

ASSISTANT GOVERNOR WORKBOOK

Goal: Prepare incoming club Presidents to become leaders of vibrant Rotary clubs.

February 29 – March 3, 2024

Dear District Assistant Governors,

Thank you for the important service you provide to your district governor and to the clubs that you have been assigned to assist. The connections and support you provide to Presidents-Elect and Presidents-Nominee as they prepare for their future leadership roles is invaluable.

Our goal at Lone Star P.E.T.S. is to provide you with a forum to meet and collaborate with presidents-elect and presidents-nominee. We encourage you to incorporate the following learning opportunities in your preparation:

1. Reach out to the Club Leadership Teams you have been asked to assist.
2. Develop a good relationship with these Club Leadership Teams. Working together you can help develop a continuity of club programs and goals.
3. Participate in each of your district's various training sessions and events. You will develop a broad knowledge of the many Rotary programs in which club members may wish to participate.
4. Encourage collaboration among clubs to promote best practices relating to Rotary programs.
5. Complete the Assistant Governor Basics Learning Center courses on the Rotary International website. learn.rotary.org/members/learn/lp/121/assistant-governor-basics
6. Very importantly, take every opportunity to communicate with your District Governor-Elect and attend all training and information sessions provided by your District Governor-Elect.

This workbook is the product of many volunteer hours. The Curriculum/Facilitators Subcommittee has put together an outstanding program which will provide you with tools and resources to serve and support Rotary clubs.

I encourage you to take full advantage of this learning experience. Develop relationships with your fellow Rotary leaders. Ask questions of your facilitators. Visit the vendors and exhibitors in the House of Friendship. Be inspired by our speakers. Complete the evaluations.

May the next year be your best year in Rotary yet. And, most importantly, HAVE FUN!!!!

Yours in Rotary,
PDG Art Zeitler
2024 Operating Chair
Lone Star P.E.T.S., Inc

Table of Contents

MODULES A-1, A-2, A-3, and A-4 (designed for PEs and PNs)

The assistant governor will gain insights into leadership development, relationship-building techniques, and engagement practices by observing and participating in the club presidents-elect and presidents-nominee training of these modules, enabling them to support and guide vibrant Rotary Clubs effectively.

MODULE A-1 BECOMING A VIBRANT CLUB LEADER page 5

Club leaders will enhance their skills using targeted resources and tools, empowering them to emerge as vibrant and effective leaders.

Assistant Governors:

By observing and participating in this module, the assistant governor will understand how club leaders utilize targeted resources and tools to refine their skills.

MODULE A-2 DEVELOPING A VIBRANT ROTARY CLUB page 8

Club leaders will master the resources and tools necessary to establish comprehensive multi-year goals and strategies, ensuring a thriving vibrant Rotary Club.

Assistant Governors:

Through active engagement in this module, the assistant governor will gain a deeper understanding of how club leaders effectively harness resources and tools to formulate comprehensive multi-year goals and strategies, equipping them with the insights to foster and sustain vibrant Rotary Club.

MODULE A-3 GROWING AND ENGAGING CLUB MEMBERSHIP page 11

Club leader will acquire tool to craft robust membership strategies for the club's growth and vitality.

Assistant Governors:

By observing and participating in this module, the assistant governor will gain insights into the tools and methodologies used by club leaders to design powerful membership strategies, thereby enhancing their capacity to support clubs in achieving growth and vitality.

MODULE A-4 UNDERSTANDING AND SUPPORTING OUR ROTARY FOUNDATION page 14

Club leaders will gain skills to cultivate member support and foster a deep understanding of The Rotary Foundation among their club members.

Assistant Governors:

By observing and participating in this module, the assistant governor will grasp the techniques and strategies employed by club leaders to nurture member support and deepen understanding of The Rotary Foundation, enabling them to guide and mentor clubs more effectively in this area.

Table of Contents

MODULES B-5 through C-10 are designed for Assistant Governor Sessions only.

MODULE B-5 EMBRACING LEADERSHIP: THE ASSISTANT GOVERNOR'S ROLE page 18

Assistant Governors will gain insight into the roles and responsibilities of an Assistant Governor, emphasizing their commitment to both the clubs they guide and their relationship with the district governor.

MODULE B-6 SUPPORTING VIBRANT ROTARY CLUBS page 20

Assistant Governors will be equipped with the knowledge and insights necessary to guide their assigned clubs in crafting effective action plans to enhance their vibrancy.

MODULE B-7 EXPLORING RESOURCES: UNCOVERING OPPORTUNITIES page 22

Assistant Governors will identify and utilize available resources to address questions or emerging needs.

MODULE C-8 EMPOWERING CLUB LEADERS page 24

Assistant Governors will have the skills and knowledge necessary to effectively facilitate and support Rotary Club leaders in their adoption and utilization of online tools, ensuring enhanced communication, efficient club management, and improved member engagement within their respective clubs.

MODULE C-9 DATA-DRIVEN LEADERSHIP: UTILIZING CLUB REPORTS page 26

Assistant Governors will identify, assess, and effectively utilize available reports to gain data-driven insights to support and enhance club leadership decision-making and strategic planning.

MODULE C-10 LEADERSHIP:EMPOWERING EXCELLENCE page 28

Assistant Governors will hone their leadership skills to maximize their impact in each club, driving and inspiring efforts towards establishing and sustaining vibrant clubs.

FRIDAY, MARCH 1, 2024

MODULE A-1 BECOMING A VIBRANT CLUB LEADER

GOAL: Club leaders will enhance their skills using targeted resources and tools, empowering them to emerge as vibrant and effective leaders.

RELEVANCE: Club presidents motivate members to reach goals, recognize club members with awards, communicate with club and district leaders, and listen to all members to ensure that their needs are met.

OBJECTIVES

At the end of the session, club leaders will have learned and be able to:

1. List characteristics of and resources available for developing a vibrant leader.
2. List specific responsibilities of the Club President and Club President-Elect.
3. Explain how the club President and President-Elect work collaboratively with club leaders to support the structure of a vibrant Rotary Club.
4. Discuss the importance of a strong leadership team and committee structure in building a vibrant and impactful Rotary Club.

REFERENCE MATERIALS

- [Be a Vibrant Club](#)
- [Rotary Citation page on My Rotary](#)
- [Creating Your Club Leadership Plan](#)
- [Preparing to Be a Club President](#)

Module A-1: Becoming A Vibrant Club Leader

Breakout Discussion Questions:

1. List characteristics of a vibrant leader.
2. What resources are available to assist you in becoming a vibrant leader?
3. What most excites you about being your club's President?
4. List specific responsibilities of the club President and President-Elect.
5. What most concerns you for next year?
6. Refer to Be a Vibrant Club. How do collaborative efforts between President and President-Elect strengthen a club?
7. See Creating Your Club Leadership Plan in **Reference Materials**. Discuss the importance of a strong leadership team and committee structure for a vibrant, impactful club.
8. Take a few minutes to write action ideas on the Notes page at the end of this module.
9. What is your primary takeaway from the Vibrant Club Leader session?
10. Any other question(s)?

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

FRIDAY, MARCH 1, 2024

MODULE A-2 DEVELOPING A VIBRANT ROTARY CLUB

GOAL: Club leaders will master the resources and tools necessary to establish comprehensive multi-goals and strategies, ensuring a thriving vibrant Rotary Club.

RELEVANCE: By understanding trends, strengths, and opportunities, presidents can help clubs set short-term goals that align with Rotary's Action Plan.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Explain the benefits of strategic planning to maintain a vibrant club.
2. Outline the planning process to set multi-year goals and develop an action plan for the club.
3. Describe how to use the Rotary citation to list your goals in Rotary Club Central.

REFERENCE MATERIALS

- [Action Plan | My Rotary](#)
- [Rotary Citation](#)
- [Club Health Check](#)
- [Strategic Planning Guide](#)

Module A-2: Developing a Vibrant Rotary Club

Breakout Discussion Questions:

1. Refer to the Strategic Planning Guide in **Reference Materials**. What are the benefits of a three-year strategic plan to maintain a vibrant club?
2. What are the benefits of good financial management? What ways ensure good stewardship of club funds?
3. How does your club reflect Rotary's vision statement?
4. What steps help create meaningful goals and effective action plans for your Rotary Club?
5. How far have you progressed in setting club goals for the coming year?
6. See Rotary Citation Goals and Instructions in **Reference Materials**. Describe how to use the Rotary Citation to plan and list goals in Rotary Club Central.
7. Take a few minutes to write action ideas on the Notes page at the end of this module.
8. What is your primary takeaway from the vibrant Rotary Club session?
9. Any other question(s)?

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

FRIDAY, MARCH 1, 2024

MODULE A-3 GROWING AND ENGAGING CLUB MEMBERSHIP

GOAL: Club Leaders will acquire tools to craft robust membership strategies for the club's growth and vitality.

RELEVANCE: By getting to know members well, club presidents can engage them in ways that tap into their unique skills and interests, creating a more meaningful membership experience. When club presidents create an inclusive club culture, then develop and implement innovative strategies to attract diverse participations, they strengthen their own clubs and Rotary.

OBJECTIVES

At the end of the session, club leaders will have learned and be able to:

1. Describe how a Club President can create a club atmosphere welcoming to all.
2. Share strategies and best/worst practices to attract, engage, and retain members.
3. List key elements of club membership health.

REFERENCE MATERIALS

- [Membership | My Rotary](#)
- [Membership Assessment Tools](#)
- [Strengthening Your Membership: Creating Your Membership Plan](#)
- [Connect for Good](#)
- [Improving Your Member Retention](#)
- [Creating a Positive Experience for Prospective Members](#)
- [Impact Begins With You](#)
- [RI Code Of Conduct, Harassment Policy](#)

Module A-3: Growing and Engaging Club Membership

Breakout Discussion Questions:

1. What helped you get engaged in your club?
2. Refer to Rotary International Code of Conduct Harassment Policy in the **Reference Materials**. How can you as President create a club atmosphere welcoming to all?
3. Refer to Impact Begins with You in the **Reference Materials**. What can your club do differently to attract/ retain Rotary members who can make an impact?
4. What strategies have you used to attract new members?
5. What are keys to member engagement from your perspective?
6. Refer to Club Health Check, Creating Your Membership Plan, and other membership assessment tools in your **Reference Materials**.
7. Take a few minutes to write action ideas on the Notes page at the end of this module.
8. What is your primary takeaway from Membership session?
9. Any other question(s)?

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

FRIDAY, MARCH 1, 2024

MODULE A-4 UNDERSTANDING AND SUPPORTING OUR ROTARY FOUNDATION

GOAL: Club leaders will gain skills to cultivate member support and foster a deep understanding of The Rotary Foundation among their club members.

RELEVANCE: The Rotary Foundation helps advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty throughout the world.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Explain how participation in programs of The Rotary Foundation attract, engage, and retain members.
2. Explain how your club goals and support for The Rotary Foundation fund local and international projects.
3. Discuss the importance of a trained Foundation Chair and Committee to the club's impact in communities.
4. Identify types of individual and club recognitions for giving to our Foundation.

REFERENCE MATERIALS:

- Rotary's Areas of Focus
- Rotary Foundation Reference Guide

Module A-4: Understanding and Supporting Our Rotary Foundation

Breakout Discussion Questions:

1. How does participation in Rotary Foundation programs attract, engage, and retain members?
2. Explain how your club goals and support for The Rotary Foundation fund local and international projects.
3. What is some work accomplished through our Foundation? Refer to Rotary's Areas of Focus in the **Reference Materials**.
4. Discuss the importance of a trained Foundation Chair and Committee to the club's impact in communities.
5. What are some individual and club recognitions for giving to our Foundation (Sustaining Member, Paul Harris Fellow, Paul Harris Society, etc.)? Refer to Individual and Club Recognitions in the **Reference Materials**.
6. Take a few minutes to write ideas on the Notes page at the end of this module.
7. What is your primary takeaway from The Foundation session?
8. Any other questions?

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

Icebreaker and Midway Review Questions:

Icebreaker

Implement an Icebreaker, with each participant sharing the following points:

- a. Name
- b. Role at PETS
- c. Club
- d. City
- e. Most important characteristic for a Rotary leader
- f. Desired individual takeaway from PETS

Midway Review

What is your *primary takeaway* from PETS thus far?

1. Take a couple of minutes to jot down action ideas on the notes page at the end of this module.
2. Any other question(s) or comments?

SATURDAY, MARCH 2, 2024

MODULE B-5 EMBRACING LEADERSHIP:THE ASSISTANT GOVERNOR'S ROLE

GOAL: Assistant Governors will gain insight into the roles and responsibilities of an Assistant Governor, emphasizing their commitment to both the clubs they guide and their relationship with the district governor.

RELEVANCE:Understanding the specific role and responsibilities of an assistant governor is crucial. This clarity ensures that clubs under their guidance are effectively supported and that the district governor's objectives are consistently met, fostering harmony and efficiency within the Rotary district's leadership structure.

OBJECTIVES

At the end of the session, club leaders will have learned and be able to:

1. State the responsibilities that an Assistant Governor has to the club and to the district.
2. Build on knowledge of Rotary Club Central and how its use helps an Assistant Governor track club progress and build continuity.
3. Articulate key relationships and key components of an Assistant Governor's communication plan.

ACTIVITIES

- An interactive panel of Assistant Governors discuss real-life experiences and challenges in fulfilling the role as well as discuss best practices and lessons learned.
- Small groups discuss, create and present sample communication plans.

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

MODULE B-6 SUPPORTING VIBRANT ROTARY CLUBS

GOAL: Assistant Governors will be equipped with the knowledge and insights necessary to guide their assigned clubs in crafting effective action plans to enhance their vibrancy.

RELEVANCE: Vibrant clubs are essential for community impact and district objectives. This session equips Assistant Governors to guide clubs in crafting effective action plans, fostering adaptive leadership and strategic planning.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Demonstrate a clear understanding of what constitutes a vibrant Rotary club, considering various aspects such as membership engagement, service projects, and community impact.
2. Assess strengths and weaknesses of their assigned clubs and identify areas for improvement in club dynamics, activities, and member involvement.
3. Identify strategies for fostering a culture of innovation within their assigned clubs.

ACTIVITIES:

- Brainstorm the meaning of innovation in the context of Rotary clubs and how innovation can enhance different aspects of club activities, projects, and engagement.
- Explore and share ways Assistant Governors and club members can collaboratively work on solving a specific challenge or improving an existing project using innovative approaches.

Notes

This image shows a single page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, leaving small margins at the top and bottom. There is no handwriting or other markings on the paper.

SATURDAY, MARCH 2, 2024

MODULE B-7 EXPLORING RESOURCES: UNCOVERING OPPORTUNITIES

GOAL: Club leaders will acquire strategies to enhance the public image of Rotary within their community. Assistant Governors will identify and utilize available resources to address questions or emerging needs.

RELEVANCE: This session ensures that Assistant Governors are adept at navigating the wealth of resources at their disposal. By actively seeking and leveraging these resources, Assistant Governors can efficiently respond to inquiries, tackle emerging challenges, and foster a culture of continuous improvement within Rotary clubs.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Identify and evaluate available resources.
2. Develop a resource mapping framework.
3. Generate innovative opportunities through resource integration.

ACTIVITIES:

- Meet with RI Club & District Support staff member, Michael De Grandis, to learn more about support RI offers AGs in their role as well as to discuss and develop the Assistant Governor's personal resource framework.

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

SATURDAY, MARCH 2, 2024

MODULE C-8 EMPOWERING CLUB LEADERS

GOAL: Assistant Governors will have the skills and knowledge necessary to effectively facilitate and support Rotary Club leaders in their adoption and utilization of online tools, ensuring enhanced communication, efficient club management, and improved member engagement within their respective clubs.

RELEVANCE: Equipping Assistant Governors with the expertise to guide and empower club leaders through the integration of online tools ensures not only the seamless implementation of technology but also fosters a culture of innovation within each club. This goal is not just about keeping pace with the times; it is about creating vibrant and responsive Rotary clubs that thrive in the digital landscape.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Effectively communicate the benefits and functionalities of key online tools relevant to Rotary club operations (such as Rotary Club Central and Rotary Showcase) to club leaders.
2. Identify key performance indicators to measure the success of online tool adoption.
3. Strategically plan for the phased implementation of online tools in the club setting.

ACTIVITIES:

- Group discussions on milestones, challenges, and effective communication with club leaders along with phased implementation strategies.

Notes

[illegible]

Module C-9: DATA DRIVEN LEADERSHIP: UTILIZING CLUB REPORTS

Goal: Assistant Governors will identify, assess, and effectively utilize available reports to gain data-driven insights to support and enhance club leadership decision-making and strategic planning.

RELEVANCE: By leveraging data-driven insights, Assistant Governors empower themselves to support and enhance club leadership decision-making and strategic planning. In doing so, they not only contribute to the efficiency of day-to-day operations but also enable Rotary clubs to make informed, forward-thinking decisions. This goal underscores the importance of harnessing the power of data as a tool for continuous improvement.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Demonstrate proficiency in identifying key reports relevant to club operations.
2. Evaluate the reliability and relevance of each report for decision-making and strategic planning.
3. Demonstrate the ability to interpret data in the context of club dynamics, membership engagement, and service projects.

ACTIVITIES:

- Roundtable discussions on specific strategic topics using insights from available reports to discuss and formulate strategic plans.

Notes

[illegible]

Module C-10: LEADERSHIP: EMPOWERING INTELLIGENCE

Goal: Assistant Governors will hone their leadership skills to maximize their impact in each club, driving and inspiring efforts toward establishing and sustaining vibrant clubs.

RELEVANCE: Assistant Governors serve as catalysts for positive change. By maximizing their leadership skills, they become instrumental in driving and inspiring efforts within each club. This goal is deeply relevant as it recognizes that vibrant clubs are not just the result of individual initiatives but of cohesive, inspired leadership.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Show an increased ability to motivate and influence club leaders toward shared goals.
2. Develop proficiency in conducting comprehensive assessments of club dynamics, member engagement, and service projects.
3. Facilitate collaborative initiatives and partnerships among clubs to maximize collective impact.
4. Foster a culture of transparency, inclusivity, and shared responsibility within the district's leadership structure.

ACTIVITIES:

- Open discussions on leadership experiences, challenges, and best practices for creating an inclusive culture, including how "Empowering Excellence" aligns with vibrant club leadership.

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.