

# LEAD YOUR DISTRICT

Committees  
2014-17



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This is the 2013 edition of *Lead Your District: Committees* (249), formerly known as the *District Committee Manual*. It is intended for district committee chairs holding office in 2014-15, 2015-16, and 2016-17. The information in this publication is based on the Constitution and Bylaws of Rotary International, the Rotary Code of Policies, and The Rotary Foundation Code of Policies. Changes to the documents listed above by the triennial Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.



# INTRODUCTION

Congratulations on your appointment to a district committee. As a committee member, you will support specific club and district activities and promote your committee's message.

In this role, you join the governor, assistant governors, and members of the other district committees on the district leadership team. At the district team training seminar, you will discuss how your committee and the district leadership team will support clubs. Use this manual to prepare for your term in office. Review it before the seminar, and be sure to bring it along.

For district committee information not included in this manual, please refer to the [Rotary website](#). Rotary will launch a new website in 2013-14. This site will make it easier for Rotarians to connect with others who share their interests. It will also support the exchange of ideas and collaboration on community service projects, in addition to supplying Rotary news and announcements of local and international events. The site will make it easier for you, a district officer, to conduct district business. You will be able to work with others in similar roles in a secure space.

## COMMENTS?

If you have questions or comments about this manual, please submit them to:

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# OVERVIEW

You have been selected to be a committee member because of your expertise and experience. Use this knowledge and your commitment to Rotary to strengthen the clubs in your district. To maximize your impact in this role, collaborate with other leaders in your district.

## YOUR TEAM

You are an integral part of the district leadership team, which is also made up of your district governor, district governor-elect, and assistant governors. Work with your governor-elect and other members of the district leadership team to develop district goals. Assistant governors will work with clubs on their goals, which should support the goals of the district.

Create a communication plan that includes how and when you communicate with clubs, the district governor, your assistant governors, and other district committee members. The table below lists people to consider including when working on your communication plan.

Regional leaders	District leaders	Club leaders
Rotary coordinator	Past district	Presidents
Rotary public image coordinator	governors	Secretaries
Regional Rotary Foundation coordinator	Governor	Executive secretaries
	Governor-elect	Treasurers
	Governor-nominee	Committee chairs
	Committee chairs	Trainers
	Assistant governors	
	Executive secretaries, where applicable	

You and your district leadership team should discuss your district’s communication plan to make sure that everyone is aware of it and in agreement.

Work with other district committees as well as assistant governors for maximum impact in your district. Assistant governors have the most contact with clubs. Consult them to see which clubs may need your committee’s assistance or to get your committee’s message to clubs.

## TRAINING

In addition to the district team training seminar, where you will receive training for your role as a committee member or chair, consider attending other district meetings, such as PETS, the district training assembly, district leadership seminar, district membership seminar, and the district Rotary Foundation seminar, as appropriate, to meet and talk with club leaders and to answer questions they may have. Appendix 1: District Training Meetings has more information about each seminar's purpose and intended audience.

You also have the opportunity to offer training for your clubs with specific needs. For example, if a club wants to learn more about qualifying for a Rotary Foundation grant, a member of the district Rotary Foundation committee can work with the club to develop training or come and talk about the grants at a club meeting. Find out from assistant governors, who have regular contact with their assigned clubs, which ones may benefit from training.

## HOW TO USE THIS MANUAL

This manual includes information for all committees, as well as specific information for each district committee. Review the section about your particular committee, but also familiarize yourself with the roles of the other committees to understand where yours may overlap with another, to determine opportunities for collaboration, and to avoid duplicating efforts.

Under each recommended district committee are responsibilities, key messages, and resources. Familiarize yourself with the key messages, and use them as you interact with clubs in your district.



**Responsibilities** — These are duties specified in the Rotary Code of Policies.



**Key Messages** — Use these to communicate your committee's value to clubs.



**Resources** — We recommend materials that are relevant to each committee. Become familiar with them, and share them, with clubs that can benefit from the information in them.



# ABOUT DISTRICT COMMITTEES

The RI Board of Directors recommends that districts appoint committees to perform ongoing administrative functions. These are the district committees the Board recommends:

- District conference
- District programs (for example, Rotary Community Corps and Vocational Service)
- Extension
- Finance
- Membership development
- New Generations
- Nominating
- Public relations
- RI Convention promotion
- Rotary Foundation
- Training

The Board further recommends that districts appoint additional committees as needed. They may include a district policies and procedures committee, district community service committee, and others.



## RESPONSIBILITIES OF ALL COMMITTEES

All district committees are expected to

- Work with the governor, governor-elect, governor-nominee, and assistant governors to plan strategies for achieving goals
- Promote and attend district training meetings and the district conference
- Relay information between Rotary International, the district, and club members
- Work closely with club leaders to provide support and guidance
- Share materials received from the Secretariat, RI committees, and regional coordinators



## RESOURCES FOR ALL COMMITTEES

- [Rotary.org](#) — Rotary will launch a new website in 2013-14. This site will make it easier for Rotarians to connect with others who share their interests. It will also support the exchange of ideas and collaboration on community service projects, in addition to supplying Rotary news and announcements of local and international events. The site will make it easier for you, a district officer, to conduct district business. You will be able to work with others in similar roles in a secure space.
- [Rotary Club Central](#) — An online tool clubs use to set goals and track accomplishments. District leaders have access to a district view, used to help clubs in their district set goals and communicate about those goals and accomplishments with other district leaders.
- [Club and District Support representatives](#) — Staff members at Rotary headquarters and international offices who can answer many administrative questions and direct other inquiries to appropriate Secretariat staff.
- *Official Directory* (007) — 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 by district, including contact information. Issued every year. Available to members on [rotary.org](#).
- *Manual of Procedure* (035) — 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 the Council on Legislation.
- [Regional coordinators](#) — Rotary coordinators, regional Rotary Foundation coordinators, and Rotary public image coordinators are appointed to advise on their areas of expertise.
- [Shop.rotary.org](#) — Online store for Rotary resources.





# DISTRICT COMMITTEES IN DETAIL

## DISTRICT CONFERENCE COMMITTEE

This committee plans and promotes the district conference and helps ensure maximum attendance.



### RESPONSIBILITIES

- Recommend the district conference venue and make all related logistical arrangements.
- Coordinate conference finances to ensure maximum attendance.
- Promote conference attendance with particular emphasis on new Rotarians, new clubs, and representation from every club.
- Publicize the district conference to external audiences, such as the media, community leaders, and beneficiaries of Rotary's programs.
- Arrange a district leadership seminar in cooperation with the district trainer to be held in conjunction with the conference.
- Consider including time in the agenda to report on Rotary Foundation activities if no report has been or will be provided at another district meeting.



### KEY MESSAGES

- The district conference celebrates the achievements of clubs and Rotarians in the district.
- The conference offers clubs an opportunity to share ideas for service projects, programs, and fundraisers.
- Club members can meet fellow Rotarians from other clubs at the district conference.



## RESOURCES

- [District Conference Manual](#) (800) — Manual that includes information about planning and promoting your conference and conducting conference business.
- [Ideas for the Promotion of District Conferences](#)

## DISTRICT PROGRAMS COMMITTEES

These committees promote and administer ongoing district activities, projects, or Rotary programs, providing support and guidance to clubs. Districts often have a specific committee for each of the programs and activities offered. Rotary International has resources for the following:

- [Community Service](#)
- [International Service](#)
- [Rotarian Action Groups](#)
- [Rotary Community Corps](#)
- [Rotary Fellowships](#)
- [Rotary Friendship Exchange](#)
- [Vocational Service](#)



## RESPONSIBILITIES

- Coordinate districtwide efforts related to the program.
- Promote program participation through regular contact with assistant governors and clubs.
- Promote successful programs at district meetings and during club visits by inviting participants to speak and encouraging clubs to get involved.
- Promote publication of Rotary program goals and achievements in all appropriate Rotary and non-Rotary communication media in the district.
- Consult with Rotary coordinators to identify program expertise in your region.
- Assist club program committee chairs in carrying out their responsibilities.
- Encourage clubs to determine whether the program can address local needs.
- Identify potential areas of cooperation between district programs and local, non-Rotary service organizations.
- Encourage participants in one program to participate in others offered in the district.



## KEY MESSAGES

- There are many ways that clubs and their members can reach out and connect with fellow Rotarians and others, both locally and internationally.
- There are many opportunities for clubs and their members to partner with like-minded individuals and organizations to enhance fellowship and strengthen service projects.
- Clubs are encouraged to serve their communities by undertaking challenging, sustainable projects that address significant needs and enhance Rotary's public image in the process.



## RESOURCES

- [Rotary Showcase](#) — Online project gallery that allows Rotarians to share stories, photos, and descriptions of the impact of their clubs' service projects, and allows them to post on Facebook. Promote it to clubs as a way to showcase their service projects.
- [Rotary's Areas of Focus](#) (965) — An introduction to these critical humanitarian needs that Rotarians are addressing worldwide, with examples of service projects for each.
- [Communities in Action: A Guide to Effective Projects / Community Assessment Tools](#) (605) — Comprehensive instructions for planning, conducting, and evaluating a service project and detailed guidelines for conducting effective community assessments.
- [Rotary coordinators](#) — The 41 RCs appointed by the RI president-elect work to create stronger, more dynamic, and more effective clubs and districts. Rotary coordinators work as facilitators, motivators, consultants, and resource persons for clubs and districts in the region and help them create and implement plans to build better Rotary clubs.

## EXTENSION COMMITTEE

This committee develops and implements plans to organize new Rotary clubs within the district.



## RESPONSIBILITIES

- Identify communities without Rotary clubs that have a population capable of meeting the requirements for chartering a new club.
- Find communities where additional Rotary clubs could be established without detracting from service provided by existing clubs.
- Assist in organizing and establishing new clubs.

## Training and Support

The chair and as many committee members as possible should attend a training meeting conducted by the Rotary coordinator.



## KEY MESSAGES

- It is important for clubs to look for opportunities to start a new Rotary club.
- A new Rotary club means more service for the community.
- Sponsor clubs have the responsibility of supporting new clubs for at least two years.



## RESOURCES

- [\*Organizing New Clubs\*](#) (808) — Resource designed for district governors and their representatives that provides guidance in organizing new clubs.
- [\*Rotary coordinators\*](#) — The 41 RCs appointed by the RI president-elect work to create stronger, more dynamic, and more effective clubs and districts. Rotary coordinators work as facilitators, motivators, consultants, and resource persons for clubs and districts in the region and help them create and implement plans to build better Rotary clubs.

# FINANCE COMMITTEE

This committee supervises district funds by reviewing and studying the amount of per capita levy and district administration expenses. It also prepares annual reports on the status of the district's finances. The district treasurer serves as an ex officio member of the committee.



## RESPONSIBILITIES

- In cooperation with the governor, create a district budget to be submitted to clubs at least four weeks before the presidents-elect training seminar (PETS) or the district training assembly and approved at a meeting of incoming club presidents.
- Review and recommend the amount of per capita levy. Any per capita levy must be approved by at least three-fourths of the incoming club presidents at PETS or the district training assembly, or by a majority of the electors present and voting at a district conference.
- Ensure that proper income and expense records are kept.
- Prepare an annual financial report to be presented at the district training assembly.
- Ensure that a member of the committee (preferably the treasurer) and the district governor are the authorized signatories for district bank accounts. Both signatures are required for any withdrawal.
- Consider working with the district Rotary Foundation committee chair to disburse grant funds and ensure that a proper record of grant activity is maintained for reporting purposes.



## KEY MESSAGES

- Clubs are expected to remain in good financial standing with Rotary International and the district.
- Maintaining transparent financial practices ensures accountability.
- Practicing good stewardship of club funds ensures they are used properly.



## RESOURCES

- [District Finance Committee Resource Guide](#) — A comprehensive guide covering the role and responsibilities of the district finance committee.
- [Club Treasurer's Manual \(220\)](#) — A reference manual that explains the responsibilities of the club treasurer.
- [Financial representatives at Rotary headquarters](#) — Financial service representatives who can answer financial questions for your region.
- [Club and District Support representatives](#) — Staff at Rotary headquarters and international offices who can answer general finance questions.

# MEMBERSHIP DEVELOPMENT COMMITTEE

This committee identifies, markets, and implements membership development strategies that are appropriate for the district and will result in membership growth.



## RESPONSIBILITIES

- Plan, market, and conduct a district membership seminar in consultation with the governor and district trainer.
- Assist clubs' member recruitment efforts, paying special attention to small and weak clubs.
- Encourage each club to strive to represent the demographic composition of the community's professionals.
- Ensure that clubs are aware of the membership tools available from Rotary headquarters and that membership information is reported promptly to Rotary headquarters.
- Work and communicate regularly with the district governor and club leaders to ensure that the district achieves its membership goals.
- Coordinate districtwide membership development activities.
- Encourage clubs to participate in Rotary or presidential membership development recognition programs.
- Work with the district extension and public relations committees to plan activities that will aid membership development efforts.
- Encourage clubs to develop and implement innovative membership development strategies.

- Assist club membership committee chairs in carrying out their responsibilities.
- Visit clubs to speak about innovation, flexibility, diversity, and ways to engage members.
- Work with the Rotary coordinator to plan membership activities in the district.
- Ensure that each club committee has a copy of the *Membership Development Resource Guide* (417) and is aware of resources available on rotary.org.

## Training and Support

The chair and as many committee members as possible should attend a training meeting conducted by the Rotary coordinator.



### KEY MESSAGES

- Both attracting new members and keeping existing members are important to membership development.
- Providing updates and training for new and current club members is vital to keeping them engaged in the club, the district, and the organization as a whole.
- Asking past participants of Rotary programs to share their experiences can attract potential members and remind members of Rotary's impact.



### RESOURCES

- *Membership Development Resource Guide* (417) — A publication that identifies best practices and tips for attracting new members and keeping members engaged and active.
- *Club Assessment Tools* — Online supplement to the *Membership Development Resource Guide* that offers useful tools to assess the current and future state of clubs.
- *Club Secretary's Manual* (229) — A reference manual that describes club secretary responsibilities, including the reporting of new members.
- **Rotary coordinators** — The 41 RCs appointed by the RI president-elect work to create stronger, more dynamic, and more effective clubs and districts. Rotary coordinators work as facilitators, motivators, consultants, and resource persons for clubs and districts in the region and help them create and implement plans to build better Rotary clubs.

# NEW GENERATIONS COMMITTEE

This committee develops, implements, and supports New Generations activities in the district and coordinates with other committees to engage youth. The district governor may determine the best structure for the committee and its relationships with other district committees.



## RESPONSIBILITIES

- Promote New Generations Month (September).
- Coordinate with the district Interact, Rotaract, Rotary Youth Leadership Awards (RYLA), Youth Exchange, Community Service, International Service, and Vocational Service committees to foster cooperation.
- Emphasize service in each of the New Generations programs (Interact, Rotaract, RYLA, and Youth Exchange).
- Encourage and facilitate relationships with other organizations to expand opportunities for young people.
- Encourage and facilitate transition of young people from one program or activity to another, and offer progressively increasing responsibility as young people acquire leadership skills.
- Engage with former New Generations program participants to maintain their ongoing contact with Rotary.



## KEY MESSAGES

- New Generations programs connect young people with a global network of friendship, engagement, and action.
- Rotarians can empower young people to develop the skills they need to become leaders who can have an impact in their local communities.
- Participating in a New Generations program is a fulfilling experience for everyone involved and can create a lifelong relationship with Rotary.
- Protecting youth participants from physical, sexual, and emotional abuse is a critical responsibility of every adult participant, both Rotarians and non-Rotarians.



## RESOURCES

- [\*An Introduction to New Generations Service\* \(735\)](#) — Information and resources related to Interact, Rotaract, Rotary Youth Exchange, RYLA, youth protection, and program alumni activities.
- [\*Abuse and Harassment Prevention Training Manual and Leaders' Guide\* \(775\)](#) — Youth protection guidance that can be modified to comply with local laws and address specific situations to create and maintain the safest possible environment for all participants.



## NOMINATING COMMITTEE

This committee nominates the most qualified available Rotarian to serve as governor. Unless excused by the RI Board, districts are required to use a nominating committee procedure, ballot-by-mail, or vote at the district conference for all district elections.



### RESPONSIBILITIES

- Conduct a selection process in a dignified, responsible manner in accord with the principles of Rotary.
- Seek out and nominate the best qualified person.
- Interview all candidates for governor, whether they are suggested by clubs or by the nominating committee. Each interview of governor-nominee candidates should satisfy the minimum needs specified in the Rotary Code of Policies, Governor Nominee Selection, section 19.030.
- Ensure that no member, alternate member, or candidate for membership on a nominating committee is eligible to be nominated for any office being considered by that committee.



### RESOURCE

Article 13 of the RI Bylaws in the *Manual of Procedure* (035) includes details on the process of selecting the district governor.

## PUBLIC RELATIONS COMMITTEE

This committee promotes Rotary to external audiences and fosters understanding, appreciation, and support for the organization's programs. It also helps Rotarians understand that effective external publicity, favorable public relations, and a positive image build support for the organization, inspire potential donors, and attract possible candidates for membership.



### RESPONSIBILITIES

- Maintain contact with the district governor and key committee chairs to stay informed about district projects and activities that can be promoted — particularly those that are of interest to the general public.
- Promote Rotary to external audiences, such as the media, community leaders, potential partner organizations, program beneficiaries, and the general public.
- Contact the media with newsworthy stories of district projects and events, and share district and club stories via social media.
- Share Rotary public relations materials with clubs and encourage them to make public relations outreach a priority, using both traditional and digital media.



- Seek opportunities to speak to individual clubs about the importance of club public relations, including developing websites geared toward the general public.
- Promote all aspects of Rotary activities, such as PolioPlus, the six areas of focus, grant successes, alumni activities, and awards to districts and the Rotary community.

## Training and Support

Committee members should attend public relations workshops held in conjunction with Rotary training meetings whenever possible, as well as the regional seminar held by the Rotary public image coordinator.



### KEY MESSAGES

- Strategize public relations outreach as part of project planning.
- Incorporate both traditional and social media in public relations efforts.
- Club members, as members of the community, know the local media and should use that knowledge and their connections.
- Clubs should take good public relations outreach ideas and make them fit their local needs.



### RESOURCES

- [Rotary's Media Center](#) — Multimedia site featuring the latest news stories, Rotary advertisements, and links to Rotary social media sites.
- [Rotary PR Tips](#) — A brief e-newsletter that provides examples of Rotary in the news, PR tools and training, and outreach ideas.
- [Weekly Update](#) — E-newsletter highlighting the latest Rotary news. It can be used for club and district newsletters and websites.
- [Endpolionow.org](#) — New website that has compelling stories about polio eradication that you can share; interactive, dynamic graphics that help you tell the story; information about how donations can be used to fight polio; and links to polio communications resources that will help you educate and inspire others to end polio now.
- [Rotary public image coordinators](#) — The 41 RPICs appointed by the RI president-elect work to enhance the public image of Rotary by increasing recognition of the organization's humanitarian efforts among Rotarians and the general public. This involves helping clubs and districts communicate Rotary's success stories to the media, local government officials, civic leaders, and communities. RPICs can help with applications for public image grants and assist and train at district seminars.

# RI CONVENTION PROMOTION COMMITTEE

This committee promotes attendance at the annual RI Convention to Rotarians throughout the district.



## RESPONSIBILITIES

- Attend club and district meetings to promote the convention.
- Serve as a local resource for convention materials and information.
- Communicate with and assist the zone-level RI Convention promotion committee member assigned to your district.
- Contact potential registrants.
- Contribute convention articles and information to district newsletters, publications, and directories.
- Translate important convention information into local languages, if necessary.
- Create or expand a district website with links to convention information.

Many district conference committees also

- Organize district group tours for the convention (especially for first-time attendees).
- Invite prospective Rotarians to attend the convention. (This is done mainly by host districts.)
- Carry out marketing campaigns and promote contests put on by the RI Convention Promotion Committee.



## KEY MESSAGES

- The RI Convention inspires, informs, and engages Rotarians by offering an opportunity to share stories and experiences with fellow Rotarians from around the world.
- Club and district officers will be able to network to find service partners.
- Rotarians and their guests will be inspired by speakers who have made changes that have improved the lives of others.
- The convention allows clubs to learn more about programs offered by Rotary and participate in sessions designed to provide in-depth training and skill development in leadership, the six areas of focus, and other topics.



## RESOURCES

- [Convention pages on rotary.org](#) — Information about convention promotion, registration, housing, and booths.
- The Convention Promotion booklet (996) — A resource for all clubs and districts that has information about the destination, registration, the venue, a preliminary schedule, and other information.
- [RI Convention Update](#) — E-newsletter with updates, deadlines, and news stories sent out five times a year.

## ROTARY FOUNDATION COMMITTEE

This committee assists the governor in educating Rotarians about Foundation programs and fundraising activities and inspiring them to participate. It serves as a liaison between the Foundation and club members. The district governor is an ex officio member of the committee.

The members of the district Rotary Foundation committee serve as chairs of four subcommittees:

- Fundraising — Coordinates the district’s fundraising goals for the Annual Fund and the Endowment Fund, soliciting gifts and educating Rotarians about their gift options
- Grants — Oversees the qualification of clubs, assists clubs in applying for Rotary Foundation grants, ensures that proper stewardship and grant management practices are implemented, reports irregularities in grant-related activities, and promotes Rotary Foundation grants
- PolioPlus — Supports Rotary’s commitment to polio eradication and encourages participation in PolioPlus activities
- Stewardship — Ensures the careful management of Rotary Foundation grant funds and educates Rotarians on proper and effective grant management

Districts are free to appoint additional subcommittees to support their activities and goals. There are six additional subcommittees that can be reported online but are not required:

- Alumni subcommittee
- Annual Fund subcommittee
- Endowment Fund subcommittee
- Rotary Peace Fellowships subcommittee
- Scholarships subcommittee
- Vocational training team subcommittee



### RESPONSIBILITIES

- Assist the district governor in presenting a district Rotary Foundation seminar for club presidents, presidents-elect, club Foundation committees, and other Rotarians.
- Help the district training committee conduct Foundation sessions each year at the presidents-elect training seminar and district training assembly.
- Encourage clubs to offer at least two programs on the Foundation annually, paying special attention to November, which is Rotary Foundation Month.
- Promote high levels of financial support for Foundation programs by encouraging regular contributions to the Annual Fund and gifts to the Endowment Fund.
- Coordinate all district Foundation fundraising and program participation.

- Encourage clubs to find current Foundation information at [rotary.org](http://rotary.org).
- Decide, in consultation with the district governor and governor-elect, how to use the District Designated Fund (DDF).
- Help the governor-elect gather input from club-level Rotarians before establishing district Foundation goals for the upcoming year.
- Represent the committee in the DDF distribution process and, with the district governor, authorize the use of the fund for program, grant, and fundraising purposes.
- Ensure that satisfactory final reports on district-sponsored programs and activities are submitted to The Rotary Foundation in a timely manner.
- Serve as an ex officio member of all subcommittees, maintain contact with them to stay informed of their progress, and directly support them as needed.
- Help the governor select qualified recipients for Foundation awards.
- Qualify the district and its clubs to use Rotary Foundation grants.
- Ensure that all clubs interested in participating in Rotary Foundation grants are able to qualify.
- Help organize grant management seminars to qualify clubs.
- Confirm that clubs applying for global grants are qualified.

## Training and Support

All members of the district Rotary Foundation committee are expected to attend a regional Rotary Foundation seminar conducted by a regional Rotary Foundation coordinator.



### KEY MESSAGES

- Every Rotarian, Every Year is a fundraising effort that promotes giving among all Rotarians and identifies those capable of giving major gifts to The Rotary Foundation.
- All Rotarians should participate in the grants of The Rotary Foundation.
- Rotary Foundation seminars and events can help Rotarians learn more about their Foundation.



### RESOURCES

- *District Rotary Foundation Committee Manual* (300) — Information on the committee's grant and fundraising responsibilities.
- *District Rotary Foundation Seminar Manual* (438) — Guide to help districts conduct their Foundation seminar.
- [Regional Rotary Foundation coordinators](#) — The 41 RRFs appointed by the Foundation trustee chair serve as a key resource on all Foundation matters, both program-related and financial, and as a vital link between Rotarians and the Foundation. RRFs promote the Foundation, including its grants and fundraising initiatives, in addition to setting and achieving participation and giving goals.

## TRAINING COMMITTEE

This committee supports the district governor and governor-elect in training club and district leaders and overseeing the district's overall training plan. The district trainer serves as the chair of the training committee and assigns responsibility for training meetings and functions as necessary. The district training committee members are responsible for working with the convener of each meeting.



### RESPONSIBILITIES

- Work with the governor-elect, who has final say on the program, speakers, training leaders, evaluations, and logistics for the presidents-elect training seminar (PETS), district training assembly, and district team training seminar, which includes assistant governor training. A district participating in a multidistrict PETS should have a training committee member selected by the governor-elect to develop and conduct training at the seminar.
- Work with the governor, who has final say on the program, speakers, training leaders, evaluations, and logistics for the district leadership seminar, club-level and Rotaract leadership training, and other training and leadership development programs, as appropriate.
- Consult on training issues for the district Rotary Foundation seminar and district membership seminar. (These meetings are the primary responsibility of other district committees.)
- Support club trainers as needed.
- Work with the district governor and the district Rotary Foundation committee chair to plan, organize, and promote the district Rotary Foundation seminar, and work with the district governor-elect to promote the grant management seminar.



### KEY MESSAGES

- District training meetings are an opportunity to prepare for the year and network with other Rotarians in the district.
- Training is an ongoing process for developing club leaders and members.
- Each club should have a plan for the training of incoming officers, new club members, existing members, and future leaders by the club trainer.



### RESOURCES

- The courses for trainers on [learn.rotary.org](https://learn.rotary.org) — Information for trainers about planning a training meeting, adult learning theory, training trainers, web conferencing, club trainers, and training best practices.
- *Lead Your District: Training* (246) — Manual that includes responsibilities and best practices for the district training committee and its chair, a train the trainer session guide, and training resources.

- [Learn.rotary.org](https://learn.rotary.org) — A new site that enables Rotarians to take interactive courses, customize their user profiles, track their progress in their courses, and print certificates upon completion. To register for a course, sign in to [rotary.org](https://rotary.org) and click on “Learn.”
- [Rotary coordinators](#) — The 41 RCs appointed by the RI president-elect work to create stronger, more dynamic, and more effective clubs and districts. Rotary coordinators work as facilitators, motivators, consultants, and resource persons for clubs and districts in the region and help them create and implement plans to build better Rotary clubs.

# DISTRICT TRAINING MEETINGS

This chart lists the annual district training meetings held for club leaders. District committees should encourage club leaders to attend.

TRAINING MEETING/ TIME OF YEAR	PURPOSE	CONVENER/ ORGANIZER	MATERIALS
<b>Governors-elect Training Seminar (GETS)</b> August-December, regional training in conjunction with Rotary institute	District governors-elect learn their responsibilities and prepare to lead their districts.	<b>Convener:</b> RI director or immediate past director	<b>For leaders:</b> <i>Governors-elect Training Seminar Leaders' Guide</i> <b>For participants:</b> <i>District Governor's Manual</i>
<b>International Assembly</b> Before 15 February	District governors-elect are provided a Rotary education, instruction on administrative duties, motivation, and inspiration.	<b>Conveners:</b> RI president and president-elect <b>Organizer:</b> Moderator	<b>For leaders:</b> <i>International Assembly Leaders' Guide</i> <b>For participants:</b> <i>Governor-elect's Workbook</i>
<b>District Team Training Seminar</b> February	Assistant governors and district committee leaders learn their new roles and responsibilities, and work with the district leadership team on district goals and complete the district leadership plan.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee	<b>For leaders:</b> <i>District Team Training Seminar Leaders' Guide (247)</i> <b>For participants:</b> <i>Lead Your District</i> manuals for assistant governors (244) and committees (249)
<b>Presidents-elect Training Seminar (PETS)</b> February or March	Club presidents-elect learn their new responsibilities and work with assistant governors to set their goals.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee	<b>For leaders:</b> <i>Presidents-elect Training Seminar Leaders' Guide (243)</i> <b>For participants:</b> <i>Club President's Manual (222)</i>

TRAINING MEETING/ TIME OF YEAR	PURPOSE	CONVENER/ ORGANIZER	MATERIALS
<p><b>District Training Assembly</b> March, April, or May (after PETS)</p>	<p>Club presidents-elect build on PETS training to gain leadership skills, while other incoming club leaders learn their new responsibilities. Club leadership teams refine their goals for the year.</p>	<p><b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee</p>	<p><b>For leaders:</b> <i>District Assembly Leaders' Guide</i> (828) <b>For participants:</b> <i>Club Officers' Kit</i> (225) manuals for: president (222) secretary (229) treasurer (220) committees (226) (administration, membership, public relations, service projects, Rotary Foundation)</p>
<p><b>District Membership Seminar</b> April or May (after district training assembly)</p>	<p>Club president, club membership committee chair, interested Rotarians, and district leaders learn necessary skills, knowledge to sustain and increase their clubs' membership.</p>	<p><b>Convener:</b> Governor-elect <b>Organizer:</b> District membership committee</p>	<p><b>For leaders:</b> <i>District Membership Seminar Leaders' Guide</i> (242) <b>For participants:</b> Determined by the district</p>



# DISTRICT PLANNING GUIDE

April 2014

This guide 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. To complete this form, refer to Rotary Club Central. Work with your district leadership team to set the goals, which should promote your district's strategic plan. Review and revise the goals throughout the year. Download a Word version of this form at [rotary.org](http://rotary.org).

District number: \_\_\_\_\_ Rotary year of office: \_\_\_\_\_

Name of governor: \_\_\_\_\_

Name of immediate past governor: \_\_\_\_\_

Name of governor-elect: \_\_\_\_\_

Name of governor-nominee: \_\_\_\_\_

## STRATEGIC PLANNING

### Current State

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

Does your district consult with the Rotary coordinator?  YES  NO

If so, when was it last reviewed/established? \_\_\_\_\_

### Future State

The district will focus on the following areas or strategic priorities:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## 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: \_\_\_\_\_

Grant Management seminar: \_\_\_\_\_

Number of clubs with Rotarians appointed at the district level: \_\_\_\_\_

How does the district support club trainers? \_\_\_\_\_

The district will focus on the following areas of training and leadership development:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**DISTRICT ADMINISTRATION**

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

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

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 rotary.org?  YES  NO

How is the governor’s monthly communication distributed?  Mail  Email  Website  Video

What social media networks does the district use (e.g., Facebook, YouTube, LinkedIn)? \_\_\_\_\_

How often is the district’s website updated? \_\_\_\_\_

How often does the 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? \_\_\_\_\_

What awards does the district give out? \_\_\_\_\_

**Future State**

The district will focus on the following areas of district administration:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

**FINANCE**

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**Current State**

How is the district budget prepared? \_\_\_\_\_

When was the budget approved by a majority of clubs? \_\_\_\_\_

When is the statement of district finances reviewed?

How is the district financial statement shared with clubs? \_\_\_\_\_

Email  Mail  Verbal report  Website  Other \_\_\_\_\_

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**

The district will focus on the following areas in finance:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

## DISTRICT CONFERENCE

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### Current State

Number of participants: \_\_\_\_\_

Number of clubs in attendance: \_\_\_\_\_

Highlights of the program: \_\_\_\_\_

Have participant 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. \_\_\_\_\_

## RI CONVENTION PROMOTION

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### Current State

Is the RI Convention promoted in your district?  YES  NO

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

YES  NO

About how many Rotarians from your district attended the last RI Convention? \_\_\_\_\_

Does your district website have a link to RI Convention resources?  YES  NO

### Future State

The district will focus on the following areas of RI Convention promotion:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## PUBLIC RELATIONS

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### Current State

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

\_\_\_\_\_

Does your district consult with the Rotary public image coordinator?  YES  NO

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

Does your district budget for public relation materials?  YES  NO

Did your district apply for public image grants in the past two years?  YES  NO

### Future State

The district will focus on the following areas of public relations:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## MEMBERSHIP

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### Current State

Current number of members: \_\_\_\_\_

Net membership growth in existing clubs during current year: \_\_\_\_\_

Number of male members: \_\_\_\_\_ Number of female members: \_\_\_\_\_

Number of clubs targeted to attract younger members: \_\_\_\_\_

Number of clubs with 25 or fewer members: \_\_\_\_\_

Describe the district's strategy for incorporating innovative and flexible ideas for attracting and keeping members into current practices: \_\_\_\_\_

### Future State

The district will focus on the following areas of membership:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## NEW CLUBS (EXTENSION)

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### 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

The district will focus on the following areas to increase its number of new clubs:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## THE ROTARY FOUNDATION

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### Current State

Does your district consult with the regional Rotary Foundation coordinator?  YES  NO

District qualified status:  Qualified  Pending  Incomplete

Amount of District Designated Fund for a district grant: \_\_\_\_\_

Number of clubs currently participating in a district grant: \_\_\_\_\_

Amount of District Designated Fund for global grants: \_\_\_\_\_

Global grants:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

The district held the following educational, promotional, and fundraising projects for PolioPlus last year:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Number of Rotary Peace Fellows the district nominated last year: \_\_\_\_\_

Number of district's Rotary Peace Fellow nominees selected by the Trustees last year: \_\_\_\_\_

Amount contributed to Annual Fund last year: \_\_\_\_\_

(Note: This should be the sum as reported in Rotary Club Central.)

Permanent Fund:

Number of Benefactors last year: \_\_\_\_\_

Number of Bequest Society members last year: \_\_\_\_\_

Number of Major Donors last year: \_\_\_\_\_

#### **Future State**

Amount of District Designated Fund for a district grant: \_\_\_\_\_

Number of clubs you would like to involve in district grants: \_\_\_\_\_

Amount of District Designated Fund for global grants: \_\_\_\_\_

The district will concentrate on the following area(s) of focus:

- |   |   |
|---|---|
| <input type="checkbox"/> Peace and conflict prevention/resolution | <input type="checkbox"/> Maternal and child health          |
| <input type="checkbox"/> Disease prevention and treatment         | <input type="checkbox"/> Basic education and literacy       |
| <input type="checkbox"/> Water and sanitation                     | <input type="checkbox"/> Economic and community development |

Global grants:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Number of global grants still in progress: \_\_\_\_\_

The district will plan the following educational, promotional, and fundraising projects for PolioPlus:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Number of Rotary Peace Fellows the district will nominate: \_\_\_\_\_

Annual Fund contribution goal: \_\_\_\_\_

(Note: This should be the sum of club goals as reported in Rotary Club Central.)

Permanent Fund:

Number of Benefactors: \_\_\_\_\_ Number of Bequest Society members: \_\_\_\_\_

Number of Major Donors: \_\_\_\_\_

## **DISTRICT PROGRAMS**

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### **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) participants: \_\_\_\_\_

Number of Rotary Youth Leadership Awards (RYLA) activities: \_\_\_\_\_

Number of Rotary Friendship Exchanges: \_\_\_\_\_

Number of service projects coordinated by the district (includes all Avenues of Service): \_\_\_\_\_

Number of Rotarians in the district participating in

Rotarian Action Groups: \_\_\_\_\_

Rotary Fellowships: \_\_\_\_\_

### **Future State**

The district will focus on the following areas to improve district programs:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Strategic planning goals**

\_\_\_\_\_  
\_\_\_\_\_

**Training goals**

\_\_\_\_\_  
\_\_\_\_\_

**District administration goals**

\_\_\_\_\_  
\_\_\_\_\_

**Finance goals**

\_\_\_\_\_  
\_\_\_\_\_

**District conference goals**

\_\_\_\_\_  
\_\_\_\_\_

**RI Convention promotion goals**

\_\_\_\_\_  
\_\_\_\_\_

**Public relations goals**

\_\_\_\_\_  
\_\_\_\_\_

**Membership goals**

\_\_\_\_\_  
\_\_\_\_\_

**Organizing new club goals**

\_\_\_\_\_  
\_\_\_\_\_

**Rotary Foundation goals**

The district will participate in the following Rotary Foundation grants: \_\_\_\_\_

The district's Annual Fund contribution goal is \_\_\_\_\_.

The district's Permanent Fund contribution goal is \_\_\_\_\_.

**District programs goals**

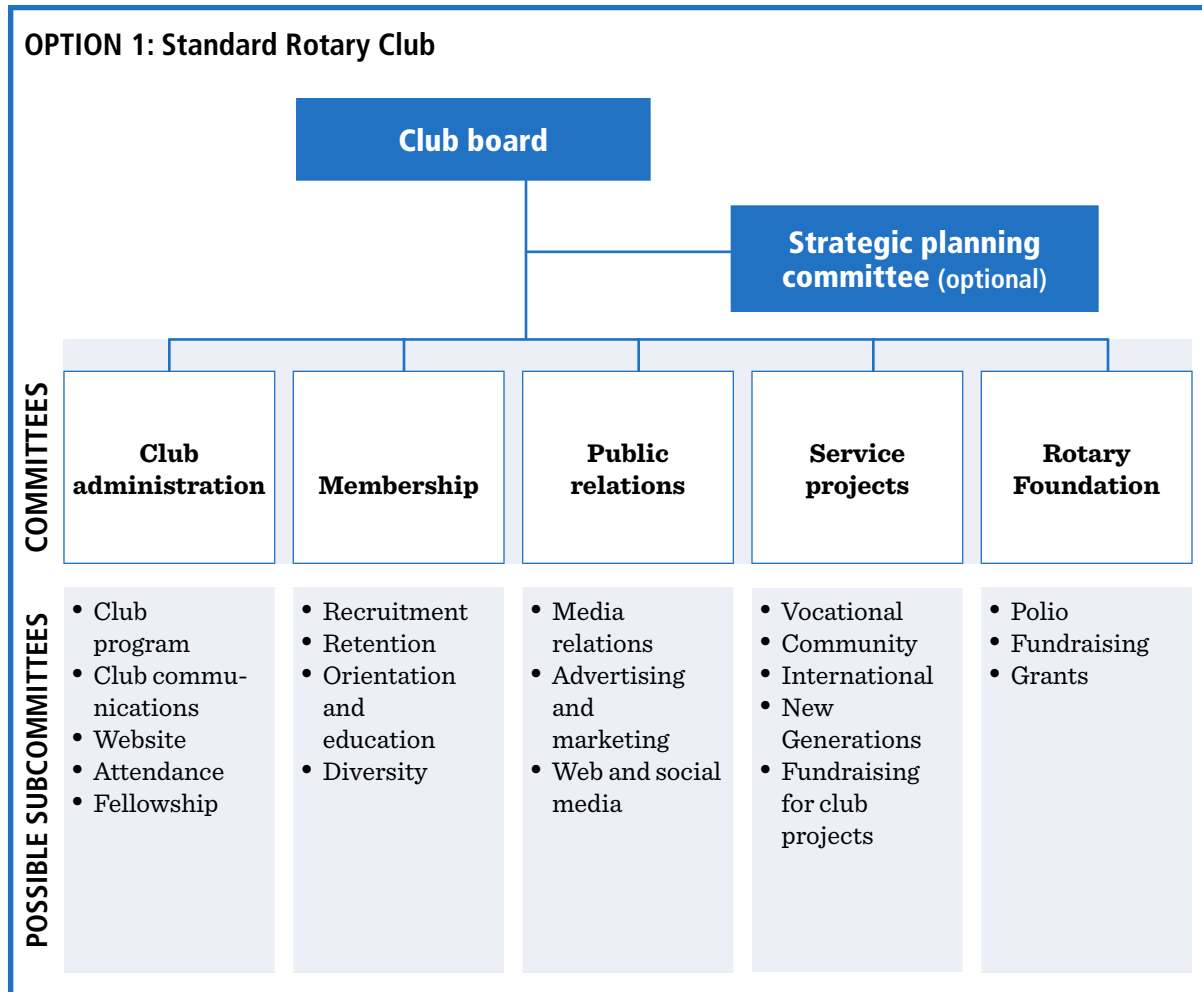
For the local community: \_\_\_\_\_

For communities in other countries: \_\_\_\_\_

**Other goals**

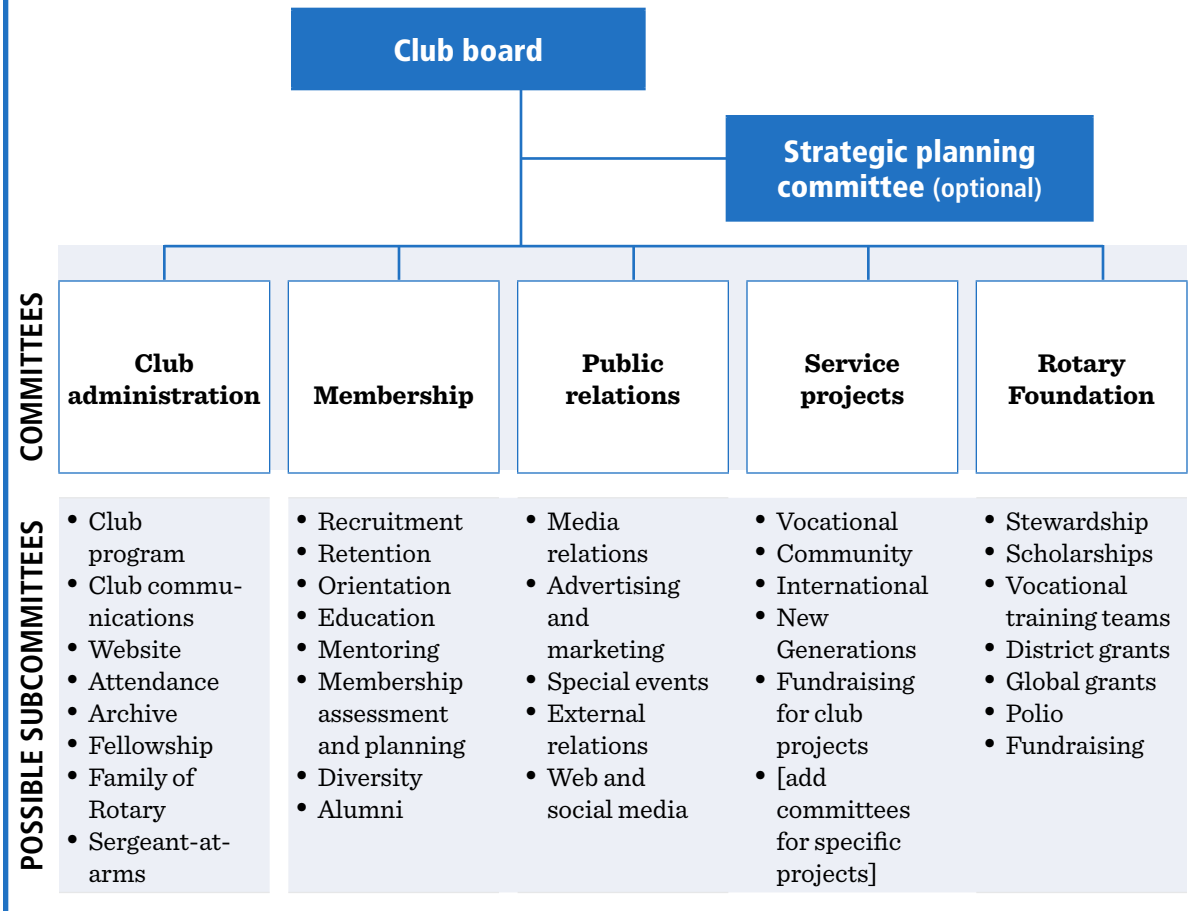
\_\_\_\_\_  
\_\_\_\_\_

# CLUB COMMITTEE STRUCTURE

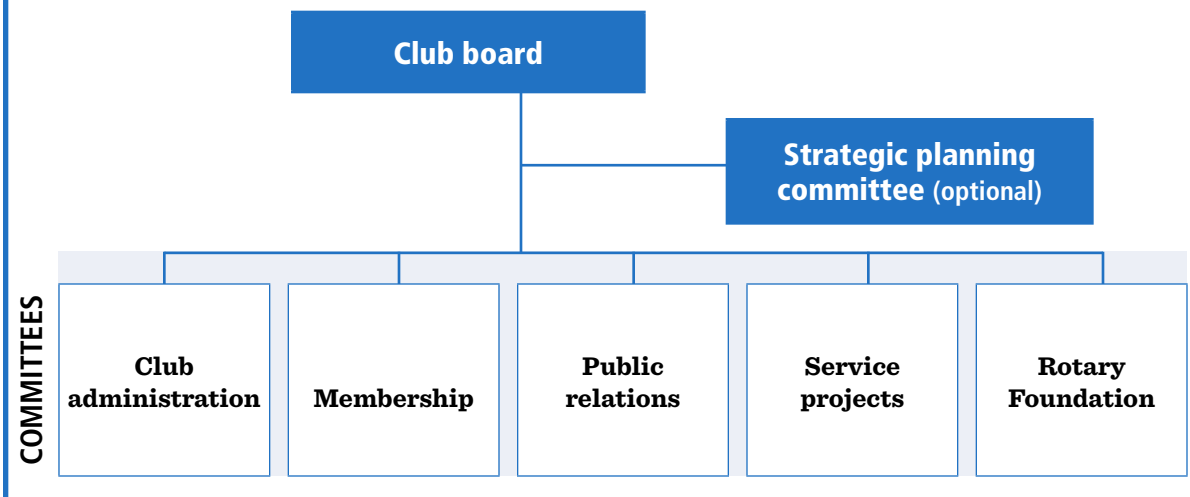




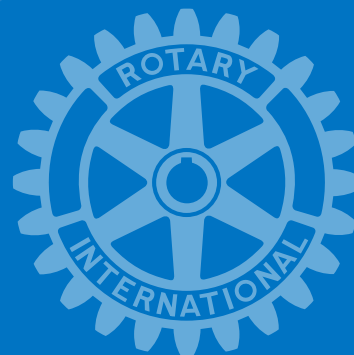
**OPTION 2: Large Rotary Club**



**OPTION 3: Small Rotary Club**



# ROTARY CLUB CENTRAL PLAN TOGETHER TRACK PROGRESS ACHIEVE GOALS



## Why should clubs use Rotary Club Central?



It's a one-stop shop.



It eliminates paper.



It fosters continuity in leadership.



It enables clubs to track their progress.



It creates transparency.



It showcases the important work that Rotary clubs do worldwide.

## How do I get to Rotary Club Central?

Go to [www.rotary.org/clubcentral](http://www.rotary.org/clubcentral).

## Who can use Rotary Club Central?

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



Rotary

ROTARY CLUB CENTRAL: [www.rotary.org/clubcentral](http://www.rotary.org/clubcentral)