

# 2026 LONE STAR P.E.T.S.



Assistant Governor  
Learning Guide

Modules C-8, C-9, C-10

# Lone Star P.E.T.S. 2026

## ASSISTANT GOVERNOR LEARNING GUIDE

### SATURDAY

#### 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.

#### OBJECTIVES

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

1. Identify key Rotary reports available to club leaders (e.g.; Club Health, Membership, Foundation, and goal progress reports).
2. Coach club leaders on how to access and interpret these reports using My Rotary tools.
3. Use report data to facilitate meaningful conversations that support informed decision-making and strategic planning aligned with Rotary's Action Plan.

## Module C-8: Empowering Club Leaders

### Breakout Discussion Questions

**Purpose:** Build Assistant Governor skills and confidence to guide club leaders in adopting and effectively using online tools for communication, management, and member engagement. “This session is not about becoming technology experts; it’s about knowing *what to ask, where to point clubs, and how to support change.*”

“Assistant Governors play a key role in helping clubs work smarter—not harder—using online tools.”

Assistant Governors need the skills and knowledge to effectively support Rotary Club leaders in accessing, understanding, and using available Rotary reports. Through this training, Assistant Governors will learn how to guide club leaders in using data-driven insights to strengthen leadership decision-making, monitor club health, and support strategic planning aligned with Rotary’s Action Plan.

Assistant Governors play a key coaching role by helping club leaders move beyond assumptions and anecdotes and instead rely on meaningful data to identify trends, celebrate successes, and address challenges. By using Rotary’s online tools and reports, Assistant Governors can facilitate productive conversations that lead to informed goals, sustainable growth, and stronger clubs.

#### **What Assistant Governors Should Know:**

- Where to access key reports in **My Rotary** and **Rotary Club Central**
- The purpose of commonly used reports (membership trends, club health, goal progress, Foundation giving, service activity engagement)
- How Rotary data aligns with **Rotary’s Action Plan** and club strategic planning
- Which data points indicate a **healthy club** versus areas needing attention
- How to interpret trends over time rather than focusing on single data points
- Common challenges club leaders face when using reports (access, confidence, interpretation)

## **What Assistant Governors Should Know: Key Reports Overview (15 minutes)**

### **Focus Areas (high level):**

- Membership and retention trends
- Club goals and progress (Rotary Club Central)
- Foundation giving and participation
- Service and engagement indicators

### **Activity:**

- Review the **'What AGs Should Know' checklist**
- Ask AGs to identify which reports they feel most and least confident using

### **What Assistant Governors Should Do:**

- Model the use of data during club visits and leadership conversations
- Guide club leaders step-by-step on how to access relevant reports
- Ask coaching questions that encourage reflection and insight (e.g., “What trend do you notice?”)
- Use reports to support goal setting and progress monitoring in Rotary Club Central
- Help leaders connect data insights to practical actions and priorities
- Reinforce that data is a **tool for improvement**, not evaluation or criticism
- Encourage regular review of reports as part of a predictable leadership rhythm

### **What Assistant Governors Should Do: Coaching with Data (15 minutes)**

#### **Facilitator Talking Points:**

- How to introduce reports during club visits
- Asking open-ended, coaching-focused questions
- Keeping conversations constructive and forward-looking

#### **Practice Activity (Pairs or Tables):**

Given a sample report, practice:

- Identifying one insight
- Asking one coaching question
- Suggesting one possible next step

## **Why Data Matters for Club Leadership (10 minutes)**

### **Table Discussion Prompt:**

- “How could data improve a recent club conversation you’ve had?”

## **Building a Predictable Leadership Rhythm (10 minutes)**

### **Discussion:**

- When should clubs review data during the Rotary year?
- How AGs can normalize regular report review without overwhelm
- Aligning data review with goal setting and progress checks

## **Discussion Questions**

- What indicators show a club is digitally strong?
- What red flags suggest a club may need support?
- How can AGs assess readiness without making clubs feel judged?

## **Breakout Activity: Communication and Management Tools (15 minutes)**

### **Instructions**

- Divide into small groups of 4–6.
- Assign each group a scenario:

### **Scenario Examples**

1. A club struggles to keep members informed between meetings.
2. A club president uses multiple platforms, causing confusion.
3. A club wants better attendance tracking and document sharing.

## **Group Task**

### **Discuss:**

- What online tools could help?
- What questions should the AG ask first?
- What simple recommendation could be made?



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## ASSISTANT GOVERNOR LEARNING GUIDE

### SATURDAY

#### MODULE C-9 DATA DRIVEN LEADERSHIP: UTILIZING CLUB REPORTS

**GOAL:** Assistant Governors will have the skills and knowledge necessary to effectively facilitate and support Rotary Club leaders to access available reports to gain data-driven insights to support and enhance club leadership decision-making and strategic planning.

### OBJECTIVES

At the end of the session, assistant governor 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.

## Module C-9: Data Driven Leadership: Utilizing Club Reports

### Breakout Discussion Questions

#### 1. My Rotary ([rotary.org/myrotary](https://rotary.org/myrotary))

**Purpose:** Central hub for club and member management

##### **Key Functions**

- Member data management (add/update members)
- Club officer roles and reporting
- Club health check and goal setting
- Access to Rotary policies and resources

##### **Discussion Question:**

- “Why is it important for club leaders and members to use My Rotary regularly, and how can it help them stay connected, access resources, and make informed decisions for their club?”

##### **Optional Activity:**

- Have participants **explore My Rotary for 5–10 minutes** and identify one feature they would recommend to a club leader for improving club operations or planning.
- Share insights in pairs or small groups.

##### **Discussion Question:**

1. “What types of information can members access in My Rotary that they might not find elsewhere?”
2. “How can regular use of My Rotary improve communication within the club and with the district?”
3. “Can you think of a recent club challenge or project that could have been easier to manage if the leaders had used My Rotary?”
4. “How can an Assistant Governor encourage club leaders to make My Rotary part of their regular planning and reporting habits?”

## 2. Rotary Learning Center - Leadership Development and Skill-Building

**Purpose:** Training and leadership development

### **Key Functions**

- Online courses for:
  - Club presidents
  - Secretaries
  - Treasurers
  - Foundation chairs
- Self-paced, role-specific learning
- Certificates for completed courses

### **Discussion Question:**

- “Why is the Rotary Learning Center a valuable tool for club leaders and members, and how can it support leadership development, skill-building, and effective club management?”

### **Activity:**

- Identify one course or module that could help a club leader address a current challenge. Discuss how it could be applied in practice.

## 3. Club Central - Goal Setting and Tracking Progress

**Purpose:** Planning, goal-setting, and continuity

### **Key Functions**

- Set and track club goals
- View historical goals and progress
- Share goals with district leadership
- Supports long-term planning beyond one Rotary year

### **Discussion Question:**

- “How can Rotary Club Central help club leaders set, track, and achieve their club goals?”

### **Optional Activity:**

- Review a sample Club Central report, identify one trend or insight, and discuss one actionable step for the club.

## 4. Brand Center – Maintaining a Consistent Public Image

**Purpose:** Public image and communications

### **Key Functions**

- Logos and branding guidelines
- Customizable templates:
  - Flyers
  - Social media graphics
  - Banners and posters
- Brand-compliant messaging tools

### **Discussion Question:**

- “Why is the Rotary Brand Center important for maintaining a consistent public image, and how can clubs use it to enhance their communications and outreach?”

### **Optional Activity:**

- Ask participants to **explore the Brand Center** and select one resource (e.g.; a social media template or logo) they would recommend for an upcoming club event.
- Discuss in pairs or small groups: “How would using this resource strengthen the club’s public image?”

## 5. Rotary Showcase

**Purpose:** Service project visibility and storytelling

### **Key Functions**

- Promote service projects
- Share photos and impact stories
- Inspire other clubs
- Improve public image and transparency

### **Discussion Question:**

- “How can clubs use Rotary Showcase to share their projects and highlight their impact in the community and worldwide?”

**Activity:**

- Have participants explore Rotary Showcase and identify one project that could serve as a model for their club. Discuss how their club could adapt a similar approach.

## 6. Grant Center - Applying for and Managing Grants

**Purpose:** Foundation grants management

**Key Functions**

- Apply for District and Global Grants
- Track grant progress
- Submit reports online
- Centralized documentation

**Discussion Question:**

- “Why is the Rotary Grant Center important, and how can it help clubs plan and implement impactful projects?”

**Activity:**

- Review a sample grant application or funded project report. Ask participants to identify one way their club could leverage grants for a future project.

## 7. Rotary Club Locator - Finding Clubs and Connecting

**Purpose:** Membership growth and visibility

**Key Functions**

- Helps prospective members find clubs
- Pulls information from My Rotary
- Displays meeting times and contact info

**Discussion Question:**

- “Why is the Rotary Club Locator a useful tool for club leaders and members, and how can it help strengthen connections and collaboration locally and globally?”

**Activity:**

- Ask participants to use the Club Locator to find **three clubs in their district or nearby areas** and identify one potential collaboration or partnership idea.
- Discuss as a group: “How could this connection benefit both clubs?”

## 8. Rotary Email and Communication Tools - Keeping Members Informed and Engaged

**Purpose:** Official communications

### Key Functions

- Rotary emails and announcements
- Newsletters and updates from RI and districts
- Event and training notifications

### Discussion Question:

- “Why is effective communication essential for club success, and how can Rotary’s email and communication tools help club leaders keep members informed and engaged?”

### Activity:

- Ask participants to draft a **short sample club email or newsletter** using the available templates or best practices.
- Discuss in pairs or small groups: “What makes this message clear, engaging, and aligned with Rotary branding?”

## How Assistant Governors Can Position These Tools

### Key Message for Clubs

- These tools are:
  - Free
  - Secure
  - Designed specifically for Rotary
- They support:
  - Better communication
  - Smoother leadership transitions
  - Stronger member engagement



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## ASSISTANT GOVERNOR LEARNING GUIDE

### SATURDAY

#### MODULE C-10      CREATING A CALENDAR FOR DISTRICT EVENTS, LEARNING OPPORTUNITIES, AND PROJECTS

**GOAL:** Assistant Governors will identify, promote, and follow up with club leaders on District events, learning opportunities, and projects for member engagement and growth.

### OBJECTIVES

At the end of the session, Assistant Governor 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.

## MODULE C-10: Creating A Calendar For District Events, Learning Opportunities, And Projects

### Breakout Discussion Questions

#### **Assistant Governor Checklist Discussion**

**Purpose:** Help Assistant Governors consistently identify, promote, and follow up on District events, learning opportunities, and projects to boost member engagement and growth.

#### **Rotary Action Plan Pillars**

- **Increase Our Impact** – Stronger, relevant service
- **Expand Our Reach** – Attract and involve more people
- **Enhance Participant Engagement** – Meaningful experiences
- **Increase Our Ability to Adapt** – Flexible, responsive clubs

#### **Club Visit Planning Guide**

- Review notes and action items from the last visit and your communications with the president.
- Review the club's goals, achievements, ratings, and comments in Rotary Club Central.
- Review reports on My Rotary to understand the club's trends in Membership, Foundation contributions, and other areas.
- Read the club's newsletters and its social media feeds to learn how it communicates and confirm that it uses the correct Rotary branding.
- Review any Action Plan resources or assessments that could help support the club.
- Ask the Governor for any other information you should share with the club.

## 1. Prepare (Before Club Contact)

### *Action Plan Alignment:*

- **Increase Our Impact:** Match District opportunities to real club needs
- **Expand Our Reach:** Select opportunities that attract diverse participants
- **Increase Our Ability to Adapt:** Plan ahead using a 90-day horizon
  - Review the District calendar for the next **90 days**
  - Identify **1 event**, **1 learning opportunity**, and **1 project** most relevant to each club
  - Match opportunities to club needs (membership, leadership, service, public image)
  - Gather key details: *who it's for, why it matters, time commitment*
  - Prepare a short **value-based message** (benefits > logistics)

## 2. Promote (During Club Visits, Calls, Emails)

### *Action Plan Alignment:*

- **Expand Our Reach:** Clear, compelling messaging increases participation
- **Enhance Participant Engagement:** Personal invitations and storytelling matter
  - Lead with **benefit** (“Great for new members,” “Builds future leaders”)
  - Personalize the message to the club’s culture and goals
  - Share a brief **testimonial or success story**
  - Ask for a **specific action** (register, appoint a lead, bring 3 members)
  - Encourage the club to promote internally (meeting announcement, newsletters, and WhatsApp/GroupMe)

## 3. Engage Leaders (President, Membership, Foundation, Service)

### *Action Plan Alignment:*

- **Enhance Participant Engagement:** Leaders model involvement
- **Expand Our Reach:** Target the right members for the right opportunities
  - Ask: “Which members would benefit most from this?”
  - Encourage leaders to attend **with** members
  - Suggest using District activities for **onboarding new members**
  - Connect opportunities to leadership development pathways

#### 4. Follow Up (Within 2–3 Weeks)

##### *Action Plan Alignment:*

- **Enhance Participant Engagement:** Follow-up reinforces value and belonging
- **Increase Our Ability to Adapt:** Learn and adjust based on feedback
  - Check participation status (registered/attended)
  - Thank leaders who promoted or attended
  - Ask what worked and what barriers remain
  - Share outcomes or photos to reinforce value
  - Encourage next-step involvement

#### 5. Measure and Adjust

##### *Action Plan Alignment:*

- **Increase Our Impact:** Focus on what produces results
- **Increase Our Ability to Adapt:** Use data to refine strategies
  - Track club participation by opportunity
  - Note engagement trends (who attends, what resonates)
  - Identify underutilized opportunities needing better messaging
  - Share insights with District leadership

