



District 7030 PETS 2020

Running your Meeting and your Club

Presented by:-

DS Soraya Warner-Gustave

DT Nigel Aquí



Agenda

1. Welcome and Introductions.
2. Running your Meeting
3. Running your Club



Introductions

- Nigel is the incoming District Trainer
- Soraya is the incoming District Secretary
- This is your year as President.



What you should have in your possession



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Two documents you should read



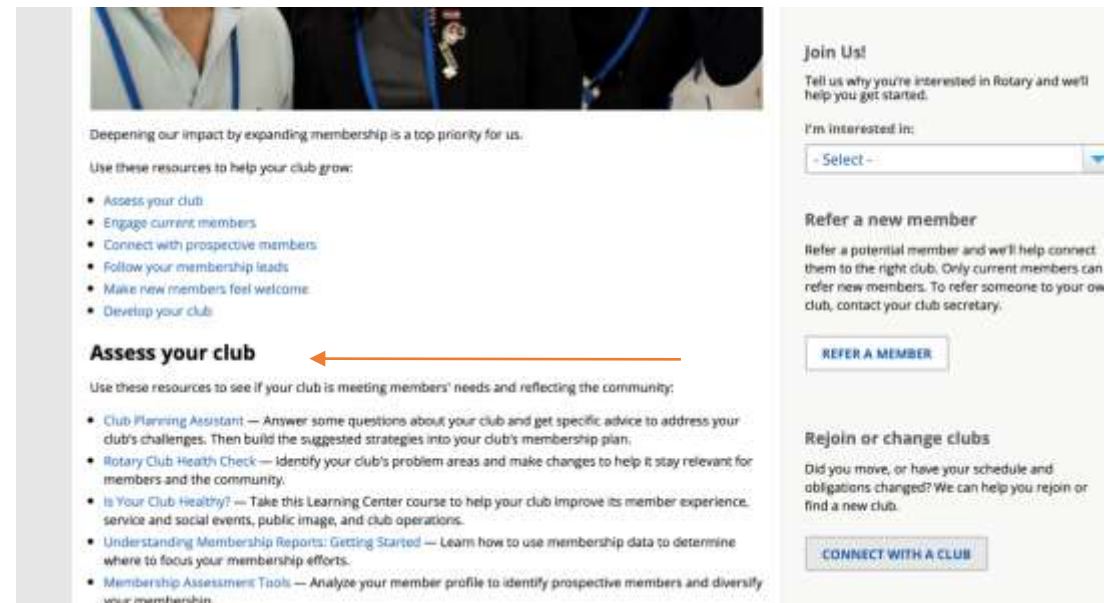
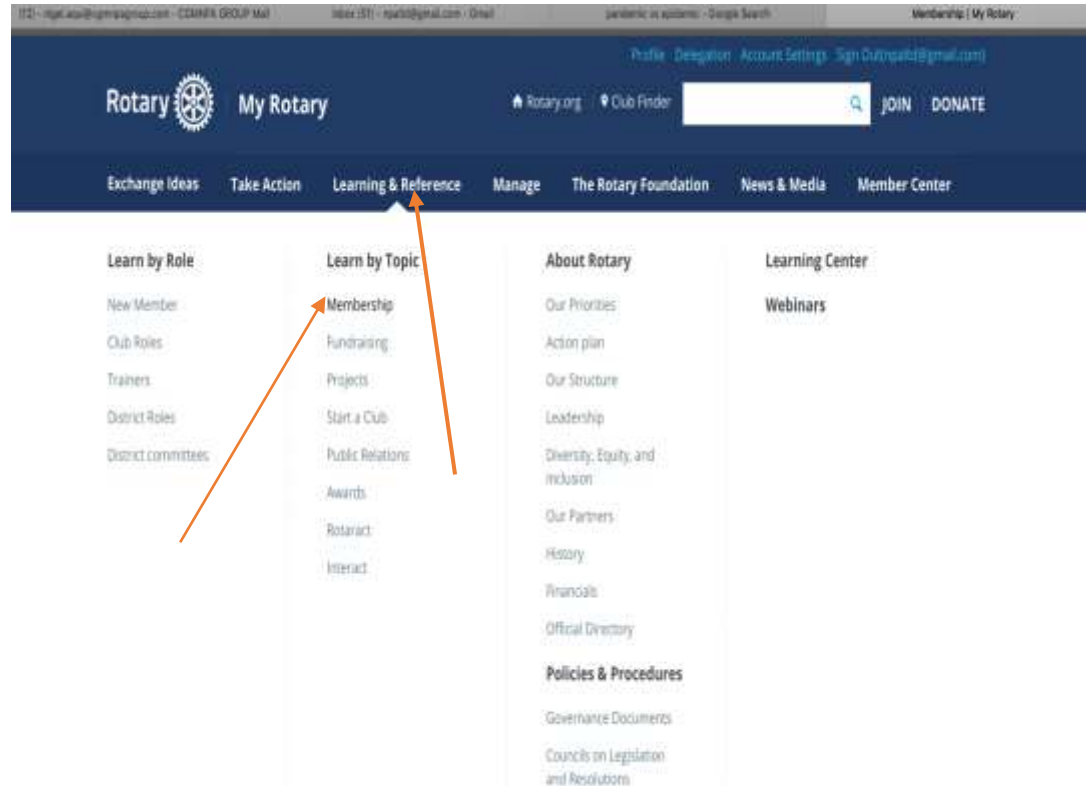
Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.



Log on to Rotary.org Learning and References ⇒ Membership



Learn by Role

- [New Member](#)
- [Club Roles](#)
- [Trainers](#)
- [District Roles](#)
- [District committees](#)

Learn by Topic

- [Membership](#)
- [Fundraising](#)
- [Projects](#)
- [Start a Club](#)
- [Public Relations](#)
- [Awards](#)
- [Rotaract](#)
- [Interact](#)

About Rotary

- [Our Priorities](#)
- [Action plan](#)
- [Our Structure](#)
- [Leadership](#)
- [Diversity, Equity, and Inclusion](#)
- [Our Partners](#)
- [History](#)
- [Financials](#)
- [Official Directory](#)

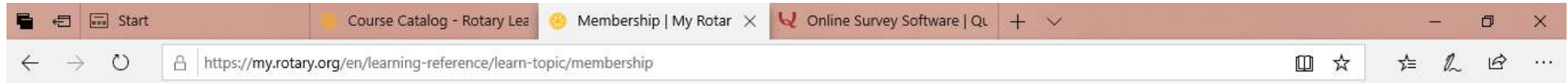
Policies & Procedures

- [Governance Documents](#)
- [Councils on Legislation and Resolutions](#)


Learning Center

Webinars





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- Contributions
- Reports
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- Official Rotary Apps
- Club Management Systems & Website Providers
- Marketplace Resources

Brand Center

- Our Story
- Guidelines
- Logos
- Materials
- Ads
- Images & Video
- Strengthening Rotary Resources

Products & Services

- Shop.rotary.org
- Licensed Vendors
- Special Offers
- Rotary Global Rewards

Travel & Expenses



<https://my.rotary.org/en/manage>

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Join Us!



Running your meetings

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Club Administration.....	
Creating an Engaging Club Experience.....	
Club Assemblies.....	
Governor's Visit.....	
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Running your meetings

AS PRESIDENT

Run engaging and fun club meetings, board meetings, and club assemblies

Oversee the club's reporting requirements and check with the club secretary to make sure updates to your membership list are made within 30 days

Prepare for the district governor's visit and visits from your assistant governor



Running your meetings

Run engaging and fun club meetings, board meetings, and club assemblies

- How do you do this?
- I need a few ideas in the ideas box please before we move forward?



Some Ideas

- Start on time and finish on time?
- Have engaging speakers on topical matters
- Report on the progress of projects
- Report on the achievements on members
- Have a different type of meeting at a different place.
- What about PIS?





Just as routine doctor visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.



- Participating in service and having fun with fellow members are the primary reasons Rotarians join and stay in Rotary.
- The healthiest clubs vary their activities and offer multiple ways to get involved.
- Try a new kind of social event or a different service experience and watch the impact it has on your club.



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CLUB ASSEMBLIES

Club assemblies offer an opportunity to exchange ideas and share information about issues that are important to your members. Most clubs hold four to six assemblies per year.

You or another designated club officer should lead club assemblies. Encourage all members to attend, but especially new members. Seek out member input to make sure the meetings address their interests and concerns. See the chart below for suggested timeframes and topics for club assemblies.

TIMING	PURPOSE
Immediately after the district training assembly (before 1 July)	To share plans developed at the district training assembly (club president-elect presides)
After 1 July	To discuss goals for the year
Two weeks before the district governor’s visit	To prepare for the visit
During the governor’s visit	To discuss the club’s status with the governor
Midpoint of year (January/February)	To review progress toward club goals and overall member satisfaction, and determine the plan for the rest of the year, including any needed changes
April or May	To provide an opportunity for open discussion (ideas for bringing club projects and activities to completion)



AS PRESIDENT

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Oversee the club's reporting requirements and check with the club secretary to make sure updates to your membership list are made within 30 days

Prepare for the district governor's visit and visits from your assistant governor

GOVERNOR'S VISIT

One of your district governor's core responsibilities is to visit all clubs in the district, either individually or in groups, to provide support and guidance, update members on district goals, and motivate members to achieve club goals.

If possible, schedule the governor's visit to coincide with an event that highlights your club's accomplishments, such as a charter night, induction ceremony, new member orientation program, award presentation, or Rotary Foundation event.

To prepare for the visit:

- Review your club's progress toward its goals. Reflect on member morale. Identify questions or concerns you want to discuss with your district governor.
- Organize reports of committee plans, activities, and accomplishments.



BEFORE WE MOVE ON TO THE SECOND SEGMENT
HOW MANY OF YOU

- HAVE BEEN PRESIDENTS BEFORE?
- BEEN A SECRETARY BEFORE?
- BEEN A ROTARIAN FOR LESS THAN FIVE YEARS?



Why did Paul Harris form Rotary?

Last week we were told

- Learn from our past

- Why did you join Rotary? Type in the box ?
- Have you enjoyed Rotary?
- What did you enjoy?



Running your Club

<p>3 RUNNING YOUR MEETING</p> <ul style="list-style-type: none"> Club Administration Committee Creating an Engaging Club Experience Club Assemblies Governor's Visit Discussion Questions <p>4 RUNNING YOUR CLUB</p> <ul style="list-style-type: none"> Rotary Club Standards Club Constitution and Bylaws Rotary's Online Tools Reporting Requirements Financial Management Risk Management Working With Your District Discussion Questions <p>Appendix</p> <ul style="list-style-type: none"> 3. Rotary's Online Tools 	<p>4 RUNNING YOUR CLUB</p> <ul style="list-style-type: none"> Rotary Club Standards Club Constitution and Bylaws Rotary's Online Tools Reporting Requirements Financial Management Risk Management Working With Your District Discussion Questions <p>Appendix</p> <ul style="list-style-type: none"> 3. Rotary's Online Tools 	<p>25</p> <ul style="list-style-type: none"> 25 26 27 28 29 31 32 33 <p>34</p>
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Running your Club

AS PRESIDENT

Oversee the management of club finances and make sure your club invoice is paid



Invoices in conjunction with treasurer and secretary

Encourage members to attend district training meetings



In conjunction with the various chairs

Minimize risk associated with club activities



In conjunction with your board

Make certain the Rotary logos are used properly



In conjunction with PI



Running your Club – Risk Management

- I need some ideas what you think the risks are? You have one minute to type into the box, I need four responses.



Running your Club – Risk Management

- Planning
- Delegate – super heroes are fictional
- Membership Loss.
- Communication – manner and interpretation.
- Financial risk
 - Invoices from RI and District
 - Fund raisers by the Club – important that you are always aware of where you are?



Running your Club – Risk Management

FUNDRAISING

- An effective fundraising plan
- Make sure your members follow these financial best practices to promote transparency and good stewardship of funds:
- Report raised funds in accordance with local laws.
- Require the Chair of an event to sign off on charitable expenses.
- Specify which causes the event proceeds will support in your promotions.
- Issue receipts to donors if your fundraiser qualifies as a tax-deductible event.



WHAT WE HAVE NOT COVERED

<p>3 RUNNING YOUR MEETING</p> <ul style="list-style-type: none"> Club Administration Committee..... Creating an Engaging Club Experience..... Club Assemblies..... Governor’s Visit..... Discussion Questions..... <p>4 RUNNING YOUR CLUB</p> <ul style="list-style-type: none"> Rotary Club Standards..... Club Constitution and Bylaws..... Rotary’s Online Tools..... Reporting Requirements..... Financial Management..... Risk Management..... Working With Your District..... Discussion Questions..... <p>Appendix</p> <ul style="list-style-type: none"> 3. Rotary’s Online Tools..... 	<p>4 RUNNING YOUR CLUB..... 25</p> <ul style="list-style-type: none"> Rotary Club Standards..... 25 Club Constitution and Bylaws..... 26 Rotary’s Online Tools..... 27 Reporting Requirements..... 28 Financial Management..... 29 Risk Management..... 31 Working With Your District..... 32 Discussion Questions..... 33 <p>Appendix</p> <ul style="list-style-type: none"> 3. Rotary’s Online Tools..... 34
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Still to be completed

- ROTARY ON LINE TOOLS. TO BE DONE WITH SECRETARIES
- REPORTING REQUIREMENTS – TO BE DONE WITH SECRETARIES AND TREASURERS
- FINANCIAL MANAGEMENT - TO BE DONE WITH SECRETARIES AND TREASURERS
- WORKING WITH THE DISTRICT – TO BE PART OF AGS DISCUSSION IN SMALLER GROUPS.



QUESTIONS?



Thank You

