



LEAD YOUR DISTRICT

Assistant Governor
2017-20



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This is the 2016 edition of Lead Your District: Assistant Governor. It is intended for assistant governors holding office in 2017-18, 2018-19, and 2019-20. The information in this publication is based on Rotary’s constitution and **policy documents**. Changes to Rotary’s constitution and policy documents override policy as stated in this publication.

INTRODUCTION

Congratulations on your appointment as an assistant governor. This manual explains your responsibilities and discusses how you can support and strengthen clubs in your area. Be sure to bring it with you to the district team training seminar, where you'll use it as a reference. Review the discussion questions in appendix 3 before attending this event.

COMMENTS?

If you have questions or comments about this manual, please contact:

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ROLE AND RESPONSIBILITIES

Your primary role as an assistant governor is to help your assigned Rotary clubs become more effective by assisting the district governor with their administration.

RESPONSIBILITIES

Your responsibilities to the governor and your assigned clubs include:

- Help develop district goals.
- Coordinate the governor's visits with clubs.
- Communicate clubs' strengths, weaknesses, and progress toward goals to the governor.
- Join in district events and activities.
- Participate in the district team training seminar.
- Attend the presidents-elect training seminar and district training assembly.
- Identify and develop future leaders.
- Brief the incoming assistant governor on the status of clubs.
- Check in regularly with clubs.
- Help presidents-elect to develop goals, enter them into Rotary Club Central, and achieve those goals.
- Attend club meetings, club assemblies, and other events as invited.
- Offer the district leadership team specific ideas for supporting clubs.
- Promote attendance at the district conference and other district meetings.

Rotary International does not provide funding for assistant governors' activities. Check with your district to find out whether you will have a budget.

SUGGESTED TIMELINE FOR ASSISTANT GOVERNOR

Preparation

- | | |
|----------------|--|
| February-March | <ul style="list-style-type: none"> • Review club constitutions and Lead Your Club: President. • Attend the district team training seminar. • Discuss the district's goals with the governor-elect. • Meet with the presidents-elect of your assigned clubs at PETS. • Advise the governor-elect on district committee selections. |
| April-June | <ul style="list-style-type: none"> • Meet with club leadership teams at the district training assembly. • Meet with the outgoing assistant governor to discuss what you can expect when working with club leaders. • Schedule visits to your assigned clubs for the year. • Review clubs' goals in Rotary Club Central and check in with your district governor by 1 July. |

Year in office

- | | |
|-------------|---|
| July-August | <ul style="list-style-type: none"> • Begin your club visits. • Help club leaders plan for the governor's visit. |
| December | <ul style="list-style-type: none"> • Remind club leaders that updated membership lists and club invoices are due to RI on 1 January. They can submit both on My Rotary. |
| January | <ul style="list-style-type: none"> • Remind club leaders to report incoming club officers on My Rotary by 1 February. |
| May | <ul style="list-style-type: none"> • Add club ratings and comments in the Rate Clubs section of Rotary Club Central by 15 May. • Meet with the incoming assistant governor. |
| June | <ul style="list-style-type: none"> • Remind club leaders that semiannual dues and updated membership lists are due to RI on 1 July. |

KEY RELATIONSHIPS

Of all the district leaders, assistant governors generally have the most frequent contact with clubs, relaying information between the club, district, and Rotary International. Communication is essential to working with club and district leaders. Your key contacts include:

District leaders	Club leaders
Governor	Presidents
Governor-elect	Secretaries
Governor-nominee	Executive secretaries
Committee chairs	Treasurers
Other assistant governors	Committee chairs
Executive secretaries, where applicable	Trainers
Past district governors	

Discuss your district’s communication plan with these leaders to make sure everyone shares information effectively. Your plan should include how and when you communicate with clubs, the district governor, your fellow assistant governors, and district committee members.

TRAINING

In addition to the district team training seminar, which will help prepare you for your role as assistant governor, you are expected to attend other district training events. These meetings expand clubs’ knowledge about Rotary and help them become more effective. Appendix 1: Rotary Training Events has more information about each seminar’s purpose and intended audience. As you work with your assigned clubs, be sure to promote attendance and participation in these district meetings.

You also can coordinate training events for your assigned clubs as needed, using the district committees as resources. For example, if a club wants to learn more about The Rotary Foundation, you can ask a member of the district Rotary Foundation committee to help the club develop a training curriculum, or to talk about the Foundation at a club meeting.

Encourage all your assigned clubs to appoint a club trainer if they don’t already have one. A club trainer can facilitate training for prospective, new, and experienced members, addressing topics such as Rotary’s programs, online tools, and service opportunities.



WORKING WITH CLUBS

You are the key support person for your assigned clubs. Be available to the club presidents, and offer ideas and guidance throughout the year. Make sure they know that you are there to help them achieve their goals.

VIBRANT CLUBS

Rotary clubs often benefit from examining their practices and traditions to determine what is working well and what is not. Start with the [Rotary Club Health Check](#) to identify areas for improvement. Encourage clubs to evaluate themselves regularly using [Membership Assessment Tools](#), and to think of innovative ways to become more vibrant. Offer them best practices for strong clubs, such as:

- Develop long-term goals that address the elements of an effective club.
- Set annual goals that support these long-term goals.
- Hold club assemblies to keep members informed and involved.
- Promote regular communication among club leaders, club members, and district leaders.
- Ensure continuity in leadership and service projects from year to year.
- Customize club bylaws to reflect club practices.
- Provide opportunities for members to develop stronger relationships with one another.
- Ensure that every member is active in a club project or function.

The Strategic Planning Guide helps clubs create a vision and set long-term and annual goals.

- Offer regular, consistent training.
- Assign committees that support club needs.
- Participate in the [Presidential Citation](#) program.

Encourage club leaders to be flexible and try new ideas. Suggest that they evaluate club practices and work with incoming and past leaders to customize a leadership plan that works best for their club. Above all, help your clubs create a culture that welcomes new members and keeps current members coming back.

GOALS

To develop district goals, work with your governor-elect and other members of the district leadership team, using the [District Planning Guide](#) as a resource. Although club and district goals may differ, they should complement each other.

Club goals should align with [Rotary’s strategic plan](#) and the [Presidential Citation](#), and should be set in [Rotary Club Central](#).

Clubs can earn the Presidential Citation by achieving specific goals, defined by the RI president, that strengthen clubs and Rotary as a whole. [Rotary Club Central](#) is a one-stop shop for managing and tracking a club’s goals. It provides information about club membership, service, public relations, and fundraising trends. Encourage clubs to use these figures in setting goals and to enter their goals into this tool, which will allow incoming club leaders to review their club’s history and district leaders to track their progress. [Rotary Club Central](#) fosters continuity of leadership, promotes transparency, and saves paper. Learn more in the [Rotary Club Central Resources](#) course in the [Learning Center](#).

Goal setting is crucial to a successful Rotary year because it provides a plan of action. A basic goal-setting process includes:

1. Analyzing clubs’ strengths and weaknesses

Before the presidents-elect training seminar (PETS), meet with club presidents-elect to examine past club trends and current practices, and to consider goals. Suggest goals that can improve club operations.

2. Developing goals

Goals should be shared, measurable, challenging, achievable, and time specific. Work with club leaders to establish goals that will help their clubs function effectively, and that will involve a variety of activities to engage all members. During PETS, work with club presidents-elect to draft these goals. See that club presidents enter the goals into [Rotary Club Central](#) by 1 July.

3. Action planning

Once a club develops its goals, be sure it has an action plan to achieve them.

Once you create a [My Rotary](#) account and your district governor assigns you a club group, you can view your assigned clubs’ information and enter goals on their behalf in [Rotary Club Central](#).

4. Evaluating progress

Encourage club presidents to keep their goals current and to track their progress in Rotary Club Central so you can review this information before visiting. During your visits, discuss the club's progress with the board.

SUPPORTING CLUBS

You're an important resource for your assigned clubs. Because you interact with a variety of clubs, you can observe a wide range of approaches to common issues, and you can share insights that can help clubs meet their goals and overcome challenges.

Understanding each club's needs and strengths is crucial to providing helpful guidance. To support clubs:

- Be available and approachable.
- Give special attention to weak clubs.
- Tailor your support to individual clubs.
- Connect clubs that excel in a particular area with clubs that are struggling.
- Monitor clubs' progress toward their goals in Rotary Club Central.

Sharing information

Clear communication is vital to any organization, including Rotary. As the liaison between club and district leaders, you should share information about clubs' strengths and weaknesses with the district governor, governor-elect, appropriate district committees, and most important, the person who will succeed you as assistant governor. These discussions will promote continuity, improve the management of ongoing challenges, and allow appointees to become familiar with clubs before they take office.

You also can act as a liaison among Rotary clubs. Your regular contact with clubs will allow you to observe their progress, share their successes, and encourage cooperation.

The governor may ask you to discuss the following items with your assigned clubs:

- Paying the RI club invoice, and district and club dues
- Updating member lists and club information on My Rotary
- Viewing data from reports
- Submitting new club officer information to RI by 1 February for inclusion in the Official Directory
- Earning Rotary awards
- Attending the district conference, district training assembly, PETS, and other district events

Talk to your district membership chair about the individual qualities of your assigned clubs. This information will help the chair determine which club might be the best fit for prospective members.

Encourage your clubs to subscribe to Rotary Leader.

When club leaders create an account on [My Rotary](#) and become familiar with its features, your job will be easier. They can use it to update membership lists, change contact information, pay club invoices, and enter annual goals.

Visiting clubs

Visit each club regularly — quarterly if possible. If face-to-face meetings aren't feasible, hold an online meeting or conference call. During your discussions:

- Provide the club with information about RI and district resources.
- Inquire about the club's progress toward its goals.
- Ask about membership, service projects, support of the Foundation, important club functions, and club morale.
- Discuss the club's strengths and how it can apply those skills to other areas.
- Suggest practical solutions to club problems.
- Schedule the governor's visit, if requested.

Using the Rate Clubs tool

Rate Clubs is a feature in Rotary Club Central that allows you to report clubs' practices, accomplishments, and weaknesses, and helps you track which clubs the governor has visited.

You and the governor should use this tool to leave comments about a club after each visit. You can comment on and view ratings for your assigned clubs only; the governor and governor-elect can do so for all clubs in the district. These ratings and comments will serve as a reference for you and your district governor. Clubs will not be able to view them.

Attending club assemblies

Rotary clubs are encouraged to hold four to six club assemblies a year. These meetings give all members a chance to discuss activities and ideas for the future. An assembly is typically held during the governor's visit, and you are expected to be present. Talk to club leaders about which of the other assemblies you'll attend and what your role will be.

Encourage club leaders to name their successors on My Rotary so district leaders can contact them about club business.

CLUBS REQUIRING SPECIAL ATTENTION

A few clubs may need special attention from you and other district leaders. These clubs generally have difficulty meeting membership, financial, or other minimum standards established by the RI Board of Directors.

Minimum standards for Rotary clubs

To ensure that clubs are functioning effectively, the RI Board has adopted these minimum standards for every Rotary club:

- Meets regularly
- Implements service projects that address the needs of the local community and communities in other countries
- Accepts the visit of the assistant governor, governor, or any officer of Rotary International
- Pays per capita dues to RI
- Subscribes to a Rotary World Magazine Press publication
- Maintains liability insurance appropriate for the region (United States only)
- Acts in a manner consistent with the RI Constitution and Bylaws and Rotary Code of Policies
- Pays RI membership and district dues without outside assistance
- Provides accurate membership lists to RI in a timely manner
- Resolves club disputes amicably
- Maintains cooperative relations with the district
- Cooperates with RI by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, the associate foundations, and the international offices of the Secretariat
- Follows and completes the election review process established in the RI Bylaws

Work with your clubs to make sure they exceed the minimum standards. Much of the information used to determine a club's compliance comes from the Rate Clubs section in Rotary Club Central.

Of all district leaders, assistant governors often have the most direct contact with clubs, so your district will rely on you to help those that are struggling. If one of your assigned clubs needs special attention, consider:

- Visiting the club more frequently
- Increasing communication with the club
- Pairing the club with a stronger club in the district
- Contacting the appropriate district committee for additional support

Unpaid per capita dues

Four months after the 1 January and 1 July deadlines, clubs with unpaid per capita RI dues totaling more than \$250 are terminated. As an assistant governor, you can work with your clubs to help them avoid termination, and to help terminated clubs get reinstated.

Reinstatement

Reinstatement is allowed as follows:

- Within 150 days of termination, the club must pay all financial obligations to RI and a \$30/member reinstatement fee.
- More than 150 days after termination, the club loses its charter and is not eligible for reinstatement.

If a club can't comply with the minimum standards, it can consolidate with a nearby club or voluntarily terminate its membership in RI. Clubs should consider this option only when all other efforts have failed.

GOVERNOR'S VISIT

One of your main responsibilities is to help clubs prepare for the governor's visit. The governor visits each club in the district once during the year and pays extra attention to those that are struggling. The governor may attend an individual club's meeting or go to a multiclub event. The visit is a key responsibility of the governor and an important occasion for each club.

During the visit, the governor should:

- Motivate club members to participate in club and district activities and service projects
- Recognize outstanding club projects and the work of individual Rotarians
- Discuss pressing club matters with club leaders
- Highlight important Rotary initiatives

Scheduling the visit

When you help schedule the governor's visit to each of your assigned clubs, consider the following suggestions:

- Arrange for the visit to coincide with an important club event, such as a charter night, new member celebration or orientation program, award presentation, Rotary Foundation event, or intercity meeting.
- Schedule visits to new or struggling clubs, and to others that require special attention, early in the Rotary year.
- Factor in geography and travel times.
- Ensure that all logistical arrangements are in place for the governor and governor's spouse, if requested.

Preparing for the governor's visit

To build excitement among members and inspire them to participate, encourage club leaders to promote the governor's visit on the club website, through social media, and in the club newsletter. Suggest that clubs recognize members during the visit or arrange for the governor to present awards.

Work with the club to develop an agenda that will allow members to learn from the governor's knowledge and experience. It should include:

- Discussion of the club's progress toward its goals
- Time for the club board to present committee plans, activities, and accomplishments
- Recognition of club projects
- Report from the governor on important district initiatives and RI issues
- Time for questions and open discussion

Help the governor prepare for the visit by:

- Supplying a profile of the club, including the status of service projects, Rotary Foundation grant participation, and member satisfaction
- Sharing the successes and challenges of each club
- Providing an agenda

CONCLUDING THE YEAR

Throughout the year, your assigned clubs will add members, implement new service projects, and support Foundation programs. Finish your term as strongly as you started by making sure clubs feel ready to begin the next year. Consider the following suggestions:

- Acknowledge and celebrate clubs' accomplishments.
- Ensure that clubs recognize what they do well and continue to use those strengths.
- Suggest areas that need more attention in the next year.
- Review club goals and discuss clubs' progress toward achieving them.
- Share your final evaluation with clubs so they can reflect on the year.



RESOURCES

Clubs will look to you for guidance in achieving their goals. Though you may not know all the answers, you should know where to find them. Many resources are available from your district and Rotary International.

DISTRICT RESOURCES

Talk to district leaders to determine which resources are available in your district.

Governor's monthly communication

Provide the governor with news you feel should be included, such as recognition of members, innovative ideas that clubs are trying, and reports from service projects. Encourage club leaders to refer to this communication for the latest district information.

District training events

Before PETS and the district training assembly, consult with the district trainer about the agenda and your role in it. You also can talk with the district trainer about addressing any club-level training needs.

District directory

The district directory lists when and where clubs meet, as well as contact information for district leaders, club officers, and other Rotary leaders.

District website

The district website should provide current news about club, district, and RI activities. Use it to enhance your clubs' public image and to highlight projects.

Social media

Your district may have a presence on social networking sites, such as Facebook or Twitter. Try using social media to increase communication among Rotarians within the district and to promote Rotary to the general public.

ROTARY RESOURCES

Rotary International offers many resources, including information on programs, policies, and members' activities around the world. Use this list to help support clubs, either by finding the information they need or by directing them to a helpful publication, tool, staff member, or leader.

Find contact information for Rotary staff, officers, and appointees in the [Official Directory](#).

Regional leaders

Rotary coordinators, regional Rotary Foundation coordinators, Rotary public image coordinators, endowment/major gifts advisers, and End Polio Now zone coordinators are experts with professional experience and Rotary knowledge in membership development, fundraising, grants, and public relations. Talk with the district governor to determine which regional leaders you will work with. Often assistant coordinators are assigned to specific districts.

Rotary staff

The Secretariat acts as the administrative body for Rotary clubs worldwide. It includes Rotary International World Headquarters in Evanston, Illinois, USA, and seven [international offices](#). Staff members help Rotarians and Rotary clubs to achieve their goals by supporting them in their daily work.

[Club and District Support staff](#) — Direct administrative questions to these staff members at international offices and Rotary headquarters. If you have other inquiries, they can help you reach the appropriate person.

Online resources

[Brand Center](#) — Find materials including official Rotary logos, brochure templates, and brand guidelines.

[Lifecycle of a Project](#) — See a service project from start to finish.

[Member Center](#) — Learn about awards, products, and online tools, and refer a member.

My Rotary at Rotary.org — Complete your club and district business quickly. (You will need a My Rotary account to access many resources. Learn how to create one.)

Official Directory — Find listings for committees, task forces, and the Board and Trustees, and search for club and district information by district or city. (The directory is available only to Rotarians.)

Newsletters — Subscribe to publications such as Rotary Leader, Membership Minute, and Training Talk.

Rotary Club Central — Set and track progress toward annual club goals for membership, service, and Foundation giving.

Learning Center — Take courses to develop your skills and learn more about Rotary. View the [Learning Center Course Catalog](#).

Publications and reference documents

Manual of Procedure — Learn about Rotary policies and procedures that affect your role. This reference is published every three years, after each Council on Legislation.

Lead Your Club series — Read about the responsibilities of club officers and find general guidelines for these roles. The series contains:

Lead Your Club: President

Lead Your Club: Secretary

Lead Your Club: Treasurer

Lead Your Club: Administration Committee

Lead Your Club: Membership Committee

Lead Your Club: Public Relations Committee

Lead Your Club: Service Projects Committee

Lead Your Club: Rotary Foundation Committee

Membership

Clubs

Be a Vibrant Club: Your Club Leadership Plan

Membership Assessment Tools (web only)

New Rotary Clubs Quick Start Guide

Rotary Club Health Check (web only)

Strengthening Your Membership: Creating Your Membership Development Plan

Understanding Membership Reports: Getting Started (EN only)

Prospective and new members

Connect for Good

Connect to Membership Leads (web only)

Creating a Positive Experience for Prospective Members

Download
publications at
[My Rotary](#), or
order them at
[shop.rotary.org](#).

Impact Begins With You brochure (shop only)
Introducing New Members to Rotary: An Orientation Guide
New Member Welcome Kit (shop only)

Service projects

Rotary's Areas of Focus
Community Assessment Tools

Rotary programs

Youth Protection Guide
Interact Handbook
Rotaract Handbook
Rotary Youth Leadership Awards handbook
Youth Exchange Handbook

The Rotary Foundation

endpolio.org
The Rotary Foundation Reference Guide
A Guide to Global Grants

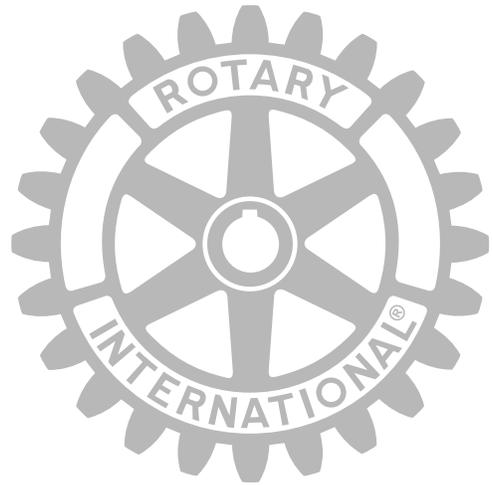
Public relations

Brand Center
Media Center
Tell Rotary's Story: Voice and Visual Identity Guidelines

Training

Rotary leader's guides:

- District Leadership Seminar Leader's Guide
- District Membership Seminar Leader's Guide
- District Rotary Foundation Seminar Leader's Guide
- District Training Assembly Leader's Guide
- Grant Management Seminar Leader's Guide
- Presidents-elect Training Seminar Leader's Guide



ROTARY TRAINING EVENTS

**ROLE-BASED TRAINING EVENTS
CONVENED BY THE GOVERNOR-ELECT**

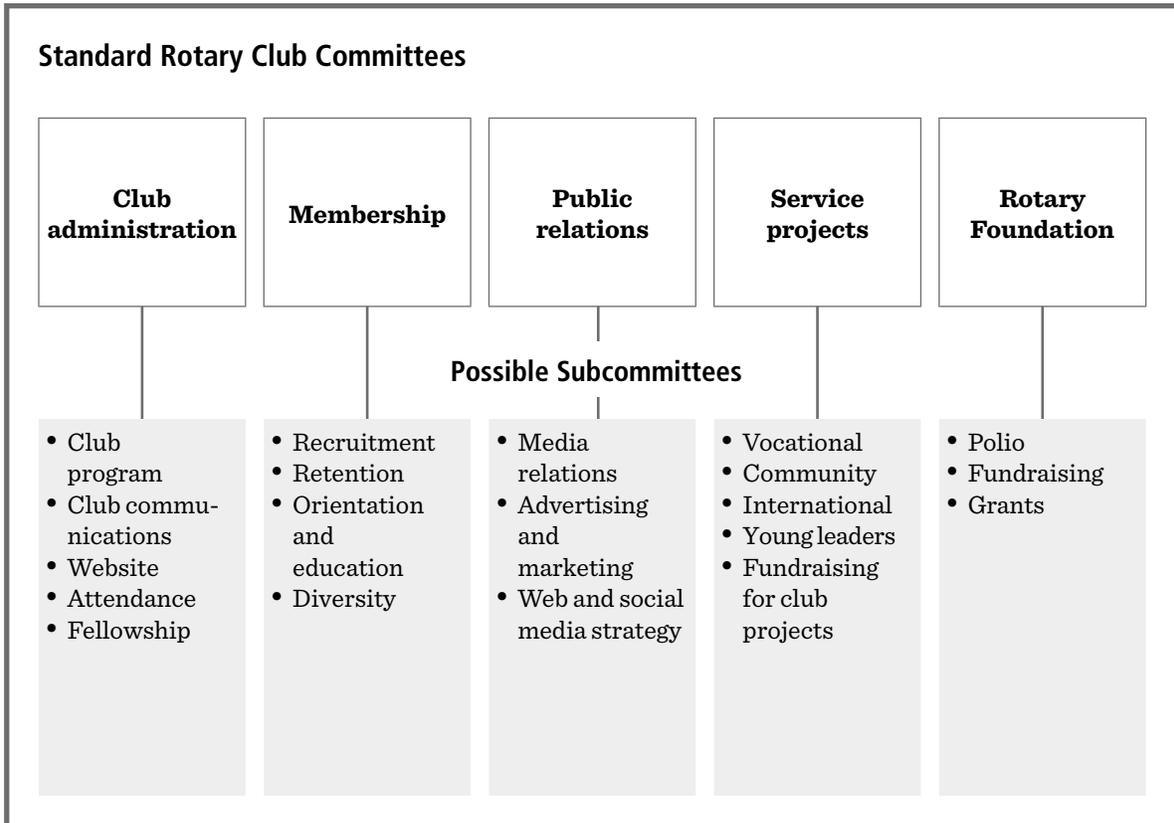
TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
<p>District Team Training Seminar February</p>	<p>Assistant governors and district committee leaders learn about their roles and set goals with the district leadership team.</p>	<p>District training committee</p>	<p>Trainers Assistant governors Committees</p>
<p>Presidents-elect Training Seminar (PETS) February or March</p>	<p>Club presidents-elect learn their role and work with assistant governors to set goals.</p>	<p>District training committee</p>	<p>Trainers Presidents</p>
<p>District Training Assembly March, April, or May (after PETS)</p>	<p>Club presidents-elect develop leadership skills; other incoming club leaders learn about their roles; together, club leaders set goals.</p>	<p>District training committee</p>	<p>Trainers Presidents Secretaries Treasurers Committees</p>

TOPIC-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR

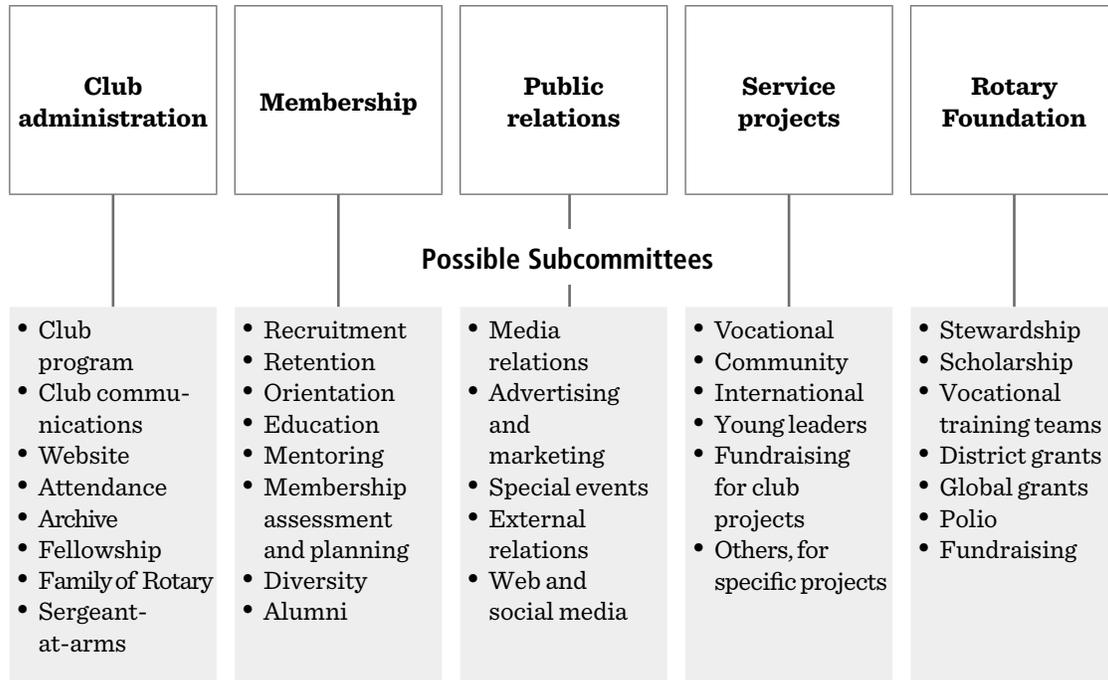
TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
District Rotary Foundation Seminar Determined by district	Club Rotary Foundation committee chairs and interested Rotarians learn about the Foundation.	District Rotary Foundation committee, district training committee	Trainers Club Rotary Foundation committee chairs
District Membership Seminar Determined by district	Club presidents, club membership committee chairs, interested Rotarians, and district leaders learn about membership.	District membership committee	Trainers Participants
District Public Image Seminar Determined by district	Club and district leaders and interested members learn how to enhance Rotary's public image.	District training committee	Trainers (available July 2016) (Participants' materials are developed by the club or district)
Grant Management Seminar Determined by district	Club presidents-elect (or appointees) learn how to manage Rotary grants.	District Rotary Foundation committee, district training committee	Trainers Participants
District Leadership Seminar Immediately before or after the district conference	Interested members with club leadership experience to develop their leadership skills.	District training committee	Trainers (Participants' materials are developed by the club or district)
Rotaract District Leadership Training Anytime after club open elections and before 30 June	Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and non-Rotarians learn about Rotaract.	District Rotaract representative	Participants

APPENDIX 2

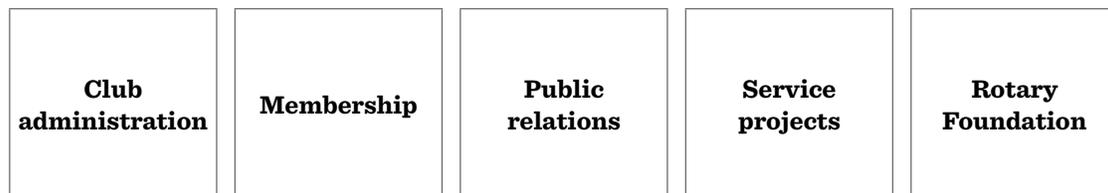
SAMPLE CLUB COMMITTEE STRUCTURE



Large Rotary Club Committees



Small Rotary Club Committees



APPENDIX 3

DISTRICT TEAM TRAINING SEMINAR DISCUSSION QUESTIONS

Consider the following discussion questions. Thinking about these issues and reviewing your manual before the district team training seminar will help you prepare for the training and effectively use your time with fellow district leaders.

Communication within the district

When and how often should members of the district team communicate with one another?

What information should the team communicate to clubs? What information should it communicate to district leaders?

How will the team communicate information to clubs and district leaders?

Role and responsibilities

What are your club- and district-level responsibilities?

Who will you need to work with?

Characteristics of a vibrant club

What is the district's role in supporting clubs?

What are the qualities of an effective club?

Club goals

Why is goal setting so important?

How can you help clubs establish goals?

Working with clubs

How can you promote the best practices in Be a Vibrant Club: Your Club Leadership Plan?

What are some common challenges that clubs must overcome?

What are some club characteristics that would signal a need for special attention?

What is your role in helping clubs and the district governor prepare for the governor's official visit?

What successful coaching strategies have you used that you can share with other assistant governors?

How can you use Rotary Club Central to identify club issues?

Resources

How will you collaborate with district committees and other assistant governors to support clubs?

How can clubs use the Learning Center?

What other resources will you recommend to clubs?

ROTARY CLUB CENTRAL PLAN TOGETHER TRACK PROGRESS ACHIEVE GOALS



Why should clubs use Rotary Club Central?



It's a one-stop shop.



It eliminates paper.



It fosters continuity in leadership.



It enables clubs to track their progress.



It creates transparency.



It showcases the important work that Rotary clubs do worldwide.

How do I get to Rotary Club Central?

Go to www.rotary.org/clubcentral.

Who can use Rotary Club Central?

All Rotarians can view the goals and achievements for their club. The current and incoming club president, secretary, executive secretary, treasurer, Foundation chair, and membership chair can add and edit the goals and achievements for their club.



Rotary

ROTARY CLUB CENTRAL: www.rotary.org/clubcentral



Rotary

One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
www.rotary.org

244-EN-(716)