

P.E.T.S. Orientation

ROTARY DISTRICT 6460



PLANNING A SUCCESSFUL ROTARY YEAR



FIVE AVENUES OF SERVICE

- ▶ **Club service-** focuses on strengthening fellowship and ensuring the effective function of the club.
- ▶ **Vocational service-** encourages Rotarians to serve others through their vocation and to practice high ethical standards.
- ▶ **Community service-** covers projects and activities the club undertakes to improve life in its community
- ▶ **International service-** includes actions taken to expand humanitarian reach around the globe that promotes world understanding and peace.
- ▶ **Youth Service-** recognizes the **POSITIVE** changes implemented by youth and young adults through leadership development within the following New Generations activities: RYLA, EARLYACT, INTERACT, ROTARACT, and Rotary Youth Exchange.



SIX AREAS OF FOCUS

- ▶ **Peace and conflict prevention/resolution.**
- ▶ **Disease prevention and treatment.**
- ▶ **Water and sanitation.**
- ▶ **Maternal and child health.**
- ▶ **Basic education and literacy.**
- ▶ **Economic and community development.**



KEY DATES



- ▶ **Midwest P.E.T.S. March 2-4, 2018**
- ▶ **District Assembly April 21, 2018**
- ▶ **District Governor's Installation June 30, 2018**
- ▶ **Official Club Visit**
- ▶ **District Conference November 2-3, 2018**
- ▶ **Club Elections BEFORE December 1, 2018**
- ▶ **Rotary International Convention June 23-27, 2018**
- ▶ **Presidents' Mid-Year Summit January 2019**



MIDWEST P.E.T.S.

MARCH 2-4, 2018

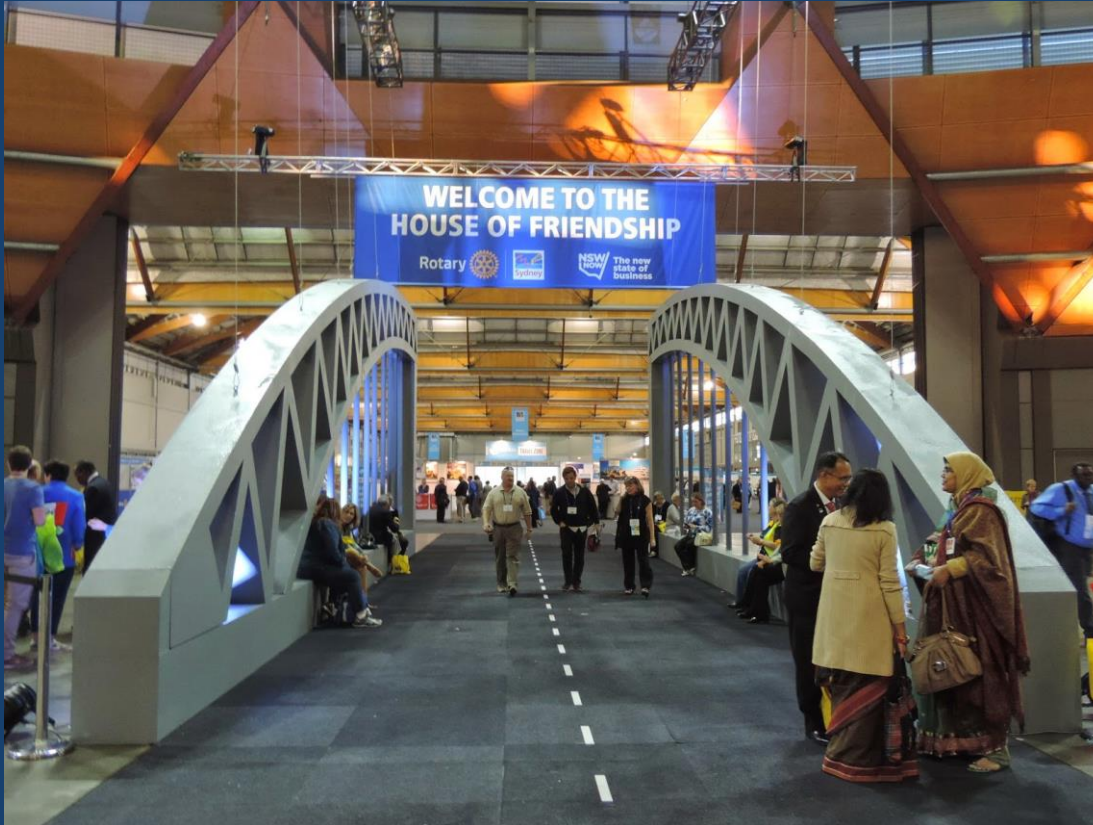
**The Westin Chicago
Northwest**

400 Park Blvd, Itasca, IL 60143



Register On-Line

www.midwestpets.org



**DO I HAVE TO ATTEND
MIDWEST P.E.T.S. AT THE
WESTIN IN ITASCA?**



Why wouldn't you want to?

You will meet PEs from seven districts for an amazing time of networking.

You will fulfill the training requirement to serve as your club president.



Rotary

District Assembly



WHO: Your club's committee chairs, officers, and **potential** leaders – **ESPECIALLY** secretaries, treasurers, and board members

WHAT: A condensed training for officers/chairs that includes Rotary International updates and grant certification

WHEN: **April 21, 2018**

WHERE: University of Illinois - Springfield



Meet ~~Brian~~ & ~~Nancy~~!

Rotary 



ABCs OF THE DISTRICT GOVERNOR'S VISIT:

- ✓ **Assistant Governor makes the introduction**
- ✓ **Board should meet with DG Brian**
- ✓ **Confirm DG Brian is THE program**

District Governor's official visit protocol

- ▶ Arrange for someone meet the DG at the door early and assist him with his materials.
- ▶ Introduce the Assistant Governor with a personal touch.
- ▶ The official introduction of the DG is done by your Assistant Governor.
- ▶ When the DG is introduced and goes to podium, those in attendance stand and applaud out of respect for the office he holds in District 6460.
- ▶ The DG is the only program that day.
- ▶ When the DG has finished his presentation, stand and applaud again in respect and appreciation.
- ▶ Determine ahead of time if the DG's spouse is attending and make the appropriate arrangements.
- ▶ The DG may wish to meet with your club board or leadership before or after the meeting. Be sure to arrange for that if requested.





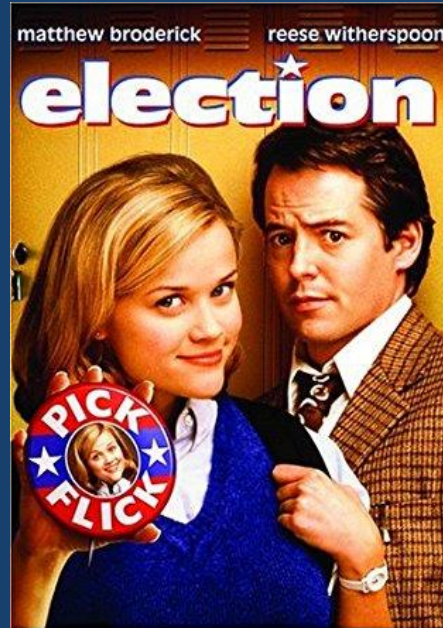
DISTRICT CONFERENCE

November 2 & 3, 2018

Springfield, IL



CLUB ELECTION



ELECTION should be completed prior to **December 1**. Then electronically post names to Rotary.org by December 1st for the next year's Club President , Club Secretary and Club Treasurer.

ROTARY INTERNATIONAL CONVENTION June 23-27, 2018



District 6460 Club Grants

2018-2019



- ▶ **Receive up to \$2,000.00 for a new, one-time only local service project**
- ▶ **Applications will be due in August 2018 (the month after your presidency begins) so begin identifying projects NOW**
- ▶ **Contact Club Grants Chair Carl Affrunti for more information**

NEXT STEPS



- ▶ Register for Midwest P.E.T.S. **March 2 - 4 , 2018** in Itasca.
- ▶ Communicate with your club leaders regarding their participation at District Assembly **April 21, 2018** at the U of I – Springfield
- ▶ Save the date for our DG Installation on **June 30 , 2018** at the Springfield Wyndham.
- ▶ Collaborate with your AG for the Governor's official club visit.
- ▶ Begin to promote District Conference **November 2-3** in Springfield.
- ▶ Conduct club elections **before December 1, 2018**
- ▶ Save the Date Rotary International Convention **June 23-27** in Toronto



QUESTIONS ?

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ROTARY DISTRICT 6460



RISK AND FINANCIAL MANAGEMENT

Not fun, but necessary



- ▶ **Event Risk Assessments & RI Liability Insurance**
- ▶ **Treasurer Training & Financial Best Practices**
- ▶ **Youth Protection Policies & Personnel**

DISCLAIMER



Nothing contained in this presentation is, or should be construed as, legal advice.

If you have or become aware of a situation in which you feel that legal advice is needed, contact an attorney to discuss the specific facts of that situation.

Event Risk Assessment & RI Liability Insurance



- ▶ **Take a common sense approach to risk management**
- ▶ **For every event, ask, “What could go wrong here?”**
- ▶ **Then follow up with, “What are we going to do if that happens?”**

Event Risk Assessment & RI Liability Insurance



- ▶ **Be sure contracts with venues or other third parties address liability**
- ▶ **Consider whether event participants should sign a liability waiver**
- ▶ **Use professionals in your own organization. That's why we're here.**

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Event Risk Assessment & RI Liability Insurance



- ▶ **RI provides directors & officers/employment liability insurance**
- ▶ **RI provides third-party liability insurance**
- ▶ **RI's liability insurance does NOT cover participating Rotarians or volunteers**

Event Risk Assessment & RI Liability Insurance



- ▶ Detailed info re: RI insurance is at <https://insight.ajg.com>
- ▶ Log-in info should be e-mailed to club leaders
- ▶ Insurance certificates can be obtained at this sight
- ▶ Submit claims to claims@rotary.org

Financial Management Best Practices



- ▶ **Be sure that your club treasurer is WELL TRAINED**
- ▶ **Treasurers' training is conducted annually at District Assembly**
- ▶ **Club Treasurers' Manual is available at rotary.org**

Financial Management Best Practices



- ▶ **No matter how trustworthy your treasurer, consider oversight of club accounts**
- ▶ **Multiple signers on checks**
- ▶ **Annual audit or financial review, preferably from a non-Rotarian**

Youth Protection Policies and Personnel



- ▶ **Applicable to Youth Exchange, Interact, RYLA, and any other activities involving children**
- ▶ **Rotary Youth Protection guide available at rotary.org**
- ▶ **“Protecting Youth Program Participants” online course at rotary.org**

Youth Protection Policies and Personnel



- ▶ **District Youth Protection Officer – Tom Turpin**
- ▶ **Report all youth protection concerns to TOM, especially for District programs**
- ▶ **If concerns are not addressed, try youthprotection@rotary.org**



QUESTIONS ?