

Notes from small group breakouts

Chris Jones: President Nominee Sessions

- Took first 4 chapters of Presidents Manual and broke out the early items needed
- 4 breakouts just for PN's
 - Helping good Cubs become great clubs
 - Solving problems building consensus
 - Club Financial planning
 - 15 month calendaring
 - GA PETS
 - Also 4 structured sessions
 - Sharing session facilitated by DGNs
 - Solutions to concerns shared above
 - Strategies for planning for your year as Prez
 - Broad context about finance, automated reporting, etc
- Add meat and potatoes to Saturday to keep folks there
- Building fellowship amongst PNs
- Important to have separate curriculum for PNs so they have a reason to go
- How to deal with the extra \$\$ for the club to send both PE and PN
 - District underwrite part of PN expenses as long as PE goes?
- Important to have DGN identifying PN as soon as possible and start communicating with them. The DGN invites PN too PETS. AG's also invite PNs to PETS
- Build testimonials from attendees and put on website

Results/Benefits

- Starting to learn earlier
- More interaction between PE & PN
- Start planning earlier
- See the bigger picture earlier
- Earlier goal setting
- Visioning starts earlier

Concerns

- Cost
- More to do for Committee
- Having PN identified
- Getting PN to PETS

Separate

- Consider a separate track for recycled Presidents

Wade Nomura: Pre PETS

Focus- Non PETS Curriculum to standardize President Elect education prior to PETS

- Most have DGE create the curriculum on an annual basis.
 - Question to consider “Why not standardize curriculum?”
 - It was suggested the Alliance publish a “template” on line

- Some topics include:
 - Protocols
 - My Rotary (Club Central)
 - Council on Legislation updates
 - Risk Management
 - Membership/Vibrant Clubs
 - Running a Meeting
 - Memorandum of Understanding (Grant qualification)
 - Awards
 - PETS Preview (What to expect, take, wear, buy, and the famous District Hospitality Suite events!).
 - TRF- not needed, group felt this could be delegated....too complicated and time consuming and the MOU process is all that is needed.
 - Material Distribution, such as the Club President and Club Officers manuals.

- Attendance to PETS and Pre PETS were a challenge for most in discussion group.
 - Only a small few had 90% plus.
 - Also webinars were discussed as a possible venue for specific subjects/topics

- Post PETS surveys also important for the development of future Pre PETS planning

- Curriculum could also be spread out to include the District Training Assemblies
 - Preplanned multiple sessions/seminars that are topic specific

- Some are/were doing a Presidents Midterm, where PETS and Pre PETS were discussed.

- It was agreed by all to make sure there is a lesson plan/take-away for these topics

- All agreed that it is the responsibility of the districts and DGEs to develop and implement their own Pre PETS, as topics may be more district specific.

- Include RLI or PRLS as a recommended/mandatory curriculum.

- Though many do include Pre PETS in their curriculum, all agreed it could be better and wanted to standardize this. Those that did not yet have Pre PETS also saw this as a huge benefit for them.

Ed Hardesty: Utilization of District Training Chairs

To conduct pre-PETS in each District

Trainers serve as part of the planning committee or PETS Council, providing overall input and guidance to the event

Trainers do not participate in the general sessions or electives, but have primary responsibility for determining the content and presenting the District sessions, along with the DGE

One event has a “train the trainer” session for the District Trainers.

The District Trainer job is not well defined. Involvement is dependent on the individual trainer.

District Trainers were described as “not a sage on the stage, but a guide on the side”

Joe Beverage: Working With Licensed Vendors

Increasing PE's' Awareness about Licensed Vendors and their importance to Clubs and to Rotary International

The bulk of the PE's we see comment to us that they never knew this stuff existed, referring to Rotary Emblem merchandise. For an organization that depends on membership and marketing itself to the public to thrive and/or survive that is a serious issue.

- The PE's should have a list of things that they want to see and get from us while we are at PETS.
- They should have a list of things that they want to know and keep in mind throughout their year.
 - Club supplies
 - Awards / Recognition
 - Branding and Event Marketing
- Catalogs: As an added service we would also like to provide the PETS w/ catalogs for the PE's to have included in w/ their materials also emphasizing the importance of using Licensed Vendors and marketing their clubs/events.

To combat the "I never knew this stuff existed" and Rotary being "One of the World's best kept secrets" we have offered to present or at the very least put together some guidelines for a 10-15 minute class on Licensed Vendor Awareness, Rotary Branding, & Marketing Your Club.

- The idea was raised in the first session that it might be a better to have a 10-15min class like this at Pre-PETS so that when the PE's arrive at PETS they would come armed with the knowledge of who and what Licensed Vendors are and that we are a valuable resource that they should stop and visit with while they have us onsite.
 - We thought this was a phenomenal idea and was not originally aware of just how little was known about Licensed Vendors and our contributions to Rotary.

Licensed vendors are a Resource NOT just a Commodity

The PE's have direct access to us at the hotel for a few day while they are at PETS and we are being severely under utilized

- We work in marketing day in and day out and in addition to simply distributing Rotary products we are also a great resource for ideas for marketing their events and getting a maximum return on their marketing dollars.
- We are also a great planning resource for their year as often Rotary products, recognition items, and awards are the last thing they think about and then end up paying more for expedited shipping when it could've been avoided.

Direct Impact on RI

- 10% of all Licensed Vendors' Sales goes back to RI

- If 30,000 clubs each placed \$100 orders from Unlicensed Vendors it would rob RI of \$300,000.00 in Royalties
 - And we all know you order much more than \$100/yr
- “I have a guy in my club that does that”
 - 7 out of 10 times the quality is either bad to really bad or at best it’s definitely just not up to Rotary’s standards and guidelines

Rotary Brand Awareness & Guidelines

All of the branding and visual voice changes has brought with it a good deal of confusion. There is confusion even amongst the ranks of those working at RI headquarters and a lot of information is floating around out there that is either dated or incorrect.

- We could put together a short/basic brand guide as far as the logos are concerned
 - What they are
 - What they are called
 - How they are to be/can be used
 - Interact / Rotaract New Logos
 - And more

Consider the Vendors in the Hotel Contracts

Hotels are hammering everybody with random and often steep costs for things these days. A couple of the places where they are really hitting us hard are:

- Shipping/Receiving/Storage:
 - This part I want to clarify, we ship our boxes to and from via UPS and that is not what I am referring to. Rather, we have had hotels that wanted to charge us \$750.00 to hold our boxes in their back room! This is absurd. I don’t believe there should be a charge at all but if there were I wouldn’t have it be more than \$10-\$15/box. We ship 15-20 boxes and that adds up fast for our boxes to be sitting in the back being used to fold linens on (I’ve seen it).
 - And they want to hit you coming in and going back out. Double jeopardy.
- Electricity. Same thing here. I have had places that wanted to charge you \$100/day to plug into their outlet. I’m not running a generator here, I just needed a place to plug in my credit card machine (because most people don’t carry cash anymore) and a few lights if we’re in a really dark room.
 - We also bring our own extension cords and power strips so the fee is basically to plug into their outlets.
 - We usually find out about the fee after we are set up and end up simply unplugging the lights and packing it all back up and dealing with the dark.

Other than that I will say that the majority of the hotels have been great to work with and over the years we have ended up developing great working relationships with their long time staff.

Jim Probsdorfer: Budget Development

Chuck Berg: Facility Issues, Venue Negotiation

Eric Grubb: Event Leadership Team Best Practices