Use this timeline to prepare for your role. It contains the best practices and tips from other assistant governors.

**ASSISTANT GOVERNOR**

**PREPARATION TIMELINE**

*January-February (before taking office)*

Understand the leadership roles that you’ll be working with at the club and district levels. Try to meet the people who’ll hold these positions during your year:

|  |  |
| --- | --- |
| District Leaders | Club Leaders |
| Governor | Presidents |
| Governor-elect | Secretary or executive secretaries |
| Governor-nominee | Treasurers |
| Trainers | Trainers |
| Other assistant governors |  |
| Secretary or executive secretaries |  |
| Past district governors |  |

*February*

Work with your district leadership team:

* Understand the structure of the district team and how its members support club committees.
* Determine a plan for communicating with your team.
* Discuss district goals with the governor-elect.
* Check with your district to see whether you’ll have a budget for the year.
* Decide how online membership leads will be managed.
* Work with the outgoing assistant governor and the district team to make consistent, realistic, and long-lasting plans for supporting clubs.

*February-March*

Understand how to use Rotary’s online tools:

* Resources in My Rotary under the [Manage](http://www.rotary.org/myrotary/en/manage) tab
* [Rotary Club Central](https://my.rotary.org/en/user/login?destination=/secure/13301)
* [Online Membership Leads](https://my.rotary.org/en/document/how-manage-membership-leads-districts) at the district level
* [Rotary Ideas](https://my.rotary.org/en/secure/15486)
* [Rotary Showcase](https://my.rotary.org/en/secure/showcase)
* [Discussion groups](https://my.rotary.org/en/exchange-ideas/groups)
* [Brand Center](https://my.rotary.org/secure/application/136)

*February-June*

Work with the outgoing assistant governor:

* Learn about each club’s successes, challenges, and culture.
* Get suggestions for working with these clubs.
* Find out what tools the assistant governor used to manage clubs.
* Ask about their approach to working with each club.
* Observe club visits with your predecessor before you take office.

*February-June*

Get to know your clubs’ strengths and weaknesses. Use this information to help plan your year:

* Review their goals, achievements, and ratings in Rotary Club Central.
* Review membership, Foundation, club balance, and other reports in My Rotary.
* Read your clubs’ newsletters and follow their accounts on social media.
* Assess your clubs based on their:
  + Operating structure and effectiveness
  + Overall strength, including membership, Foundation giving, financial situation, management practices, and stewardship
* Work with your district team to create a plan for clubs that need the most attention and for those that are performing well.

*February-April*

Attend training sessions, including:

* The district team training seminar
* The presidents-elect training seminar (PETS)
* The district training assembly

*February-May*

Work with incoming club presidents during PETS:

* Build relationships so you understand their needs.
* Encourage them to identify their club’s needs.
* Encourage club officers to create [My Rotary](https://my.rotary.org/en/document/how-create-my-rotary-account) accounts.
* Help them develop or refine their club goals and enter them in Rotary Club Central.
* Make sure current club officers add [incoming club officers](https://my.rotary.org/en/document/how-add-club-officer) to My Rotary or their club management system. (You’ll receive a list from Rotary in March of club officers who haven’t been reported.)
  + Club officers should be reported by 1 February for the following year.
  + Club presidents, secretaries, treasurers, Foundation chairs, and membership chairs can add new officers.
* Discuss how the district and your clubs will manage online membership leads.

*April-June*

**Schedule your club visits for the year:**

* Plan to visit each club at least once per quarter.
* Schedule your visits based on the club’s needs.
* Ask the previous assistant governor how they scheduled their visits.
* Meet with your club presidents monthly, either in person or virtually, to stay current on their successes and challenges.

*Ongoing*

**Make sure that you are familiar with the latest Rotary initiatives, policies, and resources:**

* Subscribe to [Rotary newsletters](https://my.rotary.org/en/secure/16821), including Rotary Leader.
* Visit My Rotary often for news, videos, and stories.
* Become familiar with resources available on My Rotary.
* Refer to [Rotary’s governance documents](https://my.rotary.org/en/learning-reference/about-rotary/governance-documents) when you work with clubs on matters concerning policy. Your [Club and District Support representative](https://my.rotary.org/en/contact/representatives) can also help.