

# Rotary 2021 Lone Star PETS

## Lone Star PETS Assistant Governor Training Agenda

**Facilitators:** DGND Monica Gutierrez D5840, Executive Assistant Governor Kerry Quinn D5840,  
Chief of Staff Assistant Governor Alan Brevard D5890

**Saturday, March 13, 9:45AM to 11:45AM; 1:45PM to 3:00PM**

	Time	Session Topic/Speaker	Resources
1	9:45AM – 9:55AM	Welcome and Opening Remarks	
2	9:55AM – 10:45AM	The Role of the Assistant Governor ♦ Identify Duties and Responsibilities	<a href="#">AG Manual</a>
3	10:45AM – 10:55AM	<b><i>Time For A Break</i></b>	
4	10:55AM – 11:45AM	<p>Working with your District Governor</p> <ul style="list-style-type: none"> <li>♦ Support District Goals</li> <li>♦ Support Training Events</li> <li>♦ Preparing for Club Visits</li> <li>♦ Provide Club Updates</li> <li>♦ Determine Level of Engagement</li> <li>♦ Determine Communication Strategy</li> </ul> <p>Working with your Clubs</p> <ul style="list-style-type: none"> <li>♦ Assist with Rotary Club Central</li> <li>♦ Determine Communication Strategy</li> <li>♦ Encourage Rotary Citation</li> <li>♦ Attend Club Meetings, Service Projects and Events</li> <li>♦ Discuss Theme, Vision Statement, and Action Plans</li> </ul>	<a href="#">Be a Vibrant Club</a>  <a href="#">Impact Begins with You</a>  <a href="#">Rotary Citation Goals</a>
5	11:45AM – 1:00PM	<b><i>Lunch</i></b>	
6	1:00PM – 1:30PM	PRIP Rick King	
7	1:45PM – 2:45PM	Table Talk (Breakout Rooms) ♦ The AG Experience	
8	2:45PM – 3:00PM	Wrap Up ♦ Session Takeaways	



# BE A VIBRANT CLUB

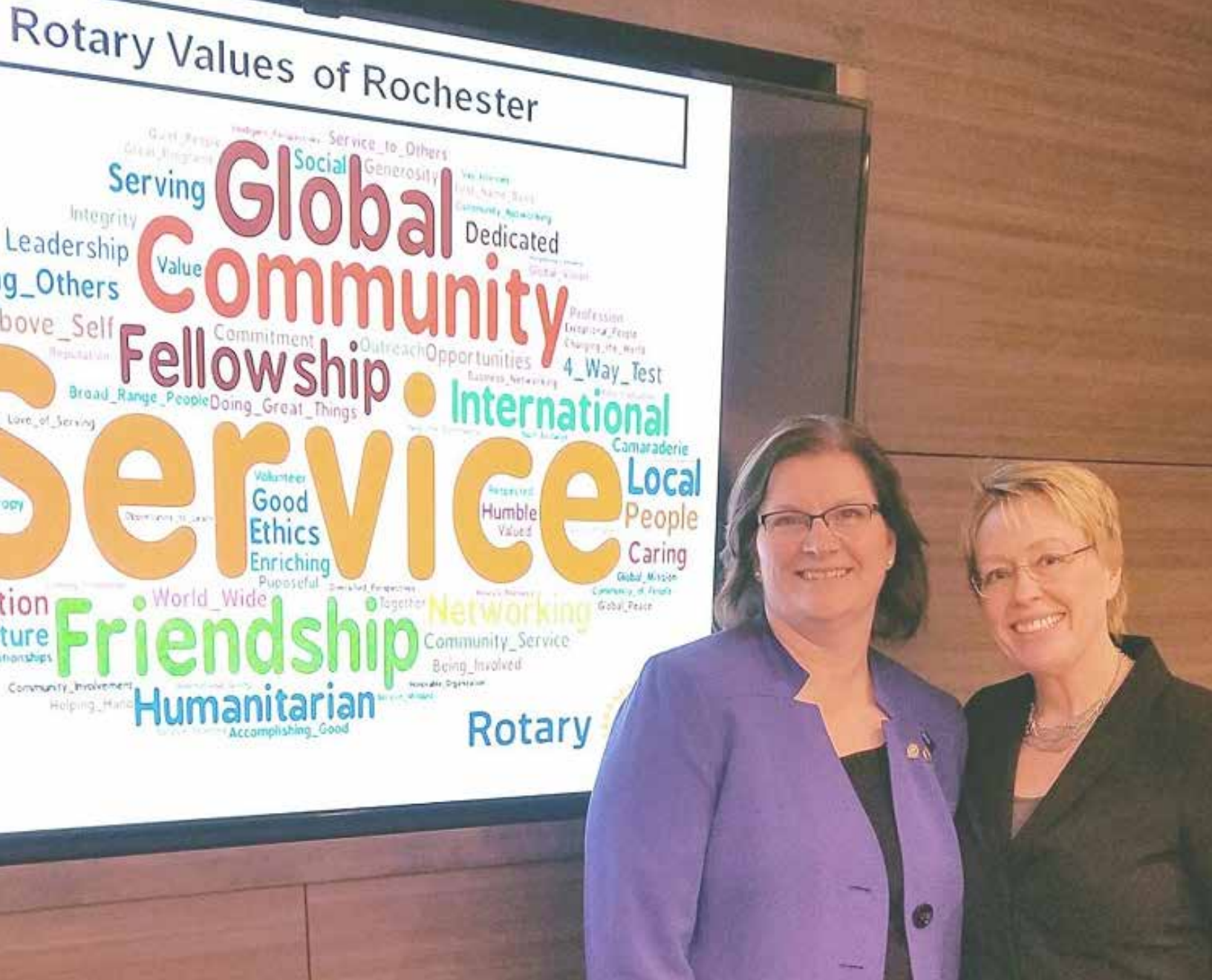
NORTH AMERICA

## YOUR CLUB LEADERSHIP PLAN

Rotary







## MEET OUR VIBRANT CLUB

Like many Rotary clubs in the United States, the Rotary Club of Rochester, Minnesota, struggled with a decline in meeting attendance and member engagement. Many of our younger working members struggled to balance the demands of career and family with a desire to serve. In addition, businesses and corporations are no longer as eager to pay membership costs, so expenses associated with Rotary have become personal expenses.

We started with a strategic planning session to improve our club's public image, increase membership, and boost member participation and attendance. As a result, we made several changes to become more innovative and flexible while maintaining our values of service, global reach, community, fun, and friendship.

# START YOUR CLUB ON A PATH TO VIBRANCY

Vibrant clubs engage their members, conduct meaningful projects, and try new ideas. List the new ideas your club wants to try, and create a plan to increase community interest and attract more members.

As you develop your plan, use these tips and ideas, and let your club evolve.

## Decide what you'd like your club to be like in three to five years.

- Plan an annual visioning session, and use the **Rotary Club Health Check** to identify your club's strengths and areas that need improvement.
- Use the **Strategic Planning Guide** to set long-term goals.

## Decide on your annual goals, and enter them into Rotary Club Central.

- Focus on something your club is good at, and make it something your club is great at.
- Update committees once a month on your goal progress.

## Hold club meetings that keep members engaged and informed.

- Conduct the **Member Satisfaction Survey** to find out what your members like and don't like about your club, and create a plan for implementing changes.
- **Vary your meeting format** to include a mix of traditional and online meetings, service projects, and social gatherings.

## Communicate openly in your club.

- Share information at club meetings, on your club website, and through social media, and check regularly to see how members are feeling.
- Use the templates and resources in the Rotary **Brand Center** to create your club brochures and newsletters.

## Prepare members for future roles to smooth leadership transitions.

- Ensure continuity by making appointments for multiple years, having a current, incoming, and past chair on each committee.
- Conduct on-the-job training for incoming club officers, and have job descriptions for each officer.

## Adapt your club's bylaws to reflect the way the club works.

- Involve your members when you review your club's bylaws every year.
- Edit the **Recommended Rotary Club Bylaws** template to reflect new practices and procedures.

## Develop strong relationships within your club.

- Find suggestions in **Introducing New Members to Rotary**.
- Sit with different people at each meeting.

## Make sure all members are involved in activities that genuinely interest them.

- Conduct a member-interest survey, and use the results to plan projects, activities, and engaging meetings.
- Get new members involved early by learning their interests and giving them a role in the club.

## Coach new and continuing members in leading.

- Appoint a club training committee to oversee training for members.
- Use the **Leadership in Action guide on starting a program** to develop members' leadership skills.

## Create practical committees for your club.

- Small clubs: Consider how you can combine the work of committees.
- Large clubs: Create additional committees to get all members involved.



# HOW WE DID IT

## We rewrote our values statement.

The updated language — which calls us “a service club of inspired individuals whose contributions improve lives in communities locally and worldwide” — unified our members, inspired prospective members, and generated interest in our community work.

## We introduced creative meeting formats.

Our club provides innovative and flexible, cost-free meeting options:

**Speed networking.** This helps our members build relationships and rapport.

**Service first Thursdays.** On the first Thursday of each month, we meet at the public library to clean books and prepare and inventory multimedia materials.

**1905 meetings.** Our 1905 meetings honor the early days of Rotary tradition. Like the first Rotarians, we meet in small groups. Members can participate remotely by meeting at designated locations closer to their workplaces. We use Facebook Live to tune in simultaneously to our club president for the first half of the meeting. For the second half, we break into small groups to discuss a video presentation on the theme of the month.

The varied formats increased member engagement in a way that wasn’t possible with traditional meetings alone. Even former Rotarians started to re-engage. While our weekly attendance may be around 60 members per meeting, our real-time Facebook Live videos that broadcast our 1905 meetings and traditional meetings have generated over a thousand views.

Our experience has taught us that it is possible to make changes in the spirit of innovation and flexibility yet maintain Rotary values. We discovered that there are many fun ways to serve and promote fellowship with Rotarians.

## We relaxed attendance guidelines.

While we are committed to making our meetings more accessible to working members, we also wanted to continue regular meetings, because they foster the fellowship and camaraderie that our members enjoy. We revised guidelines to require only 50 percent attendance at the weekly meetings. Missed meetings can be made up at other Rotary meetings or by participating in a service activity.







IMPACT BEGINS  
**WITH YOU**

## CONNECT WITH A **ROTARY CLUB** TODAY

Rotary members join clubs by invitation. Let us help you connect with a club that may be right for you. With 35,000 clubs around the world, and others that meet online, Rotary makes it easy to get involved and start making a difference today.

Be a part of the Rotary difference. Bring your passion, your perspective, and your purpose to Rotary.

**To connect with a club in your area and learn more, visit us at [www.rotary.org/join](http://www.rotary.org/join).**



One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
[www.rotary.org](http://www.rotary.org)

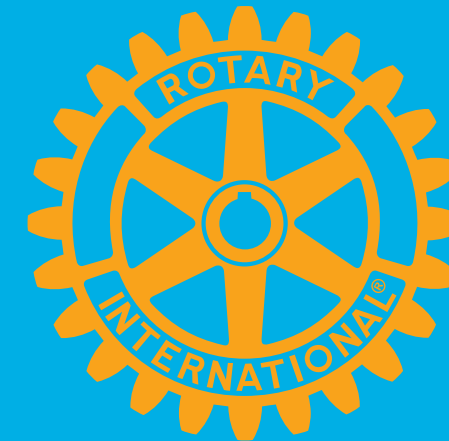
CONNECT WITH US:



001-NA—(316)



Rotary



## THE **ROTARY** DIFFERENCE

Rotary is more than a service organization that's making a difference in your community. We're an international membership organization made up of people who share a passion for and commitment to enhancing communities and improving lives across the world. The difference we make starts with our members.



# IMPACT ACROSS THE WORLD



With more than **1.2 million members** in clubs in almost every country, **we are improving communities around the globe**. As a member of Rotary, you'll have opportunities to change lives locally *and* to connect with other clubs to work on **international projects that address today's most pressing humanitarian challenges**, including fighting disease, providing clean water, supporting education, and promoting peace.

**Our largest and proudest effort to date is our work to eradicate polio.** We initiated the audacious polio eradication campaign in 1979, by vaccinating children in the Philippines. **With the help of our partners, we have since reduced polio cases worldwide by 99.9 percent.**



## WE SEE DIFFERENTLY:

We are problem solvers working together to achieve a better world. Our members are deeply ingrained in the communities in which they live and serve, affording them insight into local challenges and access to the leaders, resources, and networking opportunities needed to strategize and take action to make lasting change.



## WE THINK DIFFERENTLY:

Rotary clubs reflect the diversity of our communities and the breadth of viewpoints that comes from our members' varied professional and personal experiences. For more than 100 years, we have been applying different perspectives to create innovative, sustainable solutions that address the needs and challenges affecting our communities.



## HOW ARE WE DIFFERENT?



## WE LEAD DIFFERENTLY:

As Rotary members we hold ourselves to the highest ethical standards. Community members, community leaders, and other organizations seek us out because they know they can trust us to be effective partners and deliver on our promises.



## OUR ACTIONS MAKE A DIFFERENCE:

Harnessing our unique perspectives and ideas gives us a shared purpose — one that compels us to take action. We roll up our sleeves, leverage our personal relationships with local partners and businesses, and apply our leadership skills as a way to get the job done and bring to life the changes we envision.

## IMPACT BEGINS WITH OUR LOCAL CLUBS

The impact our members make takes shape at Rotary club meetings and activities. These gatherings allow you to join other passionate, visionary women and men regularly to discuss and act upon community needs. Rotary club meetings are also a place to strengthen connections to friends and neighbors and form meaningful relationships that last a lifetime.

And just as Rotary helps you invest in your community, it gives you an opportunity to invest in yourself. Many clubs offer continuous learning opportunities, with a broad range of workshops, conferences, guest speakers, and more — all aimed at helping you grow personally and professionally.





## ROTARY'S VISION STATEMENT

**TOGETHER** WE SEE A WORLD  
**PEOPLE** UNITE AND TAKE ACTION  
**TO CREATE** LASTING  
**CHANGE** ACROSS THE GLOBE  
**IN OUR COMMUNITIES AND IN OURSELVES**

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.

To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the next five years.

## ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

### **INCREASE OUR IMPACT**

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

### **EXPAND OUR REACH**

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

### **ENHANCE PARTICIPANT ENGAGEMENT**

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

### **INCREASE OUR ABILITY TO ADAPT**

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

## ROTARY'S CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:

**FELLOWSHIP**  
**INTEGRITY**  
**DIVERSITY**  
**SERVICE**  
**LEADERSHIP**

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant, but thriving.



[rotary.org/actionplan](https://rotary.org/actionplan)



# ROTARY'S ACTION PLAN

## WHAT CLUBS CAN DO

Rotary's Action Plan builds on our past successes and sets our future direction to ensure that we continue to grow, unite people, and make a lasting impact.

We encourage all members to review the Action Plan, think about your own club and district goals, and find meaningful ways to align those goals with our plan. Have open and ongoing discussions in your club and throughout your district about the new priorities and objectives, then use those talks to shape your own strategies.

For each of the four priorities that will direct our work, we've listed ways you can put that goal into practice. Think about how *you* can bring Rotary's Action Plan to life.



# ROTARY'S ACTION PLAN

## INCREASE OUR IMPACT



**DEVELOP A STRATEGY** for educating members about the importance of impactful service projects. Research shows that measurable, data-driven results offer proof of the impactful service that is attractive to the next generation of leaders.

**CONDUCT A COMMUNITY ASSESSMENT** to determine which issues are top concerns in the area. Learn about needs and strengths and identify the key decision-makers. Try conducting evaluations both before and after you implement projects to get a better sense of where and how you can create measurable, lasting change that truly helps the communities you serve.

**FOCUS YOUR EFFORTS.** Review your club's activities and determine which ones can be streamlined or eliminated so your club can spend more time on activities that make a real impact.

**ENCOURAGE YOUR CLUB OR DISTRICT TO CELEBRATE THE LONG-TERM SUCCESSES** of service and program offerings, but to be open to new projects or opportunities to prove that your club or district's impact has only begun. Apply for a global or district grant to fund a project that will have sustainable, measurable outcomes.

## EXPAND OUR REACH



**SET A GOAL** to collaborate with new groups in your community, either through service projects or social events, to introduce more people to Rotary. As our vision statement says, we want to unite people — not just Rotarians — to create lasting change.

**USE ROTARY'S MEMBERSHIP TOOLS** and resources to assess your club and learn how to make it more diverse, open, and attractive to everyone in your community.

Districts should **CONSIDER FORMING NEW CLUBS.** Take advantage of our flexible club models to create clubs that are welcoming to people with diverse interests, backgrounds, and needs. As always, these new clubs should embrace our core values and deliver value to members.

**BE SURE TO TELL COMPELLING STORIES** about how your club or district is making a difference. Use the People of Action materials and other resources in the Brand Center to learn how to show your club or district's impact through the media, on social media, and in the community. Strengthening your public image can help you attract like-minded people to your club, form new partnerships for service, and build a stronger and more diverse network of collaborators.

## ENHANCE PARTICIPANT ENGAGEMENT



**FOCUS NOT ONLY ON GAINING NEW MEMBERS BUT ALSO ON DELIVERING VALUE** — both personal and professional — to current members. Hold a brainstorming session or use a survey to ask members what's important to them in their club experience and how they want to grow and develop through Rotary.

Consider everyone who encounters Rotary a participant. Invite them to **OFFER NEW IDEAS AND SHARE THEIR THOUGHTS**. Encourage them to stay involved (whether or not they join the club) so they feel valued and are inspired to support Rotary activities.

**USE OUR CURRICULUM** in the Learning Center, to develop leadership and other skills in members and participants.

## INCREASE OUR ABILITY TO ADAPT



**HOLD INNOVATION FORUMS AND BRAINSTORMING SESSIONS** with club members and other participants to gather ideas for activities and service projects in the community. Contact other organizations or clubs that have a strong record of innovation or reinvention and look for ways to apply what they did to your own club.

**SET ASIDE A SMALL FUND** to try new ideas. Expand initiatives that succeed and document what you learn from those that don't.

**REVIEW YOUR CLUB ROLES, PROCESSES, AND TASKS** and look for ways to be more efficient — whether it's by reducing, combining, or eliminating responsibilities or using different technology.

**ESTABLISH A CONTINUITY PLAN**. Encourage club presidents, district governors, and other officers to work with the incoming leaders chosen for the next few years so that their efforts will be cohesive and all will be invested in a joint success.

**EXPLORE ROTARY'S ACTION PLAN:**  
[rotary.org/actionplan](https://rotary.org/actionplan)





# CITATION GOALS AND INSTRUCTIONS



To be eligible for the Rotary Citation, clubs need to begin the year as active clubs in good standing – or having paid each invoice balance in full upon receipt. To verify that your club is in good standing, check your daily club balance report under Club Administration > Club Finances. You should have an outstanding balance of \$0.00. Invoices are due when they are posted, in mid-January and mid-July.

Rotary club leaders can go into Rotary Club Central and select at least 13 out of 25 goals they wish to apply toward citation achievement. This flexibility allows clubs to choose the goals that are most relevant and achievable. In addition, many goals will be self-reported by marking “achieved” in Rotary Club Central.

To achieve the citation:

- Go to Rotary Club Central
- Review the 25 available goals
- Select at least 13 goals (or more than 50% of the available goals)
- Achieve those goals
- Report achievement in Rotary Club Central

Once you are in Rotary Club Central, navigate to the **Goal Center**, select the **year**, and click on the **All tab** to see the goals.

Goal	Goal Detail
Club membership	How many total members does your club want by the end of the Rotary year?
Service participation	How many members will participate in club service activities during the Rotary year?
New member sponsorship	How many members will sponsor a new club member during the Rotary year?
Rotary Action Group participation	How many club members will be members of at least one Rotarian Action Group (RAG) during the Rotary year?
Leadership development participation	How many members will participate in leadership development programs or activities during the Rotary year?
District conference attendance	How many members will attend your district conference?
Rotary Fellowship participation	How many club members will be members of a Rotary Fellowship during the Rotary year?
District training participation	How many of your club's committee chairs will attend the district training assembly?
Annual Fund contributions	How much money will be contributed to The Rotary Foundation Annual Fund by your club and its members during the Rotary year?

# CITATION GOALS AND INSTRUCTIONS



Goal	Goal Detail
PolioPlus Fund contributions	How much money will be contributed to The Rotary Foundation PolioPlus Fund by your club and its members during the Rotary year?
Major gifts	How many single outright donations of US\$10,000 or more will be made by individuals associated with your club during the Rotary year?
Bequest Society members	How many individuals or couples will inform The Rotary Foundation of their plans to leave US\$10,000 or more to The Rotary Foundation through their estate?
Benefactors	How many individuals or couples will inform The Rotary Foundation of their estate plans to include the Endowment Fund as a beneficiary or will make an outright gift of US\$1,000 or more to the Endowment Fund?
Service projects	How many service projects will your club complete during the Rotary year?
Rotaract clubs	How many new and existing Rotaract clubs will your club sponsor during the Rotary year?
Interact clubs	How many new and existing Interact clubs will your club sponsor during the Rotary year?
Inbound Youth Exchange students	How many Rotary Youth Exchange students will your club host during the Rotary year?
Outbound Youth Exchange students	How many Rotary Youth Exchange students will your club sponsor during the Rotary year?
RYLA participation	How many individuals will your club sponsor to participate in Rotary Youth Leadership Awards (RYLA) events during the Rotary year?
Strategic plan	Does your club have an up-to-date strategic plan?
Online presence	Does your club's online presence accurately reflect its current activities?
Social activities	How many social activities will your club hold outside of regular meetings during the Rotary year?
Update website and social media	During the Rotary year, how many times per month will your club's website or social media accounts be updated?
Media stories about club projects	How many media stories will cover your club's projects during the Rotary year?
Use of official Rotary promotional materials	Did your club use Rotary International's advertising and public service materials, such as broadcast videos, print ads, and other official materials available in the Brand Center, to promote Rotary in your community during the Rotary year?