- **Gain** new members and **start** new service projects



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## Celebrate and Have Fun

- Rotary Clubs and Presidents are the Core of Rotary International. Every Good Deed, every Service Project, Every lifesaving and life improvement project worldwide begins with the idea of a club member and a club president that that takes the challenge and moves forward with it.
- Enjoy the Journey in which you will continue to learn and experience new things, meet new and exciting people, and always be the kind of person who is better today than you were yesterday.



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## Exercise

- Your Story
- Your "Why"
- Your Rotary Passion



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# Journey To Leadership

- Questions
- Discussion



Show Me Rotary  
President Nominee Training  
March 28-29, 2019

## Club Finances and the Planning Calendar



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## Introduction

Jacqueline Howard  
DGN 6080

- My Rotary Story
- Club Finances and Accountability
- Budget Planning and Evaluation
- Fundraising and Grants
- The Rotary Foundation (TRF) Overview
- Planning Calendar
- My Rotary exploration
- Learning Center Opportunities
- Discussion Questions



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## Club Finance Primer

- **Responsibilities**

- Duties spelled out in Club By-Laws (Officers, Board, Membership)
- Importance of policies for control and accountability
- Have an operating plan for the year – the BUDGET.

- **Key resources**

- Current and Past Club Treasurer
- Current snapshot of Financial Position of Club
  - Cash on Hand
  - Restricted funds
  - Other Assets



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## The Budget

- **Income Sources – General Operations**

- Membership Dues
- Charges for Meals
- Visitor Meals
- Interest Income on Investments

- **Special Purpose Income**

- Fund Raising Proceeds
- Specialized donations (Scholarships, Sponsored projects, etc.)
- Tax-exempt status required for deductible contributions



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## The Budget General Operating Expenses

- Meals
- Room/Facility Rent
- Board Meetings
- Club sponsored Social Events
- Rotary Magazine
- District Dues
- Rotary International Dues
- District Meetings (PETS, District Conference, other training)
- Supplies and other expenses



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## The Budget Projects

- **Project Income**
  - District Grants
  - Special Fundraisers, donations
- **International Projects (consider TRF Matching Grant)**
  - Scholarships
  - Community Projects



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## The Rotary Foundation

- Charitable organization – well respected globally.
- Named “World’s Outstanding Foundation” for 2016 by AFP.
- 4-Star rating by Charity Navigator
  - 97 of 100 for Financial Integrity
  - 100 of 100 for Transparency
- Supports Projects on local, regional and international level.



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## Foundation Motto and Mission

### Doing Good in the World

To enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty



Endorsed by 2007 Council on Legislation



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## Foundation Recognition

- Foundation Recognition - Club
  - 100% Paul Harris Fellow Club – At one point during the year, all active dues-paying members qualify for PHF status. One-time recognition.
- Donor Recognition
  - Paul Harris Fellow
  - Multiple Paul Harris Fellow
  - Major Donor
  - Paul Harris Society
  - Bequest Society
  - Arch Klumpf Society



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## Foundation Support

- Rotary Foundation Support
  - Annual Fund - SHARE
  - Polio Plus
  - Specific Global Grant designations
  - Endowment Fund
- Foundation Recognition - Club
  - EREY Club - Each club member gives at least \$25 and Club per capita \$100 to the Annual Fund.
  - 100% Foundation Giving Club - Each club member gives at least \$25 and Club per capita \$100 to the Annual.



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## Calendar of Key Events

- Start Now – Use the time to observe, dream and plan!
- April – June, 2019
  - Attend Board meetings and Meetings of Club Officers.
  - Investigate Club Vision, Strategic Plans, Multi-Year goals.
  - Give thought to priorities for the Club during your year as President.
  - Consider attending International Convention this year and/or next.
- July – September, 2019
  - Engage with Immediate Past President and Other Past Presidents.
  - Learn how Board functions, agendas set and meetings conducted. How might the process be improved?
  - Engage with District Governor Nominee who will be your District partner.
  - Begin to set goals (Membership, Projects, Foundation Support, etc.)



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## Calendar of Events – cont'd

- October – December, 2019
  - Research “My Rotary” and “Rotary Club Central”. These are tools to assist and support you and your team of Club leaders. Get to know how they work.
  - Meet with Club Treasurer and get a tutorial on Club budget, financial condition, etc.
  - Investigate District Training Calendar and consider meetings to attend to further orientation and education on Rotary Leadership.
    - District Assembly
    - District Foundation Seminar
    - District Membership Seminar



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## Calendar of Events – cont'd

- January – March, 2020
  - Identify Members of your Leadership Team
  - Recruit candidates for positions with incumbents ending terms.
  - Meet with those continuing in roles to refine priorities and goals.
  - Finalize plans for a Meeting/Retreat with your Leadership Team.
  - Complete "Club Leadership Plan Worksheet" as a starting point for your own leadership plan
  - Develop, refine and communicate goals in each key area to guide your year.



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## Calendar of Events – cont'd

- April - June, 2020
  - Conduct Leadership Team Retreat to finalize goals, plans and responsibilities. Build excitement for a great year to come.
  - Consider asking Club President for a full program one week to conduct a Club Assembly and communicate goals for the year.
  - Develop a final "Checklist" of items that may still need attention BEFORE your year of leadership begins.
  - Meet with Program Chair to refine and communicate any modifications to program priorities for year.
  - Plan your Officer Installation.



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Start Your Year

**July 1, 2020**

Begin your Presidency. It will be your best  
year as a Rotarian!  
Have fun!



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# Show Me Rotary President Nominee Training March 29 – 30 2019

President Responsibilities and Resources



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## Responsibilities of the Club President to Rotary International

### • **Presidents Manual Responsibilities**

- Make sure the club dues to RI and the District are paid on time.
- Set and Track your goals in Rotary Club Central.
- Attend PETs as President Elect
- Appoint Committee Chairs and a Trainer.
- Encourage attendance at District Events.
- Prepare for your District Governor's visit.
- Run your Club's meetings. Weekly and Board meetings.
- Make sure your Club records are updated by the Secretary in Clubrunner/DACDb
- Work on the Rotary (President's) Citation Goals



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## Responsibilities of the Club President to The Rotary Foundation

- Attend Grant Management Training
- Sign the Grant Management MOU
- Promote giving to TRF and Annual Fund/Share by Rotary Direct
  - Save your Treasurer some grief.
- Get members to attend your District Foundation Dinner
  - Sponsor a Club table
- Come up with a specific Polio Plus Fund Raiser for your Club
  - Bill & Melinda Gates Foundation 2 for 1 match
- Work with your Club TRF Chair to track performance to goals.
- Promote Paul Harris and Paul Harris Society to the members.



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## Responsibilities of the Club President to their Club

- Have Fun!
  - It will be the best year you ever have as a Rotarian. Enjoy it!!
- Listen and Learn
  - Everyone has an opinion and you need to hear them.
- Help people grow as Rotarians
  - The right people in the right positions.
    - Find Committee Chairs with Passion for their work.
- Help your Club grow
  - Develop a Strong Membership Recruitment and Engagement Practice.
  - Begin a Visioning process with your Club
    - Visioning Session(s)
    - Plan for the Future



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Rotary  
International  
President Elect  
Mark Daniel  
Maloney



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Resources at  
Rotary  
International

- Rotary. Org "People of Action"
  - my Rotary <https://my.rotary.org/en>
    - All of your Rotary information in one place
  - Rotary Club Central <https://rcc.rotary.org/#/dashboard>
    - Club-District-Zone-Global Goals and Tracking
  - Brand Central <https://brandcenter.rotary.org/en-GB>
    - Public Image information, videos, logos, customizable materials.
- Resources and References file:
  - <https://my.rotary.org/en/learning-reference/learn-role/president>
    - Governance Documents including the President's Manual.
    - Manuals on all Club positions.
    - Be a Vibrant Club



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## Rotary International Director Elect Floyd Lancia



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## Resources at the Rotary Zone

- Zone 30 and 31 Support <https://www.rizones30-31.org/>
  - Zone Leadership supports Districts in all areas. We are in RI Zone 31
    - The Rotary Foundation, Membership, Public Image, etc.
    - Zone meetings every year in the Fall. Every other year in Zone 31
      - Emerging Leader Sessions
  - Leadership Seminars



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## District Governor Nominees Districts

6040  
6060  
6080

- D6040 Don Gladhart
- Rotary Club of St Joseph, MO;  
[Rotarian.donald.gladhart@gmail.com](mailto:Rotarian.donald.gladhart@gmail.com)
  - 816-244-2571
- D6060 Tom Drennan
  - Rotary Club of Overland, MO
  - [Tomrotary6060@gmail.com](mailto:Tomrotary6060@gmail.com)
  - 314-570-5057
- D6080 Jacqueline Howard
  - Rotary Club of Pulaski County, MO
  - [Howardjs.Rotary6080@gmail.com](mailto:Howardjs.Rotary6080@gmail.com)
  - 816-880-2243



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## Resources at your Rotary District

- District Support
- D6040 <http://www.rotary6040.org/>
- D6060 <https://www.rotary6060.net/>
- D6080 <https://rotary6080.org/>
  - Do you know your District Leadership?
    - District Governor, DG-Elect, DG-Nominee and DG-Nominee Designate
    - Assistant Governor
      - Responsible for helping your club and being the go to person.
      - They are all Past Presidents. They have been in your shoes.
    - District Committee Chairs
      - All areas of Rotary
        - Guidance/Help in making and meeting your goals
        - Speakers Bureau for Programs
  - Rotary Leadership Institute
    - Get to know the in's and out's of Rotary



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## Resources at your Rotary District

- District Training:
  - District 6040
  - District 6060
  - District 6080



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## Resources in Your Club

- Past Presidents
  - Interview them as to what they would do over and what they would not.
  - Get their opinions as to what is going well and where the club needs help.
  - Get their opinions on Committee Chairs and potential Chairs
- Current Club President Lineup
  - Does your club have a monthly meeting of the:
    - Immediate Past President
    - Current President
    - President-Elect
    - President-Nominee
  - Share information on upcoming events, issues and whatever.



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