

MODULE 1

INTRODUCTION AND ROTARY INTERNATIONAL OVERVIEW

Learning Outcome: Participants will be introduced to incoming District Governor and RI President. Participants will be introduced to Rotary International (RI), understand the role of The Rotary Foundation (TRF), understand RI objectives and goals, raise awareness of how members and districts are informed by/can influence RI leadership, and better understand the role of Zones.

December 31, 2020

Rotary District 7305

PETS Training Manual

Preface

The preparation of this manual is a response to the need to provide a comprehensive learning experience for the President Elects (PEs) who will be assuming a leadership role in their Rotary Club. The diverse and dynamic nature of Rotary is something one grows into overtime. One develops leadership skills not by reading alone, but implementing effective practices and through trial and error as a Club leader tries to learn from their experiences. As one reviews the materials in this training manual take some time to reflect on your own leadership experiences in your club and in your profession.

*The year 2020 has required Rotary clubs and district to rethink how they carry out their Rotary activities. The shift to virtual meetings has been one way of adapting to the reality of a pandemic. To provide more time for PEs to review the training materials and in a safe environment, the District PETS team has adopted a plan to offer 6 Tuesday night **zoom meetings** starting on January 19 through February 23. The meetings will begin at 6:30 and will include breakout sessions as needed.*

The broad and diverse characteristics of Rotary have been reviewed for themes and are presented here in a series on modules. The first module includes an introduction to the incoming DG and an overview of Rotary International and its key components. Modules 2 through 6 cover the organization of the District and its programs. In Module 7 we review the role of the Club President and finally in Module 8 we will guide the PE in managing and planning their year as Club President.

Modules will become available at least one week before the scheduled review session. President Elects should review the information, complete the activities and answer the questions that follow each activity. During the Zoom meeting, PEs will have a chance to ask questions on the content of the training. There will be breakout sessions so smaller groups can share their responses to questions and discuss a topic in more detail. Assistant Governors (AGs) will help facilitate the breakout sessions.

The modules are listed below with tentative dates for the Zoom meetings:

Module 1 Introduction and Rotary International Overview (Jan 19)
Module 2 District Support for Clubs and Members (Jan 26)
Module 3 District Information, Technology and Communication (Jan 26)
Module 4 Strengthening Membership (Feb 2)
Module 5 Youth Leadership Services (Feb 2)
Module 6 District Financing (Feb 9)
Module 7 Being a Club President
Module 8 Club Planning and Management.

On behalf of the PETS Training Team, we wish each of you a very successful and fruitful Rotary Year!

Dr. Vincent P. Costa
Walt Sickles
Steve Arnowitz
Tom Fallon
Pam Moore
Colleen Arnowitz
Dan Daugherty

Rotary District 7305 PETS Training Manual

Accessing the Rotary's Learning Center, the District's Website and DACdb

During your review of the training material you will be asked to access training materials, videos and power point presentations from RI's learning Center, the District's Website and DACdb (District and Club database). It is important that you have access to a computer, laptop or tablet so that you can review the online training materials when required. These three online resources require registration. If you are not registered then access each resource and register. Make sure you remember your User ID and Password. The web address for each site is:

District 7305 Website:

- Type in [Rotary District 7305](https://rotarydistrict7305.org) <<https://rotarydistrict7305.org>>
- At the top right corner click on Member login.
- You are already registered with your email address serving as your UserID. If this is the first time accessing the website you should create a new Password.
- Look for District Library along the right side of the window and identify learning resources listed in the training manual.

DACdb:

- Type in DACdb < <https://www.dacdb.com/SecLogin.cfm>>
- If new register for your account. If already registered sign in with User Id and Password.
- When learning resources become available the participants will be instructed on how to access the information.

Note: Clubs need to integrate DACdb with the RI data base. The instructions are located in the District Library (District 7305 Website) as well as the Application to Integrate the data bases. See Dan Daugherty (dan-dougherty@comcast.net) if you need assistance.

MyRotary.org

- Type in MyRotary.org < [My Rotary | My Rotary](#)>
- If new, register for your account. If already registered sign in with User Id and Password
- Scroll to bottom of page until you see the Online Tool Box.
- Look for Learning Center and click.
- Type training program name in search box.

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INTRODUCTION

Welcome District Governor 2021-22 Dr. Vincent P. Costa, EdD



Dr. Costa worked as an electrical engineer with Dravo Corporation from 1975 – 79. He considered a career change and ended up working at Pitt while completing his Masters in Counselor Education degree. After 17 years at Pitt and holding positions from advising, recruiting, program coordination and international program development he completed his Doctorate in Instructional Design and Technology in 1997. His dissertation was on the needs for teacher education in Mongolia during socio-economic transitions. He then started a new career in educational development. He has worked in such countries as Indonesia, Mongolia, Fiji (South Pacific) and Afghanistan. He spent a total of 10 years in Indonesia where he met his wife Sandra. His activities included managing large education projects, conducting educational research, policy

and implementation analysis, training, designing instructional materials, program development, curriculum development and faculty development. The focus of his efforts ranged from primary through university education and from institutional to provincial and national levels. He had a strong interest in teacher education.

He was inducted into the Oakland Rotary Club in 2002. He then left Pittsburgh to work abroad from 2003 - 2013 before returning to the US. While working in Indonesia he was a member of the Indraprasta Rotary Club in Semarang, Central Java, Indonesia and served as President in 2008-9. Working with the Oakland Rotary Club, they cosponsored a clean water project with both District and Global Grants. Upon returning and rejoining the Oakland Rotary Club he was nominated as president while he missed the whole year (2015) when working in Afghanistan. He served as President from 2016-18. Has been the Co-Chair for The Buzzz, the Districts Dictionary Distribution and Spelling Bee, since 2019. Has been serving on the Finance Committee, the District TRF Board and the District 7300 Foundation Board.

He met his wife Sandra while working in Indonesia and was married here in Pittsburgh in 2001. They have one son Christopher who is currently a freshman in college.

Introducing Rotary International 2021-22 President Shekhar Mehta

Shekhar Mehta of India selected to be 2021-22 Rotary International President



Shekhar Mehta, of the Rotary Club of Calcutta-Mahanagar, West Bengal, India, is the selection of the Nominating Committee for President of Rotary International for 2021-22. He will be declared the president-nominee on 1 October if no challenging candidates have been suggested.

Mehta acknowledges that current membership trends are a challenge and says that membership development should be Rotary's highest priority. He believes that focusing on regional plans, successfully transitioning Rotaractors into Rotary clubs, and increasing diversity and female members could yield a 5 percent net growth in membership each year.

"A major brainstorming is needed to find effective solutions suited to different areas of the world," says Mehta. He adds that regional ethos and culture have to be taken into account to find localized solutions, as "one size does not fit all." He believes Rotary can extend to new geographical areas and countries.

As a strong proponent of Rotary's strategic plan, Mehta says he will encourage clubs to use action plans and reinforce the core values of Rotary.

Mehta says Rotary needs to become more contemporary and adaptable by focusing on partnerships with governments and corporations, expanding partnerships with organizations that specialize in Rotary's areas of focus, and investing in technology.

Mehta, an accountant, is chair of the Skyline Group, a real estate development company he founded. He is also a director of Operation Eyesight Universal (India), a Canada-based organization.

Mehta has been actively involved in disaster response and is a trustee of ShelterBox, UK. After the 2004 Indian Ocean tsunami, he helped build nearly 500 homes for families affected by the disaster.

Mehta pioneered a program that has performed more than 1,500 life-changing heart surgeries in South Asia. He is also the architect of the TEACH Program, which promotes literacy throughout India and has reached thousands of schools.

A Rotary member since 1984, Mehta has served Rotary as director, member or chair of several committees, zone coordinator, training leader, member of The Rotary Foundation Cadre of Technical Advisers, and district governor. He is also the chair of Rotary Foundation (India).

Mehta has received Rotary's Service Above Self Award and The Rotary Foundation's Citation for Meritorious Service and Distinguished Service Awards.

He and his wife, Rashi, are Major Donors and members of the Bequest Society.

To learn more about Mehta, read his [interview](#) and [vision statement](#) outlining his goals for Rotary.

Rotary Guiding Principles

For more than 110 years, our [guiding principles](#) have been the foundation of our values: service, fellowship, diversity, integrity, and leadership.

Rotary Four Way Test

The Four-Way Test is a nonpartisan and nonsectarian ethical guide for Rotarians to use for their personal and professional relationships. The test has been translated into more than 100 languages, and Rotarians recite it at club meetings:

Of the things we think, say or do
Is it the TRUTH?
Is it FAIR to all concerned?
Will it build GOODWILL and BETTER FRIENDSHIPS?
Will it be BENEFICIAL to all concerned?

The Objectives of Rotary

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

- FIRST: The development of acquaintance as an opportunity for service;
- SECOND: 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;
- THIRD: The application of the ideal of service in each Rotarian's personal, business, and community life;
- FOURTH: The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service

The Avenues of Service

We channel our commitment to service at home and abroad through five Avenues of Service, which are the foundation of club activity.

- Club Service focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.
- Vocational Service calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society
- Community Service encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest.
- International Service exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.
- **Youth Service** recognizes the importance of empowering youth and young professionals through leadership development programs such as Rotaract, Interact, Rotary Youth Leadership Awards, and Rotary Youth Exchange.

Rotary International Overview

1.1 Rotary – Its History, Purpose & Accomplishments

Rotary is a well established and diverse organization committed to fellowship and service.

Activity 1.1 Review the training *Rotary Basics* in the RI Learning Center [Rotary Learning Center](#). (Place the cursor over the blue highlighted link, press the control key and click/left click.) Complete the quiz at the end of the program. Another program titled *Rotary Basic* is a PDF slide presentation [Rotary Learning Center](#) and offers additional information.

1.2 The Rotary Foundation

The training program *Rotary Basics* provided a brief introduction to *The Rotary Foundation*. In this activity we will explore more deeply how *The Rotary Foundation* supports the aspirations of Rotarians around the world.

Activity 1.2a Access the Rotary Learning Center and search for *The Rotary Foundation: Our Foundation, The Power of Light*. <https://learn.rotary.org/members/share/asset/view/1359> or click on [Rotary Learning Center](#). **This year a seventh Area of Focus was added Protecting the Environment.**

Questions:

1. What are the three Foundation Funds?
2. List the seven areas of focus.
3. Which Area of Focus would you want to support during your year as President?

Activity 1.2b Access the Rotary Learning Center and search *Our Foundation: Doing Good in the World*. <https://learn.rotary.org/members/share/asset/view/1351> or [Rotary Learning Center](#).

Questions:

1. Has your club supported/participated in a Foundation Sponsored Program either as a District Grant and/or as a Global Grant?
2. What project do you wish to pursue using a Global Grant and/or a District Grant?
2. Has your club sponsored a Global Grant Scholar or a Peace Fellow?
3. Would you like your club to sponsor someone for either of these?

For additional information search the topic in the Learning Center. For additional help please contact the Chair of the District's *The District Foundation*, Jeff Klink (jldklink59@gmail.com)

1.3 Disaster Relief Support

In the last decade RI has entered into the disaster relief sector since it has an existing network of Rotarians ready and able to respond to a catastrophe anywhere in the world. To assist Districts, they offer Disaster Relief Grants to assist in addressing the needs that arise from a disaster. District 7305 received a \$25,000 Disaster Relief Grant in 2020 to address the impact of Covid 19 in our District.

Activity 1.3 The following article provides information concerning the Disaster Relief Grant.



ROTARY DISASTER RESPONSE GRANTS

[Rotary disaster response grants](#) support relief and recovery efforts in areas that have been affected by natural disaster within the past six months.

WHAT ROTARY DISASTER RESPONSE GRANTS SUPPORT

Districts that have been affected by a disaster can use Rotary disaster response grants to launch their own projects or work with established relief organizations to help their communities recover. Grant funds can be used to provide basic items such as water, food, medicine, and clothing. Districts should work closely with local officials and groups to ensure that the funding will meet a specific community need.

WHO CAN APPLY FOR A DISASTER RESPONSE GRANT

Once [qualified](#) for Rotary grants, districts in an affected area or country may apply for a maximum grant of \$25,000, based on the availability of funds. A district may apply for subsequent grants after it successfully reports outcomes from previous grants.

HOW TO APPLY

The district governor and district Rotary Foundation chair complete the [Rotary Disaster Response Grant Application](#) and send it to grants@rotary.org.

DONATE TO THE DISASTER RESPONSE FUND

Donors can [help](#) provide disaster recovery and support rebuilding efforts where the need is greatest. Contributions are combined into one fund and made available through Rotary Disaster Response Grants; donations cannot be directed to a specific disaster.

FIND OUT MORE

Download the [terms and conditions](#).

The Secretariat's contact is Disaster Response Grants Program Officer [Tiffany Miller](#). Send general questions to grants@rotary.org.

ROTARY DISASTER RESPONSE GRANTS (September 2019)

Questions:

1. Has your club participated in a disaster relief grant (for example Covid 19)?
2. Is this a grant that might be helpful in your community?

1.4 RI Strategic Planning: Priorities and Objectives

RI Director Dr. Stephanie Urchick of our own McMurray RC oversaw the development of the RI's Strategic Plan. We will review the results of this effort in this section. Additional information is available by placing the cursor over the blue text and press the Control key.

Activity 1.5 Read the following summary of RI's Strategic Plan

RI Strategic plan vision



PRIORITY 1 IMPACT

People of Action are effective problem-solvers

PRIORITY 2 REACH

People of Action activate and inspire one another.

PRIORITY 3 ENGAGEMENT

People of Action strive to understand the needs of others.

PRIORITY 4 ADAPT

People of Action are inventive, entrepreneurial, and resilient.

Click on [Learn more](#) for additional information

Action Plan

As People of Action, we share a strong sense of purpose.

More than a century ago, we pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that spans the globe—bridging cultural, linguistic, generational, and geographic barriers—and shares the vision of a better world.

As People of Action, we understand that fulfilling that vision requires a plan.

This is Rotary's plan for the next five years: **to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.**

By helping to realize the goals of this plan, you ensure a stronger and even more effective future for Rotary—a tremendous legacy. Our plan is rooted in our tried-and-true values and builds on the remarkable capabilities and spirit of Rotarians.

It is clear-eyed about the challenges that Rotary and the world face. It protects the value of human connection in an age of technology. It lays out a path for bringing great ideas to the forefront of the global imagination of what's possible.

And our plan will provide us with a continuity of vision from year to year, keeping us moving toward fulfilling our shared purpose.

This is our [Action Plan](#).

Resources

- [Strategic Plan presentation](#) (PPTX)
- [Strategic Plan Flyer](#) (PDF)
- [Strategic Planning Guide](#) (PDF)

PRIORITY 1

Increase Our Impact

People of Action are effective problem-solvers.

Why do Rotarians achieve so much? We invest in relationships. We make decisions grounded in evidence. We know how to mobilize our networks to create solutions that last. And we're always learning from our experiences in projects, clubs, and careers.

Throughout the fight to end polio, we've shown what we can do when we draw on our collective strengths. We've created solutions that match the people they serve. We've evaluated the results to learn from our successes and setbacks.

This is a model we will use again and again in pursuit of our audacious goals: educating the world's children, ensuring equitable access to water and sanitation, helping local economies grow sustainably, and so much more.



Let's seek out new ways to translate our expertise into making a difference—in our communities and across the globe. Let's prove that our impact on the world has only just begun.

PRIORITY 2

Expand Our Reach

People of Action activate and inspire one another.

We know that our capacity to make a difference is larger when more people unite with us. We want the world to appreciate our ambitious, compassionate, and inclusive spirit—because when they do, they see that Rotary is the source for the person-to-person involvement so many are seeking.

Told widely and emphatically, our stories give people hope that the world can change for the better, inviting listeners to imagine themselves as part of that change, too.



Let's build connections and opportunities that will allow people who share our drive to do the same.

PRIORITY 3

Enhance Participant Engagement

People of Action strive to understand the needs of others.

Just like the people and communities we serve, our participants need to feel seen and heard. They're seeking experiences that feel personally and professionally relevant and fulfilling. When they see our dedication to investing in them at every stage of their professional life, our participants are eager to go the distance with us—even at a time when there are many other options for networking and volunteering.



Let's recommit to putting the needs, expectations, and growth of our participants at the center of all we do.

PRIORITY 4

Increase Our Ability to Adapt

People of Action are inventive, entrepreneurial, and resilient.

We've shown throughout our history that we excel at finding new ways to lead the world to lasting change. And we've proven in our own careers that we know how to help organizations of every kind move forward. That's why new approaches to our organizing principles don't threaten our sense of who we are. We're ready to seek out fresh opportunities, create more paths to leadership, open up our conversations to diverse voices, and simplify how we operate—with confidence.



Let's stay true to ourselves and stay ahead of change in our next 115 years.

Questions:

1. How can your club increase its impact?
2. What can your club do to expand its reach?
3. What can be pursued to enhance participant engagement?
4. To what extent is your club able to adapt?

1.5 Council on Legislation

The Council on Legislation is the governing body of RI and responsible for changes to the RI Constitution, the RI Bylaws and the Standard Club Constitution. Each District sends a Representative to vote on amendments to the governing documents and to bring amendments to the Council to be voted on.

Activity 1.5a Review the following statement concerning the Council of Legislation's responsibility for the RI Constitution. Note a copy of the document is available through the link in the statement. One can choose either the PDF or Word format.

The RI Constitution is Rotary's highest governing document ([Constitution of Rotary International](#) ([PDF](#)) ([Word](#))). It can be amended only if two-thirds of Council representatives approve. It specifies:

- * That clubs, not Rotarians, are members of RI
- * Who may be members of a club
- * The selection and organization of the RI Board of Directors and RI Officers
- * The workings of The Rotary Foundation
- * How the RI Convention and Council on Legislation are run
- * The Object of Rotary
- * Other central Rotary matters

Activity 1.5b The next statement reviews the purpose of the RI Bylaws. Note a copy of the document is available through the link in the statement. One can chose either the PDF or Word format.

Rotary's second highest governing document is the RI Bylaws ([Bylaws of Rotary International](#) ([PDF](#)) ([Word](#))), which must accord with the RI Constitution. The bylaws can be amended only by a simple majority vote at a COL They provide details on:

- * The RI Board's responsibilities
- * Districts and their responsibilities
- * RI dues
- * The Rotary Foundation
- * Elections
- * RI's convention and legislative procedures
- * Other administrative matters

Activity 1.5c The last document for review concerns how Clubs are to be governed. Note a copy of the document is available through the link in the statement. One can chose either the PDF or Word format.

The Standard Rotary Club Constitution is Rotary's third-highest governing document ([Standard Rotary Club Constitution](#) ([PDF](#)) ([Word](#))), and it aligns with the RI Constitution and RI Bylaws. It can be amended by a simple majority vote of the council and is adopted by all Rotary clubs. It lays out:

- * When and how clubs meet
- * Attendance and participation requirements
- * Club leadership structure
- * The Avenues of Service and the Object of Rotary
- * Other club administrative details

Question:

1. Which governing document is the most important for a club?
2. How does your Club's Constitution compare to the Standard?

1.6 Our District 7305 and Zone 33 aligned with Zone 34

Rotary District 7305 was created on July 1, 2019 when former Districts 7300 and District 7330 were merged. The outcome was a stronger, diverse and vibrant District. Modules 2 thru 6 provides more information on the District's activities. The following map displays the location of clubs.

Click on this link for the map of the District [Rotary District 7305](#)

Rotary District 7305 is served by Zone 33. Zones 33 and 34 are aligned to offer support for the Rotary Districts in their areas. Visit [Rotary Zones 33-34](#) to learn more about the Zones.

Activity 1.6 Review the two charts that cover the Districts in Zone 33 and 34.



Pennsylvania

[District 7280](#)

[District 7305 \(was 7300 & 7330\)](#)

[District 7360](#)

West Virginia

[District 7545 \(was 7530 & 7550\)](#)

Delaware, Maryland, DC

[District 7620](#)

[District 7630](#)

Virginia and part of Tennessee

[District 7570](#)

[District 7600](#)

[District 7610](#)

North Carolina

[District 7670](#)

[District 7680](#)

[District 7690](#)

[District 7710](#)

[District 7720](#)

[District 7730](#)

South Carolina

[District 7750](#)

[District 7770](#)

Georgia

[District 6900](#)

[District 6910](#)

[District 6920](#)

Florida

[District 6890](#)

[District 6930](#)

[District 6940](#)

[District 6950](#)

[District 6960](#)

[District 6970](#)

[District 6980](#)

[District 6990](#)

Puerto Rico

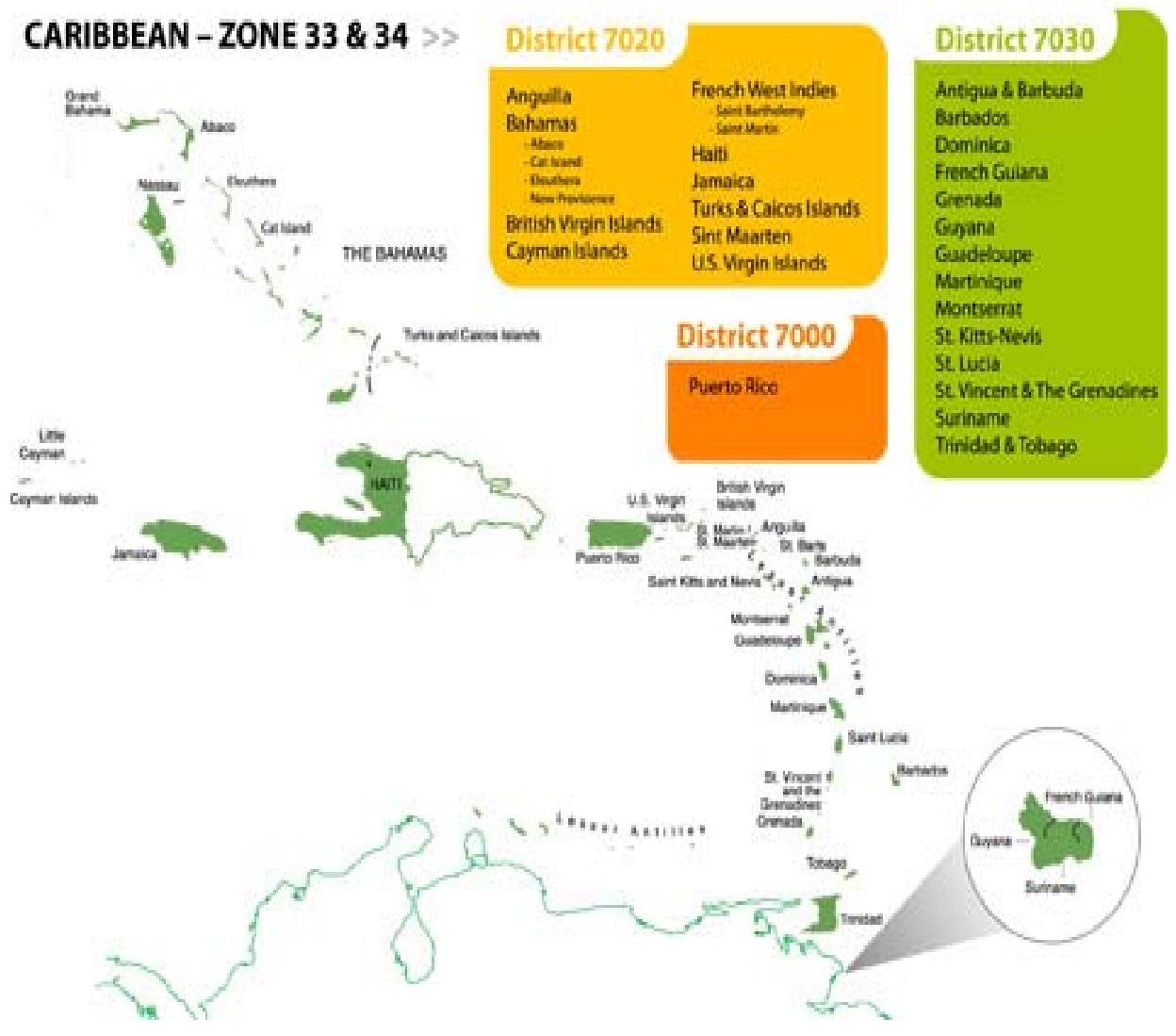
[District 7000](#)

North Caribbean

[District 7020](#)

South Caribbean

[District 7030](#)



Questions:

1. In what year was District 7305 created?
2. What area of Pennsylvania is covered by District 7305?

1.7 Zone and RI Contact Information

District 7305 is supported by a team of Rotarians from RI and Zone 33/34. As President you have the opportunity to discuss any concerns with the RI and Zone leaders. Additional information and Zone leadership can be found at the Zone 33/34 website [Rotary International Zones 33-34 | Service Above Self \(rizoness33-34.org\)](http://Rotary International Zones 33-34 | Service Above Self (rizoness33-34.org)).

RI KEY CONTACT – CLUB AND DISTRICT SUPPORT (CDS)



Provides personalized service, training, and regional guidance on Rotary Resources and Services, Administrative Procedures, Board Policy and Rotary Constitutional Documents, Navigating www.MyRotary.org and Conducting Rotary Business Online.

JOHN M. HANNES
Senior Officer
John.Hannes@Rotary.org
T +1.847.866.3275
English

ANDREZ PEREZ
Associate Officer
Andrez.Perez@Rotary.org
T +1.847.424.5368
English/Spanish



Rotary Coordinators (RC)

Rotary Coordinators (RCs) serve as resources for districts and clubs, working in partnership with their Zone Director. RCs are your main resource for membership development.

Zone 33



Zone 33 RC
[Patrick Eakes](#)
District 7690

Zone 34



Zone 34 RC
[George Robertson-Burnett](#)
District 6890

Zone 33 Assistant Rotary Coordinators (ARC)

Janet “JB” Brown (D-7610) Districts 7600, 7610, 7620, 7630

Carol Burdette (D-7750) Districts 7670, 7750, 7770

Patrick Eakes (D-7690) District 7690

John Scibal (D-7730) Districts 7710, 7720, 7730

Andy Vanhook (D-7570): Districts 7545, 7570, 7680

Scott Bayline (D-7280) Districts 7280, 7305, 7360

Terry Weaver (D-7750) Data Analysis & Strategy, Zone Online Resources

Zone 34 Assistant Rotary Coordinators (ARC)

Scott Yochum and Pepper Pettit (D-6910) Districts 6900, 6910, 6920

Mike Darragh (D-6970) Districts 6940, 6970

Cyndi Doragh (D-6960) Districts 6930, 6960, 6990

Felix Stubbs (D-7020) Districts 7000, 7020, 7030

RC George Robertson-Burnett (D-6890) Districts 6890, 6950, 6980