

10 May 2018: PETS is 10 months away

- Prepare a notebook PC (this is not a Tablet-friendly exercise) to bring to Carolinas' PETS Annual meeting on June 14th. The wireless Ethernet port on your PC must be functional.

- Spend some quality time on your district's website. Get familiar with your district's DaCdb. Discover which clubs already have Presidents-Elect (PEs) and which do not.

- Spend some quality time on the Carolinas' PETS website. The answer to almost every question you will be asked about PETS is on our website. Get familiar with this resource. Appear knowledgeable and informed to your PEs, AGs, and DGN.

It is very important that you know how to access and use these sites.

Popular DGE questions we will cover in June:

- Where are the RI materials for Carolinas' PETS to be shipped?
- Where are the RI Theme materials for Carolinas' PETS to be shipped?
- How do I know who is registered?
- How do I know who is not registered?
- How do I know if a registrant has lodging?
- Since they aren't registered, can I just tell them to come anyway?
- Can participants pay when they arrive?
- How many copies of district materials do I need to bring?
- Can I invite my district aides / administrative assistants to committee meetings/meals?
- If the PE came last year as a PN, do they need to come as PE?
- A registrant is not part of my district. How can I remove them?
- PEs I follow-up with tell me they are registered. How can I verify this?
- Is there a price difference if someone is coming just Friday?
- I have a PE whose partner wants to come to the entire meeting. Is that OK?

⑨ June 2018: PETS is 9 months away

► Wednesday, June 13th

Charge your PC's battery tonight. Please test your wireless Ethernet port on the notebook PC (again, not a Tablet-friendly exercise) prior to this meeting. Tomorrow, bring your notebook PC and AC Power Adapter should it be needed. Bring an external mouse if the built-in pointing stick or touchpad is not your thing.

► Thursday, June 14th at 9:00am

We must begin by 9:00am so we recommend that you arrive sometime around 8:45am to allow yourself time for a potty stop and get your PC set-up. This is a DGE-only meeting. Please do not bring DGs, DGNs, AGs, or other folks to this 9:00am meeting.

A notebook PC is preferred over a tablet as these exercises will focus on website navigation and a fair amount of data entry procedures. The wireless Ethernet port on your PC must be functional. Please be familiar with how to locate and connect to a WiFi signal on the device you bring to this meeting.

We'll work through a few practice exercises on the DaCdb as well as cover the Carolinas' PETS website in detail. This two-hour session will have a direct impact on your district's registration experience.

After this June meeting, you'll know how to:

- Properly flag a club member as a PE
- Send your PEs an email
- What to do when it bounces back
- Help a PE register on-line for Carolinas' PETS
- Help a PE download a registration form
- Help a PE access the training material email they might have missed
- Help an AG register on-line for Carolinas' PETS
- Locate training resources on the Carolinas' PETS website
- Locate dates & contact information of other nearby PETS
- And more ...

8 July 2018: PETS is 8 months away

DaCdb tasks:

Login to DaCdb and update, as needed, each club's officer data

To view a list, click **Committees** at top of navigation bar

Click the **View** action to the right of Club PEs 2018-2019 (how many show up?)

To edit members who are your PEs ... but not on the list you just viewed

Click CLUBS tab at top of navigation bar and click EDIT at the club in question

Go to the POSITIONS tab

Locate the name of PE and click the edit tool (pencil) beside their name

Select "President-Elect" in the drop-down list and click SAVE

Upon return to the club positions listing, click the **Update** button near the top

Review Contact Information

Do they have a complete address, city, state, ZIP?

Do they have an email address?

Run the report again; how many are listed now? (same quantity as clubs)

Continue to pursue accurate information on your known PEs. Post any changes directly to your district's DaCdb. Do not email any changes to Harry/Ken/Steve.

Continue to pursue identification of unknown PEs. Edit the "Club Position" to "President-Elect" in their DaCdb record.

When the registration brochure mailing is prepared, only those members who are identified as President-Elect as of October 15th and whose address is correct will receive the mailer.

When the training material email broadcasts begin in November, only those members who are identified as President-Elect and whose email is correct will receive the broadcasts.

Interact with your district's webmaster.

Just a link to Carolinas' PETS website *home page* from your district's website is all that's needed. Do not copy Carolinas' PETS web pages or forms to your district's website. Do not activate "RegisterMe" for Carolinas' PETS on your district's Calendar of Events.

7 August 2018: PETS is 7 months away

- Continue to pursue accurate information on your known PEs. Post any changes directly to your district's DaCdb. Do not email any changes to Cookie/Newman/Chris/Ken/Steve.
- Continue to pursue identification of unknown PEs. Edit the "Club Position" to "President-Elect" in their DaCdb record.
- Email, using PMail, the PEs for your district to verify the email addresses and instruct them to verify and update as needed their postal address. Use template #1 and type message.

Do any of the PEs reply to your email messages?

How do you know they received the message or have read it?

When the message bounces back:

- Call the PE and obtain a correct email address,
- Logon to the DaCdb and edit the PE's profile with a corrected email address


Coming attractions ...

► September 21st

- Carolinas' PETS 2019 DGE Meeting in Greensboro from 9:00am until 3:00pm. This is a meeting structured just for DGEs.

⑥ September 2018: PETS is 6 months away

► September 21st

- ☑ Carolinas' PETS 2019 DGE Meeting in Greensboro. This is a meeting structured just for DGEs. Agenda to be announced; includes significant Q&A time. Prepare a notebook PC (this is not a Tablet-friendly exercise) to bring to this meeting. The wireless Ethernet port on your PC must be functional.
- ☑ Confirm with Cookie: which Discussion Leader will be conducting your district's Friday afternoon Role & Responsibilities discussion.
- ☑ Continue to pursue accurate information on your known PEs. Post any changes directly to your district's DaCdb.
- ☑ Continue to pursue identification of unknown PEs. Edit the "Club Position" to "President-Elect" in their DaCdb record. Run the committee report for PEs again.
- ☑ Email, using , the PEs for your district to verify the email addresses AGAIN.

Discussion Topics Include

- Website review (status of resource updates)
- DaCdb (data & reports)
- Registration procedures & troubleshooting
- Postal mail versus email
- DGE responsibilities in registration of PEs, PNs, AGs
- DGE responsibilities before PETS (Pre-PETS and district materials at PETS)
- Pre-PETS curriculum content
- PETS1 shipment, PETS2 shipment
- PETS 2019 Agenda (detailed review)
- PETS 2019 Training Materials (District Materials & PETS Materials)
- PETS 2019 Training Leaders (recap of responsibilities & curriculum)
- DGE Duties Thursday/Friday/Saturday at PETS
- Technology (Internet availability, Participant need for Notebooks/Tablets)
- Venue meeting space review

5 October 2018: PETS is 5 months away

On-line registration opens. Every registrant (on-line or postal mail) receives an email confirmation regarding the event as well as the details of their registration including a receipt for what was paid and/or amount yet due. The respective DGE also receives a notification email each time a participant registers.

Contact your AGs and have them register via the Carolinas' PETS website using an AG-only registration page. The receipt automatically sent to them as a part of the process can be used to seek reimbursement from the district. When each AG registers themselves there are significantly fewer corrections and lodging changes needed. Do not share this page with others or post to your district website.

Begin visiting your district's registration page on the Carolinas' PETS website to see who is registering. Become familiar with the names of your PEs, AGs, etc. Sometimes an error is made during the on-line data entry. Examples are:

- An registrant selects an incorrect club office
- A registrant will register in the wrong district
- A registrant will list their last name first and vice versa

It is the responsibility of the DGE to discover these inconsistencies and email newman.aguiar@carolinaspets.org for the corrective action needed.

Continue to pursue accurate information on your known PEs. Post any changes directly to your district's DaCdb. Do not email any changes to Cookie/Newman/Chris/Ken/Steve.

Continue to pursue identification of unknown PEs. Edit the "Club Position" to "President-Elect" in their DaCdb record.

► October 1st

We export names/addresses from each district's DaCdb.

► October 15th

On or before this date, the registration email broadcast is sent to all known PEs as of October 1st.

4 November 2018: PETS is 4 months away

► **November 1st**

- Create your district's bound materials. Utilize content from your predecessor as well as your DGE classmates. Sharing is resourceful!
- Begin planning your Schedule of Official Visits.
- Begin preparing your district-specific materials for Carolinas' PETS.
- Begin preparing for your two district breakout sessions at Carolinas' PETS.
- Keep in mind that all of your bound materials must be completed and emailed to Steve **before January 1st**. This early date is needed in order to help you not add this to the pressure preparing for International Assembly. RI theme materials will be added to the data as soon as it is announced during your time at the International Assembly.
- Continue to pursue accurate information on your known PEs. Post any changes directly to your district's DaCdb. Please do not email any changes to the Executive Committee.
- Continue to pursue identification of unknown PEs. Edit the "Club Position" to "President-Elect" in their DaCdb record.
- Each week, visit your district's registration page on the Carolinas' PETS website to see who is registering. Review the page for registration accuracy.

It is the responsibility of the DGE to discover these inconsistencies and email newman.aguiar@carolinaspets.org for the corrective action needed.

③ December 2018: PETS is 3 months away

▶ December 1st

- Personal letter (postal mail) from YOU; mention PETS brochure/mailer that they should have received by November. Consistently reinforce and encourage on-line registration before the discount deadline of January 20, 2018.

- Finalize your Schedule of Official Visits.

- Finalize your district's bound materials and submit to Steve for posting to the PETS website. Send your documents in native format. We will process the Acrobat PDF conversion. **Deadline: January 1st**

- Continue preparing for your two district breakout sessions at Carolinas' PETS.

- Continue to pursue accurate information on your known PEs. Post any changes directly to your district's DaCdb. Please do not email any changes to the Executive Committee.

- Continue to pursue identification of unknown PEs. Edit the "Club Position" to "President-Elect" in their DaCdb record.

- Each week, visit your district's registration page on the Carolinas' PETS website to see who is registering. Review the page for registration accuracy.

It is the responsibility of the DGE to discover these inconsistencies and email newman.aguiar@carolinaspets.org for the corrective action needed.

- Follow-up by telephone (each month before the deadline, each week after the deadline) with those not registered. Please do not delegate this to the AG.

2 January 2019: PETS is 2 months away

▶ **January 1st**

- Last date by which to submit your district's bound materials to Steve for Acrobat PDF conversion and website posting.

- Telephone each PE & AG not yet registered. Remind them of the January 20th registration deadline.

- Continue to pursue accurate information on your known PEs. Post any changes directly to your district's DaCdb. Please do not email any changes to the Executive Committee.

- Continue to pursue identification of unknown PEs. Edit the "Club Position" to "President-Elect" in their DaCdb record.

- Each week, visit your district's registration page on the Carolinas' PETS website to see who is registering. Review the page for registration accuracy.

It is the responsibility of the DGE to discover these inconsistencies and email newman.aguiar@carolinaspets.org for the corrective action needed.

- Continue to follow-up by telephone each week with those not registered. Please do not delegate this to the AG.

▶ **January 4th**

- Conference Call for Carolinas' PETS Planning Committee. Participation on this call is critical. The call for the event is scheduled for 3:00pm. We will firm this up at the June meeting.

1 February 2019: PETS is 1 month away

► February 1st

- Telephone each PE & AG not yet registered.
- Continue to pursue accurate information on your known PEs. Post any changes directly to your district's DaCdb. Do not email any changes to us.
- Continue to pursue identification of unknown PEs. Edit the "Club Position" to "President-Elect" in their DaCdb record.
- Each week, visit your district's registration page on the Carolinas' PETS website to see who is registering. Review the page for registration accuracy.

It is the responsibility of the DGE to discover these inconsistencies and email newman.aguiar@carolinaspets.org for the corrective action needed.

- Continue to follow-up by telephone each week with those not registered. Please do not delegate this to the AG.

► February 28th [Tentative]

The DGEs will receive a report listing registrants that continue to owe money.

- It is the responsibility of the DGE to personally contact the registrant and request that they immediately remit fees due. Fees not collected by Carolinas' PETS by March 10th will be on an additional report.
- Reproduce district-specific materials for:
Quantity of registrants on your district's page on our website + clubs not represented + AGs not registered +10 more + any additional copies you need to distribute to your leadership team. All materials must be brought to the event professionally bound.

☛ **March 2019: PETS is NOW!**

▶ **March 1st**

- ☑ Each week, visit your district's registration page on the Carolinas' PETS website to see who is registering. Review the page for registration accuracy.

It is the responsibility of the DGE to discover these inconsistencies and email newman.aguiar@carolinaspets.org for the corrective action needed.

- ☑ Continue to follow-up by telephone each week with those not registered. Please do not delegate this to the AG.
- ☑ Reproduce and bind your District Materials. The quantity needed will be:
 - Quantity of registrants on your district's web page at carolinaspets.org
 - + Add for those clubs not represented
 - + Add for those AGs not attending
 - + Add ten more

▶ **March 11th**

For any remaining receivables, the district will be held responsible and will collect the funds on-site or remit a district check on Thursday, the first day of the event.

▶ **March 21st**

- ☑ Carolinas' PETS 2019 Onsite Final Preparations. Please arrive before Noon and lunch on your own with your classmates. Then report at 2:00pm in a meeting room to be determined. Bring your bound district materials to the designated meeting room at that time.

President-Elect Data Collection/Verification

- Directory On-Line DaCdb
- All of our districts are on board with the online database application. Ideal if Club Secretary would promote the member to PE OR the DGE can do it. This adds the PE to the PE Committee and automatically includes them in the export for brochure mailing
- **All** data fields must be complete in order to be used successfully
- **Verify** email addresses by sending at least one message **prior** to October 1st
Dysfunctional addresses create unnecessary problems with our email broadcasts
Common: richard@alltell.net (s/b alltel.net)
 fred1@earthlink.net (is it fred1 or fredL)
 jim@mppsyste.ms (.com, .net, .org, etc missing)
- We will practice this in June — notebook PC with working wireless Ethernet port
- Inform us immediately of clubs being disbanded, name-changed, or new

Email Broadcast System

- Distributes PE training materials beginning in mid-November
 Across seven categories app. two weeks apart
 Materials are also available on website
- PEs with dysfunctional/no email address become DGE responsibility
- As new PE addresses are discovered, please **test** them
- Please forward any missed broadcasts (and attachments) to PEs
 Do not ask our volunteer to re-send or forward to these; DGE responsibility

Our Website (www.carolinaspets.org)

- Frequently Asked Questions
- Access to Online Registration
 (3) Emails are generated: General information, Receipt/Invoice, DGE Notification
- Registration results by district (page built with every access)
- Forms/Documents:
 Registration form & dates of other nearby PETS events
 Early Information/Training PDFs (sent to PEs by email)
 Agenda (draft during the year, final in January/February)
 DL Guides & PowerPoint slides
- Photos & bios of all presenters

Adobe® Acrobat® Reader [v9.0 or newer]

- Used for PDF files on the site as well as those we transmit to Committee
- Used for the attachments in the PE broadcasts
- Current version is needed (versions older than 9.0 encounter problems)
- *Free* at www.adobe.com (look for icon "Get Acrobat Reader")

PETS Alliance Website (www.petsalliance.org)

- Other PETS events' dates & contacts, International Assembly Dates