

# ASSISTANT GOVERNOR BASICS

This Assistant Governor Basics textbook is partly extracted from RI online Learning Center. Please visit the Rotary's Learning Center for further information needed on the Rotary website: [Rotary.org](https://www.rotary.org).

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## Lesson 1

# Get Ready: Assistant Governor

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## 1.1 Introduction

As an assistant governor, your role on the district team is crucial. You're the connection between your clubs and the district, and you're the main support person for your clubs. The relationships you build with club leaders make Rotary stronger.

By working closely with your governor, you:

- Provide continuity in leadership
- Motivate incoming presidents
- Help clubs reach their potential



## 1.2 Your responsibilities

These are your official responsibilities:

- Visit each club regularly to discuss club activities, resources, and opportunities.
- Support clubs in setting and achieving goals, finding solutions to challenges, resolving conflicts, and meeting membership, financial, and other requirements.
- Serve as a liaison between clubs and district committees.
- Assess a club's ability to thrive and mentor club leaders on strategies to help their clubs succeed.
- Encourage clubs' involvement in district activities and committees.
- Keep the governor informed on the progress your clubs make toward their goals.
- Stay up-to-date on Rotary initiatives.
- Share the status of clubs with your successor.



## 1.3 Preparing for your role

Whether you're a new assistant governor or an experienced one, these best practices from other assistant governors can help you prepare for your role.

- Step 1** Understand the leadership roles that you'll be working with at the club and district levels. Try to meet the people who'll hold these positions during your year.
- Step 2** Discuss with your district leadership team how you'll work together to support clubs.
- Step 3** Understand how to use Rotary's online tools.
- Step 4** Talk with the outgoing assistant governor to learn about the clubs you'll be supporting.
- Step 5** Get to know your clubs' strengths and weaknesses. Use that information to help plan your year.
- Step 6** Attend training sessions, including the district team training seminar, presidents-elect training seminar (PETS), and district training assembly.
- Step 7** Work with incoming club presidents during PETS to build relationships and help them set goals.
- Step 8** Schedule your club visits for the year.
- Step 9** Make sure that you are familiar with the latest Rotary initiatives, policies, and resources.



## ASSISTANT GOVERNOR PREPARATION TIMELINE

Use this timeline to prepare for your role. It contains the best practices and tips from other assistant governors.

### *January-February (before taking office)*

**Understand the leadership roles that you'll be working with at the club and district levels. Try to meet the people who'll hold these positions during your year:**

District Leaders	Club Leaders
Governor	Presidents
Governor-elect	Secretary or executive secretaries
Governor-nominee	Treasurers
Trainers	Trainers
Other assistant governors	
Secretary or executive secretaries	
Past district governors	

### *February*

**Work with your district leadership team:**

- Understand the structure of the district team and how its members support club committees.
- Determine a plan for communicating with your team.
- Discuss district goals with the governor-elect.
- Check with your district to see whether you'll have a budget for the year.
- Decide how online membership leads will be managed.
- Work with the outgoing assistant governor and the district team to make consistent, realistic, and long-lasting plans for supporting clubs.

### *February-March*

**Understand how to use Rotary's online tools:**

- Resources in My Rotary under the Manage tab
- Rotary Club Central
- Online Membership Leads at the district level
- Rotary Ideas
- Rotary Showcase
- Discussion groups
- Brand Center

### *February-June*

☐ **Work with the outgoing assistant governor:**

- Learn about each club's successes, challenges, and culture.
- Get suggestions for working with these clubs.
- Find out what tools the assistant governor used to manage clubs.
- Ask about their approach to working with each club.
- Observe club visits with your predecessor before you take office.



□ **Get to know your clubs' strengths and weaknesses. Use this information to help plan your year:**

- Review their goals, achievements, and ratings in Rotary Club Central.
- Review membership, Foundation, club balance, and other reports in My Rotary.
- Read your clubs' newsletters and follow their accounts on social media.
- Assess your clubs based on their:
  - Operating structure and effectiveness
  - Overall strength, including membership, Foundation giving, financial situation, management practices, and stewardship
- Work with your district team to create a plan for clubs that need the most attention and for those that are performing well.

### **February-April**

**Attend training sessions, including:**

- The district team training seminar
- The presidents-elect training seminar (PETS)
- The district training assembly

### **February-May**

**Work with incoming club presidents during PETS:**

- Build relationships so you understand their needs.
- Encourage them to identify their club's needs.
- Encourage club officers to create My Rotary accounts.
- Help them develop or refine their club goals and enter them in Rotary Club Central.
- Make sure current club officers add incoming club officers to My Rotary or their club management system. (You'll receive a list from Rotary in March of club officers who haven't been reported.)
  - Club officers should be reported by 1 February for the following year.
  - Club presidents, secretaries, treasurers, Foundation chairs, and membership chairs can add new officers.
- Discuss how the district and your clubs will manage online membership leads.

### **April-June**

**Schedule your club visits for the year:**

- Plan to visit each club at least once per quarter.
- Schedule your visits based on the club's needs.
- Ask the previous assistant governor how they scheduled their visits.
- Meet with your club presidents monthly, either in person or virtually, to stay current on their successes and challenges.

### **Ongoing**

**Make sure that you are familiar with the latest Rotary initiatives, policies, and resources:**

- Subscribe to Rotary newsletters, including Rotary Leader.
- Visit My Rotary often for news, videos, and stories.
- Become familiar with resources available on My Rotary.
- Refer to Rotary's governance documents when you work with clubs on matters concerning policy. Your Club and District Support representative can also help.

## 1.4 During your year

### YOUR YEAR AT A GLANCE

What will you be doing during your year? Select the tabs below to see examples from past assistant governors and districts.

#### AT THE START OF THE YEAR

- Develop collaborative and friendly relationships with club leaders.
- Begin your club visits.
- Discuss your district's communication plan with club leaders and establish a process with each club for working with them.
- Start planning the governor's visits to your clubs.
- Set up a group communication with all of your club presidents to share general reminders, announcements, and information.
- Keep clubs informed about the governor's priorities and district initiatives, and motivate them to fulfill the governor's requests.
- Work with your governor and district membership chair to determine how membership leads will be handled.
- Collaborate with clubs on the strategic planning process.

#### MONTHLY/QUARTERLY

##### Monthly

- Check in with club presidents, either as a group or individually.
- Update the governor with news to include in the monthly communication to clubs, such as great projects, member recognition, or innovative ideas.

##### Quarterly

- Review your clubs' progress toward their goals.
- Visit your clubs, including for club and board meetings, and club assemblies if you're invited.
- Use the Club Visit Planner to prepare for your visits, which is in the materials for this course.
- Rate clubs in Rotary Club Central after each visit or as agreed on with your governor.
- Meet with the governor to provide updates on clubs, discuss any problems, and share your experiences.

#### ONGOING

- Continuously assess the health of your clubs and tailor your support to their needs.
- Suggest practical solutions to problems your clubs encounter.
- Promote the best practices recommended in Be a Vibrant Club: Your Club Leadership Plan. Help club leaders implement those practices.
- Tell district committee chairs about clubs' successes and challenges that relate to their subject areas.
- Ensure that club leaders implement appropriate financial stewardship of club funds.
- Promote attendance at district training events.
- Encourage participation in all district activities.
- Attend club events.
- Coach new club leaders and new members on Rotary knowledge and help find mentors for new members.

- Coordinate customized training at the club level, such as asking the district membership chair to help clubs that are not keeping members engaged.
- Identify and support the development of future leaders, including possible assistant governors. Encourage clubs to conduct a Leadership in Action program.

## **AT THE END OF THE YEAR**

- Acknowledge and celebrate the accomplishments of your clubs.
- Ensure that clubs recognize what they do well and maintain those strengths.
- Review club goals and discuss clubs' progress toward achieving them.
- Suggest areas that need more attention in the next year.
- Share your final evaluation with clubs so they can reflect on the year.
- Work with your successor to prepare them for their year as assistant governor.
- Talk to your successor about which clubs are thriving and which ones need extra support.



## 1.5 Summary

Ready to get started? Just remember these tips:

- Learn about each club's culture, successes, and challenges.
- Build relationships with your club presidents to establish trust.
- Work with your district team to create a plan for clubs that need the most attention and those that are performing well.
- Stay up-to-date with Rotary's initiatives, policies, and resources.



## Lesson 2

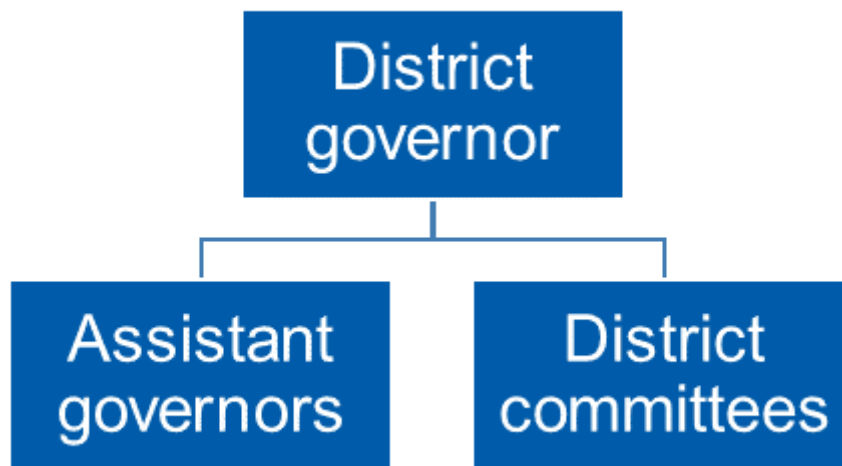
# Working with Your District Team

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The goal of the district team is to help clubs succeed. Whether you're a returning member of the team or a new one, this course will help you learn what the district team does and how you can work together to support clubs.

## 2.1 Overview of the district team

The district leadership team includes the governor, assistant governors, committees, and incoming and past governors.



This structure is intended to help the district team give clubs the support and guidance they need to succeed. But districts should adjust it as needed.

Your district leadership plan should include:

- Responsibilities for each role
- Required and optional committees
- A process for helping clubs implement the club leadership plan

Let's take a closer look at the district leadership team's responsibilities.

## 2.2 Shared responsibilities



All members of the district leadership team are expected to:

- Work with the governor, governor-elect, governor-nominee, assistant governors, and district committee chairs to set strategies for achieving goals
- Promote and attend district training meetings and the district conference
- Relay information between Rotary International, the district, and club members
- Work closely with club leaders to offer support and guidance
- Collaborate with their regional leaders: regional Rotary Foundation coordinators, Rotary coordinators, Rotary public image coordinators, endowment/major gifts advisers, and End Polio Now coordinators



## 2.3 Required roles and committees

Rotary policy requires some district roles. Let's take a look at the responsibilities the people in these roles have.

### DISTRICT GOVERNOR

During your term, clubs will look to you for leadership, support, and motivation as they carry out service projects and participate in Rotary programs. You also:

- Strengthen clubs, organize new clubs, and increase membership
- Encourage contributions and other support for The Rotary Foundation
- Improve Rotary's public image and serve as a spokesperson for the district

### ASSISTANT GOVERNORS

As assistant governor, you're the connection between the clubs assigned to you and the district. The relationships you build with club leaders make Rotary stronger. You also:

- Visit each club regularly to discuss its activities, resources, and opportunities
- Support clubs in setting and achieving goals, finding solutions to challenges, resolving conflicts, and meeting their district and RI administrative requirements
- Serve as a liaison between clubs and district committees

### Required committees

#### Membership

Develops, markets, and implements club and district strategies to increase membership

#### Public image

Helps members understand that effective external publicity, alignment with Rotary's brand, and a positive public image help Rotary grow

#### Finance

Supervises district funds by reviewing and recommending the amounts of the district fees per person and overseeing all district expenditures and income

#### Training

Supports the governor and governor-elect in training club and district leaders and overseeing the district's overall training plan

#### Rotary Foundation

Helps the governor educate, motivate, and inspire Rotarians to participate in Foundation programs and fundraising; oversees five subcommittees: fundraising, grants, PolioPlus, Rotary Peace Fellowships, and stewardship

## Rotary Foundation committee required subcommittees

### **Fundraising**

Coordinates the district's fundraising goals for the Annual Fund, PolioPlus Fund, and Rotary's Endowment, soliciting gifts and educating Rotarians about their gift options

### **Grants**

Helps clubs apply for Rotary grants and encourages participation in district grants and global grants

### **PolioPlus**

Supports Rotary's commitment to eradicate polio and encourages participation in PolioPlus activities

### **Rotary Peace Fellowships**

Encourages clubs to participate in the Rotary Peace Centers program and manages clubs' applications

### **Stewardship**

Oversees the qualification of clubs to participate in grants and has responsibility both for ensuring the careful management of Rotary grant funds and for educating Rotarians on how to manage grants properly and effectively

① Find details about the qualifications and responsibilities for each of these required committees in District Leadership Team Responsibilities. (Appendix 2)



## 2.4 Optional committees

### **Alumni**

Finds ways that clubs and the district can engage alumni in Rotary's fundraising, membership, and service efforts

### **Community service**

Promotes programs, activities, and resources related to community and vocational service and offers additional support for Rotaract and Interact clubs

### **Convention promotion**

Promotes attendance at the annual Rotary Convention to Rotary members throughout the district

### **District conference**

Plans and promotes the district conference and helps achieve maximum attendance

### **Diversity, equity, and inclusion**

Supports member, club, and district efforts to grow and diversify our membership and promote diversity, equity, and inclusion practices and policies for members, participants, and the community

### **Interact**

Offers young people ages 12-18 a chance to connect with other young people in their community or school while developing their leadership skills and serving their community

### **International service**

Motivates clubs to get involved in international service and connects them to resources and mentors

### **New Generations Service Exchange**

Promotes New Generations Service Exchange as an opportunity for professional development and service for people ages 18-30

### **Nominating**

Nominates the most qualified Rotarian available to serve as governor

### **Rotaract**

Assists the governor in publicizing Rotaract, promoting the establishment of new Rotaract clubs, and administering Rotaract within the district

### **Rotary Friendship Exchange**

Helps members to participate in exchanges by finding exchange partners and working with them to plan exchanges, as well as promoting the program to clubs

### **Rotary Youth Exchange**

Promotes youth exchanges by coordinating inbound and outbound youth exchange activities and communicating regularly with Rotary, the governor, and clubs that sponsor exchange students

## Rotary Youth Leadership Awards

Oversees, promotes, and supports the Rotary Youth Leadership Awards (RYLA) program in the district

- ① Find details about the qualifications and responsibilities for each of these optional committees in District Leadership Team Responsibilities, which is in the materials for this course. (Appendix 2)



## 2.5 Working with each other and with clubs

Now that you know more about the roles of the district team, think about how you can work with the team members and your regional leaders to:

- Give clubs the support they need
- Relay information between clubs and the district

### **How you work with clubs**

The district team is a key resource for clubs, especially those that are struggling. Here are some tips to get you started.

#### **Tip 1**

Talk with other district team members and past leaders to learn how clubs have worked with others in your role.

#### **Tip 2**

Review information in Rotary Club Central to determine which clubs you want to work with and what kind of support would benefit them most.

#### **Tip 3**

Don't forget to ask clubs what they need most. A successful partnership depends on open communication.

#### **Tip 4**

Encourage clubs to look at the suggestions in Be a Vibrant Club: Your Club Leadership Plan. They'll find tips for revitalizing their clubs and engaging new and continuing members.

## **How you work with each other**

How you work together as a team will determine your effectiveness in supporting clubs. Learn each other's roles, areas of expertise, and goals to maximize the support you offer.

Determine which projects and activities your team can take on to have the most impact.

Review your processes for planning district activities and supporting clubs. Ask yourself whether clubs are getting what they need from the team.

Put the team members' skills to use supporting district projects and activities.

What are some opportunities for collaboration in your district? Start by looking at your district's goals and considering these questions:

- What other areas does this goal affect? Membership? Public image? Any others?
- Who else on my team can help work toward this goal?
- What project can we collaborate on to achieve this goal?

## 2.6 Working with regional leaders

Regional leaders and their teams have expertise in membership, The Rotary Foundation, public image, fundraising, and polio eradication efforts. They each support multiple districts and can offer the best practices, report on trends, and suggest detailed action steps. Work with them to achieve your district's goals.

Do you know how each regional leader can help you succeed? Flip the cards to find out.

### **Rotary coordinators**

Assist in strategic planning and in attracting and engaging members to develop vibrant clubs

### **Rotary public image coordinators**

Help members tell Rotary's story in a compelling way and guide them in their marketing, media outreach, and social media

### **Regional Rotary Foundation coordinators**

Help members fully participate in their Foundation to meet their service and fundraising goals

### **Endowment / major gifts advisers**

Help increase members' participation in major gifts fundraising and the Endowment

### **End Polio Now coordinators**

Foster clubs' and districts' awareness, advocacy, and financial support to help achieve the certification of polio eradication

## 2.7 Your communication plan

Consider the types of information you want to communicate, how you want to deliver it, and how often. Here are some ways you can make sure your district has the information it needs:

- Assistant governors can relay information among the governor, district committees, and clubs
- District committees can communicate directly with club committees

### How is information shared in your district?

Use this checklist to decide how updates should be communicated among clubs, the district, and Rotary International.

#### Updates from Rotary International

- ☐ Who on the team should the governor tell first?
- ☐ How quickly should the message be given to clubs? How will you determine a message's priority?
- ☐ How will the message be communicated — in person, by phone or email, in a newsletter?
- ☐ Will different members of the team be responsible for relaying certain types of information?
- ☐ Who will communicate which information?

#### Communication among clubs, the district, and the zone

- ☐ What type of information does your district want to receive from clubs?
- ☐ How will you give this information to the governor?
- ☐ How should the governor communicate information to you?
- ☐ Under what circumstances will governors work directly with clubs?
- ☐ How will information from regional leaders be shared with clubs?
- ☐ Under what circumstances will regional leaders work directly with clubs?

## 2.8 Review

Let's review what you've learned about working with your district team. Match the district team member on the left with the responsibility or opportunity for collaboration with the district team member on the right.

1) Governor	a) Finds ways clubs and local service organizations can collaborate
2) Community service committee	b) Works with other district committees to engage alumni in club and district activities
3) Finance committee	c) Connects clubs with project resources to help them apply for global grants
4) Membership, Rotary Foundation, and public image committees	d) Plans and conducts a Vibrant Club workshop
5) Assistant governor	e) Works with the Rotary Foundation chair to disburse grant funds
6) International service committee	f) Fosters continuity by working with past, current, and incoming district leaders
7) Alumni committee	g) Assesses clubs' ability to thrive and mentors club leaders

By building relationships with each other, fostering collaboration, and communicating effectively, you'll be able to give clubs the support they need to succeed.

### Answers

1) - f   2) - a   3) - e   4) - d   5) - g   6) - c   7) - b



## Lesson 3

# Supporting Your Clubs

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## 3.1 Getting started

You're the main support person for your clubs. Look at each club as a whole and customize your support to meet its specific needs.

Before you start your term, think about how you can get to know your clubs so you can give them the support and resources they need. Start by developing relationships with presidents-elect and learning about the challenges they face and the goals they want to achieve.

You'll need to understand each club's strengths and needs in the areas of membership, Foundation giving, operations, and financial management and stewardship. Ask the outgoing assistant governor to tell you how they think the clubs are doing. By evaluating each club as a whole, you can decide — in collaboration with your governor — what kind of support to offer.

### Membership

Here's how you can assess membership for each of your clubs:

- Review the Club Growth and Member Viability and Growth reports in Rotary Club Central to understand membership trends and retention rates.
- Talk with club presidents about how their clubs handle online membership leads. Review the following reports in My Rotary to learn about the leads that have been assigned to clubs:
  - Active and Historical Membership Leads Report
  - Membership Leads Executive Summary

### History of giving to The Rotary Foundation

Understand each club's giving history by:

- Reviewing their current Foundation giving goals, progress, and achievements in Rotary Club Central, looking at Annual Fund contributions, PolioPlus Fund contributions, and Major Donors
- Reviewing reports in Rotary Club Central, such as the Club Fundraising Analysis, Club Recognition Summary, and Monthly Contribution report
- Working with the district Rotary Foundation chair to increase giving in the district



## **Operating structure and effectiveness**

Talk with the outgoing assistant governor and presidents-elect to learn more about how each club operates. You may want to ask:

- Does the club have a strategic plan?
- Do club leaders enter annual goals in Rotary Club Central?
- Does the club have active and engaged leaders?
- Is there a process for ensuring continuity in leadership?
- Do members attend district events and seminars?

## **Financial management and stewardship of funds**

The financial health of your clubs is extremely important. Here are some questions to ask club officers or the outgoing assistant governor to learn about how each club manages its finances:

- Does the club approve a budget for the upcoming Rotary year, appoint a treasurer, and keep separate bank accounts for administration and fundraising or project funds?
- Does the club achieve its fundraising goals?
- Does the club pay district and Rotary International dues on time?
- Does the treasurer update the board regularly on the club's finances?

## **Club assessments**

One of your responsibilities is to encourage clubs to assess how they're doing. By examining their practices and traditions, clubs can learn what's working well and what they could improve. Help them get started by:

- Asking club leaders to take the Rotary Club Health Check
- Suggesting that club presidents get feedback through the Member Satisfaction Survey
- Promoting the Club Planning Assistant to help clubs address their particular challenges

You can find links to these in the Resources section. Make sure clubs know that they can contact you if they have questions about how to use these assessments or what to do with the results.

## **When is a club in trouble?**

According to the Standard Rotary Club Constitution, clubs are expected to:

- Pursue the Object of Rotary
- Carry out successful service projects related to the five Avenues of Service
- Strengthen Rotary's membership
- Support The Rotary Foundation
- Develop leaders beyond the club level

Clubs that are struggling to meet these objectives or the minimum standards below may need special attention from you and other district leaders.

A functioning club should:

- Meet regularly
- Implement service projects that address the needs of the local community and/or communities in other countries
- Welcome visits by the assistant governor, governor, or any officer of Rotary International
- Pay per capita dues to RI
- Subscribe to a Rotary regional magazine
- Maintain liability insurance that is appropriate for the region (United States only)
- Act in a manner that is consistent with the RI Constitution and Bylaws and Rotary Code of Policies
- Pay RI membership and district dues without outside assistance
- Keep membership lists current in Rotary's database by using My Rotary or a club management system
- Resolve club disputes amicably
- Maintain cooperative relations with the district
- Cooperate with Rotary by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, associate foundations, or Rotary's international offices
- Complete the election review process established in the RI Bylaws, section 13.030.

Tell your governor which clubs are failing to meet these standards.

## 3.2 Working with your governor



The other main function of your role is to support the district governor. As the liaison between club and district leaders, you'll share information about your clubs' strengths and weaknesses with the district governor, governor-elect, and appropriate district committees. These discussions promote continuity and help leaders address ongoing challenges. Your governor may ask for regular status updates.

One way to communicate about a club's status is by using the Rate Clubs section of Rotary Club Central. In it, you can leave comments after your club visits or as agreed on with your governor. See the Maximizing Governor Visits course for more information about this tool.

The governor may ask you to discuss these items with your clubs

- Creating My Rotary accounts
- Setting goals
- Entering and updating goals in Rotary Club Central
- Attending the district conference, district training assembly, PETS, and other district events
- Diversifying their membership to reflect the demographics of their communities
- Using social media to promote themselves
- Observing World Polio Day, Rotaract Week and Interact Week, and other events
- Due dates for reporting club officers, club invoices, and award nominations

## 3.3 Working with Clubs

### Setting goals

Identifying areas where clubs could improve will help them set and adjust their goals. Encourage clubs to align their goals with Rotary's Action Plan and the district's goals.

Rotary Club Central is a useful tool for managing and tracking a club's goals. You can find reports about its membership, service, public image, and fundraising trends. Encourage clubs to use Rotary Club Central to set and enter their goals. This makes it easy for incoming leaders to see the club's history and for district leaders to track the club's progress toward its goals. Rotary Club Central fosters continuity of leadership, increases transparency, and saves paper.

### Goal setting

Setting goals is crucial to having a successful Rotary year because it provides a plan of action.

#### Step 1

##### **Analyze your clubs' strengths and weaknesses**

Meet with presidents-elect to review past club trends and current practices. Use the results of the Rotary Club Health Check to find clubs' strengths and weaknesses.

#### Step 2

##### **Develop goals**

Goals should be measurable, challenging, achievable, and time-specific. You'll want to help club leaders set goals that will allow the clubs to operate effectively and engage all of their members. Make sure that presidents-elect enter their goals into Rotary Club Central by 1 July.

#### Step 3

##### **Create action plans**

After a club develops its goals, be sure it has an action plan to achieve them. For example, a club could divide each goal into small, manageable steps with due dates and set milestones for achieving the goal.

#### Step 4

##### **Evaluate progress**

Encourage club presidents to keep their goals current and to track their progress in Rotary Club Central so that you can review those before you visit. During your visits, discuss the club's progress with the president.



**After your district governor assigns clubs to you, use My Rotary to learn more about them and Rotary Club Central to check on their goals.**

## 3.4 Visiting clubs

Now that you know how your clubs operate, you can find strategies to support them and plan productive visit

Plan to visit your clubs at least four times a year. (Some clubs may need more support than that.)

Prepare for your visits by:

- Reviewing clubs' goals, Foundation giving, membership reports, and service project activity in Rotary Club Central
- Using the Assistant Governor Club Visit Planner, available as part of this course, to help you plan your visits

Visits typically take place at regular club meetings. Here are some suggestions for your visits.

### Tips for visiting clubs

- Before your visit, ask the president, president-elect, and even the president-nominee, if that person is chosen already, whether they need anything from you or the district.
- Give them any reminders or other important information from the district.
- Promote upcoming training events by telling members how they'll benefit from attending. Be specific.
- Use your visit to develop relationships with club leaders and members.
- Attend club events while you're there. The more involved and visible you are, the more you'll be seen as approachable and supportive.

### Other ways to connect with club

Depending on geographical distance, the number of clubs you support, and the type of support clubs need, in-person visits may not always be feasible. You can still connect with your clubs' members by phone, video chat, and email, either individually or as a group.

Talking with club presidents individually can build rapport and help both of you address specific needs and sensitive issues. It's also a good time to check on their progress toward their goals.

Leading group calls or in-person group meetings also helps club presidents develop relationships so they can learn from and support each other.

### Approaching your clubs

How you approach your clubs can make a big difference in how receptive they are to working with you. Click on the + for advice from past assistant governors on developing strong club relationships.



## **① Build relationships with clubs to establish trust**

Here's how:

- Visit them as early as possible in the year
- Make yourself available and approachable
- Attend social events so club leaders get to know you
- Recognize club members' achievements at meetings

## **② Be empathetic**

Listen to the members of your clubs. Guide and coach them by offering suggestions. Know when the best approach is not to interfere.

## **③ Tell clubs what they can expect from you**

Clubs may hesitate to contact you about some situations because they aren't sure what the assistant governor can help with. Make sure they know what they can expect from you and what you can offer them.

## **④ Recognize that each club operates differently**

Remembering that there isn't just one way to run a club will help you and the governor maintain realistic expectations about your clubs' goals and how the clubs will work with you.

## **⑤ Understand the specifics of clubs' challenges**

What works well in one situation may not be at all helpful in another. Talk with club leaders to understand the causes of their problems as well as their unique strengths. Use what you learn to guide them to effective solutions and strategies.



## 3.5 Tailoring your support

Every club has different strengths and weaknesses. Help clubs succeed by offering advice and resources that meet their unique needs. Follow these steps to understand your clubs' challenges and tailor your support to their needs.

### 1 Identify problems and their causes

Listen to club leaders and ask thoughtful questions to make sure you understand not just the problem but its cause. Try this questioning technique:

1. Note the problem.
2. Ask: Why does this happen? If the cause is someone's behavior, find out what motivates the behavior.
3. Turn each answer into the next why question.
4. Repeat steps 2 and 3 until you find the cause of the problem.

You can also ask your clubs to take the Rotary Club Health Check and survey their members to learn what they like and don't like about the club. Use the answers to help you all determine what's causing the problem.

### Guide clubs to practical solutions

After you've found the cause of the problem, empower your clubs to take action by asking for their ideas for solving it.

### 2 Create vibrant clubs

Vibrant clubs engage their members, carry out meaningful projects, and try new ideas. Help your clubs become more vibrant by using the best practices listed below.

### Vibrant clubs

Help your clubs thrive by recommending these best practices.

#### 1) Make long-term plans

Ask clubs what they want to be like in three to five years. Do they want a more diverse membership? Are they interested in involving their communities in more club activities? Or in doing more meaningful projects?

Help them achieve these goals and more by having them make a strategic plan and set goals that they can achieve in three to five years.

#### 2) Set annual goals

It's easier to achieve long-term goals when they're broken into smaller annual goals. Rotary Club Central can help a club transform its vision into mini goals that it can reach more quickly.

#### 3) Hold engaging meetings

Lively, informative meetings get members excited about the club.

Suggest that clubs use the Member Satisfaction Survey to learn what members like and don't like about their meetings and get ideas for improving them.

#### **4) Have a communication plan**

Encourage each club to have a strong communication plan so it can inform members and the community about itself and its activities. The plan should include ways to include members who can't attend meetings in person, such as letting them participate through videoconferencing services.

#### **5) Strive for continuity in leadership**

To achieve their long-term plans, clubs need leaders who have been involved from the beginning in setting goals and making decisions. Continuity in leadership can help.

Suggest to your clubs that they make committee appointments last for multiple years and have a current, incoming, and past chair on each committee.

#### **6) Adopt bylaws that suit the club**

The recommended Rotary Club Bylaws are meant to be adapted to suit a club's needs. As your clubs evolve, their bylaws should reflect their actual practices. Recommend that club leaders involve members in shaping the club by reviewing the club bylaws each year and recommending updates.

#### **7) Develop relationships within the club**

People who enjoy their clubs are more likely to be active members. Clubs can keep members connected to the club by:

- Organizing social and networking events that give them time to get to know each other better
- Offering a mentoring program to help new members develop friendships more quickly

#### **8) Match members' activities to their interests**

Are members participating in activities that they genuinely care about? Members who are involved in activities they enjoy are often more committed.

Encourage clubs to survey members regularly to find out what their interests are and plan activities that they enjoy.

Clubs can also ask new members to develop programs and activities based on their interests. This will help them feel valued, give them a stake in what the club is doing, and grant them power to shape the club.

#### **9) Coach members to lead**

Clubs can help members develop leadership skills by assigning them a role at meetings or asking them to mentor someone new.

Remind clubs to visit the Learning Center regularly to see what new courses they can use to develop their expertise.

They can also use surveys to see which skills members want to develop. The Leadership in Action Leader's Guide can help clubs design an effective training program.

#### **10) Create practical committees**

Vibrant clubs use committees to achieve their goals and offer members opportunities to be involved.

Larger clubs may be able to accomplish more by creating additional committees or subcommittees. Smaller clubs might want to combine committees to avoid having members serving in too many roles and becoming overwhelmed.



It's a good idea for clubs of all sizes to review their committees each year to make sure they're effective.

For more information, see *Be a Vibrant Club: Your Club Leadership Plan*.

### **3 Connect them to resources**

Tell clubs about the tools and resources that can help them address challenges and become more effective. Here are some ideas:

- Encourage clubs to use the Club Planning Assistant to find strategies for their specific challenges
- Recommend alternative ways to meet members' needs, such as:
  - Starting new types of clubs
  - Offering alternative membership types or using different meeting formats
  - Relaxing attendance expectations
  - Reducing the frequency of meetings
- Connect clubs that excel in a particular area with clubs that are struggling in that area
- Recommend someone from the district who can help

See the Membership page on My Rotary for more resources.

## 3.6 Resources



You can recommend these resources to help clubs improve their member experience.

### **Membership resources**

Find a comprehensive list of membership resources on My Rotary.

<https://my.rotary.org/en/learning-reference/learn-topic/membership>

### **Club Planning Assistant**

Use this to develop strategies to address your club's specific challenges.

[https://rotary.qualtrics.com/jfe/form/SV\\_8798Eo0G60tlbsV](https://rotary.qualtrics.com/jfe/form/SV_8798Eo0G60tlbsV)

### **Membership Assessment Tools**

Assess your club to identify prospective members, diversify your membership, understand current members' needs, and learn why members leave.

<https://my.rotary.org/en/document/membership-assessment-tools>

<https://www.rotarythailand.org/doc/#Membership>

### **Rotary Club Health Check**

Identify problem areas and make the suggested changes to keep your club relevant for your members and the community.

<https://my.rotary.org/en/document/rotary-club-health-check>

<https://www.rotarythailand.org/doc/#Membership>

### **Club flexibility options**

Review the various types of clubs, memberships, and meeting formats to find the one that's right for you.

<https://my.rotary.org/en/club-flexibility>

## 3.7 Summary

Remember these tips as you work with your clubs:

- Build relationships with club leaders so they'll be receptive to the district's support.
- Help club leaders set and manage goals.
- Visit and check in with your clubs regularly.
- Guide and coach them to find solutions to their problems.
- Regularly tell your governor and district team how your clubs are doing.

## Lesson 4

# Maximizing Governor Visits

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## 4.1 Overview

Governors visit each club — either separately or during multiclub meetings — at least once during the year. The goal of these visits is to motivate and inspire members and offer district-level support for improving their communities.

During these visits, pay extra attention to struggling clubs and commend those that are successful. The visit is an important occasion for the club.

An effective club visit can lead to:

- A productive relationship with a club
- An increase in the club's sense of support from the district
- Encouragement and motivation for the club to adopt Rotary initiatives
- Stronger relationships with club leaders

### How assistant governors help

Assistant governors are an integral part of making these visits successful. Because of your close working relationship with your clubs, you understand their needs and can prepare the governor and club leaders for each visit.

### Scheduling visits

The governor, assistant governors, and club leaders should work together to decide on the best time for the visit. The funding that governors receive from Rotary assumes that you'll visit neighboring clubs consecutively.

Here are some tips to help you schedule visits:

1. Arrange for your visits to coincide with important club events, such as:
  - Charter Night programs
  - New member celebrations or orientations
  - Award presentations
  - Rotary Foundation events
2. Schedule visits to new or struggling clubs, and to others that require special attention, early in the Rotary year. If visiting in person again isn't feasible, follow up with them later in the year and have the assistant governor check in more regularly.
3. Ensure that all logistical arrangements, such as hotels and meals, are in place for the governor and the governor's partner, if they are accompanying the governor on the visit.
4. Factor in the club locations and how much time you will need for travel.
5. Encourage clubs to invite Rotaractors and Interactors to your visits. Otherwise, contact Rotaract clubs to schedule a time to connect.

## 4.2 During your visit

Use your visit to engage members and emphasize the district's role in supporting clubs

During your visit, you'll want to discuss the club's status and motivate members.

### Meeting with clubs

When you visit clubs, arrange to attend projects, events, or ceremonies that are important to the club. During the visit, you'll want to:

- Meet with the board to discuss the club's status with the president and other club leaders before the full meeting
- Ensure that the constitution and bylaws of the club comply with the constitutional documents, especially after meetings of the Council on Legislation
- Encourage club leaders to use the Rotary Club Health Check to identify issues that need attention and then create a membership plan to address them
- Attend a club meeting or assembly and talk with members about club activities, issues, and how the district can support their efforts
- Take time to listen to members' and club leaders' concerns
- Give out awards if your visit coincides with a recognition ceremony

Talking openly with club leaders will lead to a productive relationship throughout the year.

The assistant governor's role is to be a resource for both the club and governor. You'll communicate the governor's feedback and ideas to the club after the visit. Make sure you participate in the entire visit, including the meeting with the board.

### Motivating clubs

As governor, you'll have the opportunity to influence and motivate many Rotarians during club visits. Your talk should leave a lasting impact on the members.

### What to talk about

Your remarks are a chance to inform and enlighten people.

Use stories and examples to illustrate some of the following approaches.

- Explain the presidential theme and how clubs can put it into action.
- Emphasize that district leaders can help members. Give examples, such as assisting with service projects or by connecting clubs, along with those leaders' contact information.
- Encourage clubs to create an experience that works for all their members, and remind them that they can make changes in order to accommodate new and current members.

- Highlight important Rotary International and district issues.
- Recognize outstanding club projects and individual Rotarian contributions.
- Explain or emphasize Rotary initiatives and address any questions or concerns that club members have.



Preparation is the key to a successful speech. Click on the markers to see examples of how you can prepare for and structure your talks.

- 1. Have the shorter version ready** – Be prepared to adjust the length of your remarks in case you don't have as much time as you expected.
- 2. Grab the audience's attention** – Starting with a powerful opening line, such as a thought-provoking question or statement, will immediately engage your audience.
- 3. Use a conversational approach** – To avoid reading your presentation, use bullet points instead of writing out your remarks in full.
- 4. Tell a personal story** – Reflecting on a memorable moment in your life with Rotary will keep your audience engaged.
- 5. Tailor your speech** – Highlight outstanding club members, projects, and other achievements.
- 6. Close with a call to action** – What thoughts, ideas, or feelings do you want your audience to leave with? What do you want people to do?
- 7. Practice, practice, practice** – Rehearsing your speech beforehand will help you feel confident and prepared.

## 4.3 Preparing for the visit

### Assistant governors

You're in a good position to prepare club leaders and the governor for the visit. Make sure the visit is successful by creating an agenda, working with club leaders, and learning about the goals, accomplishments, and challenges of the clubs.

### Develop an agenda

Start by working with your clubs to develop an agenda. The same plan may not work for every club, but all agendas should include:

- A discussion of the club's progress toward its goals
- Time for the club board to present committee plans, activities, and accomplishments
- Recognition of club projects
- A report from the governor on important district initiatives and Rotary issues
- Time to look at membership trends
- Time for questions and open discussion

### Prepare club leaders

- Build excitement by encouraging club leaders to promote the visit on their club website, through social media, and in their newsletter.
- Suggest that clubs recognize members during the visit or arrange for the governor to present awards or induct new members.
- Encourage clubs to:
  - Enter their goals in Rotary Club Central, if they haven't already
  - Review their progress toward their goals and reflect on members' morale
  - Identify questions or concerns they want to discuss with the governor
  - Organize reports on committee plans, activities, and accomplishments

### Work with your governor

- Identify clubs that need a visit early in the year, including those that are new, have low membership, or aren't meeting minimum standards. Discuss the club's strengths, weaknesses, and needs with the governor. Offer insight and potential steps for improvement.
- Supply a profile of the club, including the status of service projects, Rotary Foundation grant participation, public image efforts, and membership trends.
- Discuss any other successes or challenges for each club.
- Finalize the agenda with the governor.

## Governors

The key to a successful visit is taking the time to understand each club's goals, accomplishments, and challenges. You can do that by:

- ☐ Looking at Rotary Club Central to see a club's progress toward its goals and to review previous ratings
- ☐ Reviewing club and district membership, Foundation, and service reports in Rotary Club Central to get an overview of how each club is doing in these areas
- ☐ Working with assistant governors to determine the strengths, weaknesses, and needs of each club so you can address them at your visits
- ☐ Looking at each club's website, social media pages, and newsletters to learn about their activities and recognize their accomplishments





## 4.4 Rating clubs

The last step of each visit is to report on the club's status in Rotary Club Central. District governors and assistant governors should use the Club Ratings section to report each club's strengths, challenges, and activities.

The club rating guide is designed to help you establish rating standards in your district.

Clubs in My District:

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2018-19

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Hide Club Rating Guide

★★★★★ Excellent	This club is strong and vibrant, and club members are consistently engaged in club activities.
★★★★☆ Good	This club is informed and engaged but could increase its effectiveness.
★★★☆☆ Satisfactory	This club functions properly but could improve in several areas.
★★☆☆☆ Needs Improvement	This club needs significant assistance.
★☆☆☆☆ Nonfunctional	This club has failed to meet the criteria established by the RI Board for a functioning Rotary club.

Finalize Club Ratings

FINALIZE RATINGS

Do not FINALIZE RATINGS until you have verified the accuracy of all club ratings. Once finalized, all ratings for the Rotary year will be locked and cannot be changed, though you'll still be able to edit comments for your term.

District governors can view their year and the two previous years of club ratings. Governors-elect can view the current year. Assistant governors can view ratings only for their year in office and for the clubs they're assigned. All clubs should be rated and their ratings confirmed by 1 June.

### Consensus on ratings

Because ratings are subjective, it's important for governors, governors-elect, governors-nominee, and assistant governors to agree on the criteria for each rating.

### Comments

Comments are an important feature in Rotary Club Central and can be very helpful in recording and tracking the progress of your clubs. Comments can help clarify the ratings and establish clear communication between the assistant governor and governor. Governors and assistant governors should enter comments after each visit with a club. The examples below show some possible comments.

Let's look at how district leaders can work together to develop rating standards.

#### Excellent

- Membership has increased in the last year.
- All goals and achievements are entered into Rotary Club Central.
- Most members contribute to The Rotary Foundation.
- The club participates in several district and global grants.

#### Good

- Membership has increased or stayed the same in the last year.
- Goals and some achievements are entered into Rotary Club Central.
- Half the members contribute to The Rotary Foundation.
- The club participates in a few district and global grants.

#### Satisfactory

- Membership has stayed the same or decreased in the last year.
- Partial goals are entered into Rotary Club Central.
- Fewer than half of members contribute to The Rotary Foundation.
- The club participates in district grants.

#### Needs improvement

- Membership has decreased in the last year.
- Goals aren't entered into Rotary Club Central.
- Very few members contribute to The Rotary Foundation.
- The club doesn't participate in grants.

#### Nonfunctional

- Meetings are held less often than twice a month.
- The club doesn't implement service projects that meet the needs of the local or international communities it serves.
- Club officers don't accept a visit from the assistant governor or governor.
- The club doesn't pay district or Rotary dues.

- **Assistant governors can comment on and view ratings for their assigned clubs only.**
- **The governor and governor-elect can comment and see ratings for all clubs in the district.**
- **Clubs can't view them at all.**



## 4.5 Summary

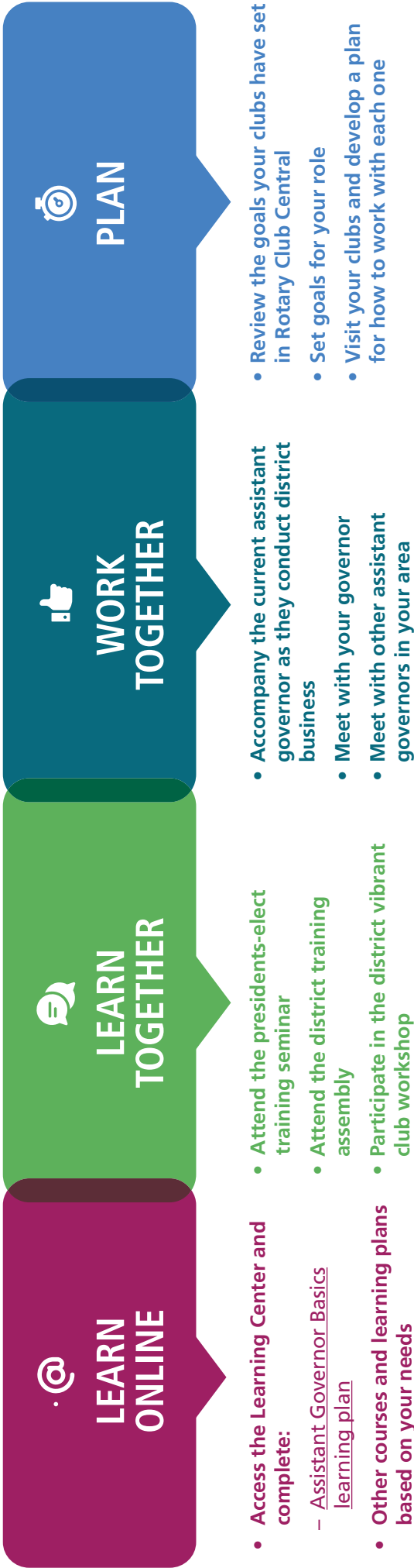
You're ready to conduct your governor visits! Remember these tips as you prepare:

- 1) Schedule visits to struggling clubs early and follow up with them throughout the year.
- 2) Build excitement among club leaders so they'll promote the visit.
- 3) Learn as much as you can about the club's achievements and challenges.
- 4) Personalize your talk to each club.
- 5) Make thoughtful ratings and comments in Rotary Club Central after each visit.

Governors who have used this approach have reported positive experiences during their visits, both for themselves and their clubs.

# PREPARING TO BE AN ASSISTANT GOVERNOR

This learning path will help you develop your leadership skills and understand what to expect as an assistant governor. You'll use this, your prior knowledge and experience, and other district resources to prepare yourself for a successful year.



Throughout this process, make sure to periodically reflect on what you've learned and evaluate how you're doing. Ask others for feedback so you can keep improving during your year in office.

## Appendix 2

# District Leadership Team responsibilities

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This document outlines district leadership committee responsibilities. Use this to determine who would be a good fit for any committee openings.

## ALUMNI COMMITTEE

This committee finds ways that clubs and the district can engage alumni in Rotary's fundraising, membership, and service efforts.

### Qualifications

Give preference to:

- Rotary alumni
- Members with professional experience working with alumni

### Responsibilities

- Work with other district committees, particularly the membership, Foundation, scholarship, and programs committees (e.g., Interact, RYLA, Rotary Youth Exchange), to engage alumni in club and district activities.
- Identify alumni and their skills or status (speaking, project handling, potential member, donor to Foundation and Rotary programs, etc.) and help clubs and the district connect with these alumni.
- Raise awareness of how to work with alumni to maintain their relationship with Rotary.
- Encourage alumni to report their data to RI by creating profiles on My Rotary, and work with fellow district committee members to ensure that RI recognizes former program participants as such.
- Follow privacy and youth protection policies and local laws.
- Support and coordinate alumni associations and alumni events, as needed.

### Training Requirements

Committee members should:

- Complete the [District Committee Basics](#) and [District Alumni Committee Intermediate](#) learning plans for their role in Rotary's Learning Center
- Participate in the district team training seminar

## ASSISTANT GOVERNORS

Assistant governors motivate and support a group of designated clubs. They are appointed for one-year terms and may serve as many as three consecutive terms. The number of assistant governors should reflect such factors as your district's size, language needs, geography, and balance of strong and weak clubs. Your district is responsible for budgeting financial support for assistant governors as they perform their duties.

### Qualifications

Minimum criteria for assistant governors:

- Active membership in good standing in a club in the district for at least three years
- Experience as president of a club for a full year or as a charter president for at least six months

Additional criteria:

- Knowledge of clubs, the district, and Rotary, including Rotary's policies and online tools
- Demonstrated leadership qualities and skills, including listening, communication, motivation, accessibility, integrity, and being proactive
- Regular participation in district events

### **Responsibilities**

- Visit each club regularly to discuss club activities, resources, and opportunities.
- Support clubs in setting and achieving goals, finding solutions to challenges, resolving conflicts, and meeting their district and RI administrative requirements
- Serve as a liaison between clubs and district committees.
- Assess clubs' ability to thrive and mentor club leaders on strategies to make their clubs successful.
- Encourage clubs' involvement in district activities and committees.
- Keep the governor informed on clubs' progress.
- Stay up-to-date on Rotary initiatives.
- Tell your successor about clubs' status.

### **Training Requirements**

Assistant governors should:

- Complete the [Assistant Governor Basics learning plan](#) in Rotary's Learning Center
- Participate in the presidents-elect training seminar
- Participate in the district team training seminar

## **COMMUNITY SERVICE COMMITTEE**

This committee promotes programs, activities, and resources related to community, vocational, and youth service. Consider establishing a Rotary Community Corps subcommittee.

### **Qualifications**

Give preference to:

- Past district governors
- Past regional Rotary Foundation coordinators
- Past assistant regional Rotary Foundation coordinators
- Rotarians and Rotaractors with experience in planning and implementing service efforts

### **Responsibilities**

- Motivate clubs to work with community members to identify issues they could address through humanitarian projects.
- Highlight successful service efforts, useful advice, Rotary programs, and resources that help strengthen projects.
- Promote vocational service by encouraging club members to use their talents and professional skills to plan and carry out service projects.
- Encourage clubs to organize a Rotary Community Corps (RCC), and encourage participants of district RCC meetings to exchange project ideas.
- Collaborate with other district committees, such as the international service and Rotary Foundation committees.
- Help the club service projects committee with its responsibilities.

- Organize district-level meetings for club service projects chairs that coincide with the district conference, district training assembly, and other gatherings, to provide opportunities to exchange ideas and promote projects.
- Identify ways that clubs and local service organizations can cooperate on service projects by sharing information and helping clubs to set goals.
- Request regular reports on successful projects from club community service chairs for promotion through the governor's monthly communications and Rotary Showcase, and pass them on to RI for possible publication.
- Organize exhibits on outstanding community service projects at district and zone meetings.
- Coordinate districtwide community, vocational, and youth service activities.
- Promote resources for service and engagement, including Rotary Fellowships, Rotary Action Groups, and your district resource network.
- Facilitate district recognition for clubs or individuals who advance the principles of Rotary, including vocational service and empowering and engaging young people.
- Promote opportunities for clubs to partner with Rotary's service and project partners.
- Coordinate with the Interact, RYLA, and New Generations Service Exchange chairs to ensure communication across all youth activities.

The Rotary Community Corps subcommittee has these responsibilities:

- Promote understanding of and participation in the RCC program through district meetings and regular contact with clubs.
- Assist clubs with establishing RCCs.
- Encourage clubs to seek resources for their RCC projects on Rotary Showcase.
- Identify successful RCC projects to promote on the district website, in the governor's monthly communication, and on Rotary Showcase.
- Keep records of RCCs' status and their activities and periodically tell the governor and RI about them.

### **Training Requirements**

Committee members should:

- Complete the [District Committee Basics](#) learning plan in Rotary's Learning Center
- Participate in the district team training seminar

## **CONVENTION PROMOTION COMMITTEE**

This committee promotes attendance at the annual Rotary International Convention to members throughout the district.

### **Qualifications**

Give preference to Rotarians and Rotaractors with:

- Experience attending a Rotary convention
- Marketing experience
- Public speaking skills

### **Responsibilities**

- Attend club and district meetings to promote the convention.
- Be a local source for convention materials and information.
- Help the zone-level RI Convention Promotion Committee member assigned to your district.
- Contact potential registrants.
- Contribute convention articles and information to district newsletters, directories, and other publications.



- Translate important convention information into local languages, if necessary.
- Add a link to [convention.rotary.org](https://convention.rotary.org) to your district website.

Many convention promotion committees also:

- Organize district group tours for the convention (especially for first-time attendees).
- Invite prospective members to attend the convention (this is done mainly by host districts).
- Carry out marketing campaigns and promote contests offered by the RI Convention Promotion Committee.

### **Training Requirements**

Committee members should:

- Complete the [District Committee Basics](#) learning plan in Rotary's Learning Center
- Participate in the district team training seminar

## **DISTRICT CONFERENCE COMMITTEE**

This committee plans and promotes the district conference and helps achieve maximum attendance.

### **Qualifications**

Give preference to the governor-elect, governor-nominee, or Rotarians and Rotaractors with:

- Experience in the meeting coordination or hospitality industry
- Professional media, public relations, or marketing skills
- Public speaking skills

### **Responsibilities**

- Recommend the district conference venue and make logistical arrangements.
- Manage conference finances to allow for maximum attendance.
- Promote conference attendance, emphasizing participation by new members and new clubs and representation from every club.
- Invite external audiences, such as the media, community leaders, and beneficiaries of Rotary's programs.
- Consider including time in the agenda to report on Rotary Foundation activities, if no other district meeting has offered or plans to offer such a report.
- Provide a relevant, motivational, and informative program.

### **Training Requirements**

Committee members should:

- Complete the [District Committee Basics](#) learning plan in Rotary's Learning Center
- Review the information and resources on the [District Conferences page](#) of My Rotary
- Participate in the district team training seminar

## **DIVERSITY, EQUITY, AND INCLUSION COMMITTEE**

This committee supports member, club, and district efforts to grow and diversify our membership and participation. It also promotes diversity, equity, and inclusion (DEI) practices and policies to members, participants, and the community. The committee should reflect the diversity of the district and include members of Rotary and Rotaract clubs and participants. The chair should serve a three-year term.



## Qualifications

Give preference to Rotarians and Rotaractors with:

- Experience leading DEI activities
- Professional DEI experience or education
- Other experience with DEI

## Responsibilities

- Offer DEI training in cooperation with the district training committee.
- Evaluate district policies and guidelines from a DEI perspective and recommend any changes needed to improve them.
- Advise district leaders on how to create a welcoming district culture.

## Training Requirements

Committee members should:

- Take the [basic](#) and [intermediate](#) DEI courses in the Learning Center
- Identify local and regional DEI issues
- Participate in the district team training seminar

## FINANCE COMMITTEE

This committee supervises district funds by reviewing and recommending the amount of the district fees per person, overseeing all district expenditures and income, preparing an annual budget, reporting to clubs on the district's finances, and managing the district governor's expenses. The district treasurer is automatically a member of the committee and has voting privileges. Rotary policy does not recommend that the governor or governor-elect serve on the finance committee. The chair should serve a three-year term.

## Qualifications

Give preference to Rotarians and Rotaractors with:

- Experience as club treasurer
- Accounting or finance experience

## Responsibilities

- In cooperation with the governor, create a district budget to be submitted to clubs at least four weeks before approval, at a meeting of incoming club presidents.
- Review and recommend the amount of per capita levy (dues). Any per capita levy needs approval from at least three-fourths of the incoming club presidents at PETS or at the district training assembly, or from a majority of electors present and voting at a district conference.
- Ensure that proper income and expense records are kept.
- Collaborate with the immediate past district governor to prepare and distribute an independently reviewed annual financial report to all clubs for discussion and approval at a district meeting, according to [RI Bylaws](#) section 15.060.4.
- Ensure that a committee member (preferably the treasurer) and the district governor are the authorized signatories for district bank accounts. Any withdrawal requires both signatures. The bank account must be held in the name of the district.
- Work with the district Rotary Foundation chair to disburse grant funds and ensure that proper records of grant activity are kept for reporting purposes.
- Manage the district governor funding process: Determine whether expenses are eligible, document guidelines and timelines for receiving expense reports, and determine the logistics and frequency of reimbursements to the governor.

## Training Requirements

Committee members should:

- Complete the [District Committee Basics](#) and [District Finance Committee Intermediate](#) learning plans in Rotary's Learning Center
- Participate in the district team training seminar

## INTERACT COMMITTEE

Interact offers people ages 12-18 a chance to connect with other young people in their community or school while developing their leadership skills. The committee is composed of Rotarians, Rotaractors, and Interactors who promote and support the activities of Interact clubs. Committee members are encouraged to serve two consecutive terms.

### Qualifications

Give preference to:

- Members with Interact experience
- Interact alumni and members with leadership potential

### Responsibilities

- Train, inspire, and engage clubs to offer leadership development and service activities that empower young people, especially through service-learning, Rotary's approach to youth service.
- Encourage Rotary and Rotaract clubs to sponsor Interact clubs.
- Keep program participants connected with Rotary and help them transition from one program or activity to another.
- Protect youth from physical, sexual, and psychological abuse by designing safe and inclusive experiences in accordance with Rotary policies and local laws.

## Training Requirements

Committee members should:

- Complete the [District Committee Basics](#) and [District Interact Committee Intermediate](#) learning plans in Rotary's Learning Center
- Participate in the district team training seminar

## INTERNATIONAL SERVICE COMMITTEE

This committee works to enhance the district's humanitarian efforts by motivating clubs to get involved in international service and connecting them to resources and mentors. The chair should serve a three-year term to ensure consistency and continuity in developing sustainable projects that make an impact.

### Qualifications

Give preference to:

- Past district governors
- Past regional Rotary Foundation coordinators
- Past assistant regional Rotary Foundation coordinators
- Rotarians and Rotaractors with relationship-building skills or project planning and international project experience

### Responsibilities

- Encourage club and district involvement in international service.
- Promote resources and strategies for improving projects and global grants.
- Help clubs find international service partners.

- Create a district resource network composed of local experts with experience in project planning and implementation, Rotary's areas of focus, and Rotary grants, who will serve as mentors and help clubs improve projects and global grants.
- Identify and recruit mentors with relevant experience and technical skills by collaborating with:
  - District governors
  - Rotary Foundation committee
  - Grants subcommittee
  - Community service committee
  - Alumni committee
  - [Rotary Action Groups](#)
  - The Rotary Foundation Cadre of Technical Advisers
  - District Rotaract representatives
  - Rotary Peace Fellows
  - Rotary Community Corps
  - Community members and professionals from partnering organizations
- Support the district Rotary Foundation committee by connecting clubs that are applying for Foundation grants with mentors to help them prepare strong project plans and grant applications.
- Establish direct lines of communication and accountability for all types of international service, with emphasis on connecting clubs to a host or international partner, and on furthering global grant international relationships.
- Motivate and support clubs in their efforts to work with international clubs on service projects and grants.

## Training Requirements

Committee members should:

- Complete the [District Committee Basics](#) and [District International Service Committee Intermediate](#) learning plans in Rotary's Learning Center
- Participate in the district team training seminar

## MEMBERSHIP COMMITTEE

This committee identifies, markets, and implements development strategies that are appropriate for the district and that will result in membership growth by increasing the number of members in existing clubs and by establishing new clubs in the district. The chair should serve a three-year term.

## Qualifications

Give preference to Rotarians and Rotaractors who have:

- Experience as chair of a club committee related to membership development
- Success at inviting new members to join Rotary
- Experience in implementing membership programs
- Success at developing strategies to retain members
- Success at developing new clubs

## Responsibilities

Assist club membership chairs with their responsibilities:

- Assist in recruitment and retention efforts that will help clubs achieve their membership goals, paying special attention to smaller and weak clubs.
- Champion ways for clubs to become more diverse, equitable, and inclusive, including by making sure to represent the demographic composition of the community's professionals.

Manage prospective members:

- In consultation with assistant governors, manage the district's process of assigning candidates to clubs using the Manage Membership Leads page.
- Follow up with clubs, especially if they don't update candidates' status promptly.

Assist in organizing, establishing, and supporting new clubs:

- Identify communities without Rotary or Rotaract clubs that could benefit from having them, as well as communities where different club models could attract a diverse membership.
- Assist in organizing, establishing, and nurturing new clubs.

Report on the committee's progress:

- Share stories of membership success.
- Support any districtwide membership development activities.

The committee also plans and conducts the district vibrant club workshop in consultation with the governor and district trainer, as well as the district membership and Rotary Foundation chairs.

### **Training Requirements**

Committee members should:

- Complete the [District Committee Basics](#) and [District Membership Committee Intermediate](#) learning plans in Rotary's Learning Center
- Participate in the district team training seminar

### **NEW GENERATIONS SERVICE EXCHANGE COMMITTEE**

This committee manages and promotes New Generations Service Exchange, an opportunity for professional development and service for people ages 18-30.

### **Qualifications**

Give preference to Rotarians and Rotaractors with:

- Experience participating in the program
- General knowledge of Rotary
- Enthusiasm for young adults' leadership development, professional development, vocational exchange, and the New Generations Service Exchange program
- Previous experience working with Rotary Youth Exchange
- Ability to communicate in English

### **Responsibilities**

- Coordinate activities related to New Generations Service Exchange across the district.
- Promote the program to assistant governors and clubs and encourage members, program participants, and alumni to get involved.
- Cultivate relationships with other districts that participate in the program to foster exchange opportunities.
- Prepare a budget and submit it to the governor and the district finance committee for approval to ensure that no personal financial profit is being made from New Generations Service Exchange activities.

## Training Requirements

Committee members should:

- Complete the [District Committee Basics](#) learning plan in Rotary's Learning Center
- Participate in the district team training seminar

## NOMINATING COMMITTEE

This committee nominates the most qualified member available to serve as governor. The terms of reference for the committee are determined at the district conference. For details, contact [Club and District Support](#).

### Responsibilities

- Conduct the selection process in a dignified, responsible manner in accord with Rotary principles.
- Find and nominate the most qualified person.
- Interview all candidates, whether clubs or the nominating committee suggested them. Each interviewee should satisfy the minimum requirements specified in the Rotary Code of Policies section 19.030.
- Ensure that no member, alternate member, or candidate for membership on the nominating committee is eligible to be nominated for any office for which the committee nominates candidates.

## PUBLIC IMAGE COMMITTEE

This committee supports clubs in their efforts to promote Rotary to external audiences and fosters understanding, appreciation, and support for the organization's programs. It also helps Rotary and Rotaract members understand that effective external publicity, favorable public relations, and a positive image will strengthen the Rotary brand.

### Qualifications

Give preference to past Rotary public image coordinators, past assistant Rotary public image coordinators, or Rotarians and Rotaractors with:

- Expertise in club public relations activities
- Skills in professional media, journalism, public relations, communications, advertising, or marketing

### Responsibilities

- Maintain contact with the district governor and key committee chairs to stay informed about district projects and promotable activities, especially those that interest the public.
- Lead by example and share stories that show your district's members as people of action, through social media and other media:
  - Post district and club stories on social media, following the best practices and guidance for engaging external audiences found on the Brand Center.
  - Seek opportunities for low-cost or free ad placements with media outlets in the district.
- Encourage clubs to prioritize communicating with the public and promoting the impact they make:
  - Support clubs in using their websites and social media channels to maintain a digital presence that's up-to-date and relevant to the public.
  - Promote the use of People of Action materials and show how it can benefit your district and its clubs.
- Cultivate relationships with journalists to get media coverage of projects.

- Work with clubs to use the resources on the Brand Center to create and use logos that reflect Rotary's brand guidelines and produce materials that are distinctly Rotary's.
- Promote the End Polio Now campaign, areas of focus, successful grant projects, and alumni activities.
- Plan and conduct the district vibrant club workshop in consultation with the governor and district trainer, as well as the district membership and Rotary Foundation chairs.

### **Training Requirements**

Committee members should:

- Complete the [District Committee Basics](#) and [District Public Image Committee Intermediate](#) learning plans in Rotary's Learning Center
- Attend public image workshops held in conjunction with Rotary training meetings
- Attend the regional seminar held by the Rotary public image coordinator (RPIC)
- Participate in the district team training seminar

## **ROTARACT COMMITTEE**

This committee assists the governor in publicizing Rotaract, promoting the establishment of new Rotaract clubs, and administering Rotaract within the district. The district Rotaract chair (a Rotarian) and the district Rotaract representative (a Rotaractor) co-chair the committee. The committee is composed of an equal number of Rotarians and Rotaractors.

### **Qualifications**

Give preference to:

- Rotarians with experience advising and supporting Rotaract clubs
- Rotaractors with Rotaract leadership experience

### **Responsibilities**

- Develop and distribute a district Rotaract newsletter.
- Implement and support leadership training.
- Conduct Rotaract promotion and extension activities throughout the district.
- Advise and support Rotaract clubs in implementing their projects.
- Coordinate joint Rotary and Rotaract activities in the district.
- Coordinate public relations activities for Rotaract at the district level.
- Plan and implement a training session for Rotaract club officers in the district.

### **Training Requirements**

Committee members should:

- Complete the [District Committee Basics](#) and [District Rotaract Committee Intermediate](#) learning plans in Rotary's Learning Center
- Participate in the district team training seminar

## **ROTARY FOUNDATION COMMITTEE**

This committee helps the governor educate, motivate, and inspire members to participate in Foundation programs and fundraising. It serves as a liaison between the Foundation and club members. The district governor is an ex officio member of the committee and, along with the committee chair, has signing authority for the use of District Designated Funds. The committee chair should serve as an ex officio member of all subcommittees to stay informed of their progress and directly support them as needed. The chair serves a three-year term.

The members of the district Rotary Foundation committee serve as chairs of five subcommittees. Subcommittee chairs should serve three-year terms to ensure continuity:

- Fundraising — coordinates the district's fundraising goals for the Annual Fund, PolioPlus Fund, and Rotary's Endowment, soliciting gifts and educating Rotarians about their gift options
- Grants — helps clubs apply for Rotary grants and encourages participation in district grants and global grants
- PolioPlus — supports Rotary's commitment to eradicate polio and encourages participation in PolioPlus activities
- Rotary Peace Fellowships — encourages clubs to participate in the Rotary Peace Centers program and manages clubs' applications
- Stewardship — oversees the qualification of clubs to participate in grants and is responsible for ensuring the careful management of Rotary grant funds and for educating Rotary members about how to manage grants properly and effectively

Districts are free to appoint other subcommittees to support their activities and goals. Several subcommittees and roles can be reported but are not required:

- Annual Fund subcommittee
- Endowment/major gifts subcommittee
- Paul Harris Society coordinator
- Scholarship subcommittee
- Vocational training team subcommittee

### **Qualifications**

Give preference to:

- Past district governors
- Past assistant governors
- Past district subcommittee members
- Past regional Rotary Foundation coordinators
- Past assistant regional Rotary Foundation coordinators
- Significant financial donors
- Members who have experience with the Foundation's programs, Rotary's areas of focus, and grants

### **Responsibilities of the chair**

- Help the governor-elect gather opinions from clubs before setting district Foundation goals.
- Help the district training committee hold Foundation sessions at the presidents-elect training seminar and district training assembly.
- Plan and conduct the district vibrant club workshop in consultation with the governor and district trainer, as well as the district membership and public image chairs.
- Encourage clubs to offer at least two programs on the Foundation annually, paying special attention to November, Rotary Foundation Month.
- Coordinate all district Foundation fundraising and program participation.
- Promote financial support for Foundation programs by encouraging regular contributions to the Annual Fund, PolioPlus Fund, and Endowment.
- Work with the governor and governor-elect to decide how to use District Designated Funds (DDF).
- Manage DDF distribution and work with the governor to authorize use of DDF.
- Work with the district governor to provide all clubs with an annual report on the use of DDF.
- Ensure that reports on district-sponsored grants are sent to the Foundation on time.



- Help the governor select qualified recipients for Foundation awards.
- Authorize and ensure proper implementation of the district memorandum of understanding, as well as helping organize grant management seminars, to qualify the district to use Rotary grants.
- Ensure that all clubs interested in participating in Rotary grants are able to qualify.
- Confirm that clubs applying for global grants are qualified.
- Collaborate with the international service chair and district governor to identify Rotarian experts who can serve on the district resource network as advisers and help clubs improve projects and global grants.

### **Training Requirements**

All members of the district Rotary Foundation committee are expected to

- Complete the [District Committee Basics](#) and [District Rotary Foundation Committee Intermediate](#) learning plans in Rotary's Learning Center
- Attend a regional Rotary Foundation seminar conducted by a regional Rotary Foundation coordinator (RRFC)
- Participate in the district team training seminar

## **ROTARY FRIENDSHIP EXCHANGE COMMITTEE**

Through Rotary Friendship Exchanges, Rotary members learn about another culture by taking turns hosting and visiting one another. The committee encourages members to participate in exchanges.

### **Qualifications**

Give preference to Rotarians and Rotaractors with:

- General knowledge of Rotary
- Enthusiasm for the Rotary Friendship Exchange program, intercultural understanding, professional development, vocational exchange, international service, and cultural immersion
- Ability to communicate in English
- Previous experience working with adult international exchanges

### **Responsibilities**

- Find exchange partners and work with them to plan exchanges.
- Promote the program to clubs in your district.
- Help clubs recruit non-Rotary participants who share Rotary's values to go on exchanges.
- Publicize stories about exchanges.

### **Training Requirements**

Committee members should:

- Complete the [District Committee Basics](#) learning plan in Rotary's Learning Center
- Participate in the district team training seminar



## ROTARY YOUTH EXCHANGE COMMITTEE

Through Rotary Youth Exchange, Rotary empowers young people to develop leadership skills while promoting global understanding and peace. The governor-nominee should serve on the district Rotary Youth Exchange committee. Committee chairs should serve for no more than three consecutive terms. Governors are encouraged not to change more than 33% of the Rotary Youth Exchange committee at any time in order to ensure the continuity of the program.

### Qualifications

Give preference to Rotarians and Rotaractors with:

- General knowledge of Rotary
- Enthusiasm for Rotary Youth Exchange
- Ability to communicate in English
- Attendance at a Rotary Youth Exchange conference beyond the district

### Responsibilities

- Coordinate inbound and outbound youth exchange activities in your district.
- Communicate regularly with Rotary, your district governor, and clubs that sponsor exchanges.
- Protect youth participants from physical, sexual, and psychological abuse by making sure exchanges operate in accordance with Rotary's certification requirements and local laws.

### Training Requirements

Committee members should:

- Complete the [District Committee Basics](#) learning plan and the Protecting Youth Program Participants course in Rotary's Learning Center
- Review the [Rotary Youth Protection Guide](#)
- Participate in the district team training seminar

## ROTARY YOUTH LEADERSHIP AWARDS COMMITTEE

Through Rotary Youth Leadership Award (RYLA) events, clubs develop young leaders while inspiring them to connect with one another, exchange ideas, and take action in their schools and communities. The chair should serve no more than three consecutive terms.

### Qualifications

Give preference to Rotarians and Rotaractors with:

- General knowledge of Rotary
- Experience with Rotary Youth Leadership Awards, as participants or organizers
- Enthusiasm for young adults' leadership development

### Responsibilities

- Assist with the organization of RYLA events in your district.
- Connect young leaders, including Interactors, Rotaractors, and Rotary Youth Exchange students, to RYLA and to Rotary's global community.
- Keep RYLA alumni engaged with Rotary.
- Protect youth participants from physical, sexual, and psychological abuse by designing safe and inclusive experiences in accordance with Rotary policies and local laws.

## Training Requirements

Committee members should:

- Complete the [District Committee Basics](#) learning plan and the [Get Ready: District RYLA Committee](#) course in Rotary's Learning Center
- Complete the Protecting Youth Program Participants course in the Learning Center
- Review the [RYLA Handbook](#) and the [Rotary Youth Protection Guide](#)
- Participate in the district team training seminar

## TRAINING COMMITTEE

This committee supports the district governor and governor-elect in training club and district leaders and overseeing the district's overall training plan. The district trainer is the chair of the training committee and assigns responsibility for training meetings and functions as necessary.

### Qualifications

Give preference to Rotarians or Rotaractors with experience in training, education, or facilitation.

### Responsibilities

- Work with the governor-elect, who has final approval on the program, speakers, training leaders, evaluations, and logistics for the presidents-elect training seminar (PETS), the district training assembly, and the district team training seminar, which includes assistant governor training. For a district participating in a multidistrict PETS, the governor-elect should select a training committee member to develop and conduct training at the seminar.
- Work with the governor, who has final approval on the program, speakers, training leaders, evaluations, and logistics for other training events as appropriate.
- Advise on the district vibrant club workshop.
- Support club trainers as needed.
- Promote district training events.

## Training Requirements

Committee members should:

- Complete the [District Committee Basics](#) learning plan and the [District Training Committee Intermediate](#) in Rotary's Learning Center
- Participate in the district team training seminar

## Appendix 3

# Assistant Governor club visit planner

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This list will help you prepare for your club visits. Customize it based on the needs of your clubs and the types of visits you're making.

### **Before each club visit**

- ☐ Review notes and action items from the last visit and communication with the president.
- ☐ Review the club's goals, achievements, ratings, and comments in Rotary Club Central.
- ☐ Review reports on My Rotary to understand membership, Foundation contributions, and other trends related to the club.
- ☐ Read the club's newsletters.
- ☐ See what the club is doing on social media.
- ☐ Ask your district governor for any other information to share with the club.

Add your own tasks:

Reminders and Activities for Clubs	

Club name \_\_\_\_\_

Notes	Recommendations

## Appendix 4

# Sample Club Committee Structure

Rotary recommends five club committees. Clubs can add, eliminate, or combine committees or subcommittees according to their interests, activities, and number of members. Assistant governors or district governors can help club leaders determine suitable subcommittees.

### OPTION 1: Standard Rotary Club Committees

COMMITTEES	Club administration	Membership	Public image	Service projects	Rotary Foundation
POSSIBLE SUBCOMMITTEES	<ul style="list-style-type: none"> <li>• Club program</li> <li>• Member communications</li> <li>• Website</li> <li>• Social events</li> </ul>	<ul style="list-style-type: none"> <li>• Attraction</li> <li>• Engagement</li> <li>• New member orientation</li> <li>• Diversity</li> </ul>	<ul style="list-style-type: none"> <li>• Media relations</li> <li>• Advertising and marketing</li> <li>• Web and social media</li> </ul>	<ul style="list-style-type: none"> <li>• International</li> <li>• Community</li> <li>• Vocational</li> <li>• Youth service</li> <li>• Fundraising (for club projects)</li> </ul>	<ul style="list-style-type: none"> <li>• Polio</li> <li>• Fundraising (for grants)</li> <li>• Grants</li> </ul>

### OPTION 2: Small Rotary Club Committees

COMMITTEES	Club administration	Membership	Public image	Service projects	Rotary Foundation
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### OPTION 3: Large Rotary Club Committees

#### COMMITTEES

Club  
administration

Membership

Public  
image

Service  
projects

Rotary  
Foundation

#### POSSIBLE SUBCOMMITTEES

- Club program
- Club communications
- Website
- Social events

- Attraction
- Engagement
- New member orientation
- Diversity
- New clubs
- Membership leads
- Assessment

- Media relations
- Advertising and marketing
- Web and social media

- International
- Community
- Vocational
- Youth service
- Fundraising (for club projects)

- Polio
- Fundraising (for grants)
- Grants
- Annual giving
- Major giving
- Stewardship

## Appendix 5

# Resources

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The Learning Plan for **Assistant Governor Basics** consists of various courses that you may learn from the Learning Center at Rotary.org

- Getting Started With the Learning Center
- Get Ready: Assistant Governor
- Working with Your District Team
- Supporting Your Clubs
- Maximizing Governor Visits
- Rotary's Action Plan and You
- Rotary Club Central Resources
- Online Membership Leads
- Protecting Personal Data
- Committing to Diversity, Equity, and Inclusion
- Preventing & Addressing Harassment
- Rotary's Change Model
- Essentials of Understanding Conflict











