

LEAD YOUR DISTRICT

Governor
2017-18





This is the 2016 edition of Lead Your District: Governor, the reference manual and GETS workbook for district governors serving in the 2017-18 Rotary year. 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. Please refer to those documents for exact Rotary policy. Changes to the documents listed above by the Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.

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ROTARY CLUB CENTRAL PLAN TOGETHER TRACK PROGRESS ACHIEVE GOALS



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.

Get started!

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INTRODUCTION



Congratulations on your position as district governor. You can use this manual to prepare for your responsibilities before attending your governors-elect training seminar and the International Assembly. You'll use it as a workbook at your GETS, so bring it with you.

As a member of Rotary's global network of more than 35,000 Rotary clubs, you have access to a wealth of Rotary services and resources available through My Rotary. You'll find information, resources, and publications translated into nine languages; club and district data; tools to apply for and manage Rotary grants; and support from staff at Rotary headquarters and international offices. To create an account, go to www.rotary.org/myrotary.

COMMENTS

If you have questions or comments about this manual or any of Rotary's training resources, please contact:

Learning and Development

Email: learn@rotary.org

Phone: +1-847-866-3000



YOUR JOB AS DISTRICT GOVERNOR

As governor you lead your district, engage and inspire members, and promote Rotary in your community.

RESPONSIBILITIES

AS GOVERNOR-ELECT

- Attending the governors-elect training seminar (introduction)
- Setting district goals for the year that align with the district strategic plan and Rotary's strategic plan (session 1)
- Appointing assistant governors and district committee chairs (session 2)
- Conducting district meetings, including the district team training seminar, presidents-elect training seminar, membership seminar, and district training assembly (session 6)
- Planning for the district conference (session 7)
- Attending the International Assembly (session 13)

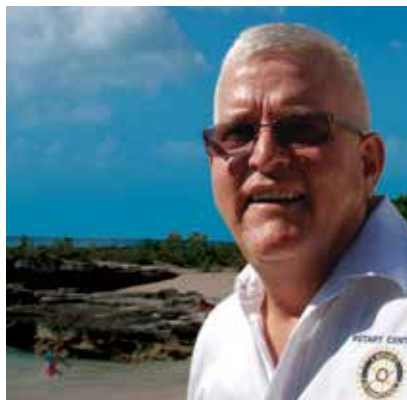
AS GOVERNOR

- Strengthening existing clubs (all sessions)*
- Starting new clubs (session 4)*
- Promoting membership growth and engagement by working with district leaders and club presidents to establish realistic membership goals for each club (session 4)*
- Supporting The Rotary Foundation through fundraising and grant activities (session 11)*
- Serving as a spokesperson for your district and Rotary when appropriate (session 10)
- Helping the governor-elect plan and prepare for incoming officer training meetings (sessions 2 and 6)*
- Conducting district events, including the district conference (session 7),* district leadership seminar (session 6), and district Rotary Foundation seminar (session 11)
- Supervising the district leadership team (session 2)
- Encouraging open communication among clubs, as well as between clubs and RI (session 8)*
- Conducting an official visit to each club (through club or multiclub meetings) to raise awareness of important Rotary issues, support struggling clubs, motivate club members to participate in service, and recognize the members' contributions (session 9)*
- Communicating at least monthly with each club president and secretary (session 8)*
- Fostering continuity by working with past, current, and incoming district leaders (sessions 1 and 2)*
- Transferring district files to the governor-elect at the end of your year (session 2)*
- Reviewing clubs' status with the district governor-elect before the International Assembly and offering recommendations for strengthening weak clubs (session 2)*
- Assigning the governor-elect responsibilities related to committees, administration, or events (sessions 2, 6, and 8)
- Ensuring that district nominations and elections are conducted according to the RI Constitution and Bylaws and other RI policies (session 12)*
- Inquiring regularly about the activities of Rotarian organizations operating in the district (session 5)*
- Following the District Governor Code of Ethics (section 19.010.1 of the Rotary Code of Policies)
- Preparing an annual statement and report of district finances to Rotary and all clubs by 1 October in accordance to the RI Bylaws 15.060.4. (session 12)*
- Performing such other duties as an officer of Rotary*

When preparing for your year of service, use the planning calendar (appendix 12) to note important dates.

**Responsibility is indicated in the Rotary Code of Policies*

WHAT ARE YOU WAITING FOR? BE A VIBRANT CLUB



Be a Vibrant Club guide includes:

- A club success story from your region
- Ideas for your club to try
- Resources for your club on My Rotary



Get your free copy at
shop.rotary.org

Rotary 

STRATEGIC PLANNING

Becoming a district governor can be overwhelming if you don't have a plan for your year. To prepare for your term as the 2017-18 governor, you need to understand your role and responsibilities, set goals, and create a plan for achieving them. Once that work is completed, you will be ready to take action.

Your year as governor will be a memorable one, and you are sure to make your mark on your district. Rotarians in your district will remember you for your impact, the result of good planning. Don't distinguish your term by creating your own theme, but support the presidential theme for the year.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|---|--|
| In collaboration with past, current, and future district leaders, set district goals for the year that align with your district's and Rotary's strategic plan | Follow the District Governor Code of Ethics |
| | Work with past, current, and incoming district leaders to follow through on long-term projects and plans |

When preparing for your term as governor, check the planning calendar (appendix 12) for important dates.

RESOURCES

- [Strategic Planning Guide](#)
- www.rotary.org/strategicplan
- [Manual of Procedure](#)

STRATEGIC PLAN

Once you understand your responsibilities, you must set goals and create a strategic plan for achieving them. Get your current governor, immediate past district governor, district governor-nominee (if known), and other district leaders involved to gather support. Follow the existing strategic plan, or develop a multiyear strategic plan if there isn't one in place, to maintain the district's focus from year to year.

Rotary's strategic plan (appendix 1) can serve as a guide for clubs and districts to follow when creating their own strategic plans.

Use the [District Planning Guide](#) to assess your district's strengths, weaknesses, opportunities, and risks and set goals for the coming year. Ask your current governor, district committee chairs, assistant governors, and Club and District Support (CDS) representatives for the information needed to complete the guide. You can also download statistical reports about your district from My Rotary to help you complete it.

CLUB GOALS

To set good goals, a club president-elect must assess past club accomplishments, member interests, and the club's capacity to achieve goals. Encourage club presidents-elect to enter their annual goals in [Rotary Club Central](#), where they can also see information on their clubs' past performance. For a list of goals clubs can enter in Rotary Club Central, see appendix 2.

As a district leader, you can view a summary of your district's goals and achievements or those of a particular club. If a club is unable to enter goals, any district leader can edit a club's data on its behalf. Club presidents are notified by email when any changes are made to their clubs' data. Remind club secretaries to keep email addresses of club officers current, either in Rotary's member database or through their member integration vendor. Take a course on Rotary Club Central in the [Learning Center](#) to become more familiar with its tools for both districts and clubs.

Work closely with your assistant governors to review each club's goals at the beginning of the Rotary year, as well as their achievements as the year comes to an end. Club goals may be adjusted during the year as needed. Clubs can use the [Strategic Planning Guide](#) to create a long-term plan if they don't already have one. A club strategic plan is helpful for setting annual goals.

RATE CLUBS IN ROTARY CLUB CENTRAL

The Rate Clubs feature in [Rotary Club Central](#) is used to keep track of your club visits and report each club's practices, accomplishments, and challenges.

You and your assistant governors can use Rate Clubs to rate and leave comments after each club visit. Assistant governors can view, rate, and leave comments only for the clubs in their club groups.

You can view the ratings and comments for all clubs in the district during your governor-elect year. You can rate clubs and leave comments during your governor year. These ratings and comments will serve as a reference for you, your assistant governors, and your successors. Once all clubs' ratings are final, you should confirm them by 1 June. Final comments and ratings should reflect the state of the club based on all club visits. Clubs do not have access to the ratings or comments.

MINIMUM STANDARDS

Before visiting a club, review information in [Rotary Club Central](#) to determine whether the club needs extra support. To be considered functional, a club should meet these minimum standards:

- Meets regularly
- Implements service projects that address the needs of the local community and communities in other countries
- Accepts the visit of the assistant governor, governor, or any officer of Rotary International
- Pays per capita dues to RI
- Subscribes to a Rotary Magazine Press publication
- Maintains liability insurance
- Acts in a manner consistent with the RI Constitution and Bylaws and Rotary Code of Policies
- Pays RI membership and district dues without outside assistance
- Keeps membership lists current in Rotary's database using My Rotary*
- Resolves club disputes amicably
- Maintains cooperative relations with the district
- Cooperates with RI by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, the associate foundations, and the international offices of the Secretariat
- Completes the election review process established in the RI Bylaws 10.070.5.

Work with your assistant governors to support clubs that are rated nonfunctioning. As your liaisons to club leaders, assistant governors can provide regular guidance to these clubs and inform you of their progress. More information is included in their main resource, [Lead Your District: Assistant Governor](#).

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What additional responsibilities does the governor of your district have?
- What will be your most challenging responsibility as governor?
- Which goals from the current year will continue into your term?
- How will you measure and track progress toward the goals you have set?
- What are your district's strengths and weaknesses?
- What motivates Rotarians in your district?
- How can you emphasize membership, Rotary's top organizational priority, in your district events and messaging?
- How will you recognize clubs that reach the goals they set in Rotary Club Central?

**Work with club secretaries to ensure membership data is kept current.*

APPENDIX 1



STRATEGIC PLAN

OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

OUR STRATEGIC GOALS



Support and strengthen clubs

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels



Focus and increase humanitarian service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally



Enhance public image and awareness

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities

JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org/strategicplan



JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org/strategicplan

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APPENDIX 2

ROTARY CLUB CENTRAL GOALS

YOUR CLUB

Membership (Set #)

Rotarian Engagement (Set % or #)

1. Members participating in club service activities
2. Members sponsoring new Rotarians
3. Members in leadership development programs or activities
4. Members in Rotarian Action Groups
5. Members in Rotary Fellowships
6. Members attending district conference
7. Committee chairs attending district training assembly

Club Communication

1. Our club has a strategic plan (yes/no)
2. Our online presence accurately reflects current activities (yes/no)
3. Number of communications distributed per month (#)

Public Relations

1. Number of times we update our website or social media accounts per month (#)
2. Number of media stories (broadcast and/or print) covering our club's projects per year (#)
3. We use RI-produced advertising/public service materials (yes/no)

SERVICE

Service Projects and Activities

1. Number of service projects and/or activities

Clubs for Young Leaders

1. Number of Rotaract clubs
2. Number of Interact clubs

Youth Program Participants

1. Number of inbound Youth Exchange students
2. Number of outbound Youth Exchange students
3. Number of RYLA participants

FOUNDATION GIVING

Annual Fund (USD)

PolioPlus Fund (USD)

1. PolioPlus Fund

Major Gifts and Endowment Fund (#)

1. Major Gifts
2. Bequest Society
3. Benefactors

NOTES

GETS WORKSHEET

STRATEGIC PLANNING

District Strategic Planning

As your group reviews your district strategic plans, consider and discuss the following questions. Record your answers for your own district.

Timeline

Where is your district in the strategic planning process?

How often does your district review and revise its plan?

Support

Who was involved in the planning process?

Who will revise it?

Which parts of the process will your team support?

Goals

What goals are in your plan, or what goals would you like to have in your plan?

Goals

Does your strategic plan still represent the mission, vision, and values of your district? What about Rotary's strategic plan?

What is one area or strategic priority that your district is planning to focus on in the next year?

Club Strategic Planning

Consider the following questions:

How should a club's strategic plan differ from the district's or Rotary's plan?

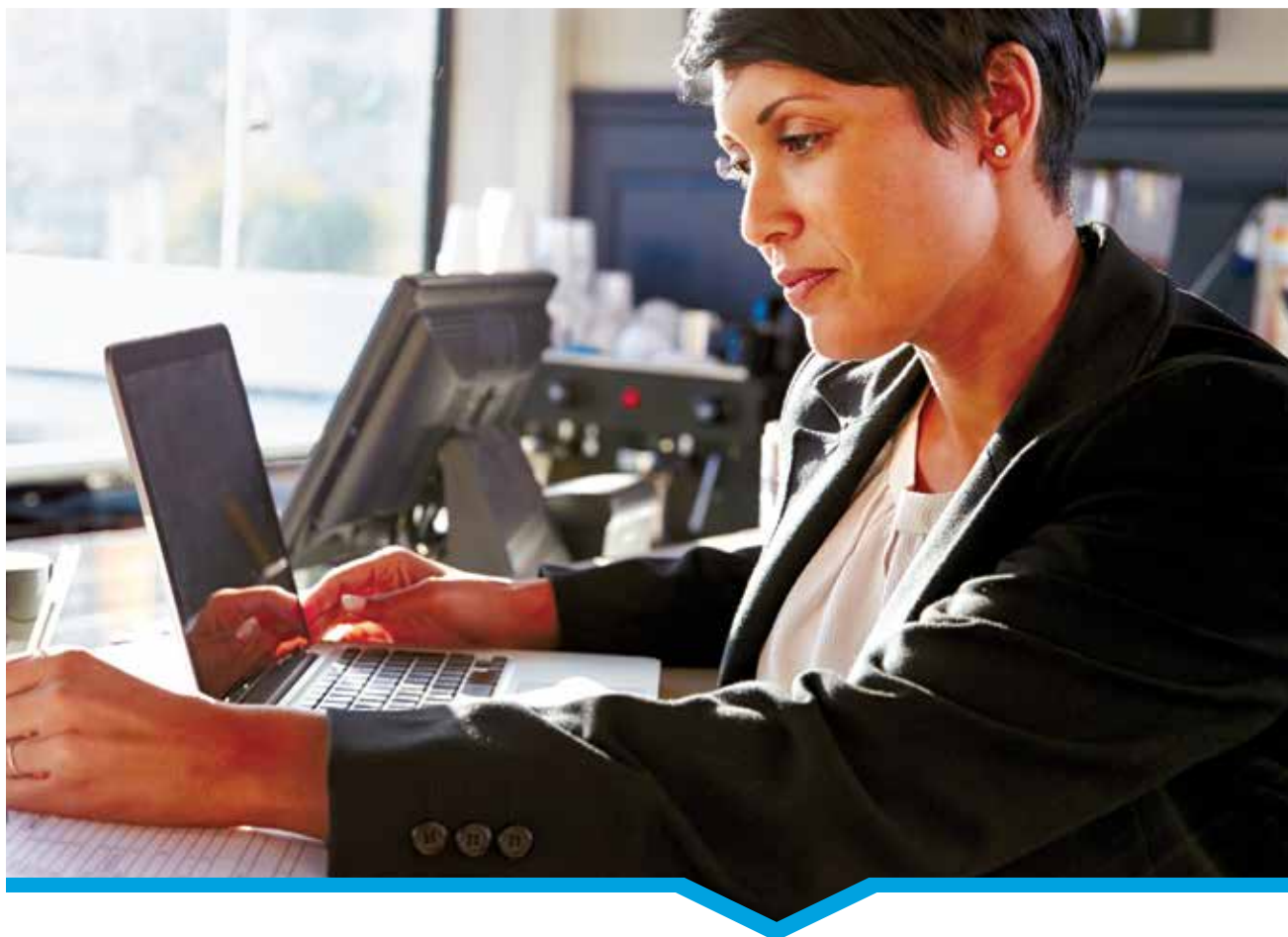
How will you ensure that clubs' goals support the district's strategic plan?

How will you help clubs monitor their plans?

Do most of your clubs use Rotary Club Central to set their goals? How can you encourage more clubs to use this tool?

How will you work with your team to track your clubs' progress toward goals in Rotary Club Central?

Use the remaining space to write down three ideas for engaging clubs in the strategic planning process. Refine these ideas as you work to implement them in your governor year.



THE LEARNING CENTER TAKES YOUR CLUB TO THE NEXT LEVEL

Acquire new skills to increase the effectiveness and influence of your club.

Learn to be more effective

The Learning Center at My Rotary has all the resources Rotarians need to be successful members — and leaders — of their clubs. Courses cover a broad range of topics, including:

- Building global grants
- Creating a strategic plan
- Running webinars
- Using social media

Learn to be a leader

Find comprehensive online training materials for specific Rotary roles. Assistant governors, governors-nominee, and trainers can receive in-depth instruction about their leadership positions.

Acquire new skills to increase the effectiveness and influence of your club.



GET STARTED AT WWW.ROTARY.ORG/MYROTARY

BUILDING YOUR TEAM

Being a successful district governor requires having a strong district leadership team. This team includes assistant governors, district committee chairs, and incoming and past governors. If you share responsibilities with your team, you'll have more time to innovate, develop leaders, and motivate Rotarians to participate in projects, programs, and activities. Use the [District Planning Guide](#) to work with your leadership team on planning your year.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|--|--|
| Review and update your district's policy, such as the role of past district governors and the coordination of multiyear projects | Ensure that the district leadership team carries out its duties |
| Appoint assistant governors and district committee chairs and members as needed to fill vacancies | Make sure that district committees support the work of club committees |
| Work with the governor-nominee and current governor to ensure continuity | |
| Conduct planning meetings with your district leadership team and ensure they report to you on their activities | |

RESOURCES

Find more information from the following people:

- Past district governors
- [Regional leaders \(Rotary coordinators and advisers\)](#)
- District governor-elect classmates
- International Assembly training leaders

APPOINTING TEAM MEMBERS

Selecting individuals to serve on your leadership team is a joint effort. Work with your predecessors and successors to select appropriate people for each open position. When making district appointments, consider the following tips:

- Consider two- to three-year terms, and stagger appointments so that there are always returning leaders in place to guide those new to the team.

- Appoint Rotarians based on their demonstrated leadership abilities and potential for growth, and select them from as many clubs as possible.
- Choose a combination of experienced district leaders and Rotarians who have not yet served at the district level.
- When offering a position, be clear about your expectations, explain the responsibilities of the position, and get a commitment to serve.

Finalize your appointments as a governor-elect several months before you convene your district team training seminar, where you will confirm each member's responsibilities, district goals, and reporting procedures. District appointments should be reported to RI by 31 December.

ASSISTANT GOVERNORS

Assistant governors play an important role, because they are the most familiar with the clubs in your district. The number of assistant governors you appoint should be based on factors such as the size, language needs, geography, and balance of strong and weak clubs in your district. Assistant governors should be appointed annually and may serve as many as three terms. Assistant governors may serve an additional period of three one-year terms two years after their third one-year term.

To develop leaders in the district, consider past club leaders who have leadership potential for the assistant governor role. For more information about assistant governor responsibilities, see [Lead Your District: Assistant Governor](#).

Your district is responsible for determining the amount of financial support provided to assistant governors as they carry out their duties.

DISTRICT COMMITTEES

District committees support club and district activities related to their areas of expertise and help achieve district goals. The recommended committees are listed and described in appendix 3. You can create additional committees as needed. For more information about district committees and their responsibilities, see [Lead Your District: Committees](#).

DISTRICT GOVERNOR CONTINUITY

To create greater continuity within the district leadership team, collaborate with your predecessor and successors, especially on activities that last more than a single Rotary year, such as strategic planning, district appointments, district service projects, and managing District Designated Funds and global grants. Your advisory council of past district governors offers a wealth of history and experience that can be very useful in long-range planning.

As governor, consider giving the governor-elect and governor-nominee the opportunity to request specific responsibilities or assignments on district committees so they can gain experience. Help prepare your successor by:

- Assigning the governor-elect specific district committee or organizational responsibilities
- Including the governor-elect in district meetings you convene, such as the district conference
- Informing the governor-elect, before the International Assembly, of the status of clubs and recommending actions for strengthening each club
- Referring the governor-nominee to the governor-nominee course in the [Learning Center](#)
- Discussing the information presented at the International Assembly after the governor-elect returns

SUPPORTING CLUBS

The district leadership team exists to support the clubs in the district. Your team can help clubs update their practices using the suggestions in [Be a Vibrant Club: Your Club Leadership Plan](#). Helping clubs be the best they can be is the ultimate goal of the district.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What should you think about when selecting Rotarians for district positions?
- How will you check in with your team during the year?
- What support will the clubs in your district need in order to be successful?
- How can past district governors support clubs in the district?

APPENDIX 3

DISTRICT COMMITTEES

Resources for running a district committee can be found in [Lead Your District: Committees](#). Encourage your committees to use Rotary resources for more information.

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 the regional support team with clubs

ALUMNI

This committee manages ongoing relationships with alumni in the district and assists clubs with alumni relations.

QUALIFICATIONS

Give preference to:

- Alumni
- Those with professional experience working with alumni

RESPONSIBILITIES

- Work in conjunction with other district committees, particularly membership, Foundation, and New Generations, to identify alumni and their skills (speaker, project skills, potential to be a member, contributor to Foundation and Rotary programs, etc.) and connect these individuals to clubs and district activities.
- Create awareness of how to work with alumni to maintain their relationship with Rotary.
- Encourage alumni to report their data to RI and work with fellow district chairs to ensure program participants are reported to RI.
- Abide by privacy and youth protection policies and local law.
- Support and coordinate alumni events and associations, where appropriate.

Club officers can access a report of names, program details, and contact information for all former Rotary program participants associated with your district in My Rotary.

CONVENTION PROMOTION

This committee promotes attendance at the annual Rotary convention to Rotarians throughout the district.

QUALIFICATIONS

Give preference to those with:

- Experience attending a Rotary convention
- Marketing experience
- Public speaking skills

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 at riconvention.org.

Many convention promotion committees also:

- Organize district group tours for the convention (especially for first-time attendees).
- Invite prospective Rotarians to attend the convention (mainly done by host districts).
- Carry out marketing campaigns and promote contests offered by the RI Convention promotion committee.

DISTRICT CONFERENCE

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

QUALIFICATIONS

Give preference to the governor-elect or governor-nominee or those with:

- Experience in the meeting coordination or hospitality industries
- Professional media, public relations, or marketing skills
- Public speaking skills

RESPONSIBILITIES

- Recommend the district conference venue and make all related logistical arrangements.
- Coordinate conference finances to achieve 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.
- In cooperation with the district trainer, arrange a district leadership seminar 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.

DISTRICT PROGRAMS

These committees promote district groups, programs, and activities, providing guidance to Interact, Rotaract, and Rotary clubs. Districts often have a specific committee for each of the programs or groups, with additional support for Rotaract and Interact clubs. Rotary offers resources for each of the following committees:

- Interact
- Rotaract*
- Rotary Community Corps
- Rotary Fellowships
- Rotary Friendship Exchange
- Rotary Youth Exchange
- Rotary Youth Leadership Awards (RYLA)

QUALIFICATIONS

Give preference to those who have club-level experience with the particular program or activity. The governor-nominee should serve on the district Youth Exchange committee.

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 program participants to speak and encouraging clubs to get involved.
- 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.

**Rotary International has a recommended structure for district Rotaract committees, which is outlined in the Rotaract Handbook.*

- Identify potential areas of cooperation between district programs and local non-Rotary service organizations.
- Encourage participants of one program to participate in others offered in the district.

FINANCE

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 district's finances. The district treasurer serves as an ex officio member of the committee and has voting privileges.

QUALIFICATIONS

Give preference to those with:

- Previous service as club treasurer
- Accounting or finance as a component of their profession

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 present 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 proper records of grant activity are maintained for reporting purposes.

MEMBER BENEFIT

The committee will market and promote Rotary Global Rewards to clubs.

QUALIFICATIONS

Give preference to those with:

- Previous service as a club officer
- Experience in marketing

RESPONSIBILITIES

- Promote Rotary Global Rewards at district training assembly, district conference, district seminars, club meetings, and other events, as needed.
- Distribute promotional materials to members and demonstrate the program.

MEMBERSHIP ATTRACTION AND ENGAGEMENT

This committee identifies, markets, and implements membership development strategies that are appropriate for the district and will result in membership growth. The chair should serve a three-year term.

QUALIFICATIONS

Give preference to the governor-nominee, past district governors, or those with:

- Experience as chair of a club committee related to membership development
- Success inviting new members to join Rotary
- Experience implementing membership programs
- Success developing strategies to retain existing members

RESPONSIBILITIES

- Plan, market, and conduct a district membership development seminar in consultation with the governor and district trainer.
- Work with clubs to enter and reach membership goals in Rotary Club Central.
- 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 and recognition programs.
- 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 Strengthening Your Membership: Creating Your Membership Development Plan and is aware of resources on Rotary.org.
- Work with governors to check online membership leads, assign them to clubs, and follow up with clubs to make sure they are taking action on the leads.
- Promote Membership and New Club Development month in August.

TRAINING REQUIREMENT

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

NEW CLUB DEVELOPMENT

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

QUALIFICATIONS

Give preference to past district governors, district governors-nominee, and those with:

- Experience as chair of a club committee related to membership development
- Success inviting new members to join Rotary
- Familiarity with implementing membership programs
- Success developing new clubs

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 REQUIREMENT

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

NEW GENERATIONS (YOUTH SERVICE)

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

RESPONSIBILITIES

- Coordinate with the district Interact, Rotaract, RYLA, Youth Exchange, Community Service, International Service, and Vocational Service committees to share expertise across the district, lead cross-promotion between programs, promote service opportunities, and coordinate efforts between district committees.
- Emphasize service in each of Rotary's programs for young leaders (Interact, Rotaract, RYLA, and Youth Exchange).
- Encourage and facilitate relationships with other organizations to expand opportunities for young people.
- Encourage and facilitate young people's transition from one program or activity to another, and offer progressively increasing responsibility as they acquire leadership skills.
- Engage with former New Generations program participants to maintain their contact with Rotary.
- Promote Youth Service Month (May).

NOMINATING

This committee nominates the most qualified Rotarian who is available to serve as governor. For more information, contact your Club and District Support representative.

RESPONSIBILITIES

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

PUBLIC IMAGE

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 are goals for Rotary.

QUALIFICATIONS

Give preference to those with either:

- Experience in club public relations activities (preferably as chair)
- Media, journalism, public relations, communications, advertising, or marketing skills as part of their profession

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 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 on social media.
- Share Rotary public relations materials with clubs and encourage them to make public outreach a priority, using both traditional and social media.
- Seek opportunities to speak with individual clubs about developing content on their websites that appeals to the general public.
- Promote Rotary initiatives, such as PolioPlus, grant successes, alumni activities, and awards, to districts and the Rotary community.

TRAINING REQUIREMENT

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.

ROTARY FOUNDATION

This committee assists the governor in educating, motivating, and inspiring Rotarians to participate in Foundation programs and fundraising activities. It serves as a liaison between the Foundation and club members. The district governor is an ex officio member of the committee and has voting privileges. The committee chair should serve as an ex officio member of all subcommittees to stay informed of their progress and directly support them as needed.

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, PolioPlus Fund, and the Endowment Fund, soliciting gifts and educating Rotarians about their gift options
- Grants — Assists clubs in applying for Rotary grants and encourages participation in district grants, global grants, and the Rotary Peace Centers program.
- PolioPlus — Supports Rotary's commitment to polio eradication and encourages participation in PolioPlus activities
- Stewardship — Oversees the qualification of clubs and is responsible for ensuring the careful management of Rotary grant funds and educating Rotarians on proper and effective grant management

Districts are free to appoint other subcommittees to support their activities and goals. Five subcommittees can be reported online but are not required:

- Annual Fund subcommittee
- Endowment/major gifts subcommittee
- Rotary Peace Fellowships subcommittee
- Scholarships subcommittee
- Vocational training team subcommittee

QUALIFICATION

Give preference to past district governors, past assistant governors, effective past district subcommittee members, significant financial contributors, and club-level Rotarians with professional or technical experience in a related field.

RESPONSIBILITIES OF THE CHAIR

- 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, PolioPlus Fund, and Endowment Fund.
- Coordinate all district Foundation fundraising and program participation.
- Encourage clubs to find current Foundation information at My Rotary.
- Work with the district governor and governor-elect to decide how to use the District Designated Fund.
- Help the governor-elect gather input from club-level Rotarians before establishing district Foundation goals for the upcoming year.
- Manage the DDF distribution process and work with the district governor to 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 on time.
- 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 grants.
- Ensure that all clubs interested in participating in Rotary grants are able to qualify.
- Help organize grant management seminars to qualify clubs.
- Confirm that clubs applying for global grants are qualified.

TRAINING REQUIREMENT

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

SERVICE

These committees promote programs and activities, providing guidance to Interact, Rotaract, and Rotary clubs. Districts often have a specific committee for each of the programs or groups, with additional support for Rotaract and Interact clubs. Rotary offers resources for each of the following committees:

- Community Service
- International Service
- Vocational Service

QUALIFICATIONS

Give preference to those who have club-level experience with service.

RESPONSIBILITIES

- Encourage clubs to be innovative and use sustainable approaches to solving community needs.
- Share service-related resources and best practices with club service leaders.
- Serve as experts on service.

- Publicize clubs' service initiatives.
- Coordinate districtwide efforts related to service.
- Promote participation in service through regular contact with clubs.
- Promote successful service activities at district meetings and during club visits by inviting participants to speak and encouraging clubs to get involved.
- Assist club service committee chairs in carrying out their responsibilities.
- Identify ways to cooperate with local non-Rotary service organizations.

TRAINING

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.

QUALIFICATION

Give preference to those with experience in training, education, or facilitation.

RESPONSIBILITIES

- Work with the governor-elect, who has final approval 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 approval 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 seminars 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 the grant management seminar.

NOTES

MANAGING VOLUNTEERS

Managing a district is no small task and is not possible without a team of volunteers who are willing and motivated to help. As district governor, you will need to demonstrate leadership qualities that inspire your district leadership team to contribute their time and energy.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|--|--|
| Start forming your team and begin teambuilding | Work with your team effectively to maximize your impact during your term |
| | Motivate your team and resolve any conflicts that arise |
| | Recognize outstanding efforts of Rotarians in your district through awards and other forms of public recognition |

RESOURCES

- www.rotary.org/awards
- Past district governors
- District governor-elect classmates

DELEGATION

During your year as district governor, much of your time will be devoted to club visits, attending training events, and other meetings. Your district leadership team is there to support you and help you achieve your district goals. The team includes your assistant governors, district committee chairs, and incoming and past governors. To have a successful year, it will be necessary to delegate tasks to your team members and communicate with them regularly. Each committee chair will take appropriate tasks back to their committees to complete. Check in with them often on their progress and advise them as necessary.

As a district leader, you can grant other leaders in your district temporary permission to conduct Rotary business online on your behalf. This permission, known as “delegation,” is not intended to relieve you of your district governor duties; it simply extends the access to My Rotary that you get as a district governor to another leader in your district who has a My Rotary account. Those you delegate to won’t be able to view your personal information, such as your

profile, contribution history, or discussion group activity. They will, however, have access to the same tools and sensitive information that you have as a district governor, including Monthly Contribution Reports, club ratings in Rotary Club Central, and district appointments.

MOTIVATION

Your role as the leader of your district is to motivate your fellow district leaders to be knowledgeable and enthusiastic about Rotary and take action to achieve goals. Keep in mind that, like you, your team members are volunteers who value their time. Have reasonable expectations and be sure to show your appreciation for their efforts.

If you don't know everyone on your district leadership team, make an effort to get to know them. This could be done with an informal gathering or by meeting individually with those you don't know as well. People vary in what motivates them, so once you get to know your team members better, you will better be able to motivate them.

AWARDS

One way to demonstrate your appreciation for Rotarians' commitment is to recognize them with an award. Awards motivate Rotarians and thank them for their service. In addition to honors given by Rotary International and The Rotary Foundation, your district may have several of its own awards. Descriptions and nomination forms for each award are available at www.rotary.org/awards.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- How will you delegate responsibilities so that goals are met and no one is overtasked?
- How will you motivate your team and other Rotarian volunteers?

NOTES

GETS WORKSHEET

MANAGING CONFLICT

In your groups, discuss your assigned case study and answer the questions that follow.

Scenario 1: Underperforming committee chair

It's halfway through the year, and one of your first-year committee chairs, who was recommended by a respected past district governor, isn't meeting your expectations. He doesn't communicate with committee members and hasn't made progress on any of the committee's goals. The committee members are frustrated and are talking about stepping down if action isn't taken.

How will you address the situation? How can you work with the chair to build a successful working environment?

How will you respond to the committee members' concerns?

Scenario 2: Clubs not working with district

Over the past few years, a few of your clubs have developed a negative attitude toward the district, and they avoid working with it whenever possible. They also won't set goals in Rotary Club Central. You would like them to work with the assistant governor to ensure they are receiving resources and support from the district to be a strong club.

How can you help the assistant governor build the trust of the club presidents?

How can you help them understand the benefit of using Rotary Club Central to set and track their goals?

What approach can you take with the presidents to make them feel confident about working with the district?

Scenario 3: The Importance of the district training assembly

A few clubs in the district say that they don't see any value in sending their club officers to the district training assembly. One president-elect tells you that he isn't attending because he thinks it is a repetition of PETS and he is not encouraging his officers to attend.

How can you convey the importance of the district training assembly to the clubs?

What other issues might be contributing to this belief? How can you address these underlying issues?

Scenario 4: Uncooperative team members

You have an innovative idea that you would like to try in your district. Some of your team members don't agree, but you feel strongly about it and need their support in order to carry it out.

Do you still move forward with your idea? Why or why not?

If so, how do you get support from your team to try your new idea?

What will you do if you can't get their support?

Scenario 5: Refusal to leave district role

A district leader on your team doesn't want to leave his role at the end of his term. He has served a three-year term and feels that another three-year term is warranted. He's done a good job, but you know several other people who are interested in serving in this role.

How do you convince him to step down?

What can you do to maintain a positive relationship between the Rotarian and the district?

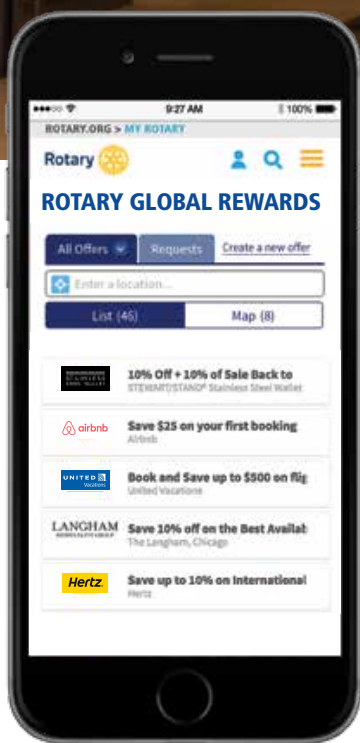
Scenario 6: Disagreement between team members

Your public image, membership, and Foundation committees are trying to work together to arrange and promote a district fundraising event that is open to the public. The chairs of the committees don't agree on the venue or the approach to publicity. They want this to be a collaborative effort, because it's a good opportunity to attract new members and raise money for the Foundation. They are at an impasse, and one of the chairs has come to you for direction but doesn't tell the others.

How would you address this situation?

How can you help the committee chairs to work together on this event to make it successful and to prevent this kind of disagreement in the future?

**SHARE
ROTARY**



ROTARY GLOBAL REWARDS: THE GOOD YOU DO COMES BACK TO YOU

Rotary Global Rewards gives you discounts on travel, hotels, vehicle rentals, and more, all designed to help you get more good work done.

Our rewards program is unique because you're invited to help build it. Create an offer for your own business to enhance our growing portfolio of Rotary Global Rewards.*

FIND ROTARY GLOBAL REWARDS AT [ROTARY.ORG/GLOBALREWARDS](https://rotary.org/globalrewards)



**ROTARY GLOBAL
REWARDS**

*Terms and Conditions apply in creating an offer for your own business.

STRENGTHEN YOUR MEMBERSHIP

You joined Rotary because you wanted to make a difference. Together, with more than a million members in 35,000 clubs worldwide, our global community's impact has never been greater. Our ability to provide service in communities around the world depends on strong, active, and engaged members.

Governors are in a unique position to influence membership growth. You and your team can help clubs become stronger, more dynamic, and more successful at keeping members active and engaged.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|--|---|
| Appoint chairs and members to your district's membership and new club development committees | Work with your director, Rotary coordinator, and district leaders to communicate your regional membership plan goals to club presidents and help them implement strategies to achieve these goals at the club level |
| Become familiar with your regional membership plan's goals and strategies to increase membership | Organize new clubs, including satellite clubs and e-clubs, to meet the needs of a wide range of prospective members in your community |
| Work with assistant governors to help ensure clubs have set membership goals in Rotary Club Central and have a plan to achieve those goals | Encourage clubs to grow and diversify their membership in profession, age, gender, ethnicity, etc. |
| | Work with club secretaries in the district |
| | Encourage clubs to embrace change and foster an innovative and flexible culture |
| | Strengthen existing clubs by encouraging them to be actively engaged in Rotary programs and service and to maintain their relevance within the community |
| | Recognize and support club and member achievements |

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|----------------------------|--|
| | Work with the membership committee to organize a district membership seminar |
| | Assign membership leads on My Rotary to appropriate clubs and see that action is taken |

RESOURCES

- [Regional membership plans](#)
- [New Rotary Clubs Quick Start Guide](#)
- [Strengthening Your Membership: Creating Your Membership Development Plan](#)
- [Membership Assessment Tools](#) (formerly known as Club Assessment Tools)
- [Connect to Membership Leads](#)
- [New Member Orientation: A How-to Guide for Clubs](#)
- [Connect for Good](#)
- [Be a Vibrant Club: Your Club Leadership Plan](#)
- [Your Rotary coordinator](#)

SERVICE, IMAGE, AND MEMBERSHIP

Rotary research shows that the number one reason people join Rotary is to have a positive effect on their community. It is important that Rotary clubs are active in service, that this service truly improves the quality of life of its beneficiaries, and that the impact is visible to improve community awareness of Rotary. Promote club service projects on your district website, in your monthly communications, and at club visits. Encourage clubs to promote their service projects in their communities and to use social media to get the word out.

Remember that clubs that have engaged members are more likely to keep them. You can engage members by:

- Asking them to serve on committees
- Giving them active roles at meetings
- Asking them to participate in service projects
- Having them mentor new members

At the district membership seminar, members can share best practices for creating strong, vibrant, and innovative clubs with involved members. Work with your membership and district training committees to plan this seminar, as well as stand-alone events or sessions for new members at your district training assembly or conference.

When you have clubs with engaged members who are fulfilling their desire to improve their communities and connect with others, they will stay in the club and will reflect a positive image. Engaged members have fun, and this also attracts new members.

DISTRICT MEMBERSHIP ATTRACTION AND ENGAGEMENT COMMITTEE

Your district membership committee exists to help clubs attract and engage members by helping them set realistic goals, connecting them with available resources, and implementing strategies that are appropriate for the district. You and your membership committee chair will receive an email alert when a membership lead is assigned to your district. Work with the chair to determine who will manage the district's membership leads. You or the chair can assign the leads to clubs on [My Rotary](#) in the district administration pages. Follow up with clubs that aren't taking action on the leads assigned to them. (You'll receive another email if no action is taken within 60 days.)

Be sure to enter your district appointments in My Rotary so that the committee can receive membership leads and resources from Rotary International. For more information on this committee, see Appendix 3: District Committees.

REGIONAL MEMBERSHIP PLANS

Regional membership plans recognize that needs vary from region to region and address our membership challenge on a local level. This focus empowers Rotarians around the world to develop membership strategies that work best in their region. Work with your membership committee to identify tactics for attracting new members, engaging your current members to improve member retention, and increasing the diversity of your membership.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What opportunities exist for organizing new clubs in your district?
- How can you help increase membership in the clubs in your district?
- How can you maximize the membership leads made available to you on My Rotary?
- What strategies for engaging existing members will you promote to clubs?
- What can you do to promote membership diversity as a key component of membership growth?

NOTES

GETS WORKSHEET

CREATING A VALUE PROPOSITION

It's important to consider various approaches to attracting and engaging members. Target segments have differing needs and want to customize their Rotary experience. As governor, encourage your clubs to develop a value proposition for each group they want to target. The following target segments have been identified as good potential sources of Rotary members.

Segment 1: Younger professionals

Segment 2: Rotary alumni (including Rotaractors)

Segment 3: Women

Segment 4: Recent retirees

Segment 5: A local or regional ethnic group that is underrepresented in your district's clubs

A value proposition is a promise of value to be delivered. It's the primary reason a prospective member should join your club. With your group, review your assigned target segment and consider the following questions.

What service or product does your club offer?

What makes your product unique?

What is the benefit for the potential member?

Use the following formula to write a value proposition to use on your website, posters, fliers, etc.

- **Headline.** Use one short sentence to convey the benefit you're offering. You can mention the product and/or the customer.
- **Subheadline or a paragraph of two to three sentences.** A specific explanation of what you do or offer, for whom, and why it is useful.
- **Three bullet points.** List the key benefits or features.
- **Visual.** Images communicate much faster than words. Show the product or consider what image you could use to reinforce your main message.

Sample: "Make a difference in your community. Joining Rotary will connect you with community leaders and develop your skills, give you the opportunity to make lifelong friendships, and transform yourself and your world."

Develop Your Value Proposition

Target segment: _____

Headline: _____

Subheadline: _____

1.

2.

3.

GETS WORKSHEET

BUILDING STRONG CLUBS

How do you determine which clubs in your district are strong and which are struggling?

Strong Clubs

What are their characteristics?

How will you support them?

Now that you’ve identified your strong clubs and how to support them, assign the remaining clubs in your district to one of three categories: average, struggling, or in decline without motivation to improve. In the boxes below, write the characteristics that identify that type of club and what steps you will take in the coming year to support them.

Average Clubs

| What are their characteristics? | How will you support them? |
|---------------------------------|----------------------------|
| | |

Struggling Clubs

| What are their characteristics? | How will you support them? |
|---------------------------------|----------------------------|
| | |

Clubs in Decline Without Motivation to Improve

| What are their characteristics? | How will you support them? |
|---------------------------------|----------------------------|
| | |

SERVICE AND WORKING WITH YOUNG LEADERS

Effective service projects help clubs maintain their members' enthusiasm for Rotary and encourage them to initiate new service efforts. Meaningful involvement with young leaders through support of Rotary's youth programs will secure a vibrant future for your district.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|---|---|
| Appoint chairs and members to service-related district committees | Ensure that district programs are conducted appropriately, in compliance with Rotary policies and local laws, and that no personal financial profit is made from the district's activities |
| Work with assistant governors to see that clubs have set service goals in Rotary Club Central | Work with the governor-elect and governor-nominee to reach a consensus on service projects that last more than one year and with past district governors on projects that continue into your year |
| | Partner with your counterparts in other countries on service projects |
| | Receive and evaluate requests to contact Rotary clubs in your district for cooperation on any activity or project from clubs, multidistrict groups, Rotarian Action Groups, or others |

RESOURCES

- [Community Assessment Tools](#)
- [Youth Protection Guide](#)
- [Learning Center](#)

DEVELOPING SERVICE PROJECTS

All Rotarians are responsible for participating in service projects that improve the quality of life in their community and communities around the world. When considering service projects and activities, keep in mind Rotary's areas of focus and programs (see appendix 4). Conduct a needs assessment to determine what will benefit the community. For more information on needs assessments, see [Community Assessment Tools](#). Talking to members of the community who will benefit from the project before developing a project plan will increase the difference that the project makes in the community.

A priority of Rotary's strategic plan is to focus and increase humanitarian service. As district governor, encourage sustainable service focused on youth programs and the areas of focus, and create projects locally and internationally.

ONLINE TOOLS

To enhance your service this year, consider using these online Rotary tools:

- [Rotary Ideas](#) — Find an international partner for a global grant, promote hands-on volunteer opportunities, or encourage clubs to crowdsource funding from their community.
- [Rotary Club Central](#) — Plan your year of service projects and see what service goals clubs in your district have set. When you visit them, you can check on their progress.
- [Rotary Showcase](#) — Promote successful projects on Rotary Showcase and share your service projects within and beyond the Rotary family. You can add your clubs' service projects and explore the projects Rotarians are undertaking worldwide. Best of all, you can connect directly to Facebook and promote your district's projects.
- [Your Profile](#) — Update your profile with your skills and interests and unlock the sections that you want to make visible. Search for and connect with Rotarians, Rotaractors, and program alumni.
- [Discussion Groups](#) — Find or start a discussion group on service projects, youth programs, or other Rotary topics.

See appendix 11 for information on all of Rotary's online tools.

WORKING WITH YOUTH

When Rotary clubs and districts work with youth, they make an investment in the future of their communities and of Rotary itself — but this investment succeeds only if the activities are administered responsibly. Our Statement of Conduct for Working With Youth outlines this philosophy:

Rotary International strives to create and maintain a safe environment for all youth who participate in Rotary activities. To the best of their ability, Rotarians, Rotarians' spouses and partners, and other volunteers must safeguard the children and young people with whom they come into contact and protect them from physical, sexual, or emotional abuse.

As district governor, take extra care to create a safe and inclusive environment that engages young people in Rotary. During the presidents-elect training seminar, ensure clubs understand their responsibility to report and follow through on any youth safety concerns.

The Rotary Youth Exchange program requires participating districts to obtain certification, which involves establishing additional policies and procedures for protecting youth. As governor, you ensure that certification requirements are met and maintained before the district plans any student exchanges.

Other club and district programs and activities that involve minors traveling outside their local communities require careful planning and specific communications with parents or guardians.

Additional resources and information for responsibly working with youth can be found in the Rotary Code of Policies section 2.110 and the [Youth Protection Guide](#). See appendix 5 for more information on managing risk for youth programs.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- How will you motivate Rotarians to participate in service projects?
- Which service projects in your district will attract the most publicity and local interest?
- What factors have made projects in your district successful?
- How will you ensure that your district is providing a safe environment for youth who participate in Rotary activities?

APPENDIX 4

ROTARY PROGRAMS AND ACTIVITIES

Rotary programs and your responsibilities for each are explained below. Resources for each program are also listed and available at My Rotary depending on the activities in your district, appoint district committees for the following programs.

COMMUNITY SERVICE

Community service includes the projects and activities that clubs undertake to respond to the needs of local communities. Rotary clubs should determine top priorities for service projects by assessing their own communities' needs and assets, then developing a response that addresses them.

RESOURCES

- Community Assessment Tools — Describes tools for identifying effective service projects
- Rotary's Areas of Focus — Booklet that introduces Rotary's six areas of focus, with examples of service projects for each area
- Rotary Service newsletter — Bimonthly newsletter that provides information and ideas for Rotarians to use in planning service projects; subscribe at www.rotary.org/newsletters
- Rotary Service blog — Weekly blog stories offering resources, best practices, success stories, and lessons learned to help Rotarians plan effective service activities

ROTARY COMMUNITY CORPS

The Rotary Community Corps program promotes self-reliance among community groups and encourages participants to identify and address community needs. A Rotary Community Corps is a group of adult, non-Rotarian volunteers sponsored by a Rotary club, which provides guidance for community and vocational projects.

YOUR RESPONSIBILITIES

- Approve the organization of all Rotary Community Corps.
- Encourage the formation of Rotary Community Corps in underrepresented areas.
- Establish relationships between Rotary Community Corps and their sponsor Rotary clubs.
- Suggest that Rotary clubs appoint a Rotary Community Corps committee.

RESOURCES

- Rotary Community Corps Handbook — Basic steps for organizing an RCC, including tips for identifying potential leaders, new case studies, and program ideas
- Rotary Community Corps Brochure — An overview of the program, including case studies and instructions for organizing a Rotary Community Corps

INTERACT

Interact is Rotary's service club for young people ages 12-18. Interact allows participants to carry out fun, meaningful service projects while developing leadership skills and meeting new friends. An Interact club must have a Rotary club sponsor and may be based either in a school or in a community.

YOUR RESPONSIBILITIES

- Approve the organization of all Interact clubs.
- Send your monthly communications to Interact clubs, highlighting opportunities for Interactors to participate in Rotary projects and activities.
- Establish strong relationships between Interact clubs and their sponsor Rotary clubs.
- Work with Interactors to develop a districtwide service project for all Interact clubs.
- Endorse the Statement of Conduct for Working With Youth and ensure that appropriate risk management measures are in place to protect all program participants.
- Promote Rotary Youth Exchange and RYLA among current Interactors, and raise awareness of Rotaract among those who are outgrowing Interact.
- If your district has two or more Interact clubs, encourage them to elect a district Interact representative to work with the district Interact committee.

RESOURCE

- [Interact Handbook](#) — Complete guide for organizing and administering an effective Interact club, written for both sponsoring Rotary clubs and Interact club leaders

NEW GENERATIONS SERVICE EXCHANGE

New Generations Service Exchange allows young adults up to age 30 the opportunity to discover their strengths while using their skills to help others. These exchanges may be designed for individuals or groups, may be reciprocal or one-way exchanges, and can last up to six months. Coordinated by district New Generations (Youth Service) committee chairs, exchanges are supported by district resources and through connections with community, international, and vocational service chairs and Rotary Foundation subcommittee chairs. All exchanges must have a strong vocational or humanitarian service component.

YOUR RESPONSIBILITY

- Encourage connections and coordination among district committees to design and plan customized exchanges for young professionals.

ROTARACT

Rotaract is a Rotary-sponsored service organization for young adults ages 18-30, designed to promote personal development by building leadership and professional skills through service. Rotaract clubs must have a Rotary club sponsor.

YOUR RESPONSIBILITIES

- Approve the organization of all Rotaract clubs. Encourage the formation of both university-based and community-based Rotaract clubs.
- Send your monthly communications to Rotaract clubs, highlighting opportunities for Rotaractors to participate in Rotary projects and activities.
- Establish strong relationships between Rotaract clubs and their sponsor Rotary clubs. Involve Rotaractors in the life of the district. They should meet regularly with sponsor Rotary clubs, attend district events, and work with Rotarians on service projects.
- Increase the capacity of Rotaract clubs to provide service.
- Welcome former Rotaractors to Rotary club activities and events.
- Ensure that the Rotaract leadership training seminar is conducted during the district training assembly, if appropriate.
- If your district has two or more Rotaract clubs, encourage them to elect a district Rotaract representative as co-chair of the district Rotaract committee. Appoint both Rotaractors and Rotarians to serve on this committee.
- Pay for the attendance of district Rotaract representatives at district, multidistrict, or international training meetings. Defray all or part of the costs associated with the district Rotaract representative-elect's attendance at the annual Rotaract Preconvention Meeting.
- Promote the Rotaract Preconvention Meeting and the Rotary convention to all Rotaractors.

RESOURCES

- [Guide for District Rotaract Representatives](#) — Manual for district Rotaract representatives and others involved with Rotaract at the district level that provides an overview of responsibilities and suggestions for successful Rotaract clubs
- [Rotaract Handbook](#) — Guide to organizing and developing a Rotaract club and conducting service projects and professional development projects; also describes district Rotaract structure and multidistrict activities and contains administrative forms and constitutional documents

ROTARY YOUTH EXCHANGE

Rotary Youth Exchange gives students ages 15-19 the opportunity to meet people from other countries and experience different cultures. The program offers two types of exchange:

- Long-term exchange — Students ages 15-19 live with more than one host family and attend school in the host country for an academic year.
- Short-term exchange — Students ages 15-19 visit the host country for several days or weeks. This exchange does not include an academic program and often takes place when schools are not in session.

YOUR RESPONSIBILITIES

- Endorse the Statement of Conduct for Working With Youth, and make certain that appropriate risk management measures are in place to protect all program participants.
- Have your district's Youth Exchange program obtain certification or maintain its certification.
- Make sure the district Youth Exchange program is being conducted within RI guidelines.
- Seek legal advice about liability issues before undertaking Youth Exchange activities.

RESOURCES

- Youth Exchange: A Guide for Exchange Students — Guide for exchange students and their parents
- Youth Exchange: A Guide for Host Families — Information on the responsibilities of serving as a host family
- List of district Youth Exchange chairs and multidistrict officers — Resource for coordinating exchanges with other districts and multidistrict groups (available from programs@rotary.org)
- Youth Exchange Handbook — Comprehensive information for Rotarians organizing a district Youth Exchange program; includes guidelines for sending and hosting Youth Exchange students
- Youth Exchange certification materials — Application, support documentation, and youth protection requirements (available from programs@rotary.org)

ROTARY YOUTH LEADERSHIP AWARDS (RYLA)

Rotary Youth Leadership Awards provide young people an opportunity to develop their leadership skills. Young men and women selected by their local Rotary clubs are invited to participate in leadership training meetings organized, funded, and implemented by Rotarians. These events can happen at the club, district, or multidistrict level.

YOUR RESPONSIBILITIES

- Endorse the Statement of Conduct for Working With Youth and make certain that appropriate risk management measures are in place to protect all program participants.
- Use RYLA as a tool to develop the leadership skills of Interactors, Rotaractors, and other young people with leadership potential, with a special focus on economically and socially disadvantaged youth.
- Promote Interact and Youth Exchange participation among younger RYLA participants.
- Encourage young professionals who participate in RYLA to start or join a Rotaract club or Rotary club or to participate in New Generations Service Exchange.
- Ask RYLA organizers to exchange ideas with other districts through social media, planning workshops, and visits to other RYLA events.
- Promote leadership of youth by empowering young people, including Rotaractors and past RYLA participants, to design RYLA programming.

RESOURCE

- Rotary Youth Leadership Awards Handbook — Step-by-step guide to organizing a RYLA event.

INTERNATIONAL SERVICE

International service promotes and fosters international understanding and goodwill through both fellowship and service.

YOUR RESPONSIBILITY

- Support clubs in their efforts to partner with clubs in other countries for fellowship and service.

RESOURCES

- Rotary grants — Available grants will vary depending on the type of project
- Rotary Service newsletter — Bimonthly newsletter that provides information and ideas for Rotarians to use in planning service projects; subscribe at www.rotary.org/newsletters
- Rotary Service blog — Weekly blog stories offering resources, best practices, success stories, and lessons learned to help Rotarians plan effective service activities

ROTARIAN ACTION GROUPS

Rotarian Action Groups are international associations of Rotarians, family members, program participants, and alumni who provide assistance and support to clubs, districts, and groups of districts in planning and implementing service projects related to a specific topic. Though each action group is administered independently, all operate in accordance with Rotary policies and with the recognition of the RI Board of Directors.

YOUR RESPONSIBILITIES

- Facilitate collaboration between clubs and Rotarian Action Groups on projects and activities.
- Report on Rotarian Action Group activities for the year at the district conference.

RESOURCES

- Rotarian Action Groups flier — List of Rotarian Action Groups, including website information
- Rotarian Action Groups Officer Directory — List of Rotarian Action Groups, including officers' contact information
- Rotarian Action Groups presentation — An overview that can be used to promote the program throughout the district

ROTARY FELLOWSHIPS

Rotary Fellowships unite Rotarians, family members, program participants, and alumni worldwide in friendship and service, the exchange of ideas, and the pursuit of international understanding based on common interests or vocations. Though each fellowship is administered independently, all operate within formal program guidelines and with the recognition of the RI Board of Directors.

YOUR RESPONSIBILITIES

- Report on Rotary Fellowships activities for the year at the district conference.
- Promote Rotary Fellowships Month (June).

RESOURCES

- [Rotary Fellowships flier](#) — List of Rotary Fellowships, including website information
- [Rotary Fellowships Handbook](#) — Guidelines and suggestions for starting, operating, and promoting a Rotary Fellowship
- [Rotary Fellowships Officer Directory](#) — List of each Rotary Fellowship, including officers' contact information

ROTARY FRIENDSHIP EXCHANGE

Rotary Friendship Exchange gives Rotarians and their families an opportunity to stay in the homes of Rotary members in other countries. These reciprocal visits advance international understanding through personal contact across national boundaries. This program also fosters partnerships between districts that lead to fellowship and service visits.

RESOURCES

- [Rotary Friendship Exchange District Chair Directory](#) — Resource for coordinating exchanges with other districts
- [Rotary Friendship Exchange Matching Board](#) — Quarterly list of districts seeking partners for an exchange
- [Rotary Friendship Exchange postcard](#) — An overview of the program to promote participation in it

VOCATIONAL SERVICE

Vocational service encourages Rotarians to model high ethical standards and apply their business knowledge and skills to benefit others.

YOUR RESPONSIBILITY

- Promote Vocational Service Month (January).

RESOURCES

- [Rotarian Code of Conduct](#) — A set of ethical guidelines for Rotarians
- Vocational Service newsletter — Quarterly newsletter that provides information and ideas for Rotarians to use in planning vocational service activities; subscribe at www.rotary.org/newsletters

APPENDIX 5

RISK MANAGEMENT FOR YOUTH PROGRAMS

It's important to be aware of the risks involved in youth activities, such as injury, illness, and abuse, so that participants may make good choices in dealing with these risks. Although awareness alone cannot prevent incidents, it can reduce their number and effects. Your district should consider developing a risk management program for working with youth that includes the following steps:

- Develop and implement a district youth protection policy to prevent and address any potential physical, sexual, or emotional abuse or harassment.
- Establish a code of behavior for adults and youth participants to follow during their involvement in the program. Screen adults before they work with youth.
- Maintain clear policies and procedures for any travel by youth and have systems in place to communicate specific information with parents or guardians.
- Review your district's policies to ensure that they align with the Rotary guidelines developed by the Board for each youth program.
- Explore the risks and insurance needs involved in sponsoring a youth program or event. Consider these questions:
 - What happens if someone is injured?
 - What happens if a natural disaster occurs?
- Work to minimize potential losses by:
 - Purchasing liability insurance coverage that is adequate for your region
 - Developing an emergency plan and practicing it at least once during the program
 - Teaching participants about safe behavior during the program

While these steps are required for Youth Exchange district certification, they are also recommended for districts that participate in Interact, RYLA, or any other youth activity.

Clubs and districts are urged to contact their insurance brokers or agents to determine whether their insurance policies provide adequate coverage for their youth programs. Insurance becomes a complex issue when multiple districts or clubs sponsor a program, because each organization may have different coverage.

All participants, including youth and organizers, are urged to verify that their health and life insurance will provide adequate coverage while they participate in the program. Many health insurance policies provide only limited coverage outside a certain area, so this precaution is especially important when traveling or living away from home. In these cases, participants must obtain a travel medical and accident insurance policy that provides the following types of coverage:

- Medical expense reimbursement
- Repatriation of remains
- Emergency evacuation
- Accidental death and dismemberment

Consult legal counsel before signing an agreement or contract with any organization, contractor, or service provider. These documents may contain waivers, hold harmless, or indemnification agreements that may attempt to release a party from liability and transfer the risk to the club or district. Be aware that Rotary International is not liable for any illness or injury to persons, including participants and organizers, or for damage to any property.

NOTES

GETS WORKSHEET

FINDING A PLACE FOR YOUNG LEADERS

With your group, read your assigned scenario and consider how you can get your district more involved in programs for young leaders. Use the questions below the scenarios as a guide.

1. On average, club members in your district are younger working professionals. The district supports an annual career fair and provides a few college scholarships for high school students; however, there is no consistent participation in Rotary's programs for young leaders.
2. Your district is in a region with many two- and four-year colleges. More than 50 percent of clubs support university-based Rotaract clubs, but there are no community-based Rotaract clubs and very little Interact participation.
3. Your region does not have any colleges or universities, but Rotarians have been very involved in a successful district RYLA program for students ages 14-18. The popularity of RYLA has led to a strong community of Interact clubs, and even a small Youth Exchange program; however, your clubs do not sponsor any Rotaract clubs.
4. Your district covers a huge area encompassing more than one country. Rotarians in the district must often travel far to attend meetings and events, and they've said that it's too difficult to support the district's Interact and Rotaract clubs.

Scenario # _____

What are the district's challenges?

What are the district's strengths and opportunities?

Which programs for young leaders might succeed in this district and why?

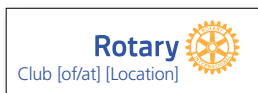
As governor of the district in this scenario, what steps can you take to get your district more involved in these programs?



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TAKE ACTION: www.rotary.org/brandcenter

DEVELOPING LEADERS

Rotary club and district leaders change annually, and new Rotary leaders are continually needed. While serving as governor-elect and governor, you are responsible for overseeing the training events that develop incoming and future Rotary leaders.

For detailed information on the district trainer's and the training committee's responsibilities, refer to Lead Your District: Training and online resources at www.rotary.org/trainers. Appendix 6 lists and summarizes Rotary training events.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|---|--|
| Appoint members, including the district trainer, to the district training committee | Convene continuing education meetings, including: <ul style="list-style-type: none"> • District Rotary Foundation seminar • District leadership seminar • District membership seminar • Grant management seminar |
| Convene incoming officer trainings, including: <ul style="list-style-type: none"> • District team training seminar • Presidents-elect training seminar (PETS) • District training assembly | Help the governor-elect with the meetings he or she convenes |
| Approve a substitute attendee for PETS if the president-elect cannot attend | |
| Ensure that each Rotary club has a training plan, and promote the role of a club trainer | |

RESOURCES

- Lead Your District: Training
- www.rotary.org/trainers
- Learning Center

DISTRICT TRAINING COMMITTEE

Your district's training committee, chaired by the district trainer, will assist you with the Rotary training meetings you are responsible for as governor-elect and as governor. Under your supervision, this committee plans and conducts the trainings, including logistics and program content. As the convener, you have final authority over the program, venue, speakers, training leaders, and other meeting elements. For more information on the district training committee, see [Lead Your District: Training](#).

ROTARY TRAINING MEETINGS

Since Rotary clubs and districts change leadership annually, training is critical to maintain continuity and the success of Rotary. Every year, there is a series of consecutive training meetings for district and club leaders. Each meeting has a recommended but flexible time frame and curriculum, allowing for modifications based on the needs of the district and participants.

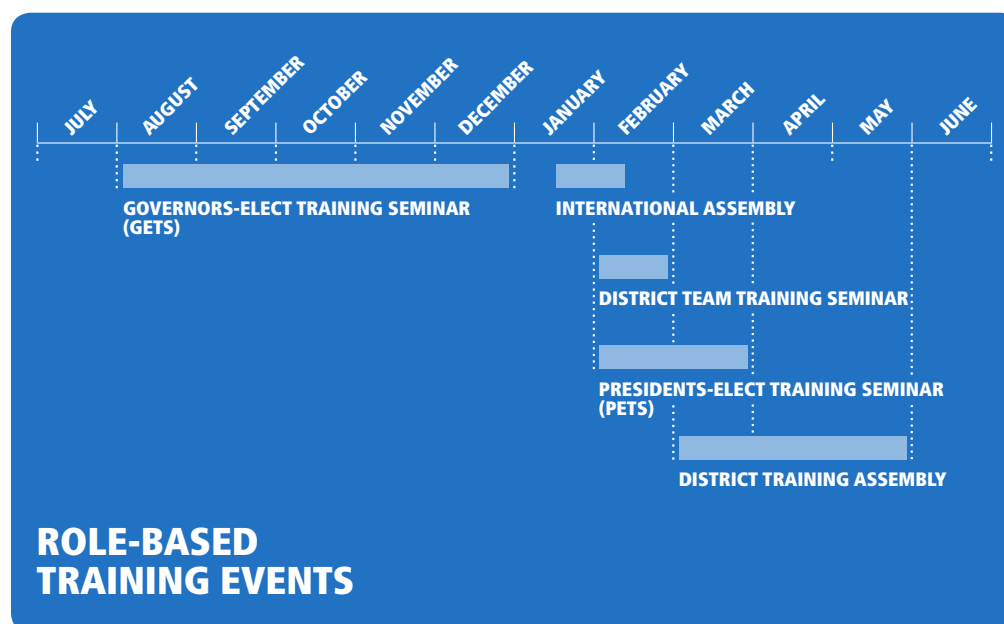
Rotary International provides many resources to support the training meetings for club and district leaders, including leaders guides for every RI Board-recommended meeting (see appendix 6). The guides can be found on www.rotary.org/trainers.

Courses for trainers are available in the Learning Center. Encourage your district trainer and committee to take the courses by signing in to My Rotary and clicking on Learning and Reference | Learning Center.

During the training meetings you convene, your main responsibilities are to motivate participants to exchange ideas and take action.

TRAINING MEETINGS FOR INCOMING OFFICERS

As governor-elect, you attend GETS and the International Assembly to prepare for your year as governor. Following these training seminars, you will begin training your district leadership team, club presidents, and other incoming club leaders to prepare them for their specific roles.



CONTINUING EDUCATION MEETINGS

As governor, you convene meetings for Rotarians to further their Rotary education. Holding training meetings during the year keeps members informed on current trends in the organization, develops leadership skills, and provides networking opportunities. For these continuing education meetings, you and your district training committee have discretion on the time frame and other details, such as who convenes and organizes each meeting. The governor and governor-elect should work together to determine what works best for the district. For more information on each of these meetings, see [Lead Your District: Training](#), or the leader's guides for each of these events.

CLUB TRAINING

Clubs are encouraged to have a club trainer to:

- Provide new members with orientation training.
- Give current members the opportunity to learn more about Rotary.
- Offer all members an opportunity to build leadership skills.
- Identify and address any other club training needs.

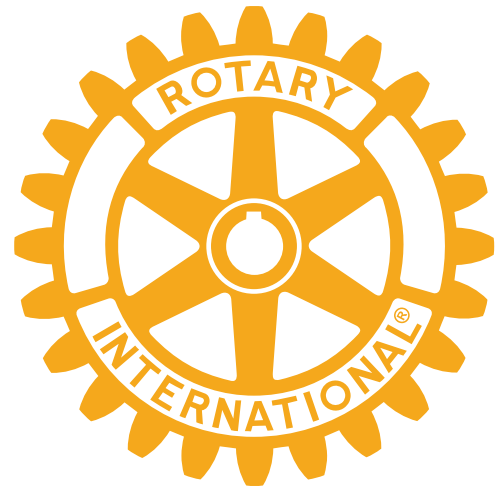
For more information about the role of the club trainer, sign in to My Rotary and clicking on Learning and Reference | Learning Center.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your GETS:

- What learning opportunities does your district offer in addition to Rotary recommended events?
- What makes training seminars successful in your district?
- How will you motivate Rotarians to attend training meetings?
- How will you support the development of future district governors?

APPENDIX 6



ROTARY TRAINING EVENTS

ROLE-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR-ELECT

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

TOPIC-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR

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

NOTES

GETS WORKSHEET

MANAGING TRAINING SEMINARS

As governor-elect and governor, you are responsible for planning incoming training and continuing education meetings for your district. Various aspects of planning these meetings are addressed below. With a partner, discuss at least one question from each topic to start thinking about how you can effectively manage these events.

Training committee and district trainer

Do you have a district trainer or a training committee? How is your district training committee structured? Is each member assigned to handle a different aspect of the meeting; are members assigned specific meetings to work on?

How will you work with your district trainer to prepare for training meetings? Will you delegate most of the training meeting arrangement to your district trainer? Which aspects of meeting planning will you handle?

Flexibility in training

Does your district currently combine training meetings? How can you schedule your trainings to be more flexible?

Flexibility in training

If applicable, describe how you use technology to train in your district.

PETS and district training assembly

Are you and your district trainers familiar with the PETS Leader's Guide?

Which of the following topics are included in your PETS curriculum?

- Planning for your year
- Running meetings
- Leading Rotarians
- Engaging your members
- Running your club
- Rotary grants
- Fundraising
- Service projects
- Partnerships
- Working with youth and young professionals
- Social media
- Promoting your project
- Telling your Rotary story
- Public image

What other sessions or topics will you include in your PETS?

PETS and district training assembly

Will your PETS and district training assembly breakout sessions include a variety of formats, such as idea exchanges, panels, workshops and speedmeets?

How is your district training assembly conducted for club leaders? Is it combined with other trainings? The District Assembly Leader's Guide helps to train incoming club leaders in their roles.

Promotion

What has inspired you to attend training seminars? Think about past training seminars you've attended: What made them successful? What would you do differently?

What strategies will you use to promote attendance at training meetings in your district?

Club-level trainers

Do you have club-level trainers in your district? If not, who provides training?

What does a club trainer do?

What kind of training do your clubs offer?

How can you encourage your clubs to appoint trainers? Who on your team would work with the trainers to train and support them?



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There's never a need to start from scratch. You'll find easy-to-use pre-produced materials to help you create custom communication pieces for your club.

Easy to standardize

When Rotarians speak with one voice, we speak more powerfully. Brand Center's resources help your club — and all Rotarians — communicate consistently and effectively.

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PLANNING YOUR DISTRICT CONFERENCE

One of your most memorable experiences as district governor will be your district conference. Start preparing for this special occasion early in your year as district governor-elect to make it successful for you and the Rotarians in your district.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|---|---|
| Select the date and venue for your district conference | Convene your district conference and oversee the event |
| Appoint the district conference committee chair and members | Appoint an aide to the RI president's representative, as well as a conference secretary to record the proceedings |
| Visit other district conferences to get ideas | Promote the conference during club visits and on the district website |
| Submit the date, location, and other district conference details by 1 February on My Rotary | Ensure that hospitality and courtesy appropriate to the RI president are given to the RI president's representative and his or her spouse (see the Rotary Code of Policies for updated Rotary protocol) |
| | Make sure that a written report of the conference proceedings is sent to clubs within 30 days of the event |
| | Submit the president's representative report to presidential.services@rotary.org |

RESOURCES

- [District Conference Manual](#)
- [Manual of Procedure](#)

DISTRICT CONFERENCE

District conferences are held each year to inspire and motivate Rotarians. Celebrate the achievements of the past Rotary year and build confidence to achieve the goals for the upcoming year. The district conference should be designed to appeal to all Rotarians in the district.

Hold your conference at a time and place agreed upon by you and a majority of club presidents. The event dates and location can be decided as early as your term as governor-nominee, with either the current club presidents or those who will be president during your term. Avoid scheduling your conference during the Rotary institute, the International Assembly, Rotary convention, and holidays; the dates for these and other RI meetings are available at My Rotary or from your CDS representative. Consider holding your conference with another district. For more information about planning and promoting your district conference, refer to the [District Conference Manual](#).

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What features of your district conference will interest Rotarians and their families?
- How will you ensure that your district conference is widely promoted?
- What will you do to make sure that your district conference is a celebratory event, in addition to training and Rotary business?

NOTES

GETS WORKSHEET

IDEAS FOR YOUR DISTRICT CONFERENCE

Use this worksheet to collect district conference ideas from your fellow governors-elect.

Promoting the conference

Working with the RI president's representative

Involving youth at your conference

Finding and using sponsorships

Recognizing achievements of Rotarians in the district

Holding service projects at the conference

CONNECTING WITH CLUBS

As district governor, you will need to communicate with Rotarians, Rotary leaders and staff, community leaders, the media, prospective members, project recipients, and the public. Communicating well and often will foster effective clubs, achieve goals, coordinate club visits, encourage membership growth, and increase Rotary Foundation support. Being aware of different communication styles and working on your own communication skills will enhance your success.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|---|-----------------------------------|
| Refine your district’s communication plan | Communicate with clubs each month |

RESOURCES

- [Official Directory](#)
- [Manual of Procedure](#)

DISTRICT LEADERSHIP TEAM COMMUNICATION

Communication is essential to the effectiveness of any team. To support effective clubs, district leaders must work together and communicate often.

Though district leaders can communicate with each other and with clubs in a variety of ways, assistant governors interact with clubs most frequently, so you may prefer to route all information through them. District committees can send information to clubs through the assistant governors assigned to those clubs. The assistant governor can then provide specific club information to the district committees. Another approach is to have district committees work directly with club committees. Whichever communication plan your district uses, all involved parties should review and support it at the district team training seminar.

DISTRICT WEBSITE

Your district website is not only a helpful tool for Rotarians in your district, but an outward-facing site where the public can learn more about Rotary in your district. To make it more useful, consider having a section only for members. Many district websites include the following features:

- A district events calendar listing upcoming district meetings and club visits
- A message for clubs (which can be your monthly communication)
- Notes on how clubs in your district have been successful attracting new members
- Profiles of club service projects
- Links to club websites
- Updates on district goals
- Contact information for district leaders

Encourage clubs to have their own websites to promote Rotary, advertise club and district events and activities, and share Rotary resources and news via RSS feeds. Clubs should also be encouraged to have an outward-facing website or Facebook page that is directed to the public.

Find everything you need to create club and district communications that reflect Rotary's new look and feel at the [Brand Center](#). The site is home to Rotary logos, templates, ads, images, videos, and more.

SOCIAL MEDIA

Communicating with Rotarians in your district through social media can facilitate networking and collaboration among Rotarians for individual or club projects and activities. Visit Rotary's official social networking pages ([Facebook](#), [LinkedIn](#), [Flickr](#), and [YouTube](#)) to share Rotary images, videos, and stories with Rotarians and your community.

GOVERNOR'S MONTHLY COMMUNICATION

The governor is required to communicate with each club president and secretary in the district at least once a month. This provides club leaders with news and reminders about the district and Rotary International. Your monthly communication can take many forms, including an electronic newsletter, a video message, or a message on your district website. Whatever form you use, you may also want to make it available to assistant governors, past district governors, and Interact and Rotaract clubs. Work with an editor to determine the content of your regular communication. This communication should:

- Inform members about important Rotary updates
- List upcoming district deadlines
- Highlight specific club activities, such as new clubs admitted and names of new Rotarians

- Motivate club leaders to use Rotary Club Central to list their goals and celebrate their accomplishments
- Motivate clubs to pursue club goals, plan for upcoming events and observances, and promote district initiatives
- Recognize the service of committees, Rotarians, and club and district programs
- Recognize the financial contributions of Rotarians and community organizations
- Recommend helpful Rotary resources

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- Which aspects of your district's current communication policy are working well, and which need to be improved?
- How will you communicate with clubs regularly?
- What kinds of social media does your district use?
- How will you make sure club members' needs are heard and addressed?

NOTES

GETS WORKSHEET

TAILORING YOUR MESSAGE

How will you communicate information to clubs? How will you convey information from clubs to your district leaders, other club members in the district, or the public? For each scenario on the following pages, consider who needs the information and how you'll communicate it. Why is that the best method? Write your plan for communicating the message by completing the **who**, **how**, and **why** boxes for each scenario, as shown in the example below. Remember there could be more than one option for each. Feel free to add audiences or methods of communication that are not included on the worksheet. The concept bank lists ideas you might consider.

Example Scenario

A change has been made in the club attendance policy.

| Who? | How? | Why? |
|---|----------------------------------|--|
| Club members Club presidents District leaders | District website Direct email | This information is timely and important for clubs to know |

Concept Bank

| Who? | How? | Why? |
|---|--|---|
| <ul style="list-style-type: none"> • The media • Rotarians around the world • Club members in your district • The general public or the local community • Club presidents • District leaders • Other _____ | <ul style="list-style-type: none"> • Twitter • District website • Direct email to all clubs • Facebook • Phone calls or emails to 1-5 people • Other _____ | <ul style="list-style-type: none"> • Information is concise and has good images • Information could be good PR for Rotary and inspiring to members • Information is timely and important for clubs to know • The more people you contact, the better • The content of this message is sensitive • A dialogue is the best way to be sure everyone understands • Other _____ |

Scenario 1

A club president has emailed you a description and pictures of a great project.

| Who? | How? | Why? |
|------|------|------|
| | | |

Scenario 2

Some clubs in your district are struggling with attendance and haven't reached any of their goals.

| Who? | How? | Why? |
|------|------|------|
| | | |

Scenario 3

A club member from your district has been given a prestigious international award.

| Who? | How? | Why? |
|------|------|------|
| | | |

Scenario 4

You want to solicit input from club members on your next district project.

| Who? | How? | Why? |
|------|------|------|
| | | |

Scenario 5

A reporter has asked you for the contact information of some club members she can talk to about service in the community.

| Who? | How? | Why? |
|------|------|------|
| | | |

Scenario 6

The dates and location of your district conference have been selected.

| Who? | How? | Why? |
|------|------|------|
| | | |

MAXIMIZING YOUR CLUB VISITS

Club visits, whether made by the governor or assistant governor to single clubs or multiple clubs at once, give clubs the opportunity to get support and guidance from an experienced district leader.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|---|--|
| Consider scheduling your club visits and getting clubs' confirmation of the scheduled dates | Visit each club in your district through either a multiclub meeting or a single-club meeting |

RESOURCES

- [Your CDS representative](#)
- [Club Finder](#)
- [Rotary Club Central](#)
- [Be a Vibrant Club: Your Club Leadership Plan](#)

CLUB VISITS

During your year as governor, you will visit clubs, either individually or in multiclub meetings. The goal of these visits is to motivate and inspire members and offer district-level support for the improvement of their communities.

Here are some tips for giving talks to the clubs in your district:

- Emphasize that district leaders are there to help them.
- Motivate club members to participate in service projects and encourage clubs to let the community know about their projects and activities.
- Encourage them to try new things to rejuvenate their clubs and attract new members. (Refer them to [Be a Vibrant Club: Your Club Leadership Plan](#).)
- Highlight important Rotary issues.
- Recognize outstanding club projects and individual Rotarian contributions.

Be sure to meet with the president and other club leaders, including committee chairs. Attend a club meeting or assembly and take the opportunity to talk to members about club activities, issues, and how the district can support their efforts. This open communication will lead to a productive relationship throughout the year.

LOGISTICS

Work with the assistant governor assigned to the club to determine the best time for your visit. Ask assistant governors to identify clubs that will require an early visit, including those that are new, have low membership, or are not meeting minimum standards (listed on page 1.3). Given their role as club advisers, assistant governors should be able to discuss a club's strengths, weaknesses, and needs with you, providing insight and potential ways to bring about improvement.

To have the greatest impact on club members, schedule the visit to coincide with a specific occasion, such as a charter night, induction ceremony, new member orientation program, award presentation, special program, Rotary Foundation event, or intercity meeting.

You can group visits to neighboring clubs or according to their meeting schedules, or you can conduct intercity meetings. Your Rotary funding for travel expenses is based on the assumption that you will visit neighboring clubs consecutively.

Once you have determined your visit dates, send club presidents your itinerary so that they can confirm. Send club leaders your final itinerary and post it on the district's website.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- How will you make sure club members' concerns are heard and addressed?
- What innovative ideas do you have for your club visits?
- What will you do to prepare for your club visits?

NOTES



TAP INTO THE GLOBAL COMMUNITY WITH **IDEAS & SHOWCASE**

Locate the resources you need and share
your successes online.

Find resources for your project

Ideas is your all-in-one tool for accessing the resources you need to make your next project a success. When your project is on **Ideas**, you can receive funds, volunteer hours, partners, and materials.

Find tools for your fundraisers

If you're raising money on behalf of a larger team, you can now create a personalized page on **Ideas** to make fundraising easier. Simply send your friends and family a link to your unique URL, and they can pledge funds on your behalf.

Find and share inspiration

Once your project is complete, upload your story to **Showcase** to share your success with the world. Track the impact you made and reach out to inspire others.



GET STARTED AT WWW.ROTARY.ORG/MYROTARY

PROMOTING ROTARY'S PUBLIC IMAGE

Promoting a positive public image is important because it informs communities around the world that Rotary is a credible organization that meets real needs. In addition, a positive image of Rotary makes members proud and motivates them to be active participants in their clubs and districts.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|--|--|
| Appoint members and a chair to the district public image committee | Serve as a spokesperson for your district and Rotary |
| Budget for the district's public relations needs | Encourage clubs to have a public relations plan |
| Ensure that clubs have appropriate public relations training | Ensure that the district's website and social networking sites are updated regularly |
| Work with assistant governors to ensure that clubs set public image goals in Rotary Club Central | Promote service projects effectively and encourage clubs to share their projects' impact through Rotary Showcase and Rotary Club Central |

RESOURCES

- [Your Rotary public image coordinator \(RPIC\)](#)
- [Brand Center](#)
- [Voice and Visual Identity Guidelines](#)
- [Lead Your Club: Public Relations Committee](#)
- endpolio.org

RAISING AWARENESS OF ROTARY

There are many ways to make the community more aware of Rotary, including:

- Sponsoring special events (for example, marathons, recycling efforts, or fundraisers for a Rotary project or program)
- Creating exhibits and displays that can be featured in museums, historical societies, city halls, or libraries
- Advertising in newspapers, magazines, billboards, buses, airports, or train stations
- Establishing communication with the public relations staff of other organizations that your clubs and district are involved with
- Cultivating relationships with journalists and key media contacts in your media market
- Linking local Rotary projects to relevant issues in your community
- Pitching stories about Rotarians working through Rotary to make the world a better place to news media and social media
- Encouraging Rotarians to wear their Rotary lapel pins and talk about the organization with colleagues, family, and friends
- Having Rotarians post information on a club or district website or social media sites, or refer members of their community to [Rotary.org](https://www.rotary.org)

Go to the Brand Center for resources.

DISTRICT PUBLIC IMAGE COMMITTEE

Your public image committee exists to raise awareness of Rotary by promoting it in local media and providing public relations advice to clubs. Seek out club members who are media, journalism, public relations, communications, advertising, or marketing professionals, and appoint them to your committee.

Be sure to enter your district appointments on My Rotary so that the committee can receive public relations resources from your Rotary public image coordinator or Rotary International. For more information on this committee, see Appendix 3: District Committees.

STRENGTHENING THE ROTARY BRAND

The Rotary brand is strengthened by members living it. The way you talk about Rotary can affect the public's perception of it. Keep this in mind when visiting clubs and encourage them to live according to the values that Rotary promotes.

The Rotary logo identifies Rotary clubs and their members in every part of the world. Rotary International owns trademarks and service marks (referred to as Rotary Marks) for the benefit of Rotarians worldwide.

RI depends on you, as governor, to work with the clubs in your district to ensure they understand how to use the Rotary Marks.

When you reproduce the Rotary Marks, follow the guidelines approved by the RI Board of Directors in the Rotary Code of Policies, which allow Rotary clubs, districts, or other Rotary Entities* to use the Rotary Marks. The marks may not be altered, modified, or obstructed in any way or reproduced other than in their complete form.

Rotary's Brand Center offers resources for Rotary clubs and districts to customize their logos, as well as templates for stationery, event fliers, PowerPoint presentations, and more that make it easy to apply Rotary's brand. You'll also find [guidelines](#) for writing about Rotary and using the Rotary Marks. Take the course Strengthen Rotary in the [Learning Center](#) to learn more about the brand. Merchandise bearing the Rotary Marks should be purchased from one of Rotary's licensed vendors. If you have questions about licensing, contact RI's Licensing Section at rilicensingservices@rotary.org.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- How do you explain what Rotary is?
- What innovative ideas do you have to promote Rotary?
- Who in your community can you partner with to enhance Rotary's public image?
- What district projects, activities, or special events would interest the public?

**Rotary Entities include Rotary International, The Rotary Foundation, Rotary clubs or groups of clubs, Rotary districts or groups of districts, Rotary Fellowships, Rotarian Action Groups, and administrative territorial units of Rotary International. Individual RI programs are not considered Rotary Entities.*

APPENDIX 7

KEY POINTS FOR TALKING ABOUT ROTARY

Below are messages you'll find it helpful to refer to when developing key points before media interviews and speeches to external audiences.

Rotary brings together a global network of volunteers dedicated to tackling the world's most pressing humanitarian challenges.

- Rotary harnesses the strength of 1.2 million professional and community leaders from more than 200 countries and areas to help families in need.
- From local food pantries to clean water and maternal health, Rotary clubs join forces to carry out effective and sustainable projects at home and abroad.
- Rotary provides a platform for successful men and women of all ethnicities, faiths, and cultures to make the world a better place through volunteer service.

Rotary's top philanthropic goal is to eradicate polio worldwide.

- Rotary and its partners are close to eradicating polio, having achieved a 99.9 percent reduction in cases since 1988. It would become the only human disease other than smallpox to be eradicated.
- Rotary's chief role is fundraising, advocacy, and mobilizing volunteers.
- Rotary members have contributed more than \$1.5 billion and countless volunteer hours to protect more than 2 billion children in 122 countries from polio.
- Rotary is working to raise an additional \$35 million per year through 2018 for polio eradication, to be matched 2 to 1 by the Bill & Melinda Gates Foundation.

Rotary builds peace and international understanding through education and humanitarian service and by developing young leaders.

- More than 900 graduates of the Rotary Peace Centers master's degree program are in key decision-making positions in governments, corporations, and organizations around the world.
- Rotary's humanitarian projects help prevent the underlying causes of conflict, such as poverty, illiteracy, and a lack of clean water.
- Rotary's Youth Exchange program fosters international goodwill by enabling 8,000 high school students to live and study abroad each year in 115 countries.
- Rotary's two adjunct organizations — Interact and Rotaract — develop young leaders by promoting volunteer service, leadership, and professional development.

NOTES

GETS WORKSHEET

UNDERSTANDING AND USING COMMUNICATIONS TOOLKITS

By the start of your term, you have begun planning activities and events for World Polio Day in October. You've downloaded a World Polio Day Toolkit that includes:

- Up-to-date facts, figures, and stories that intrigue and inspire readers
- Key messages that can be integrated into your communications
- Sample social media posts
- Graphics, infographics, and videos
- Press release templates

As you plan your promotional efforts using this toolkit, consider the following:

What are the goals of your district's End Polio Now promotional campaign?

Who are your audiences?

How would you customize your message for your region? For different audiences?

What parts of the toolkit will be most valuable to your campaign? Where will you have to supplement it with regionally appropriate tools, strategies, or messages?

What are your first steps in implementing your End Polio Now promotions?

1.

2.

3.

Thinking about the ads in the toolkit, can you identify some local media outlets that you might send this information to? If not, who can you ask for help?

Who in your district might be a good media/promotions specialist?



ROTARY CLUB CENTRAL IS YOUR ONLINE PLANNING RESOURCE

Easy-to-access membership and Foundation reports provide the information your club needs to achieve your goals.

Share with club leaders

As a club strategic planning resource, Rotary Club Central captures:

- Membership reports and trends
- Foundation giving goals and achievements
- Past and future service projects

Share with club members

Encourage all of your club members to learn about club goals.

Share with future leaders

Provide consistency through officer transitions by sharing your club's goal-setting and achievement history with incoming leaders.

Use Rotary Club Central's rich information to help you do even more good together.



GET STARTED AT WWW.ROTARY.ORG/MYROTARY

ROTARY GIVING AND GRANTS

Rotary grants enable Rotarians to carry out service that improves health, supports education, and alleviates poverty. Rotary districts coordinate club participation in Rotary grants and programs as well as financial contributions to the Foundation. As governor, you will motivate Rotarians to support our Foundation and understand the possibilities it offers.

You will need a strong team to help you carry out your Foundation-related responsibilities. Your district Rotary Foundation committee has a structure in place to help you achieve your goals. Be sure to appoint qualified and interested Rotarians to fulfill these important roles, and communicate with them regularly to see that responsibilities are met.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|--|--|
| In consultation with the district governor and governor-nominee, if known, fill open positions on the district Rotary Foundation committee and its subcommittees | Attend the regional Rotary Foundation seminar, often held in conjunction with the Rotary institute |
| Encourage clubs in your district to set Foundation goals and enter them in Rotary Club Central | Hold a district Rotary Foundation seminar for all interested Rotarians |
| Determine whether to hold the grant management seminar during your governor-elect year or your governor year and begin planning it | Work with the district Rotary Foundation committee chair to plan and evaluate all Foundation activities |
| Serve on your district's Rotary Peace Fellowships selection committee and endorse applications for the candidates selected by your district for the coming year | Share information about the Foundation throughout the district |
| Complete the qualification process for your district | Serve on the Rotary Peace Fellowships selection committee and as an ex officio voting member of the district Rotary Foundation committee |

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|---|--|
| Discuss the use of the District Designated Fund with the district Rotary Foundation committee and the district governor | Work with the district Rotary Foundation committee chair to plan, coordinate, and evaluate all Foundation activities |
| | With the district Rotary Foundation committee chair, authorize the use of the District Designated Fund for grants, programs, and donations |
| | Encourage every Rotarian in your district to contribute to the Foundation every year |
| | Recognize clubs and Rotarians that support the Foundation |
| | Promote proper stewardship of Foundation funds |
| | Report to the district on all Rotary grant activity that has taken place in the past year to ensure transparency and stewardship of funds |
| | Involve inbound, outbound, and returning Rotary Peace Fellows in district and regional events, including your district conference |

RESOURCES

- [Lead Your District: Rotary Foundation Committee](#)
- [Guide to Global Grants](#)
- [The Rotary Foundation Reference Guide](#)
- www.rotary.org/awards
- www.rotary.org/grants
- www.rotary.org/give
- endpolio.org
- [Your regional Rotary Foundation coordinator \(RRFC\)](#)
- [Your endowment/major gifts adviser \(E/MGA\)](#)
- Your End Polio Now zone coordinator
- [Rotary grants staff](#)
- Course on Rotary grants in the [Learning Center](#)
- [Rotary Peace Centers Program Guide for Rotarians](#)

DISTRICT ROTARY FOUNDATION COMMITTEE

The district Rotary Foundation committee serves as the liaison between the Foundation and Rotarians in the district. By assisting with your district Rotary Foundation seminar and other tasks, the committee will educate Rotarians about the Foundation and motivate them to participate.

The district Rotary Foundation committee chair must have significant knowledge about the Foundation and experience with its activities. The chair helps coordinate all committee activities and serves as an ex officio member of all subcommittees. The chair and the governor have signatory authority for the District Designated Fund on behalf of the district.

To provide continuity for district Foundation projects, the chair is appointed to a three-year term. If you will be appointing the chair, you will receive a nomination form from Rotary in November (or you can find it in the District Administration section of My Rotary). Work with the next two governors for your district to select a Rotarian all three of you agree on. The current chair can be reappointed for an additional three-year term if all three governors consent. Note that you cannot serve as district Rotary Foundation committee chair while serving as governor.

SUBCOMMITTEES

To reduce the committee's responsibilities, create subcommittees to complete the various tasks that need to be done. Be sure to include the following four subcommittees:

- Fundraising
- Grants
- PolioPlus
- Stewardship

The chairs of each subcommittee should be members of your district Rotary Foundation committee. Additional subcommittees can be created as needed.

See descriptions of the subcommittee structure in Appendix 9: Foundation Committee Responsibilities. Detailed information about this committee can be found in [Lead Your District: Rotary Foundation Committee](#).

FOUNDATION TRAINING

Information on The Rotary Foundation is included in sessions for the presidents-elect training seminar, district training assembly, district Rotary Foundation seminar, and grant management seminar. Your regional Rotary Foundation coordinator and your district Rotary Foundation committee will help you with these events. For details, see session 6.

GRANT MANAGEMENT SEMINAR

Every year, the district holds a grant management seminar to teach club members how to qualify their clubs to receive global grant funds and develop the skills needed to manage and oversee grant funds. In order to be qualified, each club interested in global grants is required to send at least one representative to the seminar.

The training can be given in conjunction with other district meetings, such as the presidents-elect training seminar, district training assembly, district conference, or district Rotary Foundation seminar; as a separate meeting; or as a series of

webinars. Find more information in the [Grant Management Seminar Leader's Guide](#) for trainers and [Guide to Global Grants](#) for participants.

Note: District grant funds are eligible for use to cover the costs associated with the grant management seminar.

RAISING FUNDS FOR THE ROTARY FOUNDATION

Raising funds for The Rotary Foundation is important for all Rotarians. Without financial resources, the activities through which Rotarians do good in the world would not be possible. Contributions sent to the Foundation can be directed to the PolioPlus Fund, Annual Fund, or Endowment Fund.

For year-end financial figures and notable achievements, see the [Rotary International and The Rotary Foundation Annual Report](#). For a pocket-size leaflet with recent Foundation statistics, see [Rotary Foundation Facts](#).

CLUB CONTRIBUTION GOALS

The clubs in your district should set their PolioPlus Fund, Annual Fund, and Endowment Fund goals for the coming year during your presidents-elect training seminar. Encourage all presidents-elect to set their Foundation giving goals in Rotary Club Central by 1 May. Setting these goals online enables The Rotary Foundation to set the worldwide Annual Fund goal in time to announce it at the Rotary convention. During your year as governor, support clubs' efforts to achieve their fundraising goals.

ANNUAL FUND

The Annual Fund is the primary source of support for Foundation activities. The money is spent every year to carry out Rotarians' international and local service opportunities. As governor, you are asked to promote contributions to the Foundation through the Every Rotarian, Every Year initiative, which encourages every Rotarian to participate in a Foundation project and donate to the Annual Fund every year. Contributions can be directed to SHARE, the World Fund, or one of the Foundation's six areas of focus. Note: Contributions directed to areas of focus are not included in the district's SHARE calculation and do not add to the District Designated Fund.

ENDOWMENT FUND

The Endowment Fund ensures a strong future for The Rotary Foundation by providing a continuous stream of income to meet the increasing demand for Foundation programs. Contributions are invested and a portion, as determined annually, is made available for spending. Donations to the Endowment Fund often take the form of outright gifts, such as endowed funds, bequests, or life-income agreements. Contact your endowment/major gifts adviser to support you in pursuing these types of gifts.

POLIOPLUS FUND

The PolioPlus Fund supports the immunization activities of Rotary and the other major partners of the Global Polio Eradication Initiative — the World Health Organization, UNICEF, and U.S. Centers for Disease Control and Prevention — providing needed resources in polio-endemic or at-risk countries and regions.

Rotary also works in partnership with the Bill & Melinda Gates Foundation. Through 2018, every \$1 Rotary commits for polio immunization will be matched 2-to-1 (up to \$35 million per year) by the Bill & Melinda Gates Foundation. If fully realized, the campaign will result in \$525 million for polio eradication. Encourage continued support of the PolioPlus Fund, emphasizing that contributions of any amount will make a big impact.

PolioPlus Partners is a Rotary Foundation program that provides direct support to Rotary's national PolioPlus committees to conduct polio eradication activities, such as raising awareness of polio immunizations and disease surveillance. Districts are encouraged to contact the national PolioPlus committee chairs to learn more about polio eradication activities in polio-affected countries.

ROTARY GRANTS

Rotary offers grants that support a wide variety of projects, scholarships, and training that Rotarians are doing around the world.

District grants fund small-scale, short-term activities that address needs in your community and communities abroad. Global grants support large international activities with sustainable, measureable outcomes in Rotary's areas of focus.

For more information about these grants, go to the [Global Grants](#) page on My Rotary.

ROTARY PEACE CENTERS

The Rotary Foundation provides Rotary Peace Fellowships to those interested in earning either a professional development certificate in peace and conflict studies or a master's degree in a range of disciplines related to peace and security at one of six Rotary Peace Centers around the world. Peace fellowships are funded separately from district and global grants, and there's no cost to the district.

Applications must be submitted to the district by 31 May. Your selection committee must interview all applicants and submit endorsed applications to The Rotary Foundation by 1 July for world-competitive selection. For information on selecting qualified applicants, see the [Rotary Peace Centers Program Guide for Rotarians](#).

FOUNDATION FUNDING

Since 1947, generous Rotarians and friends of Rotary have funded over \$3 billion in programs that have had a lasting impact for people around the world. These contributions have been directed to areas such as the Annual Fund, Endowment Fund, PolioPlus Fund, and specific global grants.

The Rotary Foundation's SHARE system transforms contributions into grants and programs. Its three-year funding cycle gives districts time to plan and select projects and enables the Foundation to use the investment earnings to pay for operating expenses, including fundraising and general administration.

Here's how it works:

At the end of the Rotary year, your district's contributions to the Annual Fund-SHARE are directed into two subfunds — 50 percent to the District Designated Fund (DDF) and 50 percent to the World Fund — for use three years after they have been invested.

After three years, your district uses the DDF to participate in grants and programs and to make donations (for example, to PolioPlus or Rotary Peace Centers). The Foundation uses the portion credited to the World Fund to support grants and programs available to all districts.

Note that 5 percent of Annual Fund contributions will be earmarked for operating expenses or for building the Foundation's operating reserve. These funds will be used only when net investment returns are not sufficient to cover operating expenses; DDF is not affected. Learn more about this [funding model](#).

AWARDS

It is important to honor Rotarians who support the mission of The Rotary Foundation. Receiving recognition for individual or club contributions often motivates Rotarians to provide more service to their community and communities in other countries. For more information on awards and your responsibilities for each, see www.rotary.org/awards.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- How will your district structure the district Rotary Foundation committee?
- In what year will you conduct the grant management seminar?
- How will your district focus and increase humanitarian service?
- What are the priorities of clubs in your district when it comes to spending DDF?
- How does your district determine the optimum use of its DDF?
- How will you motivate every Rotarian to give every year?
- How will your district take full advantage of Rotary grants?
- How can your district practice good stewardship for the grants it receives?

APPENDIX 8

DISTRICT AND GLOBAL GRANTS

| | District Grants | Global Grants |
|-----------------|--|---|
| Funding | District applies for a block grant (up to 50% of DDF) and distributes smaller amounts to clubs for projects. | Clubs and districts apply for a minimum World Fund award of \$15,000 for a total project budget of at least \$30,000. |
| | No World Fund match | World Fund match of 1:1 for DDF and 0.5:1 for cash |
| | Awarded to district by the Foundation. Distributed to clubs by district. | Awarded by the Foundation |
| Partner | No partner required; can be local or international; district must be qualified. | International partner and host partner; both must be qualified. |
| Scope or Vision | Related to the Foundation's mission | Aligned with an area of focus: <ul style="list-style-type: none"> • Peace and conflict prevention/ resolution • Disease prevention and treatment • Water and sanitation • Maternal and child health • Basic education and literacy • Economic and community development |
| | Short-term, one-time, smaller in scope | Long-term, sustainable, measurable |
| Activity Type | Educational, vocational, or humanitarian | Educational, vocational, or humanitarian |
| Planning | Shorter planning process | Longer planning process |
| Involvement | Active Rotarian participation | Active Rotarian participation |

APPENDIX 9

FOUNDATION COMMITTEE RESPONSIBILITIES

Review the responsibilities of each subcommittee and discuss the questions on the following pages as a group.

District Rotary Foundation Committee

| ROLE | RESPONSIBILITIES |
|--------------------------|--|
| Chair | <ul style="list-style-type: none">• Report all Foundation activities to the district governor.• Provide one of two authorizing signatures for use of District Designated Fund.• Confirm that club sponsors of global grant applications are qualified.• Oversee the district's qualification process.• Serve as liaison to RI district committees.• Provide support to club Foundation committees.• Ensure that grant activities are reported at a district meeting to which all club members are invited. |
| PolioPlus subcommittee | <ul style="list-style-type: none">• Encourage donations.• Organize district PolioPlus activities.• Ensure recognition of exemplary polio eradication activities.• Present on PolioPlus.• Coordinate with PolioPlus committees and governmental agencies. |
| Grants subcommittee | <ul style="list-style-type: none">• Serve as a resource on Rotary grants.• Educate clubs on the terms and conditions of grant awards.• Work with the district Rotary Foundation committee chair to disburse grant funds and ensure proper reporting.• Enforce the district's policy for distributing grant funds.• Promote and encourage participation in the Rotary Peace Centers program.• Conduct orientation for Rotary Peace Fellows, scholars, and vocational training teams. |
| Fundraising subcommittee | <ul style="list-style-type: none">• Assist clubs in setting and achieving fundraising goals.• Organize club and district fundraising activities.• Motivate, promote, and advise clubs on Foundation fundraising initiatives.• Coordinate donor appreciation events within the district. |

| ROLE | RESPONSIBILITIES |
|---------------------------------|---|
| Stewardship subcommittee | <ul style="list-style-type: none"> • Oversee the qualification of clubs. • Ensure stewardship practices are implemented as outlined in the district MOU. • Report misuse or irregularities in grant-related activities to The Rotary Foundation and conduct local investigations. • Approve the annual financial assessment and ensure it is distributed to clubs. • Monitor and evaluate the implementation of proper grant management. • Ensure that grants are conducted in a manner that avoids conflicts of interest, and report to the Foundation annually. |
| Optional reported subcommittees | <p>Possible subcommittees include:</p> <ul style="list-style-type: none"> • Annual Fund subcommittee • Endowment/major gifts subcommittee • Rotary Peace Fellowships subcommittee • Scholarships subcommittee • Vocational training team subcommittee |

NOTES

GETS WORKSHEET

DISTRICT QUALIFICATION PROCESS

Review the checklist of items outlined in the memorandum of understanding (MOU). The steps listed below should already be completed. Discuss how well each step went and how you would strengthen the existing district policy.

| MOU Steps | How is the process working? How would you strengthen the district policies? |
|--|---|
| Assign specific roles and responsibilities to district officers | |
| Offer grant management seminars to clubs that wish to qualify | |
| Establish a financial management plan | |
| Plan your annual financial assessment process; include dates and who will conduct it | |
| Open a separate bank account specifically for Foundation grant funds | |
| Plan how you'll report on the use of DDF to clubs | |
| Establish a document retention system | |
| Create a system for receiving, reporting, and investigating misuse of grant funds | |

GETS WORKSHEET

SUPPORTING THE ROTARY FOUNDATION

As governor, you should try to build a culture of giving among Rotarians and non-Rotarians in your district. By contributing to The Rotary Foundation, donors support projects that effect change in the district and around the world. It's important for the governor to know the many ways to contribute, how to help clubs introduce the Foundation to new members, what activities and projects will be effective fundraisers, and how to thank and recognize donors.

Contributions to the Foundation can be directed to the following funds:

- PolioPlus Fund — supporting polio eradication
- Annual Fund — supporting Rotary's work today
- Endowment Fund — supporting Rotary's future

1. Educating new members

Many Rotarians are already participating in The Rotary Foundation. Newer members may not be familiar with the recognition levels or know what their gift to the Foundation can accomplish. How can you work with clubs to educate new members about the Foundation?

2. Events or activities

Have you started thinking about the events you would like to hold this year? How do you plan to raise money and to involve Rotarians and the family of Rotary in these events? List events or activities you plan to hold and describe how you plan to engage the family of Rotary.

| Event or activity | What is the best time for this event or activity and why? | How can you encourage Rotarians and others to participate? |
|-------------------|---|--|
| | | |
| | | |
| | | |
| | | |
| | | |

3. Donor recognition

How might you or others in your district recognize and thank donors? Discuss how you would recognize, thank, and keep track of the following types of donors using the resources available to you in the district and zone.

| Type of donor | Strategies for recognition |
|---|----------------------------|
| Individual Rotarian | |
| Individual nonmembers | |
| Rotary clubs | |
| Businesses | |
| Foundations | |
| Rotary alumni (former Rotaract, RYLA, Youth Exchange, and Interact participants; grant and scholarship recipients; award recipients; vocational training team and Group Study Exchange members; etc.) | |
| Other | |

GETS WORKSHEET

MANAGING YOUR DDF

Review the following scenario and answer the questions below.

Scenario: Your district's Foundation committee has received several requests for district grants. More money has been requested than is available.

1. When and how are clubs in your district notified that DDF is available and they may submit grant proposals to the district?

2. How does your district determine who receives grant funding?

3. How will you handle complaints from clubs that are denied DDF or do not receive enough for their projects?

4. Does your district set a date by which clubs must apply for DDF? Does the deadline help you manage requests? Would you like to make any changes to the deadline?

YOUR SUPPORT FROM ROTARY TO RUN YOUR DISTRICT

District governors have a variety of administrative responsibilities, many of them financial. Your Club and District Support representatives are your main resource for questions related to these responsibilities.

NOTE: Your CDS representative will lead a session called “Your Support From Rotary” about Rotary International resources and your administrative responsibilities. Read the information in this section, which covers additional administrative responsibilities, before you attend GETS.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|--|--|
| Submit the following <ul style="list-style-type: none"> • District committee appointments • Rotary International and Rotary Foundation Expense Statement for International Assembly | Submit the following required forms <ul style="list-style-type: none"> • Governor-nominee Form • District Governor’s Report • District Governor Expense Statement |
| Consider appointing a district secretary | Oversee all district funds |
| In cooperation with the governor, create a district budget to be submitted to clubs at least four weeks before the presidents-elect training seminar or the district training assembly and approved at a meeting of incoming club presidents | Provide an annual statement of all district finances within three months of leaving office |
| | Supervise all district nominations and elections |

RESOURCES

- [Your CDS representative](#)
- [Lead Your District: Committees](#)
- [Manual of Procedure](#)
- [Appendix 11: Rotary’s Online Tools](#)

FINANCIAL MANAGEMENT

As district governor, you have fiscal responsibilities, such as managing the district's finances, monitoring the funds of clubs, practicing good stewardship, and ensuring that the district complies with all applicable local laws, including tax and nonprofit laws. Find more information about district finances in the finance committee section of [Lead Your District: Committees](#). For general information about club and district finances, see the Manual of Procedure.

Districts may establish a fund for financing district-sponsored projects and the administration and development of Rotary in the district. Such a district fund is established by resolution of the district conference. Ensure that:

- Decisions about the fund, including the district levy, are voted on at the district training assembly, presidents-elect training seminar, or district conference
- The fund is not controlled by one person

The district finance committee reviews the necessary costs of district administration. This committee prepares a budget of district expenditures that should be submitted to clubs at least four weeks before the district training assembly and approved at a meeting of the incoming club presidents at the district training assembly.

Select one member of the district finance committee to act as treasurer and keep proper records of income and expenditures for each of your district's funds. You and the treasurer will supervise the funds, which should be held in a bank account in the district's name. For more information on this committee, see appendix 3.

Send your annual report of district finances to each club within three months of leaving office. This annual statement and the report of district finances should also be reviewed by a qualified accountant, and presented, discussed, and formally adopted at the next district event and within the first three months of the year. The district finance report should include:

- Sources of the district's funds (from RI, The Rotary Foundation, district, or clubs)
- Funds received by or on behalf of the district from fundraising activities
- Grants received from The Rotary Foundation or Rotary Foundation funds designated for use by the district
- Financial transactions of district committees
- Financial transactions of the governor on behalf of the district
- Expenditures of district funds
- Funds received by the governor from RI and other sources
- The annual report on district finances that's sent to Rotary by 1 October, which should include proof that the report has been independently reviewed and provided to each club for discussion at a district meeting

If your district raises funds for a specific purpose, such as a multidistrict Rotary Youth Exchange, a budget should be prepared and submitted to the governor and the finance committee for approval. This budget should be included in the statement that the finance committee submits to the district training assembly or conference. It is essential to maintain separate bank accounts for specific funds and to designate the chair of the appropriate committee as one of the signatories.

District budgets should include funds to support the governor and governor-elect (in addition to the governor's allocation) as they prepare for and perform the responsibilities of office. Besides the official Rotary activities within the district, you may need to participate in special club or district events. In accordance with RI policy, the expenses associated with these additional activities should be covered by the club or district. The district fund should also be used to cover the expenses of any visit to your district by the RI director for your zone or any other RI or Rotary Foundation officer invited to your district.

Use Appendix 10: Financial and Risk Management Best Practices Checklist to ensure you're managing district finances appropriately.

TAXES

Check with local and national tax codes to determine which forms the district and its clubs must file, if any. (For example, a district or club that is incorporated may need to file additional tax forms.) Work with the district finance committee and your assistant governors to educate clubs about these requirements. (For example, all clubs in the United States are required by law to submit an informational return to the Internal Revenue Service every year.)

FUNDRAISING

Most Rotary clubs and districts engage in fundraising. Promote these guidelines on your district website:

- Report money earned through fundraising to your local government.
- When promoting fundraising initiatives, be precise about where the funds will go, whether it's to a local club, the district's own foundation, The Rotary Foundation, or some other entity.
- If a fundraiser qualifies as a tax-deductible event, issue receipts to donors as needed.
- Submit all contributions to The Rotary Foundation separately from payments to Rotary International.

Rotary Foundation grants are made possible through voluntary contributions from Rotarians and friends of Rotary. Find more information and tips about fundraising in [The Rotary Foundation Reference Guide](#).

RISK MANAGEMENT

Risk management is the process of planning, organizing, leading, and controlling activities to minimize the adverse effects of accidental losses on the organization. You are in a position to minimize risk and safeguard Rotarians, program participants, and district assets. Limit liability by answering three basic questions when planning activities and events:

- What can go wrong?
- If something goes wrong, how will I or the district respond?
- How will losses be paid for?

If there's a significant possibility that something can go wrong, reduce risk by:

- Not conducting the activity or event
- Modifying the activity or event to lessen the risk
- Preparing a plan to address any potential problems
- Finding another organization that will agree to participate and share the risk

RI strongly recommends using written contracts. A contract should clearly define the roles and responsibilities of each party and can include provisions that limit risk. Before signing any contract, involve local legal counsel and thoroughly read and understand what you are agreeing to. Retain legal documents for several years in case a claim is made.

Districts and clubs are urged to seek professional legal and insurance advice regarding liability protection. They can protect themselves by incorporating themselves or their activities or by purchasing liability insurance.

Use Appendix 10: Financial and Risk Management Best Practices Checklist to ensure that you're managing district risk appropriately.

DISTRICT INCORPORATION

Districts may seek the RI Board's approval to incorporate as long as they have the support of at least two-thirds of their clubs.

If you are considering incorporating your district, contact your CDS representative.

INSURANCE COVERAGE PROVIDED BY ROTARY

During your term as district governor, you will be covered by the RI general liability and directors and officers liability insurance policies, but only while acting within the course and scope of RI.

Because you will not be serving in this role at all times, your district is urged to secure liability insurance. The cost of additional insurance is not reimbursable as part of your district governor's allocation from RI. To obtain insurance, contact a local insurance professional.

If you are aware of an insurance claim or an incident that may give rise to a claim, contact your CDS representative immediately.

COVERAGE FOR U.S. DISTRICTS

Districts in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged for by RI and paid for by all active U.S. clubs through the July invoice.

COVERAGE AT THE INTERNATIONAL ASSEMBLY

You and your spouse/partner will be covered by travel insurance during the International Assembly and while traveling to and from it. Your International Assembly registration packet will include more information about the travel insurance coverage provided by RI.

DISTRICT NOMINATIONS AND ELECTIONS

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. 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. Each district selects its governor-nominee, its Council on Legislation representative, and a member of the committee that nominates the zone's RI director. Refer to the RI Bylaws for details on the selection process for these positions.

GUIDELINES FOR DISTRICT ELECTIONS

Rotarians and election candidates shall:

- Learn and follow the rules for district elections
- Consult with knowledgeable Rotarians if there are any concerns that a current assignment or a new assignment could give the appearance of campaigning
- Not undertake personal initiatives to gain visibility, personal recognition, or favor
- Not respond in kind to another candidate's improper activities
- Not communicate with or visit clubs involved in the election, except to fulfill necessary functions

Governor-nominee

The process for selecting the governor-nominee in your district must be completed between 36 and 24 months before the day this Rotarian will take office as district governor. As governor, you should remind all candidates for governor-nominee that, if selected, they must attend the governors-elect training seminar and the International Assembly; the nomination should not be accepted by anyone who cannot attend these two meetings.

Election timetables recommended by the RI Board for selecting the governor-nominee are provided by your Club and District Support representative.

As governor, you should certify the name of your district's governor-nominee to RI within 10 days of selection. Do so by submitting the Governor-nominee Form to your CDS representative.

Member of the Nominating Committee for RI Director

Every four years, a zone nominates a member of one of its clubs to serve a two-year term on the RI Board of Directors. Any club in the district can nominate one of its own members.

Each zone's nominating committee consists of a past district governor from each district in the zone. Your district should select a nominating committee member at the district conference, choosing from all the nominations submitted by clubs the Rotary year before the nominating committee meets. In certain circumstances, a ballot-by-mail can be conducted to select this Rotarian. Depending on when your zone nominates a director, your district may not need to choose a nominating committee member during your year as governor.

COUNCIL ON LEGISLATION REPRESENTATIVE

Your district should elect a representative and an alternate to the Council on Legislation two years before the Council meets. A district can select its representative through a nominating committee procedure, through an election at the district conference, or through ballot-by-mail. No Rotarian can attend more than three Councils as a voting representative. Contact your CDS representative for approval if you are conducting a ballot-by-mail to choose your Council representative.

Ballot-by-mail

If your district is unable to nominate its governor-nominee through a nominating committee system, your district may choose between voting at the district conference and conducting a ballot-by-mail.

When issuing a ballot-by-mail to nominate a governor, the current governor sends each club one ballot. If your district is authorized to select its Council on Legislation representative or a member of the nominating committee for RI director through a ballot-by-mail process, use this procedure:

1. Follow the instructions on the ballot provided by the RI office serving your district.
2. Mail one ballot to each club in your district with instructions to return it to you by a specified deadline. Any club with a membership of more than 25 is entitled to one more vote for each additional 25 members or major fraction thereof. For example, clubs with 39 members get two votes, as do clubs with 57 members.
3. Appoint a three-member balloting committee to validate and count the ballots at an announced time and date.
4. Each candidate or a representative of each candidate should be present during the opening and counting of the ballots.
5. To ensure that the ballots have been completed properly, the committee should validate the ballots before counting begins.
6. The candidate who receives the highest number of votes is nominated, and the candidate who receives the second-highest number of votes is the alternate, except in the case of governor-nominee.

COUNCIL ON LEGISLATION

The Council on Legislation, Rotary's legislative body, meets every three years and will next meet in 2019. A club or a district conference may propose legislation, but any legislation submitted by a club must be voted on at the district conference or district resolutions meeting and endorsed by the district. If there is not enough time to vote in person on a proposed item of legislation at the district conference, as governor you can obtain the endorsement of the clubs in your district through a ballot-by-mail.

You are encouraged to appoint a committee of Rotarians with past Council experience, including the district representative, to help your district prepare and understand proposed legislation. In the Rotary year before the Council meets, your district should submit its proposed legislation by 31 December. This legislation should be reviewed and discussed at the district conference.

In the Rotary year in which the Council meets, the district governor is provided with copies of all duly proposed legislation. After the Council, all clubs will receive a Report of Action, which lists all enactments and resolutions adopted by the Council. If you are governor during this year, you and your clubs should review the adopted legislation and implement it starting the following Rotary year. Adopted enactments change the Constitution and Bylaws of Rotary International and the Standard Rotary Club Constitution. These enactments become effective on 1 July following the Council. Find more information about the policies and procedures of the Council at My Rotary.

COUNCIL ON LEGISLATION TIMELINE

| | Deadlines | |
|---|---------------------|---------------------|
| | 2019 Council | 2022 Council |
| Representatives and alternates are selected | Rotary year 2016-17 | Rotary year 2019-20 |
| Representatives and alternates are reported to RI | 30 June 2017 | 30 June 2020 |
| Proposed legislation is due to Rotary International | 31 December 2017 | 31 December 2020 |
| Proposed legislation is published | 30 September 2018 | 30 September 2021 |
| Council on Legislation meets | April 2019 | April 2022 |
| Report of Action is distributed | June 2019 | June 2022 |

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What would you like to ask your CDS representative?
- Who will assist you with your administrative responsibilities?
- How can you streamline your administrative responsibilities?
- How will you ensure sound financial management of the district?

APPENDIX 10

FINANCIAL AND RISK MANAGEMENT BEST PRACTICES CHECKLIST

Review the items on this checklist to safeguard transparent and professional financial practices at the club and district levels. Share all pertinent information about local laws and regulations with clubs in the district. Select and involve qualified professionals to implement financial and risk management best practices appropriately.

FINANCIAL MANAGEMENT

- Register the club or district with the government, if required.
- Submit club or district tax documentation annually, if required by the local or national tax code.
- Set up club or district bank accounts appropriately, and assign two signatories to each account.
- Establish procedures for handling club or district funds.
- Develop a budget and follow it.
- Review the per capita levy to ensure that it meets district needs.
- Make sure that the club or district has a procedure for sending contributions to The Rotary Foundation and that each club has a procedure for sending dues to Rotary International in a timely way. You may be asked by RI staff to help with dues collection in your area to keep clubs in good standing.
- Make sure that the club or district has a procedure for naming future officers and that officers' contact information (including email addresses) are registered with Rotary.
- Be aware of local laws regarding donated funds and payment of dues, and make sure those laws are being followed.
- Have the yearly financial report reviewed by a qualified accountant who is not involved with the regular management of club or district funds.
- Ensure that the club or district has an effective way to learn about financial best practices and that these practices are passed on to incoming officers every year.

RISK MANAGEMENT

- Limit liability by anticipating what can go wrong, what the response will be, and how losses will be paid for.
- Use written and signed contracts when appropriate, involve local legal counsel when working with written contracts, and retain documentation appropriately.
- Ensure that clubs and the district have liability insurance for their activities and operations that is adequate for the region; contact a local insurance professional for assistance. (Clubs and districts in the United States and its territories and possessions are provided with general liability and directors and officers/employment practices liability insurance through a program arranged by RI and paid for by U.S. Rotarians.)

APPENDIX 11

ROTARY'S ONLINE TOOLS

| Tool | What is it? | Who adds/updates content? | Who is the information for? | Need help? |
|--------------------------------|--|--|--|--|
| <u>Rotary.org</u> | Rotary.org is the public face of Rotary, designed to inform the general public. | RI staff | General public | website@rotary.org |
| <u>My Rotary</u> | My Rotary (www.rotary.org/myrotary) has more detailed information for Rotarians and the family of Rotary. Users don't need to sign in to access some of the content. But with a My Rotary account, you can view and access information tailored to your Rotary role. | RI staff | Rotary members and family of Rotary | |
| <u>Profile and Connections</u> | Community members can manage and personalize their My Rotary profiles, participate in public or private discussion groups, and connect and message each other directly, without exposing personal email. | Rotarians and Rotaractors | Rotarians and Rotaractors | social@rotary.org |
| <u>Rotary Ideas</u> | Rotary Ideas allows clubs to seek four types of resources for their service projects: partners, volunteers, material contributions, or direct financial contributions through PayPal. Project listings can be posted on club or district websites. | Rotary club leaders and Rotaract club presidents | Rotary clubs seeking projects and general public | social@rotary.org |
| <u>Rotary Showcase</u> | Rotary Showcase allows Rotarians and Rotaractors to share successful project stories, photos, and video; identify partners; and report the project's contribution to Rotary's global impact. Data can be synchronized with Rotary Club Central. | Rotarians and Rotaractors | General public and Rotary members and family of Rotary | social@rotary.org |
| <u>Rotary Club Central</u> | Rotary Club Central allows club leaders to enter and update membership, service, and Foundation giving goals, which district leaders can view and edit. Leaders have access for the years before, during, and after their term. All Rotarians can view their club's goals. Service projects can be imported from grants and Rotary Showcase. | Club and district leaders | All Rotarians | cds@rotary.org |
| <u>Events</u> | Register for the Rotary Convention. | RI staff | Rotarians and Rotaractors | website@rotary.org |

| Tool | What is it? | Who adds/ updates content? | Who is the information for? | Need help? |
|-------------------------------|---|----------------------------------|-------------------------------------|--|
| <u>Brand Center</u> | Customize and download materials that use the new Rotary voice and visual identity guidelines. | RI staff | Rotarians | graphics@rotary.org |
| <u>Grant application tool</u> | The grant application tool is for district qualification and applying for district and global grants. | Rotarians applying for grants | RI staff: regional grants officers | grants@rotary.org |
| <u>Learning Center</u> | The Learning Center provides e-learning materials to help Rotarians learn new skills, prepare for leadership roles, and use Rotary tools to accomplish their goals. | RI staff | Rotary members and family of Rotary | learn@rotary.org |

NOTES

GETS WORKSHEET

FINANCIAL MANAGEMENT

Use the space below to record ideas you would consider implementing in your district.

The role of each member of the finance committee and how they work with the governor

Developing the district budget

Managing multiple funds

Monitoring club funds

Preparing financial reports and distribution

Systems for documenting, maintaining, and submitting district expenses

Tax and filing requirements

District incorporation

Managing money from fundraising activities

Risk management and insurance coverage

EXPLORING ROTARY'S ONLINE TOOLS

MY ROTARY

Description

Rotary.org is designed in large part to inform the public about Rotary. My Rotary, a part of Rotary.org that is accessible only to those who register, offers more detailed information for Rotarians and the family of Rotary. Users can see much of the content without signing in, but those who do sign in will have a more customized experience, including access to resources based on their roles and participation in the online community.

If you haven't already, register for an account to get access to My Rotary, and then sign in. You will be taken directly to your homepage, a personal dashboard with information that's relevant to you, including highlighted stories, your messages, important announcements, your club snapshot, and a link to your discussion groups. From there you can also navigate to your profile to add personal information and a photo.

Need help? Write website@rotary.org.

Location

www.rotary.org/myrotary

Key actions for today's session

- Find a featured link
- Add your personal contact information in My Profile

Explore more

- Add professional details to your profile
- Add skills and interests to your profile
- Set your privacy settings
- Add a profile picture

Notes

BRAND CENTER

Description

Use this page to strengthen Rotary's image by delivering a clear and compelling message that conveys what we do and how people can engage with us. Customize and download materials that reflect Rotary's voice and visual identity guidelines.

Need help with colors and fonts? Write graphics@rotary.org.

Location

My Rotary > Manage > Brand Center

Key actions for today's session

- Download the Ideas Book
- Make a club logo

Explore more

- Download the Voice and Visual Identity Guidelines
- Email the Quick Start for Club Websites to a club president-elect

Notes

BRAND CENTER
PUTS THEM ALL IN ONE PLACE

WWW.ROTARY.ORG/MYROTARY

ROTARY IDEAS

Description

This crowdsourcing tool allows clubs to seek four types of resources for their service projects: partners, volunteers, material contributions, and direct online financial contributions via PayPal. Rotarians are also encouraged to share their Rotary Ideas project listings through social media or newsletters and to post them on club or district websites.

Need help? Write social@rotary.org.

Location

My Rotary > Take Action > Rotary Ideas

Key action for today's session

- Find a featured project and view its profile

Explore more

- Search for projects by keyword “water”
- Use a detailed search to look for projects by category

Notes

IDEAS & SHOWCASE
CAN LIGHT THE WAY

WWW.ROTARY.ORG/MYROTARY

ROTARY SHOWCASE

Description

Rotarians and Rotaractors can post photos and videos of successful projects, identify partners, and report a project's contribution to Rotary's Global Impact, all on Rotary Showcase. It's the easiest way to share your project with both the Rotary world and the public. Showcase data can also be synchronized with Rotary Club Central to update a club's progress toward its service goals.

Need help? Write social@rotary.org.

Location

My Rotary > Take Action > Rotary Showcase

Key actions for today's session

- Search for projects about disease prevention
- Search for projects in your own club or district

Explore more

- Share a project on Facebook
- Post a new project for your club or district

Notes

IDEAS & SHOWCASE
CAN LIGHT THE WAY

WWW.ROTARY.ORG/MYROTARY

LEARNING CENTER

Description

The Learning Center is where you can access training information by role or by topic. Rotarians can easily register for and take courses at their own pace, on topics of their own choosing. Various materials are available for download within each course.

Need help? Write learn@rotary.org.

Location

My Rotary > Learning and Reference > Learning Center

Key actions for today's session

- Search for a course about Rotary Club Central
- Register for a course about social media

Explore more

- Register for a course about membership
- Download course materials from the Rotary Club Central course

Notes

LEARNING CENTER
THE TRAINING YOU WANT
AT YOUR FINGERTIPS

WWW.ROTARY.ORG/MYROTARY

DISCUSSION GROUPS

Description

Connect with other Rotarians, Rotaractors, and alumni by joining an online discussion group or starting a new one. Find others who share your interests and activities, connect with project partners, and tap into the diversity of global perspectives that is Rotary.

Need help? Write social@rotary.org.

Location

My Rotary > Exchange Ideas > Discussion Groups

Key actions for today's session

- Search for groups whose focus is membership
- Join an open discussion group

Explore more

- Join the open discussion group named Membership Best Practices
- Choose **Start a Group** to see what information you'd need to start a group of your own

Notes



TAKE ACTION: www.rotary.org/grants

CHOOSE THE BEST GRANT FOR YOUR PROJECT

DISTRICT GRANT

Help a community
Flexible short-term activities



GLOBAL GRANT

Make a bigger impact
Sustainable long-term projects & scholarships



PREPARING FOR THE INTERNATIONAL ASSEMBLY

The International Assembly is a motivational training meeting where your class will come together to prepare for the coming year. Because every governor-elect will attend, it is an opportunity to exchange ideas and connect with Rotarians from around the world. The connections you make can become partnerships for service projects and cultural exchanges.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|---|----------------------|
| Attend all scheduled sessions at the International Assembly | |

RESOURCES

At the International Assembly, you will receive materials for use during the meeting and your year as governor, including the Governor-elect’s Workbook and International Assembly Participants book.

These resources supplement the materials provided in this manual. You will not need to bring your manual with you to the assembly.

GETTING READY FOR THE ASSEMBLY

The International Assembly is a weeklong meeting held annually in San Diego, California, USA (check the Rotary calendar for dates). Plan to wear professional clothing according to your culture’s custom, and formal wear for some evenings. Spouses of governors-elect are invited to attend but are required to participate in the program.

Simultaneous interpretation of general sessions is provided in eight languages: English, Italian, French, Japanese, Korean, Mandarin, Portuguese, and Spanish.

You will receive a registration email in August or September that will include program highlights, travel information, and logistical details. All travel is arranged through the Rotary International Travel Service (RITS). Please wait to

make travel arrangements until you receive your registration packet. Your travel, hotel, and food expenses are paid by Rotary. To report other appropriate expenses as outlined in the registration packet, download the expense statement (on My Rotary under Manage | Travel & Expenses).

In some years, attendees choose to bring a small gift to distribute to their fellow governors-elect; in others, they are encouraged to offer a donation to The Rotary Foundation in lieu of gifts. You will receive more information specific to your class before the assembly.

THE INTERNATIONAL ASSEMBLY EXPERIENCE

At the International Assembly, you will attend general sessions and small group sessions as well as social events. The general sessions include inspirational speeches by the RI president-elect, The Rotary Foundation trustee chair-elect, and Rotary's general secretary.

The small group sessions provide an opportunity to go over your plans for the upcoming year and discover new ideas and strategies from other participants. Although the International Assembly program varies from year to year, common topics include The Rotary Foundation, public image, membership, and leadership.

You will also meet with your Club and District Support representative, who will be your primary contact during your years as governor-elect and governor. This meeting will include an overview of your Rotary funding and information on Rotary resources.

Besides attending training sessions, you and your spouse will be able to meet with other participants at social events, such as the president-elect's meals, festival night, optional host hospitality events, and banquets. You are also encouraged to visit booths during your free time, where you can talk with Rotary International staff, learn about the upcoming Rotary convention, or buy theme materials and other Rotary items.

SPOUSE PROGRAM

Your spouse is encouraged to attend the International Assembly to prepare for the upcoming year. Spouses attend general sessions and combined small group sessions with the governors-elect. They also have their own program, which may include expert-led presentations, networking activities, or roundtable discussions. Registration information for your spouse will be included in your registration materials. As long as your spouse is a registered participant, Rotary will cover the cost of his or her travel, hotel, and food. Spouse attendance at the assembly is not mandatory; however, if your spouse chooses to attend, full participation in the spouse program is required.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What are your expectations for the International Assembly?
- What is the most important goal you would like to achieve at the International Assembly?

NOTES

YOUR REGIONAL SUPPORT TEAM

Your region has a team of experts to support you during your term as governor. These leaders and their assistants can provide advice and assistance to you when you need them.

RESPONSIBILITIES

| AS DISTRICT GOVERNOR-ELECT | AS DISTRICT GOVERNOR |
|--|--|
| Get to know your regional support team | Work with your RC on ways to boost club membership and keep members engaged |
| | Get ideas from your RRFC about strategies for giving, grants, and participation in The Rotary Foundation |
| | Consult your RPIC to increase public awareness of Rotary in your region |
| | Work with your E/MGA to develop a major gifts strategy and to identify major giving opportunities in your district |

RESOURCES

- [Regional Leader Directory](#)
- [Coordinators & Advisers page on My Rotary](#)

ROTARY COORDINATOR

Your Rotary coordinator offers support and expertise to build strong, dynamic, and effective clubs and districts. RCs can help you:

- Identify regional challenges to developing strong and dynamic districts and clubs
- Develop and implement a strategic plan to address your regional challenges
- Emphasize member engagement by encouraging Rotarians to participate in Rotary International programs and service activities

ROTARY PUBLIC IMAGE COORDINATOR

Your Rotary public image coordinator has expertise in the fields of public relations or media outreach. By combining their business backgrounds with their Rotary experience, RPICs help you:

- Share Rotary's successes with the community and media, local civic and government leaders, nongovernmental organizations, and similar entities
- Encourage stronger club-level public relations efforts
- Promote Rotary's visual identity resources

REGIONAL ROTARY FOUNDATION COORDINATOR

Your regional Rotary Foundation coordinator is a key resource on all Foundation-related topics. RRFs can provide guidance and expertise on grants, grants management, and fundraising and help you:

- Encourage Rotarians in your region to continue supporting PolioPlus
- Establish Rotary Foundation goals

ENDOWMENT/MAJOR GIFTS ADVISER

Your endowment/major gifts adviser can help you and other district leaders educate Rotarians, alumni, and friends of Rotary on opportunities to give major gifts to The Rotary Foundation. Your E/MGA will work with your RRF to:

- Identify, cultivate, and solicit major gifts
- Ensure that donors who make major gifts are appropriately thanked and appreciated
- Train district leaders in major giving and suggest ways districts can establish structures to cultivate local major givers
- Suggest ways to develop cultivation events for existing and prospective Foundation supporters

END POLIO NOW ZONE COORDINATOR

The End Polio Now zone coordinator position has been established to provide leadership and to foster awareness, advocacy, and fundraising support for polio eradication at the district level. These coordinators can help you:

- Promote the End Polio Now: Make History Today Campaign
- Advocate for government support; raise awareness in the community that polio still exists; and continue to fundraise at a high level
- Maintain and provide information, resources, and support on polio eradication to district Rotary Foundation teams

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- Do you know your regional support team members? How can you get to know them?
- How can you work with your regional support team during your year as governor?

APPENDIX 12

PLANNING CALENDAR

Use this calendar to plan your years as district governor-elect and district governor. Deadlines and observances are listed on the left, and reminders are on the right.

ROTARY YEAR 2016-17

| JULY | | |
|--|--------------------------------------|---|
| | | <p>RI sends Rotary training and membership materials</p> <p>The Rotary Foundation (TRF) emails world reporting percentages for grant reporting to districts</p> <p>Have new district officers authorize district qualification for Rotary grants</p> <p>Lead by example and make your personal gift to the Annual Fund</p> <p>Around mid-July, RI emails July club invoices to all officers (email addresses must be current), or mails them to current secretaries</p> |
| AUGUST Membership and New Club Development Month | | |
| | | <p>Prepare to attend your GETS in conjunction with the Rotary institute for your zone</p> <p>TRF notifies districts that District Designated Funds unspent from the previous year are available</p> <p>If clubs haven't received their club invoices, refer them to riclubfinance@rotary.org</p> <p>RI sends 1 July club membership numbers and July month-end totals</p> <p>RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater</p> |
| SEPTEMBER Basic Education and Literacy Month | | |
| 30 | Rotaract club membership rosters due | <p>Review and discuss proposed legislation</p> <p>RI sends 60-day reminder letters to clubs with past dues balances of \$250 or greater</p> |

OCTOBER Economic and Community Development Month

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| 24 | World Polio Day | <p>TRF emails world reporting percentages for grant reporting to districts</p> <p>TRF notifies districts that any spendable earnings available from the Endowment Fund have been added to their DDF balance</p> <p>RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater</p> |
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NOVEMBER Rotary Foundation Month

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| | | <p>RI sends RI Convention District Commitment form</p> <p>TRF notifies districts of the following year's DDF amount and the maximum award available for the district grant</p> <p>RI may terminate clubs that have owed \$250 or more for 120 days or longer</p> |
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DECEMBER Disease Prevention and Treatment Month

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| 13 | Submit RI Convention District Commitment form with district convention attendance goal to impromo@rotary.org | First deadline for RI Convention; register at riconvention.org |
| 31 | Submit your district's committee appointments on My Rotary | Remind clubs to elect presidents-nominee |
| 31 | Last day to make Rotary Foundation contributions that will be credited to 2016 | |

JANUARY Vocational Service Month

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| | | <p>Attend International Assembly (confirm dates on Rotary calendar)</p> <p>TRF emails world reporting percentages for grant reporting to districts</p> <p>Ask clubs to review historical achievements in Rotary Club Central and begin to think of goals for next year</p> <p>Around mid-January, RI emails January club invoices to all officers (email addresses must be current), or mails them to current secretaries</p> |
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FEBRUARY Peace and Conflict Prevention/Resolution Month

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| 1 | Submit date and details of your district conference on My Rotary Last day for clubs to submit their incoming club officer information for inclusion in the Official Directory | Conduct district team training seminar Conduct PETS (February or March) Begin conducting grant management seminars for 2017-18 club leaders |
| 23 | Rotary's anniversary/World Understanding and Peace Day | If clubs don't receive their club invoices, refer them to riclubfinance@rotary.org RI sends first installment of the estimated governor's allocation Submit Statements of Support and Opposition for proposed legislation to Rotary RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater |

MARCH Water and Sanitation Month

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| 31 | Remind Rotaract clubs to report their membership rosters through My Rotary | Conduct district training assembly (March, April, or May) Submit RI and TRF Expense Report from the International Assembly to meetings.finance@rotary.org (download from the District Governor's Exchange) Second registration deadline for RI Convention; after this deadline, admission to preconvention events and luncheons can be purchased only on-site RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater |
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APRIL Maternal and Child Health Month

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| | | Conduct district membership seminar TRF emails world reporting percentages for grant reporting to districts RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater |
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MAY Youth Service Month

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| 15 | Remind club presidents-elect to set their annual goals in Rotary Club Central | TRF notifies districts to check the amount of unused District Designated Funds to date for the year |
| 15 | Last day to complete payment requirements for 2016-17 district grant | Email information about the Interactor elected as your district Interact representative and the Rotaractor elected as your district Rotaract representative to data@rotary.org RI may terminate clubs that have owed \$250 or more for 120 days or longer |

JUNE Rotary Fellowships Month

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| 1 | Remind club presidents-elect to set their annual goals in Rotary Club Central | Attend the RI Convention, 10-14 June in Atlanta; confirm dates at riconvention.org |
| 30 | Submit nominations for the 2017-18 TRF Distinguished Service Award to riawards@rotary.org | Remind Rotaract and Interact clubs, and their sponsor Rotary clubs, to report incoming club presidents and advisers through My Rotary |

ROTARY YEAR 2017-18

JULY

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| 1 | Rotary Peace Fellowship applications due to The Rotary Foundation | <p>Select members of the nominating committee for governor</p> <p>RI emails information about your role in receiving online membership inquiries</p> <p>The Rotary Foundation (TRF) emails world reporting percentages for grant reporting to districts</p> <p>Ensure clubs set annual goals in Rotary Club Central</p> <p>Around mid-July, RI emails July club invoices to all officers (email addresses must be current), or mails them to current secretaries</p> <p>Invoices for clubs with no officers on record will be sent to the governor</p> <p>Lead by example and make your personal gift to the Annual Fund</p> <p>Receive 70 percent of your district governor allocation from Rotary</p> |
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AUGUST Membership and New Club Development Month

TRF notifies districts that District Designated Funds unspent from the previous year are available

If clubs don't receive their club invoices, refer them to riclubfinance@rotary.org

RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater

SEPTEMBER Basic Education and Literacy Month

| | | |
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| 1 | Submit nominations for Service Above Self Award to riawards@rotary.org | RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater |
| 30 | Remind Rotaract clubs to report their membership rosters | |

OCTOBER Economic and Community Development Month

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| 24 | World Polio Day | <p>Continue the process of nominating a governor</p> <p>TRF sends Every Rotarian Every Year, 100% Rotary Foundation Sustaining Member, and Top Three per capita club banners from previous year</p> <p>TRF emails world reporting percentages for grant reporting to districts</p> <p>TRF notifies districts that any spendable earnings available from the Endowment Fund have been added to their DDF balance</p> <p>RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater</p> <p>Clubs terminated in previous May are no longer eligible to be reinstated and must apply for a new charter</p> |
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NOVEMBER Rotary Foundation Month

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| 1 | Submit nominations for the Service Award for a Polio-Free World to polioplus@rotary.org | Observe World Interact Week (30 October-5 November), including Interact anniversary (5 November) |
| 1 | Submit nominations for the RI Vocational Service Leadership Award to riawards@rotary.org | <p>Conduct district Rotary Foundation seminar (may be held earlier)</p> <p>Remind clubs to update membership data on My Rotary (or their member integration vendor)</p> <p>TRF notifies districts of the following year's DDF amount and the maximum award available for the district grant</p> <p>RI may terminate clubs that have owed \$250 or more for 120 days or longer</p> |

DECEMBER Disease Prevention and Treatment Month

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| 1 | Submit the governor-nominee form to your CDS representative | First registration deadline for RI Convention; register at riconvention.org |
| | Note that districts have until 30 June to submit the form | |
| 31 | Deadline for clubs to hold their annual meeting for election of club officers | |
| 31 | Last day to make Rotary Foundation contributions that will be credited to 2017 | |
| 31 | Deadline for submitting legislation for the 2019 Council on Legislation | |

JANUARY Vocational Service Month

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| 31 | U.S. only: Submit interim expense statements with receipts to your CDS representative | <p>Remind clubs to update Official Directory information on My Rotary</p> <p>TRF emails world reporting percentages for grant reporting to districts</p> <p>RI may terminate clubs that have owed \$250 or more for 180 days or longer</p> <p>Around mid-January, RI emails January club invoices to all officers (email addresses must be current), or mails them to current secretaries</p> <p>Invoices for clubs with no officers on record will be sent to the governor</p> |
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FEBRUARY Peace and Conflict Prevention/Resolution Month

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| 23 | Rotary's anniversary/World Understanding and Peace Day | <p>If clubs haven't received their January club invoices, refer them to riclubfinance@rotary.org</p> <p>RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater</p> |
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MARCH Water and Sanitation Month

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| 1 | Submit nominations for the Rotarian Spouse/ Partner Service Award to riawards@rotary.org | Observe World Rotaract Week (12-18 March), including Rotaract anniversary (13 March) |
| 10 | Last day for clubs to submit their incoming club officer information for inclusion in the Official Directory through My Rotary | <p>Clubs receive RI Convention credentials</p> <p>Conduct district training assembly (March, April, or May)</p> |
| 15 | Submit nominations for the Significant Achievement Award to riawards@rotary.org (nominate one Rotary club) | Second registration deadline for RI Convention; after this deadline admission to preconvention events and luncheons can be purchased only onsite |
| 31 | Remind Rotaract clubs to report their membership rosters through My Rotary | RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater |

APRIL Maternal and Child Health Month

CDS representative emails online survey link to the Governor's Report to RI

TRF emails world reporting percentages for grant reporting to districts

RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater

Clubs terminated in previous November are no longer eligible to be reinstated and must apply for a new charter

MAY Youth Service Month

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| 15 | Complete the Governor's Report to RI (see April email for link) | TRF notifies districts to check the amount of unused District Designated Funds to date for the year |
| 15 | Last day to complete payment requirements for 2017-18 district grant | Remind clubs to update membership data on My Rotary (or through member integration vendor) |

JUNE Rotary Fellowships Month

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| 1 | Confirm club ratings and visits in Rotary Club Central | RI may terminate clubs that have owed \$250 or more for 120 days or longer |
| 30 | Submit TRF contributions to be credited to current fiscal year | Attend the RI Convention, tentatively scheduled for 24-27 June in Toronto, Ontario, Canada; confirm dates at riconvention.org |
| 30 | Final district governor expense reports are due to your CDS representative | Remind Rotaract and Interact clubs, and their sponsor Rotary clubs, to report incoming club presidents and advisers through My Rotary |
| 30 | Deadline to submit one nomination for the TRF Citation for Meritorious Service to riawards@rotary.org (may be submitted anytime during 2017-18) | |
| 30 | Submit nominations for the 2018-19 TRF Distinguished Service Award to riawards@rotary.org | |

ROTARY YEAR 2018-19

JULY

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| 31 | Your expense reports are due to Rotary |
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OCTOBER Economic and Community Development Month

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| 1 | Your district's financial statements are due to Rotary, and all clubs should receive the report at the next district meeting |
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