



# LEAD YOUR DISTRICT

Assistant  
Governor  
2014-15



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This is the 2013 edition of *Lead Your District: Assistant Governor* (244), formerly the *Assistant Governor's Training Manual*. It is intended for assistant governors holding office in 2014-15, 2015-16, and 2016-17. 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. Changes made to these documents by the triennial Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.

# INTRODUCTION

You've received this publication to help you understand your role working with district leaders to support the clubs that have been assigned to you. This manual explains the responsibilities of your position and how you can strengthen clubs in your area.

You are part of the district leadership team, which also includes the district governor and district committee members. At the district team training seminar, you will meet with these leaders to discuss how to support clubs.

Use this manual to prepare for your term in office. Bring it to the seminar, and review its contents beforehand. Pay particular attention to the questions in appendix 4, which will help you get the most out of the facilitated discussions at the meeting. After you have completed your training, use this publication as a resource as you work with club and district leaders to support your assigned Rotary clubs.

## COMMENTS?

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# ROLE AND RESPONSIBILITIES

Your primary role is to assist the governor with the administration of your assigned Rotary clubs by helping them to be more effective.

## RESPONSIBILITIES

You have responsibilities to both the governor and the clubs. District-level responsibilities include:

- Assisting in developing district goals
- Coordinating the governor's visits with clubs
- Communicating clubs' strengths, weaknesses, and progress toward goals to the governor
- Attending district meetings
- Participating in district events and activities, including Rotary Foundation activities and fundraising
- Participating in the district team training seminar
- Attending the presidents-elect training seminar and the district training assembly
- Helping identify and develop future district leaders
- Briefing the incoming assistant governor on the status of clubs

**Rotary International does not provide funding for assistant governors. Check with your district to find out whether you will have a budget.**

Your responsibilities to clubs include:

- Checking in with clubs regularly (at least quarterly)
- Helping presidents-elect develop effective goals and enter them in Rotary Club Central (see below)
- Monitoring the progress of clubs toward their goals in Rotary Club Central (see below)
- Assisting clubs as they schedule and plan the governor's visit
- Attending club meetings, related club assemblies, and other events, as invited
- Motivating clubs to follow through on the governor's requests
- Promoting ways the district leadership team can support clubs
- Identifying and developing future district leaders
- Promoting attendance at the district conference and other district meetings
- Coordinating club-level training with the appropriate district committee

## Rotary Club Central

Rotary Club Central is a new online tool that clubs use to set goals and track their accomplishments. Rotary Club Central will help measure Rotary's global impact in membership, community service, Rotary Foundation giving, and other areas. Once you create an account on [rotary.org](https://rotary.org) and your district governor assigns you a club group, you can view your assigned clubs' information or enter goals on their behalf in Rotary Club Central. You will also be able to leave comments for your district governor regarding your visits or check in meetings with your clubs.

### SUGGESTED TIMELINE FOR ASSISTANT GOVERNOR RESPONSIBILITIES

#### Preparation for your role

February-March	<ul style="list-style-type: none"><li>• Review club constitutions and an updated <i>Club President's Manual</i>.</li><li>• Attend the district team training seminar.</li><li>• Provide the governor-elect with information on what the district wants to achieve.</li><li>• Meet with the presidents-elect of your assigned clubs at PETS.</li><li>• Advise the governor-elect on district committee selections.</li></ul>
April-June	<ul style="list-style-type: none"><li>• Meet with club leadership teams at the district training assembly.</li><li>• Meet with the outgoing assistant governor to discuss what you can expect when working with club leaders.</li><li>• Schedule quarterly visits to your clubs for the year.</li><li>• Review the goals of each of your clubs and check in with your district governor by 1 July.</li></ul>

Your year in office	
July-August	Congratulations on your new position! <ul style="list-style-type: none"> <li>• Begin first quarter club visits.</li> <li>• Assist club leaders in scheduling and planning for the governor's visit.</li> </ul>
October	<ul style="list-style-type: none"> <li>• Begin second quarter club visits.</li> </ul>
December	<ul style="list-style-type: none"> <li>• Remind clubs that the updated membership list and semiannual dues are due to RI on 1 January. Both can be submitted at <a href="http://rotary.org">rotary.org</a>.</li> </ul>
January	<ul style="list-style-type: none"> <li>• Begin third quarter club visits.</li> </ul>
April	<ul style="list-style-type: none"> <li>• Begin fourth quarter club visits.</li> </ul>
May	<ul style="list-style-type: none"> <li>• Add club ratings and comments in the Rate Clubs section of Rotary Club Central by 15 May.</li> <li>• Meet with the incoming assistant governor.</li> </ul>
June	<ul style="list-style-type: none"> <li>• Remind clubs that the updated membership list and semiannual dues are due to RI on 1 July. Both can be submitted at <a href="http://rotary.org">rotary.org</a>.</li> </ul>

## KEY RELATIONSHIPS

Assistant governors are the district leaders who generally have the most frequent contact with clubs, relaying information between the club, district, and Rotary International. Communication is essential to working successfully with club and district leaders. Your key contacts include:

Regional leaders	District leaders	Club leaders
Rotary coordinator	Past district governors	Presidents
Rotary public image coordinator	Governor	Secretaries
Regional Rotary	Governor-elect	Executive secretaries
Foundation	Governor-nominee	Treasurers
coordinator	Committee chairs	Committee chairs
	Other assistant governors	Trainers
	Executive secretaries, where applicable	

You and your district leadership team should discuss your district's communication plan to ensure that information is shared with the appropriate district leaders effectively. Your communication plan should include how and when you communicate with clubs, the district governor, your fellow assistant governors, and district committee members. Following the district's communication plan helps the district operate efficiently and provide consistent support to clubs.

## TRAINING

In addition to the district team training seminar, where you will receive training for your role as assistant governor, you are expected to attend other district meetings, such as PETS, the district training assembly, district leadership seminar, district membership seminar, and the district Rotary Foundation seminar. At PETS, you will assist the governor-elect with team building among your assigned presidents-elect. Your role at other meetings will be determined by the convener and the district training committee.

These training meetings are intended to help clubs increase their effectiveness and learn more about Rotary. Appendix 1: District Training Meetings has more information about each seminar's purpose and intended audience. It is important to promote attendance and participation in district meetings among your assigned clubs.

You also have the opportunity to coordinate training for your assigned clubs with specific district committees as needed. For example, if a club wants to learn more about The Rotary Foundation, you can ask a member of the district Rotary Foundation committee to work with the club to develop training or to come and talk about the Foundation at a club meeting.

Encourage all of your assigned clubs to appoint a club trainer if they don't already have one. A club trainer can facilitate training for prospective, new, and experienced members.

## GOALS

**When working with club leaders on goals, advise them to align their club goals with the priorities of the [Rotary Strategic Plan](#).**

Work with your governor-elect and other members of the district leadership team to develop district goals, and work with club leadership teams to establish club goals. Challenge club leaders to strengthen their clubs by achieving new levels of service, and establish meaningful goals that align with district goals. Although club and district goals may differ in some respects, they should complement each other.

When working on goals, make sure they are shared, measurable, challenging, achievable, and time specific. Once a club develops its goals, be sure it has an action plan to achieve the goals.





## WORKING WITH CLUBS

You are the key support person for your clubs. Be available to your club presidents, and offer ideas and guidance throughout the year. Make sure they know that you are there as a resource to help them achieve their goals and have a year they are proud of.

### VIBRANT CLUBS

Encourage clubs to create their own action plans for becoming more vibrant. Encourage them to be innovative, and offer best practices for strong clubs. Rotary clubs can evaluate their practices and traditions to determine what is working well and what could be improved.

Your assigned clubs may already use some of these best practices:

- Develop long-range goals that address the elements of an effective club.
- Set annual goals that support long-range goals.
- Keep all members informed and involved by holding club assemblies.
- Communicate effectively with club leaders, club members, and district leaders.
- Ensure continuity in leadership and service projects from year to year.
- Customize club bylaws to reflect club practices.

The [Strategic Planning Guide](#), available at [rotary.org](#), assists clubs in creating a vision and setting long-term and annual goals. Clubs should enter annual goals in [Rotary Club Central](#) by signing in to [rotary.org](#).

- Provide opportunities for members to develop stronger relationships with each other.
- Ensure that every member is active in a club project or function.
- Offer regular, consistent training.
- Assign committees that support club needs.

As clubs implement the plan, they may ask you for help. Encourage club leaders to be flexible and try new ideas to keep their clubs relevant to all members and attractive to potential members. Suggest that club leaders examine their club's current practices and work with incoming and past leaders to customize a leadership plan that works best for their club. Above all, help your clubs create a culture that welcomes new members and keeps current members coming back.

## CLUB GOALS

Work with club leaders to establish goals that help their clubs function effectively and provide a variety of activities that engage their members. Help analyze the club's past trends and current practices and suggest goals that can improve its operations.

Rotary Club Central provides information about your club's membership, service, public relations, and fundraising trends that can serve as a base line for future goals. Encourage clubs to use these trends in setting goals and then enter the goals in [Rotary Club Central](#). When clubs enter their goals in this tool, district leaders can review them and share comments with one another.

Advise club members who use the [Planning Guide for Effective Rotary Clubs](#) that this document will be phased out and replaced by Rotary Club Central.

Goal setting is crucial to a successful Rotary year because it provides a plan of action. A basic goal-setting process includes:

### **1. Analyzing the club's strengths and weaknesses.**

Before PETS, club presidents-elect and assistant governors identify trends and consider goals to address club weaknesses and capitalize on club strengths.

### **2. Developing goals.**

During PETS, work with club presidents-elect to draft goals and action plans for attaining them based on their clubs' current status.

See that club presidents enter their goals online using Rotary Club Central by 1 July. Let club presidents know that a rotary.org account is needed in order to access Rotary Club Central.

### 3. Evaluating progress.

Encourage club presidents to keep their goals and progress current in Rotary Club Central so you can review them before visiting or checking in. During club visits, review goals with the club's board to discuss progress and what is needed in order to achieve them. You can enter goals and achievements on behalf of club leaders if they are unable to access Rotary Club Central.

## SUPPORTING CLUBS

You're an important resource for your assigned clubs. Understanding each club's needs and strengths is crucial to providing helpful guidance. Because you interact with a number of clubs, you have the benefit of observing a wide range of approaches to common club issues, and you can share insights and information that clubs can use to meet goals and overcome challenges. To support clubs:

- Be available and approachable.
- Visit and check in with your assigned clubs regularly.
- Give special attention to weak clubs.
- Tailor your support to clubs based on the clubs' strengths and needs.
- Connect clubs that excel in a particular area with clubs that are struggling in that area.
- Monitor your assigned clubs' progress toward their goals in Rotary Club Central.

Encourage your clubs to subscribe to *Rotary Leader* at [www.rotary.org/rotaryleader](http://www.rotary.org/rotaryleader).

Near the end of the Rotary year, consider asking club leaders to give feedback about the quality of your assistance and support.

### Sharing Information

Clear communication is vital to any successful organization, including Rotary. As the liaison between club and district leaders, you should share any information or concerns about a particular club with the district governor, the governor-elect, appropriate district committees, incoming club and district officers, and most importantly, the assistant governor who will succeed you. These discussions will promote continuity and better management of ongoing challenges. They will also provide incoming appointees with an orientation to clubs.

You also have the opportunity to act as a liaison between Rotary clubs. Your regular contact with clubs enables you to observe the progress of activities and programs, share successes, and encourage increased cooperation between clubs.

The governor may ask you to discuss the following items with your assigned clubs:

- Paying RI and district dues
- Completing the semiannual report for submission to RI
- Paying club dues, updating club information, and viewing reports

**Encourage club leaders to name their successors on [rotary.org](https://rotary.org) so that district leaders can contact them about club business.**

- Submitting the new club officer information to RI by 31 December to be included in the *Official Directory*
- Earning RI and Foundation awards
- Attending the district conference, district training assembly, PETS, and other district events

Encourage club leaders to create an account on [rotary.org](https://rotary.org) and become familiar with the website's features. By signing in to [rotary.org](https://rotary.org), club leaders can update membership lists, change contact information, pay semiannual dues, and enter annual goals.

## Visiting Clubs

Visit each club regularly, quarterly if possible. If face-to-face meetings aren't possible every quarter, conduct an online meeting or a conference call to check in with each assigned club. During your meetings:

- Provide the club with information about RI and district resources.
- Inquire about club progress toward goals, and provide feedback on the goals and strategies used.
- Discuss what the club does well and how it can apply those skills to other areas.
- Suggest practical solutions to problems that challenge the club.
- Ask about membership, service projects, support of The Rotary Foundation, important club functions, and club morale.
- Schedule the governor's visit, if requested.

## Rate Clubs

Rate Clubs is a feature in Rotary Club Central that replaces the Memo of Club Visit. It is used to report the club's practices, accomplishments, weaknesses, and challenges. It is also a tool for you to keep track of the clubs the governor visits.

You and your district governor should use Rate Clubs in Rotary Club Central to leave comments about a club after each visit. While you can view ratings and leave comments for the clubs you are assigned, the district governor-elect and governor can view ratings and leave comments for all clubs in the district. These ratings and comments will serve as a reference for you and your district governor.

## Attending Club Assemblies

Rotary clubs are encouraged to hold club assemblies, at which all club members can openly discuss activities and other ideas for the future, four to six times each year. A club assembly is typically held during the governor's visit, and you are expected to attend it, too. Decide with club leaders which of the other club assemblies you'll attend and what your role will be.

## CLUBS REQUIRING SPECIAL ATTENTION

A small number of clubs may need special attention from you and other district leaders. These clubs generally have difficulty meeting membership, financial, or other minimum standards established by the RI Board of Directors.

### Minimum Standards for Rotary Clubs

To ensure that your clubs are functioning effectively, the RI Board has adopted these minimum standards for clubs:

- 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 and submits a semiannual report
- Subscribes to a Rotary World Magazine Press publication
- Maintains liability insurance appropriate for the region (United States only)
- 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
- Provides accurate membership lists to RI in a timely manner
- 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

**Clubs in the United States must pay mandatory liability insurance when they submit their semiannual reports.**

Work with your clubs to ensure that they are exceeding the minimum standards. Much of the information used to determine whether a club is meeting minimum standards is gathered from the Rate Clubs section in Rotary Club Central.

Of all district leaders, assistant governors often have the most direct contact with clubs, so your district will rely on you to play a greater role in helping those that are weak or struggling. If one of your assigned clubs needs special attention, consider

- Visiting the club more frequently
- Increasing communication with the club
- Pairing the club with a stronger club in the district
- Contacting the appropriate district committee for additional support

### **Unpaid Per Capita Dues**

Six months after the 1 January and 1 July deadlines, clubs with unpaid per capita RI dues over US\$250 are terminated. As an assistant governor, you can work with your clubs to help them avoid termination and to help terminated clubs get reinstated.

### **Reinstatement**

Reinstatement is allowed as follows:

- Within 90 days of termination, the club must pay all financial obligations to RI and a \$10/member reinstatement fee.
- More than 90 days after termination, the club must pay all financial obligations to RI and a \$10/member reinstatement fee, complete a reinstatement application, and pay an additional \$15/member application fee.

More than 365 days after termination, the club loses its charter and is not eligible for reinstatement.

If a club is ultimately unable to bring itself into compliance, it can consolidate with a nearby club or voluntarily terminate its membership in RI. This option should be considered only when the above efforts have been made and have failed.

## **GOVERNOR'S VISIT**

One of your main responsibilities is to help clubs prepare for the governor's visit. The district governor visits each club in the district once during the year and pays extra attention to weak and struggling clubs. The governor may visit one club's meeting or a multi-club meeting. The visit is an important responsibility of the governor and an important occasion for the club.

During a visit, the governor should

- Motivate club members to participate in club and district activities and service projects
- Recognize outstanding club projects and the work of individual Rotarians
- Discuss pressing club matters with club leaders
- Highlight important initiatives of Rotary

### **Scheduling the Visit**

When you help schedule the governor's visit to each of your assigned clubs, consider the following suggestions:

- Arrange for the visit to coincide with an important club event, such as
  - Charter night
  - An induction ceremony
  - A new member orientation program



- An award presentation
- A Rotary Foundation event
- An intercity meeting
- Schedule visits to new or struggling clubs and others that require special attention early in the Rotary year.
- Factor in geography and travel times.
- Ensure that all logistical arrangements are in place for the governor and governor's spouse, if requested.

## Preparing for the Governor's Visit

To get maximum participation from club members, encourage club leaders to promote the visit by

- Announcing the upcoming visit at weekly club meetings
- Publishing announcements about the visit in the club newsletter, on the club website, and on social media sites
- Arranging for recognition or awards to be presented by the governor

Help prepare the governor for a visit by

- Supplying a current profile of the club that includes membership statistics and trends, the status of service projects, Rotary Foundation grant participation and financial contributions, and attendance rates
- Sharing the successes and challenges of each club
- Providing an agenda

Work with the club to develop an agenda that takes advantage of the opportunity to learn from the governor's knowledge and experience. It should include:

- Discussion of the club's progress toward the goals it has set
- Time for the club board to present on committee plans, activities, and accomplishments
- Recognition of club projects
- A report from the governor on important RI issues and district goals and initiatives
- Time for questions and open discussion

## CONCLUDING THE YEAR

Throughout the year, you will see your assigned clubs add new members, implement new service projects, and support Foundation programs. Finish the year as strongly as you started by making sure clubs feel ready to start the next year. Consider the following suggestions:

- Acknowledge and celebrate the work clubs have accomplished during the year.
- Ensure that clubs recognize what they do well and continue to use those strengths.
- Suggest areas that need more attention in the next year.

- Review club goals and discuss the progress they made during the year.
- Share your final evaluation with them so they can consider it when setting goals for the next year.

Before the end of the year, provide the incoming assistant governor with an update on the progress your assigned clubs have made, as well as their strengths and weaknesses.





# RESOURCES

Clubs and other district leaders may look to you for guidance. Though you may not know all the answers, you should know where to find them. Many resources from clubs, districts, and Rotary International are available to help the district and clubs achieve their objectives.

## CLUB RESOURCES

Some of a club's most important resources exist within the club itself. As you work with clubs, encourage them to use the knowledge and experience of their own members, leaders, and contacts, including those in the community.

Also, encourage your assigned clubs to develop ties and share effective practices with one another through interclub meetings, joint service projects, and meetings for club presidents.

### Club Leaders

Club presidents are your main contacts within the clubs and can communicate their clubs' strengths and weaknesses. Work with them to identify areas that need your support.

Club secretaries can provide you with information on membership trends, attendance patterns, or administrative practices.

Club treasurers manage club funds, so work with them to support sound financial practices.

## Club Committees

Club committees plan, promote, and execute activities and projects that serve local and international communities. Work with club committees to ensure that their work supports club and district goals.

## Club Trainers

Some clubs appoint club trainers. Work with them to ensure that all club training needs are met, and if appropriate, refer them to the district training committee for further support and ideas. If a club lacks expertise in a given area, put them in touch with a district committee member who may be able to provide ideas for training. Club trainers can also find a wealth of information on [learn.rotary.org](https://www.learn.rotary.org), a members-only area of the website with courses and materials for all Rotarians, including specific resources for trainers.

## Community Members and Organizations

Successful Rotary clubs are involved in their communities. By maintaining close ties to community members and organizations, clubs can determine what types of service projects are most appropriate for local needs. Regular contact with community members can also generate interest in Rotary, attract new club members, and facilitate cooperative relationships.

## DISTRICT RESOURCES

Because you have the most frequent contact with them, your assigned clubs look to you as a key resource within the district. These district resources will help you during your year.

## District Governor

The district governor, an officer of Rotary International, is the district's liaison to the RI president and Board of Directors. The governor is responsible for overseeing all the clubs in the district, advising and motivating them, and encouraging them to adopt strategies that will make them more effective. As an assistant governor, you represent the governor, helping to implement district plans and supporting clubs in their efforts to be successful.

With the information you provide about your assigned clubs, the governor will advise you on strategies and resources available to support them. The district governor can also inform you of district trends and provide you with information from RI and the district to communicate to clubs.

## Governor-elect and Governor-nominee

Before the Rotary year begins, the governor-elect develops district goals, oversees the training of incoming district and club leaders, and may seek your advice on district committee selections. The governor-nominee

may also be involved in the planning process, especially if plans extend into the next Rotary year. The governor-elect and governor-nominee can work with clubs that require long-term attention or that have ongoing service projects to offer guidance and ensure that the necessary resources are available. This should not, however, interfere with the ongoing activities of the current district governor.

## **Fellow Assistant Governors**

Other assistant governors are excellent sources of information and strategies for maintaining strong clubs. Communicating with your fellow assistant governors will help you understand district trends and be more responsive to them, and it may lead to opportunities for clubs to work together.

## **Past District Leaders**

Past district leaders are often active in district and club affairs. With their leadership experience and knowledge of the clubs in the district, they can provide insightful ideas and successful strategies for reaching goals. Consider seeking their input when planning and implementing goals with clubs.

## **District Committees**

District committees serve specific functions that correspond to district goals and plans. They often consult with RI and Rotary Foundation committees about related programs and activities at the district and club levels.

The RI Board recommends that all districts appoint committees to address the following areas:

- District conference
- District programs (such as Rotary Youth Exchange, Rotaract, Rotary Youth Leadership Awards)
- Extension
- Finance
- Membership development
- New Generations
- Nominating
- Public relations
- RI Convention promotion
- The Rotary Foundation
- Training

**Districts may appoint additional committees as needed.**

## **Governor's Monthly Communication**

The governor's monthly communication to club presidents and secretaries should inform, inspire, and recognize Rotarians in the district.

Download publications at [rotary.org](http://rotary.org), or order them at [shop.rotary.org](http://shop.rotary.org) or from your international office.

Provide the governor with any information that you feel should be included in the communication, such as recognition of individual Rotarians, innovative ideas that clubs are trying, and reports of successful service projects. Encourage club leaders to refer to this communication for the latest district information.

## District Training Events

Training meetings held throughout the year provide Rotarians with the necessary knowledge and skills to carry out their responsibilities effectively. Under the direction of the governor or governor-elect (depending on the meeting), the district training committee is responsible for conducting training at various district meetings (see appendix 1).

Before PETS and the district training assembly, consult with the district trainer on the meeting agenda and your role in it. You can also talk with the district trainer about addressing club-level training needs that you may observe in your assigned clubs.

## District Directory

The district directory lists meeting information for the district's clubs, as well as contact information for the governor, governor-elect, assistant governors, district committees, club officers, and other Rotary leaders.

## District Website

Your district website should provide current news and information about club, district, and RI activities. Use it to enhance the public image of the clubs in your district and to highlight successful club projects. Encourage club leaders to refer to the site for current district information.

## Social Media

Your district may have a presence on social network sites, such as Facebook, Twitter, and LinkedIn, where information is posted about your district activities and initiatives. Using social media is a great way to increase communication among Rotarians within the district and to promote Rotary to non-Rotarians in your area.

## ROTARY RESOURCES

Rotary International offers many resources on Rotary policies, procedures, programs, and training meetings, as well as information on the projects and activities of Rotarians and clubs around the world. This list will help you support clubs, either by finding the information they need yourself or by directing clubs to the correct resource.

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [rotary.org](http://rotary.org).

## Appointees

RI committees — International committees created by the RI Board and comprising Rotarians appointed by the RI president. Committees advise the Board on policies affecting Rotary International, districts, and clubs.

RI resource groups — Groups of Rotarians appointed by the RI president to help clubs and districts carry out tasks related to the president's emphases.

RI training leaders — Rotarians appointed annually by the RI president-elect and trained to lead group discussion sessions for district governors-elect at the International Assembly.

Regional Rotary Foundation coordinators (RRFCs) — Rotarians appointed to help districts and clubs in all aspects of The Rotary Foundation.

Rotary coordinators (RCs) — Rotarians appointed to strengthen districts and clubs, particularly in the areas of membership and strategic planning.

Rotary public image coordinators (RPICs) — Rotarians appointed to help districts and clubs in areas of public relations and social media to promote a positive public image of Rotary.

## The Secretariat

The Secretariat of Rotary International acts as the administrative body for Rotary clubs worldwide. It includes RI World Headquarters in Evanston, Illinois, USA, and seven international offices. The Secretariat serves Rotarians, Rotary clubs, and Rotary leaders, helping them promote and uphold the guiding principles of Rotary.

[Club and District Support representatives](#) are staff members at international offices and RI World Headquarters who can answer many administrative questions and direct other inquiries to appropriate RI and Foundation staff.

## General Reference

[Rotary.org](http://www.rotary.org) (www.rotary.org) — Current information on all aspects of Rotary, including membership, The Rotary Foundation, RI programs, news, events, club and district support, training, and publications.

The Learning Center ([learn.rotary.org](http://learn.rotary.org)) — Members-only online resource that offers interactive courses on Rotary topics. Rotarians can customize their user profiles, track their progress in registered courses, and print certificates upon completion of courses.

*Club Officers' Kit* (225) — Set of manuals outlining responsibilities and general guidelines for club officers. Training discussion questions are included in each manual. The kit contains:

*Club President's Manual* (222)

*Club Secretary's Manual* (229)

*Club Treasurer's Manual* (220)

*Club Administration Committee Manual* (226A)  
*Club Membership Committee Manual* (226B)  
*Club Public Relations Committee Manual* (226C)  
*Club Service Projects Committee Manual* (226D)  
*Club Rotary Foundation Committee Manual* (226E)

*Manual of Procedure* (035) — Contains RI and club constitutional documents as well as policies and procedures of Rotary International and the Foundation established by legislative action, the RI Board of Directors, and the Foundation Trustees. Issued every three years after the Council on Legislation.

*Official Directory* (007) — Provides contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; a worldwide list of districts and governors; and an alphabetical listing of clubs within districts, including contact information.

*RI Catalog* (019) — List of RI publications, audiovisual programs, forms, and supplies.

## News Publications

*Rotary Leader* — Multimedia publication for Rotary club and district leaders that offers information, guidance, and resources to aid in the running of a successful club or district. Available in nine languages.

*The Rotarian* — RI's official magazine, which provides information on club and district projects, RI Board decisions, and RI meetings. Published monthly. (In addition to *The Rotarian*, 31 regional magazines in 25 languages serve club members around the world.)

*Weekly Update* — E-newsletter highlighting the latest Rotary news. It can be used for club and district newsletters and websites (English only).

## Membership

*Membership Development Resource Guide* (417) — A publication that identifies best practices and offers tips for attracting new members and keeping members engaged and active.

*Club Assessment Tools* (web only) — Online supplement to the *Membership Development Resource Guide* that offers useful tools for assessing the current and future state of clubs.

*Organizing New Clubs* (808) — A how-to guide for district governors and their representatives that provides guidance in organizing new clubs.

## Service Projects

*Rotary Showcase* — Online database of Rotary service projects that allows Rotarians to post project descriptions, share photos, identify partner clubs, and share the impact of their projects.



[\*Communities in Action\*](#) (605) — Comprehensive instructions for planning, conducting, and evaluating a service project, and a list of types of projects RI recommends for clubs and districts.

[\*Community Assessment Tools\*](#) (web only) — Detailed guidelines for conducting effective community assessments.

[\*Abuse and Harassment Prevention Training Manual and Leaders' Guide\*](#) (775) — Youth protection guide that can be modified to comply with local laws and situations to create and maintain the safest possible environment for all participants of Rotary youth programs.

## RI Programs

[\*Interact Handbook\*](#) (654) — Guide for organizing and administering an Interact club, for both sponsor Rotary clubs and Interact club leaders.

[\*Rotaract Handbook\*](#) (562) — Guide to organizing and developing a Rotaract club and conducting service and professional development projects.

[\*Rotary Youth Leadership Awards Handbook\*](#) (694) — Guide to organizing club or district events to help young people develop leadership skills.

[\*Youth Exchange Handbook\*](#) (746) — Guide to operating a Rotary Youth Exchange program.

## The Rotary Foundation

[\*District Rotary Foundation Seminar Manual\*](#) (438) — Guide to help districts conduct a Foundation seminar for districts and clubs.

[Endpolionow.org](http://Endpolionow.org) — Website where you can get information on how polio-free the world is, contribute to the cause, share your voice, learn about Rotary's role in polio eradication worldwide, and see other supporters of the cause.

[\*The Rotary Foundation Reference Guide\*](#) (219) — A quick reference on the programs and services of The Rotary Foundation.

[\*Grant Management Manual\*](#) (web only) — Information on how to design, carry out, and manage a global grant. Includes details on Rotary's six areas of focus, scholarships, and monitoring and evaluation.

## Public Relations

[Rotary's Media Center](#) — One-stop location for viewing and downloading multimedia content, including broadcast-quality video, high-resolution print images, radio-ready announcements, and links to Rotary's social media accounts.

[\*Effective Public Relations: A Guide for Rotary Clubs\*](#) (257) — Tools and tips for promoting club activities to attract positive attention from the community and potential club members.

[PolioPlus Headliner Kit](#) (web only) — Polio-related public relations tools that can be tailored to give local media outlets a hometown news angle. Includes a sample news feature, opinion piece, letter to the editor, and press releases, plus tips for distributing them to newspapers, journals, and trade magazines.

[Rotary PR Tips](#) (web only) — E-newsletter featuring ideas for clubs and districts to promote Rotary in their communities. Subscribe at [www.rotary.org/newsletters](http://www.rotary.org/newsletters).

## Training

[Lead Your District: Training](#) (246) — Includes information on Rotary training events and the responsibilities of the district trainer and district training committee. Includes a planning calendar and a sample session guide for a train the trainer seminar.

Rotary leaders' guides — Guides for training seminar organizers and trainers that provide information on planning and organizing a training seminar, session templates with ideas for activities, evaluation forms, and slides.

The courses for trainers on [learn.rotary.org](http://learn.rotary.org) — Information about planning a training meeting, adult learning principles, web conferencing, club trainers, and training best practices. Also includes links to many helpful tools, such as a needs assessment questionnaire and a budget worksheet.

[Rotary Training Talk](#) — Monthly e-newsletter that highlights RI materials' distribution dates and training events and includes surveys and training tips.



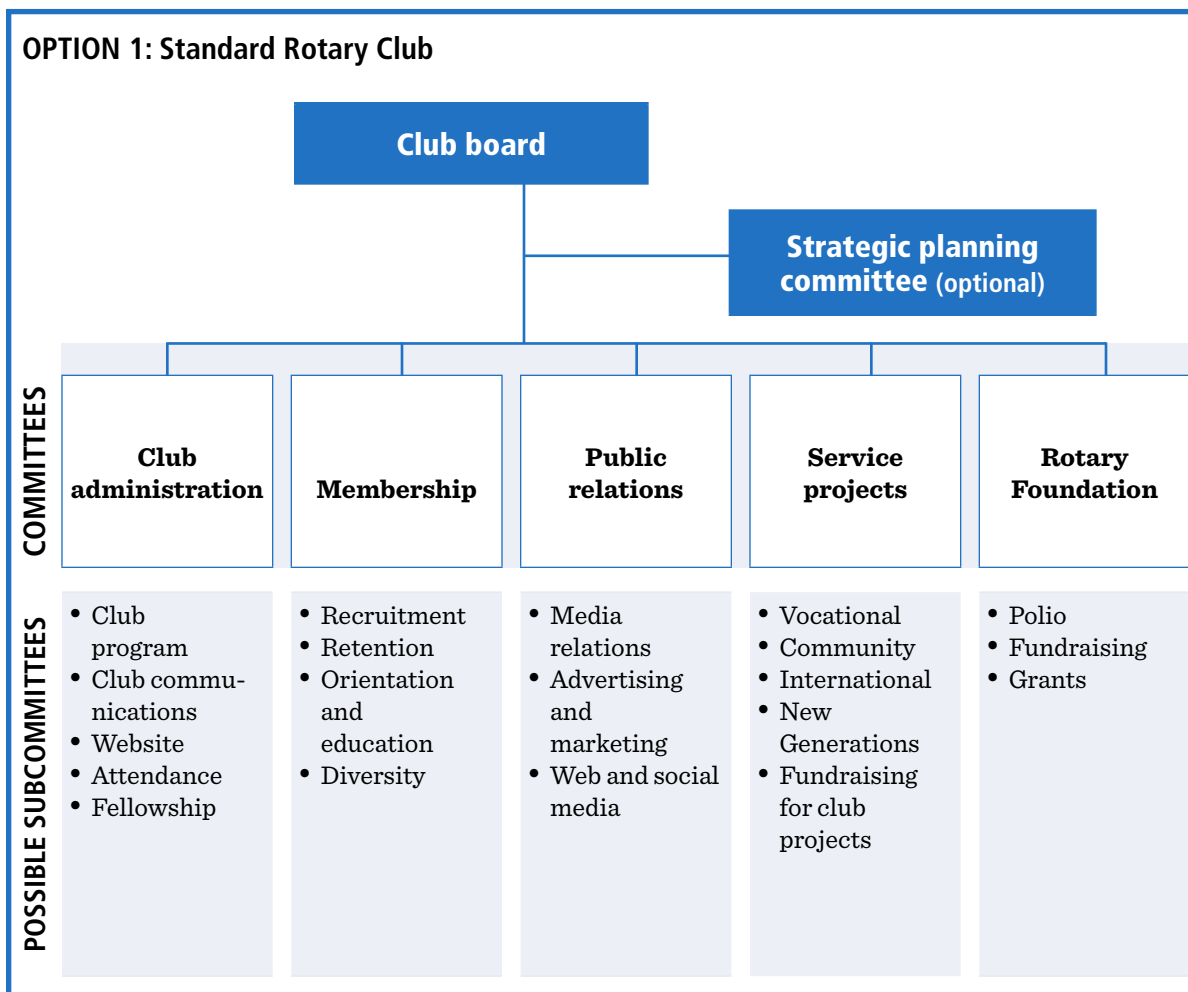
# DISTRICT TRAINING MEETINGS

This chart lists the annual district training meetings held for club leaders. Assistant governors should encourage club leaders to attend.

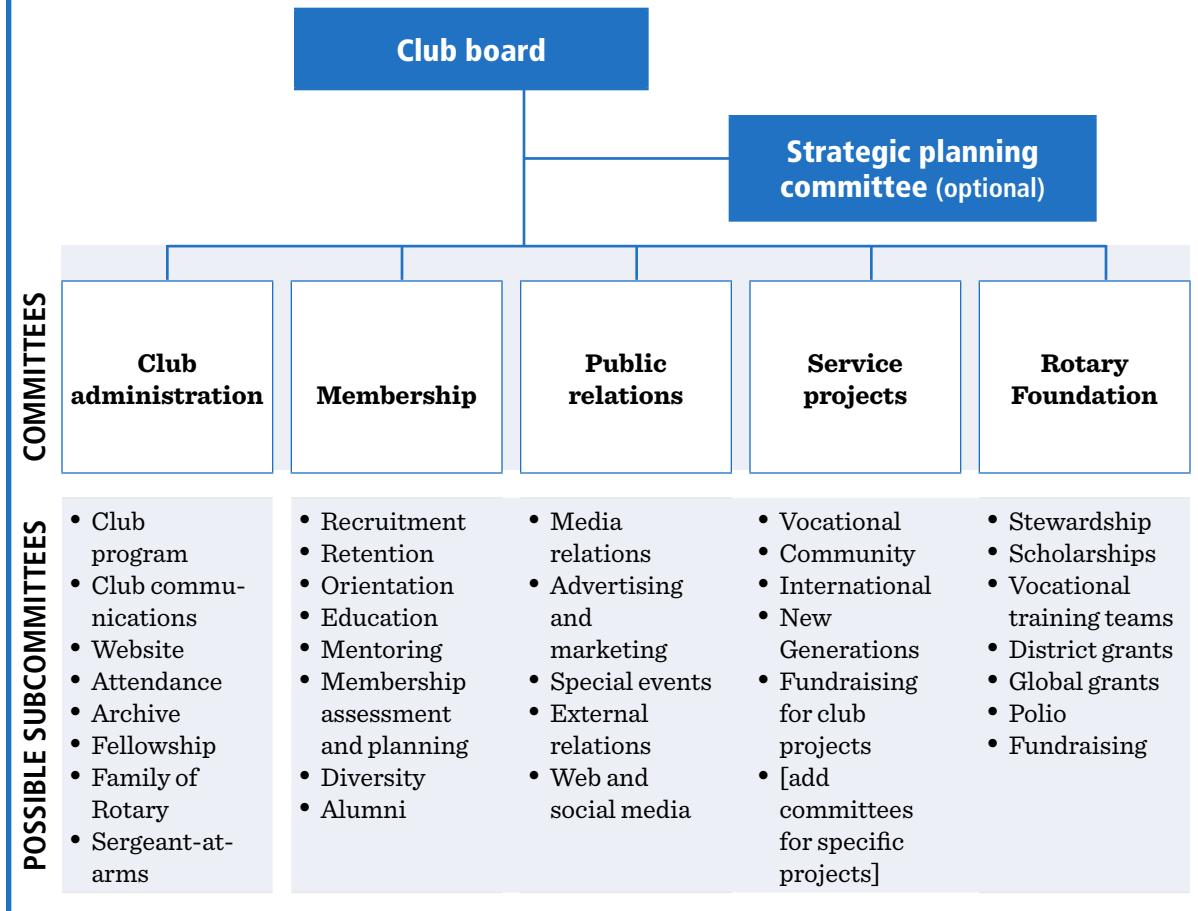
TRAINING MEETING/ TIME OF YEAR	PURPOSE	CONVENER/ ORGANIZER	MATERIALS
<b>Governors-elect Training Seminar (GETS)</b> August-December, regional training in conjunction with Rotary institute	District governors-elect learn their responsibilities and prepare to lead their districts.	<b>Convener:</b> RI director or immediate past director	<b>For leaders:</b> <i>Governors-elect Training Seminar Leaders' Guide</i> <b>For participants:</b> <i>District Governor's Manual</i>
<b>International Assembly</b> Before 15 February	District governors-elect are provided a Rotary education, instruction on administrative duties, motivation, and inspiration.	<b>Conveners:</b> RI president and president-elect <b>Organizer:</b> Moderator	<b>For leaders:</b> <i>International Assembly Leaders' Guide</i> <b>For participants:</b> <i>Governor-elect's Workbook</i>
<b>District Team Training Seminar</b> February	Assistant governors and district committee leaders learn their new roles and responsibilities, and work with the district leadership team on district goals and complete the district leadership plan.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee	<b>For leaders:</b> <i>District Team Training Seminar Leaders' Guide</i> (247) <b>For participants:</b> <i>Lead Your District</i> manuals for assistant governors (244) and committees (249)
<b>Presidents-elect Training Seminar (PETS)</b> February or March	Club presidents-elect learn their new responsibilities and work with assistant governors to set their goals.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee	<b>For leaders:</b> <i>Presidents-elect Training Seminar Leaders' Guide</i> (243) <b>For participants:</b> <i>Club President's Manual</i> (222)

TRAINING MEETING/ TIME OF YEAR	PURPOSE	CONVENER/ ORGANIZER	MATERIALS
<b>District Training Assembly</b> March, April, or May (after PETS)	Club presidents-elect build on PETS training to gain leadership skills, while other incoming club leaders learn their new responsibilities. Club leadership teams refine their goals for the year.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District training committee	<b>For leaders:</b> <i>District Assembly Leaders' Guide</i> (828) <b>For participants:</b> <i>Club Officers' Kit</i> (225) manuals for: president (222) secretary (229) treasurer (220) committees (226) (administration, membership, public relations, service projects, Rotary Foundation)
<b>District Membership Seminar</b> April or May (after district training assembly)	Club president, club membership committee chair, interested Rotarians, and district leaders learn necessary skills, knowledge to sustain and increase their clubs' membership.	<b>Convener:</b> Governor-elect <b>Organizer:</b> District membership committee	<b>For leaders:</b> <i>District Membership Seminar Leaders' Guide</i> (242) <b>For participants:</b> Determined by the district

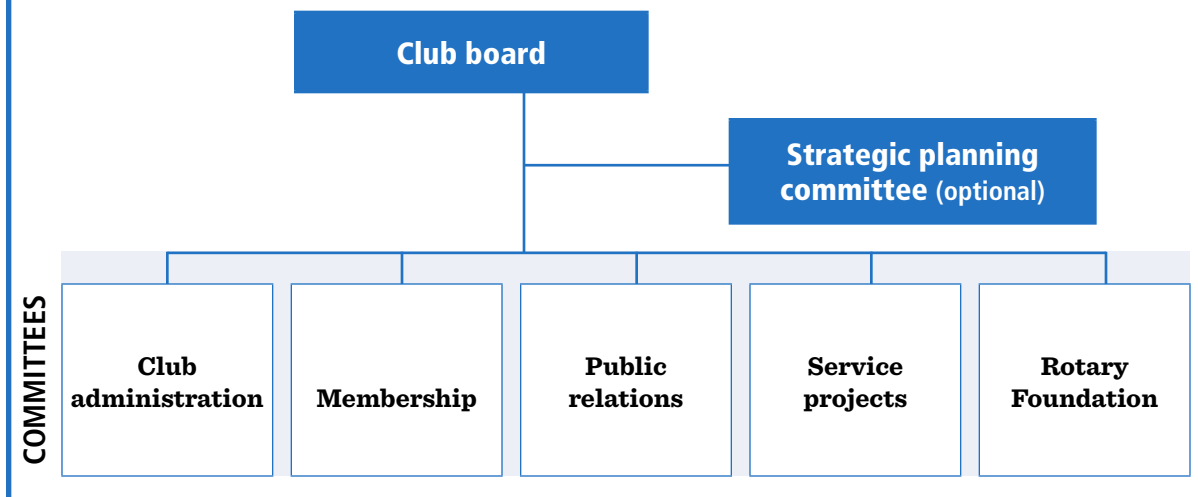
# SAMPLE CLUB COMMITTEE STRUCTURE



## OPTION 2: Large Rotary Club



## OPTION 3: Small Rotary Club



# DISTRICT PLANNING GUIDE

April 2013

This guide helps districts assess their current state and establish goals for the coming year. Complete this form during your year as governor-elect to develop goals for your year as governor. To complete this form, refer to Rotary Club Central. Work with your district leadership team to set the goals, which should promote your district's strategic plan. Review and revise the goals throughout the year. Download a Word version of this form at [rotary.org](http://rotary.org).

District number: \_\_\_\_\_ Rotary year of office: \_\_\_\_\_

Name of governor: \_\_\_\_\_

Name of immediate past governor: \_\_\_\_\_

Name of governor-elect: \_\_\_\_\_

Name of governor-nominee: \_\_\_\_\_

## STRATEGIC PLANNING

### Current State

Does the district have a strategic plan in place? ☐ YES ☐ NO

Does your district consult with the Rotary coordinator? ☐ YES ☐ NO

If so, when was it last reviewed/established? \_\_\_\_\_

### Future State

The district will focus on the following areas or strategic priorities:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## TRAINING

### Current State

Number of Rotarians who attended

District team training seminar: \_\_\_\_\_

Presidents-elect training seminar: \_\_\_\_\_

District assembly: \_\_\_\_\_

District Rotary Foundation seminar: \_\_\_\_\_

District membership seminar: \_\_\_\_\_

District leadership seminar: \_\_\_\_\_

Club leadership development program: \_\_\_\_\_

Grant management seminar: \_\_\_\_\_

Number of clubs with Rotarians appointed at the district level: \_\_\_\_\_

How does the district support club trainers? \_\_\_\_\_

### Future State

The district will focus on the following areas of training and leadership development:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## DISTRICT ADMINISTRATION

---

### Current State

Does the district have a communication plan in place? ☐ YES ☐ NO

When does the district's election process start for the following positions?

Governor: \_\_\_\_\_ Council on Legislation representative: \_\_\_\_\_ RI director: \_\_\_\_\_

What is the district's election process?

☐ Nominating committee ☐ Ballot at district conference ☐ Ballot by mail

Do you use rotary.org? ☐ YES ☐ NO

How is the governor's monthly communication distributed? ☐ Mail ☐ Email ☐ Website ☐ Video

What social media networks does the district use (e.g., Facebook, YouTube, LinkedIn)? \_\_\_\_\_

How often is the district's website updated? \_\_\_\_\_

How often does the district conduct fellowship activities? \_\_\_\_\_

How does the district involve the families of Rotarians? \_\_\_\_\_

Number of clubs that received the Presidential Citation last year: \_\_\_\_\_

What awards did the district receive last year? \_\_\_\_\_

What awards does the district give out? \_\_\_\_\_

### Future State

The district will focus on the following areas of district administration:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## FINANCE

---

### Current State

How is the district budget prepared? \_\_\_\_\_

When was the budget approved by a majority of clubs? \_\_\_\_\_

When is the statement of district finances reviewed?

How is the district financial statement shared with clubs? \_\_\_\_\_

☐ Email ☐ Mail ☐ Verbal report ☐ Website ☐ Other \_\_\_\_\_

Does the district have procedures in place to protect district funds? ☐ YES ☐ NO

Were appropriate tax documents filed with local government? ☐ YES ☐ NO

Is the per capita levy sufficient for district needs? ☐ YES ☐ NO

### Future State

The district will focus on the following areas in finance:

1. \_\_\_\_\_
2. \_\_\_\_\_

3. \_\_\_\_\_

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### DISTRICT CONFERENCE

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#### Current State

Number of participants: \_\_\_\_\_

Number of clubs in attendance: \_\_\_\_\_

Highlights of the program: \_\_\_\_\_

Have participant evaluations been reviewed? ☐ YES ☐ NO

#### Future State

During my year, the district will focus on the following areas for the district conference:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

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### RI CONVENTION PROMOTION

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#### Current State

Is the RI Convention promoted in your district? ☐ YES ☐ NO

Have materials been shared with clubs to promote the upcoming convention?

☐ YES ☐ NO

About how many Rotarians from your district attended the last RI Convention? \_\_\_\_\_

Does your district website have a link to RI Convention resources? ☐ YES ☐ NO

#### Future State

The district will focus on the following areas of RI Convention promotion:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

---

### PUBLIC RELATIONS

---

#### Current State

List district activities covered by the media, and the type of media coverage (e.g., radio, newspaper, television):

\_\_\_\_\_

Does your district consult with the Rotary public image coordinator? ☐ YES ☐ NO

Does your district encourage clubs to use RI public relations materials? ☐ YES ☐ NO

Does your district budget for public relation materials? ☐ YES ☐ NO

Did your district apply for public image grants in the past two years? ☐ YES ☐ NO

#### Future State

The district will focus on the following areas of public relations:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## MEMBERSHIP

---

### Current State

Current number of members: \_\_\_\_\_

Net membership growth in existing clubs during current year: \_\_\_\_\_

Number of male members: \_\_\_\_\_ Number of female members: \_\_\_\_\_

Number of clubs targeted to attract younger members: \_\_\_\_\_

Number of clubs with 25 or fewer members: \_\_\_\_\_

Describe the district's strategy for incorporating innovative and flexible ideas for attracting and keeping members into current practices: \_\_\_\_\_

### Future State

The district will focus on the following areas of membership:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## NEW CLUBS (EXTENSION)

---

### Current State

How many clubs have been chartered in your district over the past two years? \_\_\_\_\_

Which communities has your district identified as potential locations for new Rotary clubs? \_\_\_\_\_

How many years does a sponsor club work with a new club? \_\_\_\_\_

### Future State

The district will focus on the following areas to increase its number of new clubs:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## THE ROTARY FOUNDATION

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### Current State

Does your district consult with the regional Rotary Foundation coordinator? ☐ YES ☐ NO

District qualified status: ☐ Qualified ☐ Pending ☐ Incomplete

Amount of District Designated Fund for a district grant: \_\_\_\_\_

Number of clubs currently participating in a district grant: \_\_\_\_\_

Amount of District Designated Fund for global grants: \_\_\_\_\_

Global grants:

1. \_\_\_\_\_



2. \_\_\_\_\_

3. \_\_\_\_\_

The district held the following educational, promotional, and fundraising projects for PolioPlus last year:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Number of Rotary Peace Fellows the district nominated last year: \_\_\_\_\_

Number of district's Rotary Peace Fellow nominees selected by the Trustees last year: \_\_\_\_\_

Amount contributed to Annual Fund last year: \_\_\_\_\_

(Note: This should be the sum as reported in Rotary Club Central.)

Endowment Fund:

Number of Benefactors last year: \_\_\_\_\_

Number of Bequest Society members last year: \_\_\_\_\_

Number of Major Donors last year: \_\_\_\_\_

#### **Future State**

Amount of District Designated Fund for a district grant: \_\_\_\_\_

Number of clubs you would like to involve in district grants: \_\_\_\_\_

Amount of District Designated Fund for global grants: \_\_\_\_\_

The district will concentrate on the following area(s) of focus:

☐ Peace and conflict prevention/resolution

☐ Maternal and child health

☐ Disease prevention and treatment

☐ Basic education and literacy

☐ Water and sanitation

☐ Economic and community development

Global grants:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Number of global grants still in progress: \_\_\_\_\_

The district will plan the following educational, promotional, and fundraising projects for PolioPlus:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Number of Rotary Peace Fellows the district will nominate: \_\_\_\_\_

Annual Fund contribution goal: \_\_\_\_\_

(Note: This should be the sum of club goals as reported in Rotary Club Central.)

Endowment Fund:

Number of Benefactors: \_\_\_\_\_

Number of Bequest Society members: \_\_\_\_\_

Number of Major Donors: \_\_\_\_\_

## **DISTRICT PROGRAMS**

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### **Current State**

Number of Rotary Youth Exchange students: \_\_\_\_\_ Hosted: \_\_\_\_\_ Sponsored: \_\_\_\_\_

Number of sponsored Interact clubs: \_\_\_\_\_ Number of Interactors: \_\_\_\_\_

Number of sponsored Rotaract clubs: \_\_\_\_\_ Number of Rotaractors: \_\_\_\_\_

Number of sponsored Rotary Community Corps: \_\_\_\_\_ Number of participants: \_\_\_\_\_

Number of Rotary Youth Leadership Awards (RYLA) participants: \_\_\_\_\_

Number of Rotary Youth Leadership Awards (RYLA) activities: \_\_\_\_\_

Number of Rotary Friendship Exchanges: \_\_\_\_\_

Number of service projects coordinated by the district (includes all Avenues of Service): \_\_\_\_\_

Number of Rotarians in the district participating in

Rotarian Action Groups: \_\_\_\_\_

Rotary Fellowships: \_\_\_\_\_

### **Future State**

The district will focus on the following areas to improve district programs:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

SUMMARY OF GOALS FOR DISTRICT \_\_\_\_\_

ROTARY YEAR \_\_\_\_\_

---

**Strategic planning goals**

\_\_\_\_\_

\_\_\_\_\_

**Training goals**

\_\_\_\_\_

\_\_\_\_\_

**District administration goals**

\_\_\_\_\_

\_\_\_\_\_

**Finance goals**

\_\_\_\_\_

\_\_\_\_\_

**District conference goals**

\_\_\_\_\_

\_\_\_\_\_

**RI Convention promotion goals**

\_\_\_\_\_

\_\_\_\_\_

**Public relations goals**

\_\_\_\_\_

\_\_\_\_\_

**Membership goals**

\_\_\_\_\_

\_\_\_\_\_

**Organizing new club goals**

\_\_\_\_\_

\_\_\_\_\_

**Rotary Foundation goals**

The district will participate in the following Rotary Foundation grants: \_\_\_\_\_

The district's Annual Fund contribution goal is \_\_\_\_\_.

The district's Endowment Fund contribution goal is \_\_\_\_\_.

**District programs goals**

For the local community: \_\_\_\_\_

For communities in other countries: \_\_\_\_\_

**Other goals**

\_\_\_\_\_

\_\_\_\_\_

# DISTRICT TEAM TRAINING SEMINAR

## DISCUSSION QUESTIONS

Review the following discussion questions. Thinking about these questions and reviewing your manual before attending the seminar will help you prepare for your training and maximize the effectiveness of your time with fellow district leaders.

### Communication Within the District

- When and how often should members of the district team communicate with each other?
- What information should be communicated to clubs? What information should be communicated to district leaders?
- How will information be communicated?

### Role and Responsibilities

- What are your club- and district-level responsibilities?
- Who will you need to work with?

### Elements of a Vibrant Club

- What is the district's role in supporting clubs?
- What are the qualities of an effective club?

### Club Goals

- Why is goal setting so important?
- How can you work with clubs to help them establish goals?

### Working With Clubs

- How can you promote the best practices in *Be a Vibrant Club: Your Club Leadership Plan* (245)?
- What are some common challenges clubs must overcome?
- What are characteristics of clubs that merit special attention?
- What is your role in helping clubs and the district governor prepare for the governor's official visit?
- What successful strategies have you used that you can share with other assistant governors?
- How can you use Rotary Club Central to identify club issues?

### Resources

- How will you collaborate with district committees and other assistant governors to support clubs effectively?
- How can [learn.rotary.org](http://learn.rotary.org) be useful to clubs?
- What other resources are available that you can recommend?



# ROTARY CLUB CENTRAL PLAN TOGETHER TRACK PROGRESS ACHIEVE GOALS



## Why should clubs use Rotary Club Central?



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.

## How do I get to Rotary Club Central?

Go to [www.rotary.org/clubcentral](http://www.rotary.org/clubcentral).

## Who can use Rotary Club Central?

All Rotarians can view the goals and achievements for their club. The current and incoming club president, secretary, executive secretary, treasurer, Foundation chair, and membership chair can add and edit the goals and achievements for their club.



**ROTARY CLUB CENTRAL:** [www.rotary.org/clubcentral](http://www.rotary.org/clubcentral)