

2026 LONE STAR P.E.T.S.



Assistant Governor
Learning Guide

Modules B-5, B-6, B-7

Lone Star P.E.T.S. 2026

ASSISTANT GOVERNOR LEARNING GUIDE

SATURDAY

MODULE B-5 WORKING WITH YOUR CLUBS: GOAL SETTING AND SERVING AS A DISTRICT RESOURCE

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.

OBJECTIVES

At the end of the session, Assistant Governor will have learned and be able to:

1. Support clubs in setting SMART, realistic, and aligned goals.
2. Use Rotary's planning tools to guide productive goal-setting conversations.
3. Identify and connect clubs with district and Rotary International resources.
4. Serve as a trusted advisor and problem-solver for club leaders.

ACTIVITIES

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

Module B-5: Working With Your Clubs: Goal Setting And Serving As A District Resource

Breakout Discussion Questions

Opening Statement:

“Assistant Governors serve as the vital link between clubs and the District Governor. This session is about clarifying expectations, strengthening that connection, and equipping you to confidently support the clubs you serve.”

Purpose: Understanding the role of an Assistant Governor

Time: 5–10 minutes

Objective: Assistant Governors are *essential to club success and district strength*.

1. Understanding the Assistant Governor Role

Time: 15 minutes – Whole Group

Objective: Clarify expectations and responsibilities.

Discussion Questions: What do you see as the primary purpose of the Assistant Governor role?

- How does this role differ from being a club president or board member?
- Which responsibilities feel clear—and which need clarification?

Your role as Assistant Governor is to help clubs succeed and support the Governor. These are your official responsibilities:

1. Visit each club regularly, in person or virtually, to discuss club activities, resources, and opportunities.
2. Support clubs in setting and achieving goals, finding solutions to challenges, resolving conflicts, and meeting membership and financial requirements.
3. Serve as a liaison between clubs and district committees.

4. Assess each club's ability to thrive, and mentor club leaders on strategies to help their clubs succeed.
5. Encourage clubs to get involved in district activities and committees.
6. Help to organize, start, promote, and support new clubs, and especially encourage the use of innovative club types.
7. Keep the governor informed about the progress your clubs make toward their goals.
8. Stay up to date on Rotary initiatives.
9. Share the status of clubs with your successor.

2. Commitment to the Clubs

Time: 20 minutes

Objective: Explore how Assistant Governors effectively support and strengthen clubs.

Small Group Activity (3–4 per group): **Ask groups to discuss and report out.**

Discussion Questions:

- How can Assistant Governors build trust and strong relationships with club leaders?
- What does coaching (rather than directing) look like in practice?
- How do you support clubs that are struggling without discouraging them?
- What early signs indicate a club may need additional help?

3. Relationship with the District Governor

Time: 15–20 minutes

Objective: Strengthen understanding of the partnership with the District Governor.

Whole Group Discussion:

- What does an effective Assistant Governor – District Governor relationship look like?
- What information should flow *from clubs to the District Governor* through the Assistant Governor?
- When should an issue be handled by the Assistant Governor, and when should it be elevated?

4. Leadership, Accountability, and Commitment

Time: 10–15 minutes

Objective: Encourage personal ownership of the role.

Reflection Questions (individual or paired):

- What does success look like for you at the end of your term as an Assistant Governor?
- How will you model Rotary values and leadership by example?
- What personal leadership skills do you want to strengthen this year?

5. Wrap-Up and Key Takeaways

Lone Star P.E.T.S. 2026

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SATURDAY

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.

OBJECTIVES

At the end of the session, Assistant Governor will have learned and be able to:

1. Understand how the Rotary Action Plan explains *how Rotary will grow stronger, stay relevant, and increase our impact*—while staying true to our core values of service, fellowship, diversity, integrity, and leadership.
2. Demonstrate a clear understanding of what constitutes a vibrant Rotary club, considering various aspects such as membership engagement, service projects, and community impact.
3. Assess strengths and weaknesses of their assigned clubs and identify areas for improvement in club dynamics, activities, and member involvement.
4. Identify strategies for fostering a culture of innovation within their assigned clubs.

The ROTARY ACTION PLAN



TOGETHER WE SEE A WORLD
WHERE **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 coming years.

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

Module B-6: Supporting Vibrant Rotary Clubs

Breakout Discussion Questions

The purpose (the “why”) of the Rotary Action Plan

Rotary created the Action Plan to help clubs:

- Stay **vibrant and engaging**
- Attract and **retain members**
- Increase **community impact**
- Adapt to a **changing world**
- Align club goals with **district and international priorities**

The 4 Strategic Priorities (the “what”)

1. Increase Our Impact

What it means: Do service that truly matters and creates lasting change.

In practice:

- Focus on fewer, higher-impact projects
- Measure results
- Align projects with community needs
- Support The Rotary Foundation

2. Expand Our Reach

What it means: Bring Rotary to more people in more ways.

In practice:

- Grow membership
- Offer flexible meeting options
- Engage younger professionals and diverse voices
- Use satellites, cause-based clubs, and partnerships

3. Enhance Participant Engagement

What it means: Make Rotary meaningful and rewarding for every member.

In practice:

- Offer leadership development
- Match service to member passions
- Create welcoming club cultures
- Recognize contributions

4. Increase Our Ability to Adapt

What it means: Be open to change and innovation.

In practice:

- Try new ideas
- Use technology effectively
- Customize club experiences
- Learn from what works (and what doesn't)

5. How it connects to clubs and Assistant Governors

For **clubs:**

- Use the Action Plan to guide **goal setting**
- Align club goals with **district priorities**
- Choose projects, membership strategies, and programs intentionally

For **Assistant Governors:**

- Use it as a **conversation framework**
- Ask guiding questions instead of giving directives
- Help clubs see how their goals fit into the bigger picture

Breakout Activity 1: Club Vibrancy Diagnostic

Purpose: Practice assessing club health and identifying priorities

Time: 15-20 minutes

Scenario:

You have just been assigned to a club you've never worked with before. The club reports "things are fine," but membership has declined slightly and meeting attendance is inconsistent.

Task:

1. Identify 5 key questions you would ask the club leadership.

2. Determine which areas of vibrancy you would assess first (membership, service, leadership, engagement, public image).
3. Agree on 2–3 priority areas that should be addressed in the club’s action plan.

Breakout Activity 2: From Problems to Actionable Goals

Purpose: Turn vague concerns into clear action-plan goals

Time: 15 minutes

Case Study:

A club says:

- “We don’t attract younger members.”
- “Meetings feel stale.”
- “Only a few members do most of the work.”

Task:

1. Reframe each concern into a clear problem statement.
2. Develop **one SMART goal** for each problem.
3. Identify one concrete action step per goal that the Assistant Governor could help the club implement.

Breakout Activity 3: Coaching Through Resistance

Purpose: Practice handling resistance and reluctance to change

Time: 20 minutes

Case Study:

A long-established club resists creating an action plan, saying: “We’ve been successful for years. Planning feels unnecessary.”

Task:

1. Identify possible reasons for the resistance.
2. Draft 2–3 coaching responses an Assistant Governor could use.
3. Decide how to move the club toward *small* planning steps without confrontation.

Breakout Activity 4: Prioritization Challenge

Purpose: Help clubs focus on what matters most

Time: 20 minutes

Scenario:

*A club wants to include **eight goals** in its action plan, including membership growth, fundraising, new service projects, social events, branding, and leadership development.*

Task:

1. Select **three goals** to prioritize for the year.
2. Justify your choices using impact, capacity, and sustainability.
3. Identify which goals should be deferred and why.

Breakout Activity 5: Accountability and Follow-Through

Purpose: Strengthen implementation and accountability

Time: 15 minutes

Case Study:

A club created a strong action plan but made little progress after three months.

Task:

1. Identify where accountability likely broke down.
2. Develop a simple follow-up structure the Assistant Governor could use.
3. Create one accountability question to ask at each club visit.

Closing Reflection Activity

Time: 10 minutes (whole group)

Lone Star P.E.T.S. 2026

ASSISTANT GOVERNOR LEARNING GUIDE

SATURDAY

MODULE B-7 COACHING VS. DIRECTING CLUB LEADERS TO ENSURE CLUB SUCCESS

GOAL: To equip Rotary Assistant Governors with the mindset, skills, and tools to coach club leaders effectively, fostering ownership, leadership development, and sustainable success within their clubs.

OBJECTIVES

At the end of the session, Assistant Governor will have learned and be able to:

1. Explain the difference between coaching and directing when working with club leaders.
2. Demonstrate coaching techniques such as active listening and open-ended questioning.
3. Guide clubs to take ownership of decisions and action plans.
4. Apply a coaching mindset to support leadership development and sustainable club success.

Module B-7: Coaching Vs. Directing A Club Leaders To Ensure Club Success

Breakout Discussion Questions

Coaching vs. Directing a Club Discussion

1. Understanding the Mindset

- **Prompt:** “When you think about your role as an AG, which mindset—coaching or directing—do you naturally lean toward? Why?”
- **Prompt:** “How might your approach impact the confidence and growth of club leaders?”
- **Reflection:** Coaching requires patience and restraint—it focuses on **guiding** rather than **solving**, which can be challenging when results are needed quickly.

2. Exploring Benefits

- **Prompt:** “What long-term benefits might a coaching approach bring to a club compared to directing?”
- **Prompt:** “How might a directing approach create dependency or limit leadership development?”
- **Reflection:** AGs can consider how clubs evolve when leaders are empowered to make decisions themselves.

Key Concept: Coaching vs. Directing a Club

Aspect	Coaching a Club	Directing a Club
Approach	Guides leaders to find solutions themselves	Tells leaders what to do and how to do it
Focus	Leadership development, growth, sustainability	Immediate results or task completion
Ownership	Club leaders take responsibility	AG assumes responsibility

Communication	Open-ended questions, active listening, reflection	Instructions, prescriptive advice
Problem-Solving	Facilitates exploration of options	Provides solutions
Relationship	Collaborative partnership	Hierarchical authority
Long-Term Impact	Builds leadership capacity and confidence	May create dependency

Takeaway:

Coaching = Empowering + Guiding + Asking

Directing = Telling + Instructing + Solving

Scenario Options for Assistant Governors to actively practice a coaching mindset:

Scenario 1 - Membership Engagement Challenge

A Rotary club membership is declining, and officers are unsure how to attract new members.

Discussion Questions:

1. What questions could you ask the club to help them analyze why membership is declining?
2. How can the club identify its strengths to attract new members?
3. What small, actionable steps could the club take immediately to improve engagement?
4. How can the AG encourage ownership without prescribing solutions?

Coaching Approach: Ask reflective questions, explore past strategies, and facilitate brainstorming to leverage club strengths.

Scenario 2: Fundraising Initiative Stalled

A fundraising project is behind schedule due to low volunteer participation.

Discussion Questions:

1. How can you help the club identify potential leaders to champion this project?
2. What questions encourage the club to brainstorm creative solutions for low participation?
3. How can the AG guide the club in breaking the project into manageable steps?
4. How might celebrating small wins motivate volunteers to re-engage?

Coaching Approach: Help the club identify potential leaders, create manageable steps, and clarify responsibilities.

Scenario 3: Club Leadership Transition

New officers are struggling to understand their roles and responsibilities.

Discussion Questions:

1. What questions help the new leaders clarify their priorities for the year?
2. How can the AG facilitate reflection on past experiences to support current leaders?
3. How can the AG encourage the new leaders to identify resources and tools they need?

Coaching Approach: Guide leaders in setting priorities, identifying resources, and reflecting on support needs.

Scenario 4: Project Planning Misalignment

A community service project lacks clear goals, and members are confused about roles.

Discussion Questions:

1. What questions can help the club clarify the desired outcome of the project?
2. How can the AG guide the club to assign roles based on member strengths?
3. What reflective questions can help the club anticipate challenges and plan contingencies?
4. How can the AG encourage the club to create milestones and checkpoints for accountability?

Coaching Approach: Facilitate discussion to clarify outcomes, assign responsibilities, and establish milestones.

Expanded Coaching vs. Directing Discussion

- **Understanding the Mindset:** Which approach do you naturally lean toward as an AG, and why?
- **Exploring Benefits:** How does coaching promote leadership growth and club sustainability compared to directing?
- **Application in Real Scenarios:** Compare coaching and directing in the context of membership growth, project planning, or fundraising.
- **Self-Reflection:**
 1. When I direct, what risks might I create for the club's independence?
 2. When I coach, what challenges might I face in letting the club find its own solution?
 3. How do I know when to switch between coaching and directing?
 4. Which approach better aligns with Rotary's mission of sustainable leadership and service?

