

Assistant Governor's Training Manual

An addendum for Future Vision pilot districts
is available at www.rotary.org/futurevision

ROTARY INTERNATIONAL®



This is the 2010 edition of the *Assistant Governor's Training Manual* (244-EN). It is intended for assistant governors holding office in 2011-12, 2012-13, and 2013-14. The information in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution and Bylaws of Rotary International, and the Rotary Code of Policies. Changes to these documents, by the triennial Council on Legislation or the RI Board of Directors, override policy as stated in this publication.

Contents

Introduction	1
<hr/>	
1 Role and Responsibilities	3
Responsibilities	3
Key Relationships	5
Training	6
Goals	6
<hr/>	
2 Working with Clubs	7
Club Leadership Plan	7
Club Goals	9
Supporting Clubs	10
Clubs Requiring Special Attention	12
Governor's Official Visit	14
Concluding the Year	15
<hr/>	
3 Resources	16
Club Resources	16
District Resources	17
RI and Rotary Foundation Resources	20
Appendixes	
1. District Training Meetings	26
2. Tips for Problem Solving	28
3. Sample Club Committee Structure	29
4. <i>Planning Guide for Effective Rotary Clubs</i>	31
5. <i>Memo of Club Visit</i>	39
6. District Team Training Seminar Discussion Questions	41

Worksheets (to be completed at district team training seminar)

1. Session 1 Summary	42
2. Effective Clubs	43
3. Session 2 Summary	44
10. Session 3 Summary	45
11. Resource Search	46
13. Session 4 Summary	49
14. District Planning Guide	50
15. District Concerns	57

Introduction



Districts exist to help Rotary clubs advance the Object of Rotary. As an assistant governor, you are responsible for working with district leaders to support the clubs that have been assigned to you. You've received the *Assistant Governor's Training Manual* (244-EN) to help make your year a successful one. This manual explains the responsibilities of your position and how you can help clubs operate effectively.

Assistant governors are part of the district leadership team, which also includes the district governor and district committee members. At the district team training seminar, you will meet with these leaders to discuss ways to assist clubs in key areas of their operations.

Use this manual to prepare for your term in office. Bring it to the seminar, and review its contents beforehand. Pay particular attention to the questions in appendix 6, which will help you get the most out of the facilitated discussions at the meeting. After you have completed your training, this publication will serve as a resource as you work with club and district leaders to support effective Rotary clubs.

Comments?

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Role and Responsibilities



Your primary role is to assist the governor with the administration of your assigned Rotary clubs by helping them to be more effective.



Rotary Reminder

Effective clubs are able to

- Sustain or increase their membership base
- Implement successful projects that address the needs of their communities and communities in other countries
- Support The Rotary Foundation through both financial contributions and program participation
- Develop club leaders capable of serving Rotary beyond the club level

Responsibilities

The assistant governor has responsibilities to both the governor and the club. District-level responsibilities include:

- Assisting in developing district goals
- Coordinating the governor's official visit with clubs
- Communicating clubs' strengths, weaknesses, and progress toward goals to the governor
- Attending district meetings
- Participating in Rotary Foundation programs, events, and fundraising
- Helping develop future district leaders
- Briefing the incoming assistant governor on the status of clubs



Rotary Reminder

Each district is responsible for determining any financial support provided to assistant governors for performing their duties and responsibilities.

Assistant governors may not be able to make quarterly visits to each club in person, depending on the number and location of assigned clubs and the district budget. Although you should visit each club in person at least once, you can conduct other check-ins by phone, e-mail, or web conferencing. For clubs near each other, you might consider a multiclub visit to minimize travel and expenses.

Your responsibilities to the club include:

- Visiting clubs regularly (at least quarterly)
- Helping presidents-elect develop effective goals
- Monitoring the progress of clubs toward their goals
- Assisting clubs in planning and scheduling the governor's official visit, and attending all related club assemblies
- Motivating clubs to follow through on the governor's requests
- Coordinating club training with the appropriate district committee
- Promoting the District Leadership Plan and the Club Leadership Plan
- Identifying and encouraging the development of future district leaders
- Promoting attendance at the district conference and other district meetings

SUGGESTED TIMELINE FOR ASSISTANT GOVERNOR RESPONSIBILITIES

Preparation for your role

February	<ul style="list-style-type: none"> • Review RI and Rotary club constitutions and documents. • Attend the district team training seminar. • Provide input to the governor-elect on what the district wants to achieve.
March	<ul style="list-style-type: none"> • Meet with the presidents-elect of your assigned clubs at PETS. • Advise the governor-elect on district committee selections.
April	<ul style="list-style-type: none"> • Meet with club leadership teams at the district assembly.
May/June	<ul style="list-style-type: none"> • Meet with the outgoing assistant governor (if appropriate) to discuss what you can expect when working with club leaders.

Your year in office

July	<p>Congratulations on your new position!</p> <ul style="list-style-type: none"> • Collect a completed <i>Planning Guide for Effective Rotary Clubs</i> from each assigned club, and give them to your district governor by 1 July. • Schedule quarterly visits to your assigned clubs for the year.
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Rotary Reminder

Remind clubs that the updated membership list and semiannual dues are due to RI on 1 July. Both can be submitted through Member Access at www.rotary.org.

August	<ul style="list-style-type: none"> • Begin 1st quarter club visits. • Assist club leaders in scheduling and planning for the governor's official visit.
December	<ul style="list-style-type: none"> • Remind clubs that the updated membership list and semiannual dues are due to RI on 1 January. Both can be submitted through Member Access. • Begin 2nd quarter club visits.
February	<ul style="list-style-type: none"> • Begin 3rd quarter club visits.
April	<ul style="list-style-type: none"> • Begin 4th quarter club visits.
May	<ul style="list-style-type: none"> • Complete the <i>Memo of Club Visit</i> after your final visit to each club, and submit it to your district governor by 15 May. • Meet with the incoming assistant governor.
June	<ul style="list-style-type: none"> • Remind clubs that the updated membership list and semiannual dues are due to RI on 1 July. Both can be submitted through Member Access.

Key Relationships

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

District leaders	Club leaders
Governor	Presidents
Governor-elect	Secretaries
Governor-nominee	Treasurers
Committee chairs	Committee chairs
Assistant governors	Trainers
Executive secretaries	

You and your district leadership team will refine the district's communication plan to ensure information is shared with the appropriate district leaders. The communication plan will be discussed at the district team training seminar. It should include how and when you communicate with clubs, the district governor, your fellow assistant governors, and district committee members. Following the district's communication plan helps the district operate efficiently and provide consistent support to clubs.

Your relationship with club and district leaders is described in greater detail in chapter 2.

Training

You are expected to attend district meetings such as PETS, the district assembly, district leadership seminar, district membership seminar, and district Rotary Foundation seminar. At PETS, you will assist the governor-elect with team building among your assigned presidents-elect. Your role at other meetings will be determined by the convener and the district training committee.

These training meetings are intended to help clubs increase their effectiveness and learn more about Rotary. Appendix 1, District Training Meetings, has more information about the purpose and intended audience for each seminar. It is important to promote attendance and participation in district meetings among your assigned clubs.

You also have the opportunity to coordinate training for your assigned clubs with specific district committees as needed. 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 work with the club to develop training or to come and talk about the Foundation at a club meeting.



Rotary Reminder

To promote attendance at district training events, consider asking the district training committee for registration forms to distribute among intended participants when visiting clubs.

Goals

Assistant governors work with the governor-elect and other members of the district leadership team at the district team training seminar to develop district goals. They also work with club leadership teams to establish club goals. Your goal-setting experience as a past club leader and current district leader will help you work with clubs to ensure they establish meaningful goals that challenge them to new levels of service. Although club and district goals may differ in some respects, they should generally coincide.

When working on goals, make sure they are effective. It is important to set goals that are

- Shared
- Measurable
- Challenging
- Achievable
- Time specific

Use these characteristics to evaluate district and club goals. If one of them is missing, the goal should be further developed and more clearly defined. Once clubs develop their goals, be sure they have an action plan to achieve the goals.

Working with Clubs



Before you take office, your role is to offer ideas and guidance to clubs that will help them get ready for the upcoming year. During the year, you will serve as an adviser to clubs to help them attain their goals.



Around the World

Rotary clubs are all unique and thus have different activities. The Club Leadership Plan is flexible but emphasizes the incorporation of all Avenues of Service. See appendix 3 for club committee structure examples.

Club Leadership Plan

The Club Leadership Plan is the recommended administrative structure for Rotary clubs. It is based on the best practices of effective clubs, with the goal of creating clubs that pursue the Object of Rotary through activities related to each Avenue of Service. As clubs implement the plan, they may ask you for help.

Help club leaders analyze how the club's structure relates to the goals they set. The Recommended Rotary Club Bylaws suggest a committee structure (see appendix 3) that clubs can alter to meet their operational needs. For example, committees with overlapping responsibilities can be consolidated or even eliminated. New committees may be needed to perform responsibilities or functions that aren't covered by other club leaders or committees. If necessary, a club should amend its bylaws to better reflect the club's organizational structure. Consider these recommended standing club committees when setting goals:

- Club administration
- Membership



Rotary Reminder

The Strategic Planning Guide, available at www.rotary.org, supports clubs in creating long-term and annual goals to achieve a common vision. While tailored for clubs, it can be adapted to the district level.

- Service projects
- Rotary Foundation
- Public relations

Implementing the Club Leadership Plan

Your assigned clubs may already use some of the best practices of effective Rotary clubs outlined in the Club Leadership Plan. These are:

1. Develop long-range goals that address the elements of an effective club.

A club's long-range goals should cover the next three to five Rotary years and address the Avenues of Service and the elements of an effective club: membership, service projects, The Rotary Foundation, and leadership development. They should also include strategies for promoting a club's successes in each element. As its leadership plan evolves, the club should update these goals.

2. Set annual goals that are in harmony with the club's long-range goals using the *Planning Guide for Effective Rotary Clubs* (appendix 4).

Annual goals should address each Avenue of Service and help the club pursue the Object of Rotary. During your visits to clubs, review the planning guide and work with the club to revise its leadership plan as needed.

3. Encourage club leaders to involve members when planning club assemblies and to keep them informed of Rotary activities.

Club assemblies allow all members of the club to stay current, discuss decisions that affect the club, and hear committees report on their activities.

4. Plan for clear communication between club leaders, club members, and district leaders.

Work with club leaders to develop a plan for communicating with each other, club members, and district leaders. In the plan, specify who will communicate with whom, what method will be used, and when communication will occur.

5. Support continuity in club leadership and service projects.

Because Rotary club leaders change annually, every club needs a continual supply of leaders. Clubs can achieve continuity by making appointments for multiple years or having the current club president work closely with the president-elect, president-nominee, and immediate past president. Continuity in project leadership supports service projects that last longer than a year.

6. Amend club bylaws to reflect the practices of the club, including committee structure and the roles and responsibilities of club leaders.

Work with club officers to modify the Recommended Rotary Club Bylaws from RI to reflect each club's operations and to make sure they are current. Ensure that any bylaw changes are in accordance with all applicable local laws.



Rotary Reminder

When visiting clubs, encourage members to view the "How to Get Involved in Rotary" e-learning module on the Rotary E-Learning Center. The module offers examples of Rotarians from all continents getting involved in different ways.



Rotary Reminder

Encourage clubs to have a club trainer who is responsible for training members on various topics. For more information about the role of the club trainer, go to www.rotary.org/trainers and click Club trainers.

7. Provide opportunities to increase fellowship among club members.

Members who enjoy Rotary feel more involved. Strong club fellowship also supports a club's service efforts.

8. Ensure that every member is active in a club project or function.

Club involvement teaches members about Rotary and helps retain them as active members of the club.

9. Develop a comprehensive training plan.

Training is crucial for developing future leaders and ensuring that current club officers are well informed about Rotary and capable of leading the club and providing better Rotary service. A comprehensive training plan ensures that

- Club leaders attend district training meetings.
- Orientation for new members is provided consistently and regularly.
- Current members have ongoing educational opportunities.
- All members can participate in a leadership skills development program.

As an assistant governor, you should work with club leaders to examine the club's current operations, taking into account its existing best practices. Review this plan with club presidents as needed throughout the year. Past, current, and incoming club officers should work together to customize a leadership plan that establishes these nine best practices of effective Rotary clubs.

Club Goals

Work with club leaders to establish goals that are based on the elements of an effective club and that address the Avenues of Service. As an assistant governor, you should help analyze the club's past trends and current practices and suggest goals and practices that can improve its operations.

Encourage club leaders to review past club records, which can provide

- A base line for future goals
- Data on membership and attendance trends that can shape club plans and objectives
- Information on how to improve future project planning and implementation

Consult with the district governor or the current assistant governor, if needed, to review club records.

Goal setting is crucial to a successful Rotary year because it provides a plan of action. This process includes:

1. Analyzing the club's strengths and weaknesses.

Before PETS, club presidents-elect and assistant governors identify trends and consider goals to address club weaknesses and capitalize on strengths.



Rotary Reminder

When working with club leaders on goals, advise them to align their club goals with the priorities of the RI Strategic Plan.

2. Developing goals.

During PETS, assistant governors work with club presidents-elect to draft goals and steps for attaining them based on their clubs' current status.

- Use the *Planning Guide for Effective Rotary Clubs** (see appendix 4) to develop and record goals approved by the incoming club leadership team, as well as the strategies the club will use to achieve them.
- Collect a completed copy of the planning guide (one from each of your assigned clubs) by 1 July.

3. Evaluating progress.

During club visits, assistant governors review goals with the club's board to determine whether the club has or will achieve them. You may wish to advise clubs on how to accomplish the goals, effectively revise them, or add new ones.

Supporting Clubs

As an assistant governor, you're an important resource for your assigned clubs. Understanding each club's needs enables you to point out helpful resources and new ideas. Because you interact with a number of clubs, you have the benefit of observing a wide range of approaches to common club issues, and you can share insights and information that clubs can use to meet goals and overcome challenges. What you can do to support clubs is:

- Be available and approachable.
- Visit your assigned clubs regularly. Give special attention to weak clubs.
- Communicate with clubs often by e-mail, phone, or mail.
- Tailor your support to clubs based on the clubs' needs.
- Invite club leaders to give feedback about the quality of your assistance and support.



Rotary Reminder

Through Member Access at www.rotary.org, clubs can update membership lists, change contact information, and pay semiannual dues online. Encourage club leaders to register and become familiar with Member Access.

Sharing Information

Clear communication is vital to any successful organization, including Rotary. As the liaison between club and district leaders, you should share any information or concerns about a particular club with the district governor, governor-elect, appropriate district committees, incoming club and district officers, and particularly with the assistant governors who succeed you. These discussions will ensure continuity and better management of ongoing challenges. They also will provide incoming appointees with an orientation to clubs.

You also have the opportunity to act as a liaison between Rotary clubs. Your regular contact with clubs enables you to observe the progress of activities and programs, share successes, and encourage increased cooperation between clubs.

* Also included in the Club President's Manual (222-EN) and Club Secretary's Manual (229-EN)



Rotary Reminder

You may encounter a difference in opinion that is causing a dispute in the club. Work with club and district leaders to resolve any disputes. See appendix 2 for problem-solving tips.



Around the World

Clubs function differently in different cultural contexts. To ensure that all assistant governors in your district use the same criteria to evaluate clubs, consult with your district governor before the year begins to make sure you understand the criteria and to reach a consensus on the flexibility in the rating system.

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

- Paying RI and district dues
- Completing the semiannual report for submission to RI
- Using Member Access to pay dues, update membership lists, and report e-mail addresses of incoming officers
- Submitting the new club officer information to RI by 31 December to be included in the *Official Directory*
- Meeting deadlines for RI and Foundation awards
- Attending district conference, district assembly, PETS, and other district events

Visiting Clubs

Visit each club regularly, preferably monthly, but at least quarterly. During your visit:

- Provide the club with information about RI and district resources.
- Monitor club progress toward goals, and suggest adjustments to the strategies being used to achieve those goals.
- Suggest practical solutions to problems that challenge the club.
- Collect information about
 - Membership
 - Service projects
 - Participation and support of Rotary Foundation programs
 - Important club functions
 - Attendance
 - Ongoing disputes, if any
- Work with club leaders and the district governor to schedule the governor's official visit, if requested.

Memo of Club Visit

The *Memo of Club Visit* helps district leaders assess a club's effectiveness. This tool also provides an annual record of a club's progress for the district and Rotary International. You must submit a *Memo of Club Visit* (appendix 5) for each of your assigned clubs to the district governor by 15 May.

Like the *Planning Guide for Effective Rotary Clubs*, the *Memo of Club Visit* is largely organized around the elements of an effective club. Use it during your club visits to help measure a club's progress toward goals in these categories:

- Membership growth
- Implementation of successful service projects
- Support of The Rotary Foundation
- Development of future leaders
- Public relations
- Criteria for a functioning Rotary club

Throughout the year, fill out the *Memo of Club Visit* during each club visit. If challenges to achieving goals are identified during the year, club leaders should use the *Planning Guide for Effective Rotary Clubs* to revise goals and identify strategies to accomplish them.

At the end of the year, complete a final version of the memo and submit it to the district governor. It should reflect your observations of the club based on your cumulative visits and can be used to evaluate a club's progress over the Rotary year. Keep copies of each final *Memo of Club Visit* for your own records, and share them with your successor.

RI uses the *Memo of Club Visit* to provide the district with information on club trends.

Attending Club Assemblies

Rotary clubs are encouraged to hold four to six club assemblies a year, where all club members can openly discuss the state of the club and ideas for the future. You are expected to attend the club assembly during the governor's official visit. Work with club leaders to determine whether you should attend other club assemblies and, if so, what your role should be.

Clubs Requiring Special Attention

Club members can usually handle the challenges that most clubs face. A smaller number of clubs, however, merit special attention from you and other district leaders. These clubs generally have challenges meeting membership, attendance, or other minimum standards established by the RI Board of Directors.

Minimum Standards for Rotary Clubs

The minimum standards identify the operating requirements for functioning Rotary clubs. They were developed to ensure that all clubs pursue the Object of Rotary and contribute to their communities. They also were designed to promote proactive, collaborative efforts between struggling clubs and district leaders, who can provide guidance and support. The standards include:

- Meeting regularly
- Implementing service projects that address the needs of the local community and communities in other countries
- Accepting the visit of the assistant governor or any officer of Rotary International, including the governor
- Paying per capita dues to RI
- Ensuring that members subscribe to a Rotary World Magazine Press publication
- Maintaining liability insurance appropriate for the geographic region in which the club is located, or paying mandatory liability insurance with the semiannual report, where applicable (United States only)
- Acting in a manner consistent with the RI Constitution, RI Bylaws, and Rotary Code of Policies



Around the World

Clubs in the United States must pay mandatory liability insurance with their semiannual reports.

- Paying RI membership and district dues without outside assistance
- Providing accurate membership lists on a timely basis to the general secretary
- Resolving club disputes amicably
- Maintaining cooperative relations with the district
- Cooperating with RI by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, the associate foundations, and the international offices of the Secretariat

If one of your assigned clubs needs special attention, consider

- Increasing your visits to the club
- Communicating with the club more frequently
- Partnering the club with a stronger club in the district
- Contacting the appropriate district committee for additional assistance

Unpaid Per Capita Dues

Six months after the 1 January or 1 July deadline, clubs with unpaid per capita RI dues over US\$250 are terminated. As an assistant governor, you can work with your clubs to help them avoid termination and help terminated clubs get reinstated.

Reinstatement

- Within 90 days of termination, the club must pay all financial obligations to RI and a \$10/member reinstatement fee for a minimum of 10 members.
- More than 90 days after termination, the club must pay all financial obligations to RI and a \$10/member reinstatement fee (for a minimum of 10 members), complete a reinstatement application, and pay an additional \$15/member application fee (for a minimum of 10 members).

More than 365 days after termination, the club loses its charter and is not eligible for reinstatement.



Rotary Reminder

Bring the *Memo of Club Visit* (appendix 5) with you when visiting your assigned clubs. Use the form to record the status of club activities.

Much of the information used to determine whether a club is meeting minimum standards is gathered from the *Memo of Club Visit*. At least twice per year, Rotary International provides governors with a list of clubs in their district that don't meet minimum standards.

Work with these clubs to develop a plan to bring them up to minimum standards, and provide the necessary guidance and support. Assistant governors have more direct contact with clubs, so districts will rely on you to have more of a role in helping those that are weak or struggling.

If a club is ultimately unable to bring itself into compliance, it can

- Consolidate with a nearby club, if that club is willing
- Voluntarily terminate its membership in RI (*Consider this option only if the above efforts have failed.*)

Governor's Official Visit

The district governor is required to visit each club in the district once during the year. The visit can be done with individual or multiple clubs at once. The visit focuses attention on important Rotary issues, motivates Rotarians to participate in service activities, and allows club members to discuss pressing club matters. The official visit is an important responsibility of the governor and an important occasion for a club.

Differences between Club Visits and Official Visit

During club visits, the assistant governor

- Assesses a club's progress toward its goals
- Evaluates the effectiveness of a club's strategies to achieve its goals
- Suggests solutions to issues challenging the club
- Uses the *Memo of Club Visit* to record the status of club activities

During the official visit, the governor

- Motivates club members to participate in club and district activities and service projects
- Focuses attention on the RI theme for the year and important Rotary issues
- Recognizes outstanding club projects and the work of individual Rotarians
- Pays special attention to weak and struggling clubs

Scheduling the Official Visit

When you help schedule the governor's official visit to each of your assigned clubs, you'll need to coordinate with the club and the governor. Consider the following suggestions:

- Arrange for the visit to coincide with important club events, such as
 - Charter night
 - Induction ceremonies
 - New member orientation
 - Rotary Foundation events
 - Citation and award programs
 - Intercity meetings
- Schedule visits to new or provisional clubs and clubs 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 Official Visit

To ensure maximum participation of club members, encourage club leaders to promote the visit by

- Announcing the upcoming visit at weekly club meetings
- Publishing announcements about the visit in the club bulletin and on the club website
- Asking club members to shuffle their schedules so they can be present
- Arranging for recognition or awards to be presented by the governor

Help prepare the governor for official visits by

- Supplying a current profile for each club, including membership statistics and trends, the status of service projects, Rotary Foundation program participation and financial contributions, and attendance rates
- Sharing the successes and challenges of each club
- Providing an agenda for each visit

Setting an Agenda

Work with the club to develop an agenda for the official visit that takes advantage of the opportunity to learn from the governor's knowledge and experience. It should include:

- Discussion of the club's progress toward the goals it has set with the *Planning Guide for Effective Rotary Clubs*
- Presentations on committee plans, activities, and accomplishments
- Recognition of outstanding club and individual projects
- Time for questions about district and RI policies and activities

Concluding the Year

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

- Acknowledge and celebrate the work clubs have accomplished during the year.
- 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 a copy of the *Planning Guide for Effective Rotary Clubs* so clubs can see their progress toward goals.
- Provide clubs with a copy of the *Memo of Club Visit* so they can refer to it when setting goals for the next year.

Before the end of the year, provide the incoming assistant governor with an update on the progress your assigned clubs have made, as well as their strengths and weaknesses.

Resources



Clubs and other district leaders may look to you for guidance. Though you may not know all the answers, you should know where to find them. Many resources are available from clubs, districts, and Rotary International to help the district and clubs achieve their objectives.



Rotary Reminder

Visit www.rotary.org to download or order publications and to find additional resources.

Club Resources

Some of a club's most important resources lie within the club itself. As you work with clubs, encourage them to use the knowledge and experience of their own members, leaders, and contacts, as well as those in the community.

Also, encourage your assigned clubs to develop ties and share effective practices with one another through interclub meetings, joint service projects, and meetings for club presidents in your area.

Club Leaders

Club presidents regularly confer with other club leaders to assess progress and gather input. They are your main contact within the clubs and can communicate their club's strengths and weaknesses. Work with them to identify areas that need your support.

Club secretaries can provide you with membership trends, attendance patterns, or other administrative practices.

Club treasurers manage club funds, so work with them to support sound financial practices, as outlined in the *Club Treasurer's Manual*.

Club Committees

Similar to district committees, club committees plan, promote, and implement activities and projects that sustain the club and serve local and international communities. Work with club committees to ensure that their work supports club and district goals.

Club Trainers

Some clubs appoint or elect club trainers. Work with them to ensure all club training needs are met, and if applicable, refer them to the district training committee for further support and ideas. If a club lacks expertise in a given area, put them in touch with the appropriate district committee member who may be able to provide ideas for training.

Community Members and Organizations

Successful Rotary clubs are involved in their communities. By maintaining close ties to important community members and organizations, clubs can determine what types of service projects are most appropriate for local needs. Regular contact with community members also can generate interest in Rotary, attract new club members, and facilitate cooperative relationships.

District Resources

Because you have the most frequent contact with them, your assigned clubs look to you as a key resource within the district. These district resources can help you:

- District governor
- District governor-elect and governor-nominee
- Fellow assistant governors
- Past district leaders
- District committees
- Governor's monthly letter
- District training events
- District directory
- District website

District Governor

The district governor, an officer of Rotary International, is the district's liaison to the RI president and Board of Directors. The governor is responsible for overseeing all the clubs in the district, advising and motivating them, and encouraging them to adopt strategies that will make them more effective. As an assistant governor, you represent the governor, helping to implement district plans and supporting clubs in their efforts to be successful.

Provide the district governor with current information about your assigned clubs. The governor will advise you on strategies and resources available to support the clubs, inform you of district trends, and provide you with information from RI and the district to communicate to clubs.

Find more information about the role of the district governor in the *Manual of Procedure*.

Governor-elect and Governor-nominee

Before the Rotary year begins, the governor-elect develops district goals, oversees the training of incoming district and club leaders, and may seek your advice on district committee selections. The governor-nominee may also be involved in the planning process, especially if plans extend into the next Rotary year. The governor-elect and governor-nominee can work with clubs that require long-term attention or that have ongoing service projects to offer guidance and ensure the necessary resources are available. This, however, should not interfere with the ongoing activities of the current district governor.

Fellow Assistant Governors

Other assistant governors are excellent sources of information and strategies to help maintain strong clubs. Communicating with your fellow assistant governors will help you understand district trends and be more responsive to them, and it may lead to opportunities for clubs to work together.



Rotary Reminder

Visit www.rotary.org to download or order publications and to find additional resources.

Past District Leaders

Past district leaders are often active in district and club affairs. With their leadership experience and knowledge of the clubs in the district, they can provide insightful ideas and successful strategies for reaching goals. Seek their input when planning and implementing goals with clubs.

District Committees

District committees serve specific functions that correspond to district goals and plans. They often consult with RI and Rotary Foundation committees and resource groups about related programs and activities at the district and club levels.

District committees work with clubs to

- Provide club leaders with specialized knowledge and guidance to implement strategies that fulfill club goals
- Monitor club progress and offer support
- Encourage work toward district goals
- Educate clubs about available resources
- Identify and recognize outstanding clubs and individuals

**Rotary Reminder**

Districts may appoint additional committees.

The RI Board recommends that all districts appoint committees to address the following areas:

- District conference
- District programs (such as Rotary Youth Exchange, Rotaract, Rotary Youth Leadership Awards, World Community Service)
- Extension
- Finance
- Membership development
- Public relations
- RI Convention promotion
- The Rotary Foundation
- Training

Familiarize yourself with each committee's responsibilities, as defined by the RI Board and your district, so that you can enlist their support if needed.

Governor's Monthly Letter

The governor's monthly letter to club presidents and secretaries should inform, inspire, and recognize Rotarians in the district. The monthly letter can be sent to clubs electronically or posted on the district website.

Provide the governor with any information that you feel should be included in the letter, such as successful service projects. Encourage club leaders to refer to the letter for the latest district information.

District Training Events

Training meetings held throughout the year provide Rotarians with the necessary knowledge and skills to carry out their responsibilities effectively. Under the direction of the governor or governor-elect (depending on the meeting), the district training committee is responsible for conducting training at various district meetings (see appendix 1).

Before PETS and the district assembly, consult with the district trainer on the meeting agenda and your role in it. You can also talk with the district trainer about addressing club-level training needs, including specialized training for club committees, as needed.

District Directory

The district directory lists meeting information for the district's clubs, as well as contact information for the governor, governor-elect, assistant governors, district committees, club officers, and other Rotary leaders.

District Website

Many districts maintain websites that provide news and information about club, district, and RI activities. If your district has a website, use it to stay current on club and district events and to highlight successful club projects. Encourage club leaders to refer to the site for the latest district information.



Rotary Reminder

Download publications at www.rotary.org, or order them at shop.rotary.org or from your international office.

RI and Rotary Foundation Resources

Rotary International offers many resources on Rotary policies, procedures, programs, and training meetings, as well as information on the projects and activities of Rotarians and clubs around the world. This list will help you support clubs, either by finding the information yourself or directing clubs to the correct resource.

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at www.rotary.org.

RI and Rotary Foundation Appointees

RI committees — The RI Board determines the purpose of international committees, which comprise Rotarians appointed by the RI president. Committees advise the Board on policies affecting Rotary International, districts, and clubs.

RI resource groups — Groups of Rotarians appointed by the RI president to help clubs and districts carry out tasks related to the president's emphases.

RI training leaders — Rotarians appointed annually by the RI president-elect who are trained on facilitation skills to lead group discussion sessions for district governors-elect at the International Assembly.

Regional Rotary Foundation coordinators (RRFCs) — Rotarians appointed to help districts and clubs in all aspects of The Rotary Foundation.

Assistant regional Rotary Foundation coordinators — Rotarians appointed to assist the RRFCs, districts, and clubs with their annual giving, major gifts, and program participation.

Rotary coordinators (RCs) — Rotarians appointed to help districts and clubs in all aspects of Rotary — RI programs, effective clubs, membership, public image — in support of the RI Strategic Plan.

Assistant Rotary coordinators — Rotarians appointed to support the RC and provide additional assistance to clubs and districts.

Rotary Foundation alumni coordinators (RFACs) — Rotarians who assist RRFCs, clubs, and districts in reconnecting with Foundation program alumni and involving alumni in Foundation activities.

The Secretariat

The Secretariat of Rotary International acts as the administrative body for Rotary clubs worldwide by gathering, analyzing, translating, and publicizing Rotary information. It includes RI World Headquarters in Evanston, Illinois, USA, and seven international offices. The Secretariat serves Rotarians, Rotary clubs, and the leaders of the association, helping them attain the Object of Rotary.



Rotary Reminder

Visit www.rotary.org to download or order publications and to find additional resources.

Club and District Support representatives are staff members at international offices and RI World Headquarters who can answer many administrative questions and direct other inquiries to appropriate RI and Foundation staff.

General Reference

Club Officers' Kit (225-EN) — Set of manuals outlining responsibilities and general guidelines for club officers. Training discussion questions are provided. Kit contents:

- Club President's Manual* (222-EN)
- Club Secretary's Manual* (229-EN)
- Club Treasurer's Manual* (220-EN)
- Club Administration Committee Manual* (226A-EN)
- Club Membership Committee Manual* (226B-EN)
- Club Public Relations Committee Manual* (226C-EN)
- Club Service Projects Committee Manual* (226D-EN)
- Club Rotary Foundation Committee Manual* (226E-EN)

Manual of Procedure (035-EN) — Contains RI and club constitutional documents as well as policies and procedures of Rotary International and the Foundation established by legislative action, the RI Board of Directors, and the Foundation Trustees. Issued every three years after each Council on Legislation.

Official Directory (007-EN) — Provides contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; a worldwide list of districts and governors; and an alphabetical listing of clubs within districts, including contact information. Issued every year.

RI Catalog (019-EN) — List of RI publications, audiovisual programs, forms, and supplies. Updated annually.

News Publications

Rotary Leader — Bimonthly multimedia publication for Rotary club and district officers, potential officers, and other leaders, available in nine languages. Offers information, guidance, and resources that aid in the running of a successful club or district.

The Rotarian — RI's official magazine, published monthly. Provides information on club and district projects, RI Board decisions, and RI meetings. In addition to *The Rotarian*, 31 regional magazines in 25 languages serve club members around the world.

Weekly Update — Newsletter highlighting the latest Rotary news. It can be used for club and district newsletters and websites.

Membership

Club Assessment Tools (web only) — Online supplement to the *Membership Development Resource Guide* with instructions on why, when, and how to complete club assessment activities.



Rotary Reminder

Encourage your clubs to subscribe to *Rotary Leader* at www.rotary.org/rotaryleader.



Rotary Reminder

Get the latest Rotary news at www.rotary.org.



Rotary Reminder

Subscribe to Rotary newsletters at www.rotary.org/newsletters.

Membership Development Resource Guide (417-EN) — Outlines steps to help clubs develop a membership development action plan for recruiting and retaining members.

Organizing New Clubs (808-EN) — How-to guide for district governors and their representatives in organizing new clubs.

Start with Rotary wallet cards (613-EN) and postcards (614-EN) — Invite prospective members to attend a Rotary club meeting with these wallet cards and postcards.

The Membership Minute — E-mail newsletter offers membership strategies and tools.

Service Projects

Abuse and Harassment Prevention Training Manual and Leaders' Guide (775-EN) — Youth protection guidance that can be modified to comply with local laws and situations to create and maintain the safest possible environment for all participants.

Communities in Action (605-EN) — Comprehensive instructions for planning, conducting, and evaluating a service project, and list of RI's recommended types of projects for clubs and districts.

Community Assessment Tools (web only) — Detailed guidelines for conducting effective community assessments.

How to Start a Service Project (web only) — E-learning module that guides Rotarians through the first steps in starting a service project.

ProjectLINK (web only) — Online database of projects that are seeking assistance and a listing of successful club projects to generate new ideas and model best practices. (English only)



Rotary Reminder

For more service-related publications, see www.rotary.org

RI Programs

Interact Handbook (654-EN) — Guide for organizing and administering an Interact club, for both sponsor Rotary clubs and Interact club leadership.

Rotaract Handbook (562-EN) — Guide to organizing and developing a Rotaract club and conducting service and professional development projects.

Rotary Community Corps Handbook (770-EN) — Basic steps for organizing a corps, including how to identify potential leaders. Also includes case studies and program ideas.

Rotary Fellowships Handbook (729-EN) — Guide for organizing and promoting a Rotary Fellowship.

Rotary Friendship Exchange Handbook (web only) — Guide for hosts and guests, information on arranging exchanges, and sample itineraries for a Rotary Friendship Exchange.

Rotary Volunteers Handbook (263-EN) — Guide for Rotarians interested in becoming a Rotary Volunteer and clubs looking for volunteer assistance with projects.



Rotary Reminder

Visit www.rotary.org to download or order publications and to find additional resources.

Rotary Youth Leadership Awards Handbook (694-EN) — Guide to organizing club or district events to develop leadership among young people.

World Community Service Handbook: A Guide to Action (742-EN) — Information on how clubs and districts can become involved in international service projects.

Youth Exchange Handbook (746-EN) — Guide to operating a Rotary Youth Exchange program.

The Rotary Foundation

District Rotary Foundation Seminar Manual (438-EN) — Guide to help districts conduct a Foundation seminar for districts and clubs.

Every Rotarian, Every Year Club Success Kit (958-EN) — Brochures, stickers, and instructions to help Rotary clubs promote the Annual Programs Fund.

PolioPlus Brochure (323-EN) — Update on the global polio eradication effort, including recent developments and statistics, a description of the contributions of Rotary and its major partners, and the challenges remaining to achieve a polio-free world.

Rotary Foundation Facts (159-EN) — Pocket-size leaflet of recent Foundation statistics.

Rotary's US\$200 Million Challenge DVD (985-EN) — Video overview of Rotary's efforts to eradicate polio and fundraising initiatives to match the Gates Foundation grant.

The Rotary Foundation Quick Reference Guide (219-EN) — Compilation of the programs and services of The Rotary Foundation in a quick-reference format.



Rotary Reminder

Until 1 July 2013, addendums to all training publications are available for clubs and districts in the Future Vision pilot. Find more information at www.rotary.org/en/fvdistrict.

Future Vision

Rotary E-Learning Center — Offers a number of Future Vision e-learning modules for all Rotarians, including:

Choosing a Grant – Interactive module in which users pick the grant type appropriate for various project and activity scenarios

Areas of Focus – A series of informational modules about the six areas of focus identified for the new grant structure

Member Access: Qualification – Step-by-step guide to the online district qualification process for the DG, DGE, and DRFC

Member Access: District Grant Application – Step-by-step guide to the online district grant application process

Future Vision section of www.rotary.org (www.rotary.org/en/fvdistrict) — Provides an overview of the Future Vision Plan and includes links to FAQs and related documents.

Public Relations

Effective Public Relations: A Guide for Rotary Clubs (257-EN) — Tools and tips for promoting club activities to attract positive attention from the community and potential club members.

Humanity in Motion campaign materials — Television, radio, print, billboard, and Internet public service announcements that focus on Rotarians' efforts to address critical community issues.

PolioPlus Headliner Kit (web only) — Polio-related public relations tools that can be tailored to give local media outlets a hometown news angle. Includes a sample news feature, opinion piece, letter to the editor, press releases, and photos, plus tips for distributing them to newspapers, journals, and trade magazines.

Rotary PR Tips (web only) — Biweekly e-mail newsletter featuring ideas for clubs and districts to promote Rotary in their communities. Subscribe at www.rotary.org/newsletters.



Rotary Reminder

Visit www.rotary.org to download or order publications and to find additional resources.

Training

District Training Manual (246-EN) — Includes information on the responsibilities of the district trainer and district training committee, as well as a sample session guide for a train the trainer seminar.

Leaders' guides — Include information on planning and organizing a training seminar, session outlines, handouts, evaluation forms, and accompanying slides. Download leaders' guides in the Events section at www.rotary.org.

Trainers section of www.rotary.org (click Members → Training → For trainers) — Includes information about planning a training meeting, adult learning principles, training Rotarians, web conferencing, club trainers, and best training practices.

Rotary Training Talk — A monthly e-mail newsletter that highlights RI materials distribution dates and training events, and includes surveys and training tips.

RI Website

Rotary.org (www.rotary.org) — Current information on all aspects of Rotary, including membership, The Rotary Foundation, RI programs, news, events, club and district support, training, and publications, many of which are available online.

Member Access — Members-only section of the website where Rotarians can contribute to The Rotary Foundation, manage their RI e-mail subscriptions, register for meetings, and access member benefits. Club and district officers can obtain additional records and reports.

Rotary E-Learning Center — Offers Rotarians opportunities for independent study, featuring:

- Interactive modules on various Rotary topics for all Rotarians
- Your Voice, Your Solution: Compilation of best practices and solutions to everyday challenges from Rotarians
- Rotary Basics: Multimedia introduction to Rotary

Running a district section of Rotary.org (click Members → Running a district → District leaders → Assistant governors) — Pages to help district leaders to carry out their role.

Appendix 1: District Training Meetings



Rotary Reminder

The district Rotary Foundation grant management seminar is for Future Vision pilot districts. After January 2013, all districts will conduct this meeting in preparation for the full rollout of the Future Vision grant structure in July 2013.

This chart lists the annual district training meetings held for club leaders. Assistant governors should encourage club leaders to attend. For more details on training meetings, including topics and resources, go to www.rotary.org/en/members and click Events. Fill in the last column with the date of each of your district's meetings, and share this information with your assigned clubs.

Training Meeting	Purpose	Audience	Date of meeting in your district
District Team Training Seminar	Prepares assistant governors and district committee leaders for their new roles Provides an opportunity for incoming district leadership team to work together on district goals	Incoming assistant governors, district committee leaders	
Presidents-elect Training Seminar (PETS)	Prepares presidents-elect for their new role	Incoming club president	
District Assembly	Prepares incoming club leaders for their new roles	Incoming club president, secretary, treasurer, committee chairs	
District Leadership Seminar	Motivates Rotarians in the district to serve beyond club level	All Rotarians	
District Membership Seminar	Prepares club and district leaders to support membership efforts	Club president, club membership committee chair, interested Rotarians	
District Rotary Foundation Seminar	Motivates Rotarians to support and participate in Foundation programs	Club Rotary Foundation committee chair, interested Rotarians	

Training Meeting	Purpose	Audience	Date of meeting in your district
District Rotary Foundation Grant Management Seminar	Prepares club members for successful management of Rotary Foundation grants (attendance is part of the qualification process for clubs to receive Rotary Foundation Global Grants)	Club president-elect or a club-designated appointee	
District Conference	Advances the Object of Rotary through fellowship, inspirational addresses, and the discussion of matters of importance to Rotary clubs and Rotary International	All Rotarians	
Rotaract District Leadership Training Meeting	Prepares incoming Rotaract club leaders/ presidents	Rotaractors, Rotarians, non-Rotarians	
Leadership Development Program	Cultivates leadership skills	All Rotarians	

Appendix 2: Tips for Problem Solving

As assistant governor, you may need to help solve problems within your district leadership team or your assigned Rotary clubs. The following action plan will help you find solutions to the problems you come across during the year.

1. Identify the problem.

Ask questions such as: What is preventing this Rotary club from achieving its goal? Make sure the idea you're focusing on is the real problem and not just a symptom.

2. Explore the problem.

Create a precise, one-sentence description of the issue. If the statement is too vague, you may have difficulty coming up with valid solutions. If it is too elaborate, a solution will be too complex to implement.

3. Identify the effects of the problem.

Ask questions such as: Who is this problem affecting? Who else experiences this problem? What do they do about it?

4. Look at alternatives.

What are some possible solutions to the problem? Brainstorm ideas independently and with the people affected by the problem. Also consult other Rotarians, friends, or fellow assistant governors for solutions you haven't considered.

5. Select a possible solution.

Consider the positives and negatives of each solution to determine which is best. Get consensus on the solution from the people affected by the problem.

6. Create a plan and implement it.

Once the solution is decided, create a detailed action plan. Include who will do each step, how it will be accomplished, and when.

7. Evaluate the solution.

Now that you have worked through the problem, ask yourself: How effective was the solution? What consequences did it have on the situation? Were there any unexpected outcomes? What else needs to be done?

Appendix 3: Sample Club Committee Structure



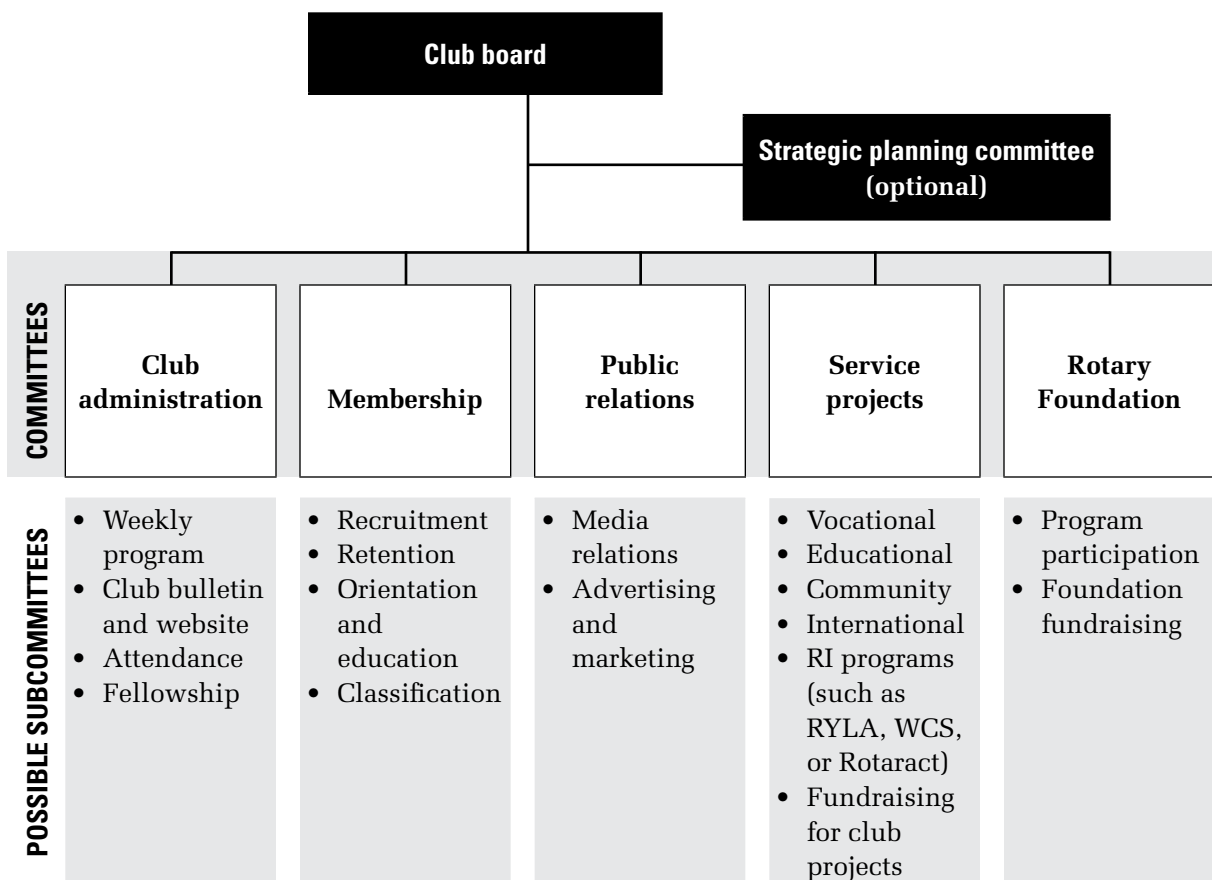
Rotary Reminder

Each Rotary club's committee structure is unique as it is based on the goals and operational needs of the club itself.

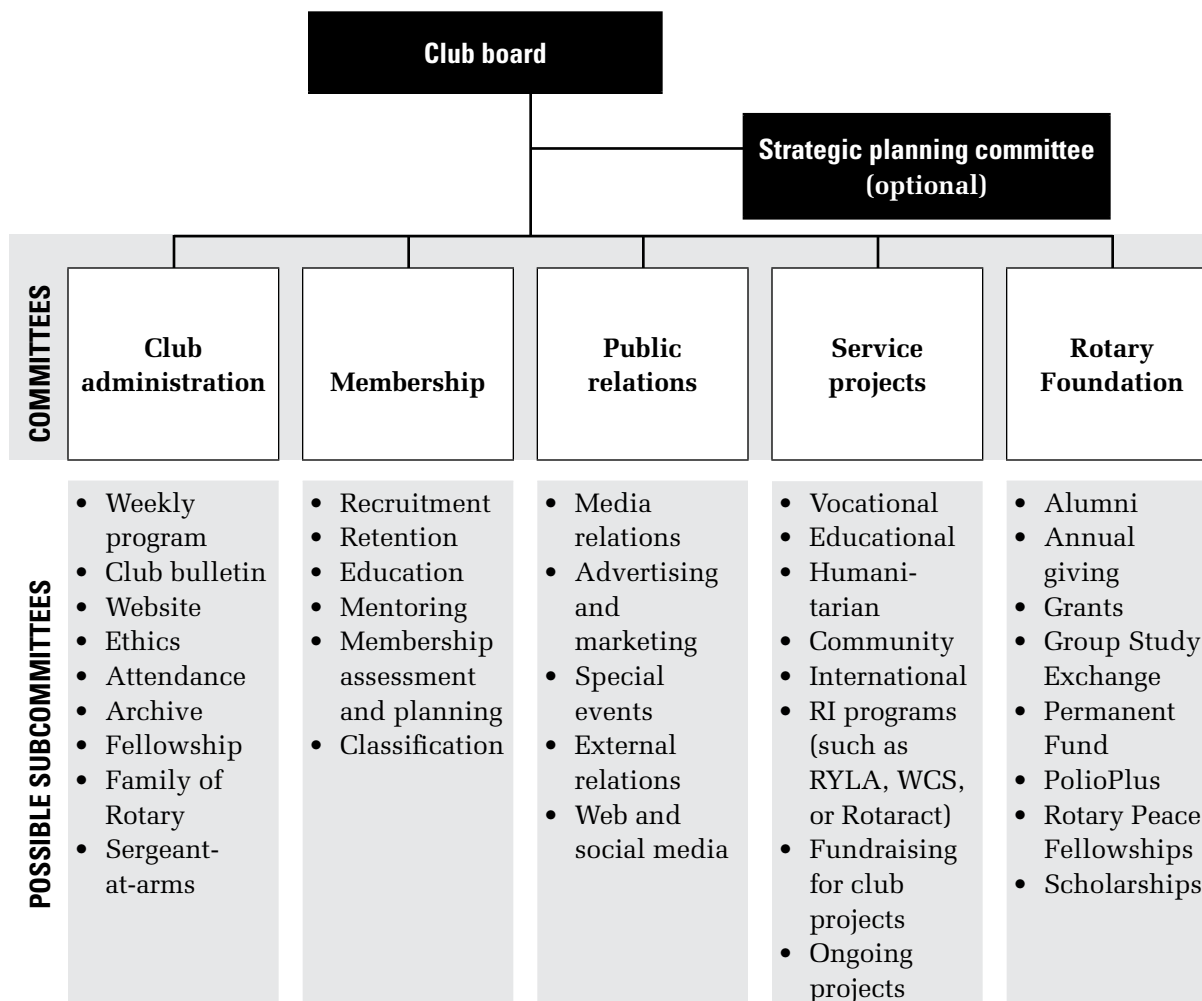
Under the Club Leadership Plan, there are five recommended standing committees. Each club can add additional committees or subcommittees to meet the special interests of their club or ongoing projects. Committees and subcommittees can also be eliminated if the club does not participate in that activity.

Below are sample subcommittees for each of the standing committees depending on your club's membership size. Choose the structure that meets the needs and goals of your clubs and then add, move, and delete subcommittees as needed or develop your own committee and subcommittee structure with your fellow club leaders. If you need assistance with determining the appropriate subcommittees, contact your assistant governor or district governor.

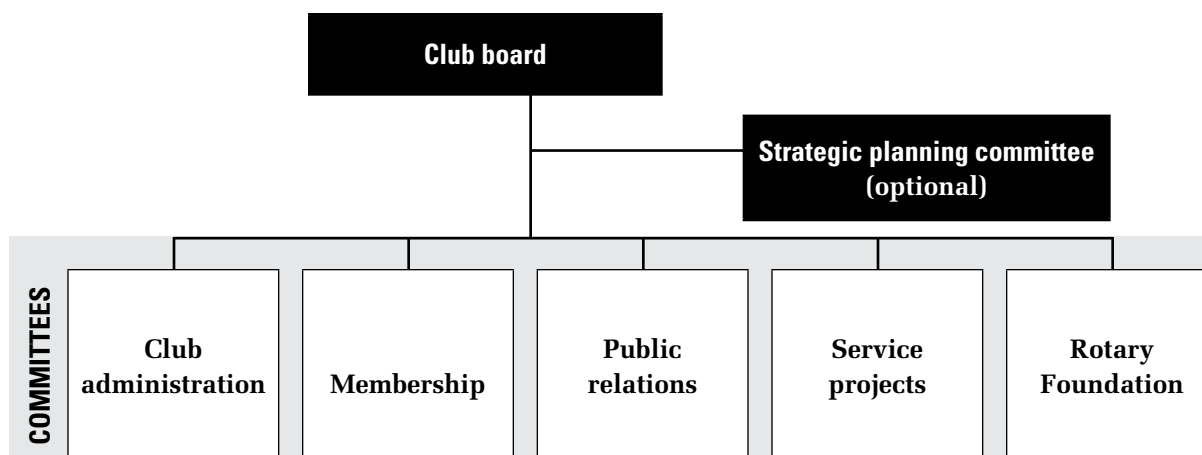
OPTION 1: Standard Rotary Club



OPTION 2: Large Rotary Club



OPTION 3: Small Rotary Club



Appendix 4:

Planning Guide for Effective Rotary Clubs

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in each section are common ways clubs might choose to pursue goals. Clubs are encouraged to develop alternative strategies to achieve their goals when appropriate. Presidents-elect should complete this form in cooperation with their club and submit a copy of it to their assistant governor by 1 July.

Download a Microsoft Word version at www.rotary.org.

Rotary Club of _____ Rotary year of office: _____

Name of president: _____

Mailing address: _____

Phone: _____ Fax: _____ E-mail: _____

MEMBERSHIP

Current State

Current number of members: _____

Number of members as of 30 June last year: _____ 30 June five years ago: _____

Number of male members: _____ Number of female members: _____

Average age of members: _____ Number of Rotary alumni members _____

Number of Rotarians who have been members for 1-3 years: _____ 3-5 years: _____

5-10 years: _____

Number of members who have proposed a new member in the previous two years: _____

Check the aspects of your community's diversity that your club membership reflects:

☐ Profession ☐ Age ☐ Gender ☐ Ethnicity

Our classification survey was updated on _____ and contains _____ classifications, of which _____ are unfilled.
(number) (date) (number)

Describe the club's current new member orientation program.

Describe the club's continuing education programs for both new and established members.

Our club has sponsored a new club within the last 24 months. ☐ Yes ☐ No

Number of Rotary Fellowships and Rotarian Action Groups that club members participate in:

What makes this club attractive to new members?

What aspects of this club could pose a barrier to attracting new members?

Future State

Membership goal for the upcoming Rotary year: _____ members by 30 June _____
(number) (year)

Our club has identified the following sources of potential members within the community:

How does the club plan to achieve its membership goals? (check all that apply)

- ☐ Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- ☐ Ensure the membership committee is aware of effective recruitment techniques
- ☐ Develop a recruitment plan to have the club reflect the diversity of the community
- ☐ Explain the expectations of membership to potential Rotarians
- ☐ Implement an orientation program for new members
- ☐ Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- ☐ Assign an experienced Rotarian mentor to every new club member
- ☐ Recognize those Rotarians who sponsor new members
- ☐ Encourage members to join a Rotary Fellowship or Rotarian Action Group
- ☐ Participate in the RI membership development award programs
- ☐ Sponsor a new club
- ☐ Other (please describe): _____

Action steps:

SERVICE PROJECTS

Current State

Number of Rotary Youth Exchange students: Hosted _____ Sponsored _____

Number of sponsored Interact clubs: _____ Rotaract clubs: _____

Rotary Community Corps: _____

Number of Rotary Youth Leadership Awards (RYLA) events: _____

Number of Rotary Friendship Exchanges: _____

Number of registered Rotary Volunteers: _____

Number of World Community Service (WCS) projects: _____

Number of other current club service projects: _____

Future State

Our club has established the following service goals for the upcoming Rotary year:

For our community:

For communities in other countries:

How does the club plan to achieve its service goals? *(check all that apply)*

- ☐ Ensure the service projects committee is aware of how to plan and conduct a service project
- ☐ Conduct a needs assessment of the community to identify possible projects
- ☐ Review current service projects to confirm that they meet a need and are of interest to members
- ☐ Identify the social issues in the community that the club wants to address through its service goals
- ☐ Assess the club's fundraising activities to determine if they meet project funding needs
- ☐ Involve all members in the club's service projects
- ☐ Recognize club members who participate and provide leadership in the club's service projects
- ☐ Identify a partner club with which to carry out an international service project
- ☐ Participate in:
 - ☐ Interact
 - ☐ Rotary Friendship Exchange
 - ☐ World Community Service
 - ☐ Rotaract
 - ☐ Rotary Volunteers
 - ☐ Rotary Youth Exchange
 - ☐ Rotary Community Corps
 - ☐ Rotary Youth Leadership Awards (RYLA)
- ☐ Use a grant from The Rotary Foundation to support a club project
- ☐ Register a project in need of funding, goods, or volunteers on the ProjectLINK database
- ☐ Other (please describe):

Action steps:

THE ROTARY FOUNDATION

Current State

Number of grants awarded:

District Simplified Grants: _____ Matching Grants: _____

Number of Ambassadorial Scholars: Nominated _____ Selected _____ Hosted _____

Number of Group Study Exchange (GSE) team members: Nominated _____ Selected _____ Hosted _____

Number of Rotary World Peace Fellows: Nominated _____ Selected _____ Hosted _____

Current year's contributions to PolioPlus activities: _____

Current year's contributions to Annual Programs Fund: _____

Current year's contributions to Permanent Fund: _____

Number of club members who are

Paul Harris Fellows: _____ Benefactors: _____ Major Donors: _____

Rotary Foundation Sustaining Members: _____ Bequest Society members: _____

Number of Foundation alumni tracked by your club: _____

Future State

Our club has established the following Rotary Foundation goals (as reported on the Fund Development Club Goal Report Form) for the upcoming Rotary year:

Polio fundraising: _____ Annual Programs Fund contributions: _____

Major gifts: _____ Benefactors: _____

Bequest Society members: _____

Our club will participate in the following Rotary Foundation programs:

How does the club plan to achieve its Rotary Foundation goals? *(check all that apply)*

- ☐ Ensure the club's Rotary Foundation committee understands the programs of The Rotary Foundation and is committed to promoting financial support of the Foundation
- ☐ Help club members understand the relationship between Foundation giving and Foundation programs
- ☐ Plan a club program about The Rotary Foundation every quarter, especially in November, Rotary Foundation Month
- ☐ Include a brief story about The Rotary Foundation in every club program
- ☐ Schedule presentations that inform club members about The Rotary Foundation
- ☐ Ensure the club's Rotary Foundation committee chair attends the district Rotary Foundation seminar
- ☐ Use Rotary Foundation grants to support the club's international projects
- ☐ Recognize club members' financial contributions to The Rotary Foundation and their participation in Foundation programs
- ☐ Encourage each club member to contribute to the Foundation every year
- ☐ Participate in:
 - ☐ Group Study Exchange ☐ PolioPlus
 - ☐ Matching Grants ☐ Ambassadorial Scholarships
 - ☐ District Simplified Grants ☐ Rotary World Peace Fellowships
- ☐ Invite Foundation program participants and alumni to be part of club programs and activities
- ☐ Other (please describe): _____

Action steps:

LEADERSHIP DEVELOPMENT

Current State

Number of club leaders who attended

District assembly: _____ District Rotary Foundation seminar: _____

District membership seminar: _____ District leadership seminar: _____

District conference: _____

Number of club members involved at the district level: _____

Number of visits from the assistant governor this Rotary year: _____

Future State

Our club has established the following goals for developing Rotary leaders for the upcoming Rotary year:

How does the club plan to develop Rotary leaders? (check all that apply)

- ☐ Have the president-elect attend the presidents-elect training seminar (PETS) and the district assembly
- ☐ Have all committee chairs attend the district assembly
- ☐ Encourage interested past presidents to attend the district leadership seminar
- ☐ Appoint a club trainer to develop club members' knowledge and skills
- ☐ Conduct a leadership development program
- ☐ Use the expertise of the club's assistant governor
- ☐ Encourage new members to assume leadership positions through participation in club committees
- ☐ Ask members to visit other clubs to exchange ideas, and then share what they have learned with the club
- ☐ Other (please describe):

Action steps:

PUBLIC RELATIONS

Current State

List club activities covered by the media and the type of media (television, radio, print, Internet, etc.) involved.

Future State

Our club has established the following public relations goals for the upcoming Rotary year:

How does the club plan to achieve its public relations goals? (check all that apply)

- ☐ Ensure the public relations committee is trained in conducting a multimedia campaign
- ☐ Plan public relations efforts around all service projects
- ☐ Conduct a public awareness program targeted at the business and professional community that explains what Rotary is and what Rotary does
- ☐ Arrange for a public service announcement to be broadcast on a local television channel, aired on a local radio station, or placed in a local newspaper or magazine
- ☐ Other (please describe):

Action steps:

CLUB ADMINISTRATION

Current State

Is your club operating under the Club Leadership Plan? ☐ Yes ☐ No

How often and when does the club board meet? _____

When are club assemblies held? _____

How is the club budget prepared? _____

Is the budget independently reviewed by a qualified accountant? ☐ Yes ☐ No

Does the club have a strategic plan in place? ☐ Yes ☐ No

Has the club developed a system for ensuring continuity of leadership on its board, committees, etc.?

☐ Yes ☐ No

Has the club developed a system for keeping all members involved? ☐ Yes ☐ No

Does the club use Member Access at www.rotary.org to update its membership list? ☐ Yes ☐ No

How often is the club's bulletin published? _____

Describe how weekly club programs are organized. _____

Does the club have its own Web site? ☐ Yes ☐ No If yes, how often is the site updated? _____

Does the club observe the special months of the Rotary calendar, such as Rotary Foundation Month and Magazine Month? ☐ Yes ☐ No

How often does your club conduct fellowship activities? _____

How does the club involve the families of Rotarians?

Future State

How does the club carry out the administrative tasks of the club? (check all that apply)

☐ Regular board meetings have been scheduled.

☐ The club will review the Club Leadership Plan on the following dates: _____

☐ The club's strategic and communication plans will be updated on the following dates: _____

☐ _____ club assemblies have been scheduled on the following dates: _____
(number)

☐ The club has either adopted the latest version of the Recommended Rotary Club Bylaws or revised its own bylaws (recommended after each Council on Legislation).

☐ Club elections will be held on _____.
(date)

☐ At least _____ delegates will be sent to the district conference.
(number)

☐ A club bulletin will be produced to provide information to club members.

- ☐ The club's Web site will be updated _____ times per year.
(number)
- ☐ A plan has been developed to ensure interesting and relevant weekly club programs.
- ☐ Monthly attendance figures will be reported to the district leadership by the _____ day of the following month.
(number)
- ☐ Member Access will be used to maintain club records by 1 June and 1 December to ensure accurate semiannual reports.
- ☐ Membership changes will be reported to RI within _____ days.
(number)
- ☐ Reports to RI, including the semiannual report, will be completed on a timely basis.
- ☐ The following fellowship activities for all club members are planned for the year:
- ☐ Other (please describe):

Action steps:

Our club would like assistance from the governor or assistant governor with the following:

Our club would like to discuss the following issues with the governor or assistant governor during a visit to our club:

Club President's Signature

Rotary Year

Assistant Governor's Signature

Date

Date

SUMMARY OF GOALS FOR ROTARY CLUB OF _____ ROTARY YEAR _____

For each goal your club has identified for the upcoming Rotary year, indicate which Avenue of Service it addresses. To ensure a balanced service effort, you should have at least one goal that addresses each Avenue of Service. Most goals will address more than one avenue.

	Club Service	Vocational Service	Community Service	International Service
Membership goal _____ members by 30 June _____ (number) (year)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service goals For our community: For communities in other countries:	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Rotary Foundation goals Our club's PolioPlus contribution goal is _____. Our club's Annual Programs Fund contribution goal is _____. Our club's Permanent Fund contribution goal is _____. Our club will participate in the following Rotary Foundation programs:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Leadership development goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public relations goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club administration goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Appendix 5: Memo of Club Visit



March 2010

Assistant Governors: Complete this form *after* your final visit to the club and submit to the district governor **by 15 May**.

District Governors: Add your feedback to the form and submit to your Club and District Support representative **by 1 June**.
File a copy of this report in your district records.

Rotary Club of _____

District _____

Assistant governor's name _____

Assistant governor made _____ visits to this club in the past year.
(total number)

Please mark the appropriate boxes. If you answer no to any of questions 1-20, use comments to explain the circumstances.

Membership

- | | |
|---|--|
| 1. Did the club achieve a net growth in membership? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Did the club implement a membership recruitment plan? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 3. Did the club conduct orientation programs for new members? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. Did the club achieve its membership goals for the year? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Comments:

Service Projects

- | | |
|---|--|
| 5. Is the club engaged in community service activities? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6. Is the club engaged in international service activities? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 7. Did the club achieve its service goals for the year? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

The Rotary Foundation

- | | |
|--|--|
| 8. Did the club participate in Rotary Foundation programs this year? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 9. Did the club achieve its goals for Rotary Foundation contributions? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Comments:

Development of Future Leaders

- | | |
|---|--|
| 10. Did the club president-elect attend PETS? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 11. How many club leaders attended the district assembly? | _____ |
| 12. How many club members attended the district conference? | _____ |
| 13. How many club members attended the district leadership seminar? | _____ |

Public Relations

- | | |
|---|--|
| 14. Did the club achieve its public relations goals for the year? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
|---|--|

Criteria for a Functioning Rotary Club

Did this club ...

- | | |
|---|--|
| 15. pay its per capita dues to RI? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 16. pay its membership and district dues without outside assistance? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 17. meet regularly? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 18. ensure that its members subscribed to a Rotary World Magazine Press magazine? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 19. implement service projects for local and/or international communities? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 20. receive the visit of the governor, assistant governor, and any other RI officer? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 21. maintain general liability insurance? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 22. act in a manner consistent with the RI constitution, bylaws, and Rotary Code of Policies? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 23. provide accurate membership lists on a timely basis? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 24. resolve disputes in an amicable manner? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 25. maintain cooperative relations with the district? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 26. cooperate with RI by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, associate foundations, and the international offices of the Secretariat? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

27. How were your visits received by the club?

- ☐ **I was very welcome.** — The club proactively contacted me in advance to present issues it wished to discuss.
- ☐ **I was welcome.** — The club greeted me warmly and was adequately prepared to discuss its progress.
- ☐ **My visit was treated as an administrative obligation.** — The club made minimal preparations and was not interested in “outside” suggestions.
- ☐ **I was not welcome.** — *Please explain on separate enclosure.*
- ☐ **The club refused to accept my visit.** — *Please explain on separate enclosure.*

28. What is your overall rating of the club?

- ☐ **Excellent** — The members of this club are informed and engaged in full support of the four elements of an effective club because they are able to: sustain and/or grow their membership base; implement successful projects that address the needs of their communities and communities in other countries; support The Rotary Foundation through both program participation and financial contributions; and develop leaders capable of serving in Rotary beyond the club level.
- ☐ **Good** — The members of this club appeared to be informed and engaged but could increase its effectiveness by focusing on _____.
- ☐ **Adequate** — The club functions, but needs significant improvement.
- ☐ **Poor** — This club is in need of assistance.
- ☐ **Nonfunctioning club** — The club failed to meet the criteria established by the RI Board in its policy for a functioning Rotary club (see questions 15-26 above).

Assistant Governor's Name

District Governor's Name

Date of official visit: _____

Appendix 6: District Team Training Seminar

Discussion Questions

Review the following discussion questions. Thinking about these questions and reviewing the *Assistant Governor's Training Manual* before attending the seminar will help you prepare for your training and maximize the effectiveness of your time with fellow district leaders.

Communication within the District

- When and how often should members of the district team communicate with each other?
- What information should be communicated to clubs? What information should be communicated to district leaders?
- How will information be communicated?

Role and Responsibilities

- What are your club- and district-level responsibilities?
- Who will you need to work with?

Elements of an Effective 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 work with clubs to help them establish goals?

Working with Clubs

- How can you use the Club Leadership Plan in working with clubs?
- What are some common challenges clubs must overcome?
- Which types of clubs merit special attention?
- What is your role in helping clubs and governors prepare for the official visit?
- What successful strategies have you used that you would like to share with your fellow assistant governors?
- How can you use the *Planning Guide for Effective Rotary Clubs* to identify issues?
- What successful problem-solving strategies have you used that you would like to share with your fellow assistant governors?

Resources

- How will you collaborate with district committees and other assistant governors to serve clubs effectively?
- What resources are available?

Contacts

[illegible]

Worksheet 2: Effective Clubs

For each element of an effective club, list examples of related club activities or programs. Then specify the assistant governor's role, if any, in the activities.

Elements of an Effective Club	Example Club Activity	Assistant Governor's Role
Sustain and increase membership base		
Implement successful service projects that address the needs of its community and communities in other countries		
Support The Rotary Foundation through program participation and financial contributions		
Develop leaders capable of serving beyond the club level		

Contacts

[illegible]

I learned . . .

I will . . .

[illegible]

Worksheet 11: Resource Search

This exercise focuses on how to find information for clubs during your term. Work in small groups to answer the questions. Some questions may have more than one answer. Consider club, district, and RI resources — publications and online tools, as well as Rotary and community leaders — for each question. Refer to the *Assistant Governor's Training Manual* (244) and the *District Committee Manual* (249) for help completing this exercise.

1. A club president asks for ideas about developing a strategy to recruit new members. What resources can the club use to develop a membership recruiting effort?

2. One of the clubs in your area wants to do a service project. Club leaders are seeking help in both designing and conducting a needs assessment to determine the project's effect on the community. What resources are available to help the club assess the effectiveness of a service project?

3. A club in your district is experiencing challenges in keeping new members; many people leave the club after a few months. You encourage club presidents to establish a membership committee and a retention plan. What resources can help with these initiatives?

To be completed at district team training seminar

4. A club has recently complained to you that its Matching Grant application was returned without being approved. What resources are available to help the club successfully complete the application?

5. A club wishes to change its committee structure. What resources would you suggest the club consult?

6. A club has a wonderful history of doing great projects but does not promote itself well within the community. What resources would you advise this club to use?

7. A club wants to sponsor a public service announcement on a radio station in the community. What resources are available to help the club do this?

To be completed at district team training seminar

8. An enthusiastic member of a club in your area has expressed a desire to combine her strong interest in computers with Rotary. What resources are available to help this Rotarian?

9. A club has expressed an interest in working more closely with young people by starting a Rotaract club. What resources are available to help the club charter a Rotaract club?

10. A club is planning a fundraiser and would like advice on how to conduct it successfully. What resources provide information about planning and conducting an effective fundraiser or guidelines and policies for handling funds?

Contacts

[illegible]

Worksheet 14: District Planning Guide

February 09

The District Planning Guide, based on the District Leadership Plan, helps districts assess their current state and establish goals for the coming year. Complete this form during your year as governor-elect to develop goals for your year as governor. Work with your district leadership team to set the goals, which should help further your district's strategic plan. Review the goals throughout the year, and revise them as needed. Download a Microsoft Word version of this form at www.rotary.org.

District number: _____ Rotary year of office: _____

Name of governor: _____

Name of immediate past governor: _____

Name of governor-elect: _____

Name of governor-nominee: _____

DISTRICT ADMINISTRATION

Current State

Does the district have a strategic plan in place? ☐ YES ☐ NO

If so, when was it last reviewed/established? _____

Number of clubs that have implemented the Club Leadership Plan: _____

Does the district have a communication plan in place? ☐ YES ☐ NO

When does the district's election process start for the following positions?

District governor _____ Council on Legislation representative _____ RI director _____

What is the district's election process?

☐ Nominating committee ☐ Ballot at district conference ☐ Ballot by mail

Do you use Member Access at www.rotary.org? ☐ YES ☐ NO

How is the governor's monthly letter distributed? ☐ Mail ☐ E-mail ☐ Web site

How often is the district's Web site updated? _____

How often does your district conduct fellowship activities? _____

How does the district involve the families of Rotarians? _____

Number of clubs that received the Presidential Citation last year: _____

What awards did the district receive last year? _____

List of awards the district gives out: _____

Future State

During my year, the district will focus on the following areas of district administration:

1. _____

2. _____

3. _____

DISTRICT CONFERENCE

Current State

Number of participants: _____

Number of clubs in attendance: _____

Best speakers/program: _____

Have the evaluations been reviewed? ☐ YES ☐ NO

Future State

During my year, the district will focus on the following areas for the district conference:

1. _____

2. _____

3. _____

DISTRICT PROGRAMS

Current State

Number of Rotary Youth Exchange students: _____ Hosted _____ Sponsored _____

Number of sponsored Interact clubs: _____ Number of Interactors: _____

Number of sponsored Rotaract clubs: _____ Number of Rotaractors: _____

Number of sponsored Rotary Community Corps: _____ Number of participants: _____

Number of Rotary Youth Leadership Awards (RYLA) activities: _____

Number of Rotary Friendship Exchanges: _____

Number of registered Rotary Volunteers: _____

Number of World Community Service (WCS) projects: _____

Number of Rotary Foundation grants received for WCS projects: _____

Number of other local service projects: _____

Number of other vocational service projects: _____

Number of other international service projects: _____

Number of Rotarians in the district participating in

Rotarian Action Groups: _____

Rotary Fellowships: _____

Future State

During my year, the district will focus on the following areas to improve district programs:

1. _____

2. _____

3. _____

EXTENSION

Current State

How many clubs have been chartered in your district over the past two years? ____

Which communities has your district identified as potential locations for new Rotary clubs? ____

How many years does a sponsor club work with a new club? ____

Future State

During my year, the district will focus on the following areas to improve extension:

1. ____

2. ____

3. ____

FINANCE

Current State

How is the district budget prepared? ____

When was the budget approved by a majority of clubs? ____

Is the budget independently reviewed by a qualified accountant? ☐ YES ☐ NO

How is the district financial statement shared with clubs? ____

Does the district have procedures in place to protect district funds? ☐ YES ☐ NO

Were appropriate tax documents filed with local government? ☐ YES ☐ NO

Is the per capita levy sufficient for district needs? ☐ YES ☐ NO

Future State

During my year, the district will focus on the following areas in finance:

1. ____

2. ____

3. ____

MEMBERSHIP

Current State

Current number of members: ____

Net membership growth in existing clubs during current year: ____

Number of male members: ____ Number of female members: ____ Average age of members: ____

Number of clubs with 20 or fewer members: ____

Describe the district's continuing education programs for both new and established members: ____

Future State

During my year, the district will focus on the following areas of membership:

1. _____
2. _____
3. _____

PUBLIC RELATIONS

Current State

List district activities covered by the media and the type of media coverage
(e.g., radio, newspaper, television): _____

Does your district encourage clubs to use RI public relations materials? ☐ YES ☐ NO

Does your district budget for public relation materials? ☐ YES ☐ NO

Future State

During my year, the district will focus on the following areas of public relations:

1. _____
2. _____
3. _____

RI CONVENTION PROMOTION

Current State

Is the RI Convention promoted in your district? ☐ YES ☐ NO

Have RI Convention materials been shared with clubs to promote the upcoming convention?

☐ YES ☐ NO

How many Rotarians from your district attended the last RI Convention? _____

Does your district Web site have a link to RI Convention resources? ☐ YES ☐ NO

Future State

During my year, the district will focus on the following areas of RI Convention promotion:

1. _____
2. _____
3. _____

THE ROTARY FOUNDATION*

Current State

Number of grants awarded:

District Simplified Grants: _____

Matching Grants: _____

Number of Ambassadorial Scholars:

Nominated _____ Selected _____ Hosted _____

To be completed at district team training seminar

Number of Group Study Exchange team members: Nominated _____ Selected _____ Hosted _____

Number of Rotary World Peace Fellowships: Nominated _____ Selected _____ Hosted _____

Number of PolioPlus activities: _____

Amount contributed to Annual Programs Fund last year: _____ Current goal: _____

Amount contributed to Permanent Fund last year: _____ Current goal: _____

Number of Rotarians who are

Rotary Foundation Sustaining Members: _____ Paul Harris Fellows: _____

Paul Harris Society members: _____ Benefactors: _____

Major Donors: _____ Bequest Society members: _____

Arch C. Klumph members: _____

Number of Foundation alumni tracked by your district: _____

Future State

During my year, the district will focus on the following areas for:

Alumni

1. _____

2. _____

Grants

1. _____

2. _____

Group Study Exchange

1. _____

2. _____

PolioPlus

1. _____

2. _____

Rotary World Peace Fellowships

1. _____

2. _____

Other Scholarships

1. _____

2. _____

* One hundred districts will be participating in a pilot of a new grants structure for The Rotary Foundation. If your district is participating, refer to www.rotary.org/futurevision for more information.

To be completed at district team training seminar

Annual Programs Fund

Contribution goal: _____ (Note: This should be the sum of club goals as reported on the Fund Development Club Goal Report Form.)

Permanent Fund

Number of Benefactors: _____

Number of Bequest Society members: _____

Number of Major Donors: _____

TRAINING

Current State

Number of Rotarians who attended

District team training seminar: _____

Presidents-elect training seminar: _____

District assembly: _____

District Rotary Foundation seminar: _____

District membership seminar: _____

District leadership seminar: _____

Club leadership development program: _____

Number of clubs with Rotarians appointed at the district level: _____

How does the district support club trainers? _____

Future State

During my year, the district will focus on the following areas of training and leadership development:

1. _____

2. _____

3. _____

SUMMARY OF GOALS FOR DISTRICT _____

ROTARY YEAR _____

District administration goals

District conference goals

District programs goals

For the local community: _____

For communities in other countries: _____

Extension goals

Finance goals

Membership goals

Public relations goals

RI Convention promotion goals

Rotary Foundation goals

The district will participate in the following Rotary Foundation programs: _____

The district's Annual Programs Fund contribution goal is _____.

The district's Permanent Fund contribution goal is _____.

Training goals

Other goals

Worksheet 15: District Concerns

In this exercise, you will work in small groups to develop strategies to address one or more of the concerns identified by the district leadership team. Consider the following questions:

What are some of the main concerns in your district?

What is the role of assistant governors in addressing these concerns?

What is the role of district committees in addressing these concerns?

What is the role of the governor in addressing these concerns?

How can the district prevent these issues from occurring or work to solve the issues that have already occurred?

THIS YEAR CLUBS WILL LOOK TO YOU FOR **GUIDANCE** AND **SUPPORT**

RI RESOURCES CAN HELP

- ✓ *Club Officer's Kit (225-EN)*
- ✓ *Planning Guide for Effective Rotary Clubs*
- ✓ *Leadership Development: Your Guide to Starting a Program (250-EN)*
- ✓ Rotary E-Learning Center
- ✓ www.rotary.org (Click Members → Running a club)

For additional publications refer to shop.rotary.org.



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