

ガバナー・エレクト研修セミナー

SEMINARIO DE CAPACITACIÓN PARA  
GOBERNADORES ELECTOS SEMINÁRIO

# GOVERNORS-ELECT TRAINING SEMINAR Leaders' Guide

DES GOUVERNEURS ÉLUS SEMINARIO  
D'ISTRUZIONE PER I GOVERNATORI  
ELETTI GOVERNORS-ELECT TRAINING  
SEMINAR 차기총재 연수회

2011-12

ROTARY INTERNATIONAL®



**GOVERNORS-ELECT TRAINING SEMINAR  
Leaders' Guide  
2011-12**

This is the 2011 edition of the *Governors-elect Training Seminar Leaders' Guide*. It is intended for governors-elect training seminars held in the 2011-12 Rotary year. The information in this publication is based on the Constitution and Bylaws of Rotary International and the Rotary Code of Policies. Please refer to those documents for exact RI policy. Changes to the documents listed above by the RI Board of Directors override policy as stated in this publication.

This leaders' guide is produced by the Leadership Education and Training Division of Rotary International. If you have questions or comments, please submit them to:

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## Planning and Organization

Congratulations on being appointed as a governors-elect training seminar (GETS) training team member. As a member of this team, you have the opportunity to prepare incoming governors for their year of service.

The *Governors-elect Training Seminar Leaders' Guide* provides the necessary information for convening a governors-elect training seminar according to the RI Board-recommended guidelines. The supporting slides for this publication are provided on a flash drive that is sent to the GETS team leader, so they may be used with an LCD projector.

This leaders' guide is sent to each member of the GETS training team. It should be considered an outline for a governors-elect training seminar rather than a script to be followed exactly. GETS training teams are encouraged to adapt the guide to meet the needs of their participants.

The *District Governor's Manual* (233) and the training that governors-elect will receive at GETS will be the foundation for the International Assembly. At the International Assembly, training will include the exchange of information and ideas, case studies, group exercises, and updates on RI and Rotary Foundation programs.

### Purpose of the Governors-elect Training Seminar

The governors-elect training seminar is intended to help governors develop the necessary skills, knowledge, and motivation to support clubs in their district by offering methods and resources to

- Sustain and increase the district's membership base
- Implement successful projects that address the needs of their community and communities in other countries
- Support The Rotary Foundation through both program participation and financial contributions
- Develop leaders capable of serving in Rotary beyond the club level

### Program

The GETS Training Team is responsible for developing the program of the training event. The team should consider taking a needs assessment of the incoming group of governors-elect to determine what level they rate themselves at for the knowledge and skills needed for the office of governor.

### Board-recommended Topics

The Rotary Code of Policies recommends that GETS includes a minimum training time of nine hours which includes the topics listed below. The *GETS Leaders' Guide* sessions provide you with the materials to train on these topics.

- Role and responsibilities
- District organization
- Membership development
- Developing effective leaders

- The Rotary Foundation\*
- Administration requirements of RI (the role of the Secretariat)
- Preparing for the International Assembly

### **The Rotary Foundation**

The Rotary Code of Policies states that three hours of GETS should be dedicated to training on The Rotary Foundation. The *GETS Leaders' Guide* presents Foundation content in three sessions:

- A one-hour session (8A) for all districts together to discuss the Future Vision Plan and how districts can prepare for the transition and work with pilot districts
- Two separate two-hour sessions, held concurrently, for nonpilot districts (8B) and pilot districts (8C)

If governors-nominee and district Rotary Foundation committee chairs from the pilot districts are already present during preinstitute events, training team may wish to include them in these sessions.

### **Leadership Skills-based Topics**

In addition to Board-recommended topics, the GETS training team may wish to offer additional training on leadership skills needed for the role of district governor. While the *GETS Leaders' Guide* incorporates leadership skills throughout the sessions, [\*Leadership Development: Your Guide to Starting a Program\*](#) (250) is a very useful resource to provide training on a variety of skills:

- Communication
- Leadership styles
- Leading and motivating volunteers
- Mentoring
- Time management
- Goal setting and accountability
- Strategic planning
- Ethics and The Four-Way Test
- Building consensus
- Teamwork

### **Program Development**

Training materials have been divided into 11 sessions that vary in length from 40 to 120 minutes. Training leaders should develop a program to suit the needs of governors-elect in their region.

When developing the program, training leaders should

- Make topics more relevant to participants by using zone-specific examples to illustrate points
- Apply culturally appropriate training techniques based on the needs of the region

\* The recommended minimum training time for Rotary Foundation topics is three hours.

- Add interest to the program by using a variety of techniques, including panel discussions, audiovisual presentations, and group activities
- Incorporate frequent breaks throughout the training
- Incorporate movement into the sessions, for example, moving into small groups, standing up to share ideas, etc., to help keep participants focused
- Build in time at the end of each day to address additional questions from governors-elect or to discuss additional topics
- Bring energy and creativity to the program to make it fun for participants

### Course Outline

Session	Suggested Duration	Rotary Topics	Skills Developed
1: Responsibilities and Strategic Planning	60 minutes	<ul style="list-style-type: none"> <li>• Responsibilities</li> <li>• Strategic planning</li> </ul>	<ul style="list-style-type: none"> <li>• Consensus building</li> </ul>
2: Your District Leadership Team	60 minutes	<ul style="list-style-type: none"> <li>• Selecting the district team</li> <li>• Club Leadership Plan best practices</li> </ul>	<ul style="list-style-type: none"> <li>• Leading a team</li> <li>• Managing different work styles</li> </ul>
3: Developing Leaders	60 minutes	<ul style="list-style-type: none"> <li>• Managing training seminars</li> <li>• Promoting training seminars</li> </ul>	<ul style="list-style-type: none"> <li>• Project management</li> <li>• Motivation</li> <li>• Team building</li> </ul>
4: Running Your District	60 minutes	<ul style="list-style-type: none"> <li>• RI administrative requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Financial management</li> <li>• Organization</li> </ul>
5: Communicating with Rotarians	60 minutes	<ul style="list-style-type: none"> <li>• Communicating with clubs</li> <li>• Preparing for the official visit</li> <li>• Preparing for the district conference</li> </ul>	<ul style="list-style-type: none"> <li>• Speech writing</li> <li>• Speech delivery</li> <li>• Using technology to communicate</li> </ul>
6: Promoting a Positive Public Image	45 minutes	<ul style="list-style-type: none"> <li>• Successful public relations</li> <li>• PR grant program</li> <li>• Communicating Rotary's message</li> </ul>	<ul style="list-style-type: none"> <li>• Working with the media</li> <li>• Social networking</li> </ul>
7: Strengthening Membership	60 minutes	<ul style="list-style-type: none"> <li>• Identifying membership issues</li> <li>• Addressing membership issues</li> <li>• Setting membership goals</li> </ul>	<ul style="list-style-type: none"> <li>• Goal setting</li> </ul>

8A: Future Vision Plan <i>(all participants)</i>	60 minutes	<ul style="list-style-type: none"> <li>• Future Vision Plan overview</li> <li>• Building partnerships between pilot and nonpilot districts</li> </ul>	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Change management</li> </ul>
8B: Leading Your Foundation <i>(nonpilot participants)</i>	120 minutes	<ul style="list-style-type: none"> <li>• Foundation support team</li> <li>• Distributing DDF</li> <li>• Fundraising</li> </ul>	<ul style="list-style-type: none"> <li>• Team building</li> <li>• Motivation</li> <li>• Goal setting</li> <li>• Celebrating successes</li> </ul>
8C: Future Vision Pilot <i>(pilot participants)</i>	120 minutes	<ul style="list-style-type: none"> <li>• Foundation grants</li> <li>• Qualification</li> <li>• Funding model</li> <li>• Fundraising resources</li> </ul>	<ul style="list-style-type: none"> <li>• Financial management</li> <li>• Change management</li> </ul>
9: Supporting Successful Service	60 minutes	<ul style="list-style-type: none"> <li>• Developing service goals</li> <li>• Minimizing risk</li> </ul>	<ul style="list-style-type: none"> <li>• Motivating volunteers</li> <li>• Recognition</li> <li>• Networking</li> </ul>
10: Preparing for the International Assembly	40 minutes	<ul style="list-style-type: none"> <li>• International Assembly program</li> <li>• Preparing for the International Assembly</li> </ul>	<ul style="list-style-type: none"> <li>• Planning</li> </ul>

## **Logistics**

The RI Board requires governors-elect to attend standardized zone training meetings to better prepare them for their year of service and enhance the training provided at the International Assembly.

A two-day governors-elect training seminar must be held annually, in conjunction with the Rotary institute. The institute convener is responsible for ensuring that the GETS program is fully implemented as outlined in the Rotary Code of Policies.

## **Participants**

Participants attending GETS should include the GETS training team and governors-elect from the zone.

The GETS training team is appointed by the institute convener. It is made up of a minimum of four members, including:

- GETS training team leader
- Regional Rotary Foundation coordinator (RRFC)\*
- Rotary coordinator (RC)\*
- GETS general training team member

The team leader has the following responsibilities:

- Coordinate the GETS training team members
- Distribute the GETS training materials to the governors-elect, if necessary
- Collect the attendance sheet and submit it to RI
- Perform other responsibilities as required by the zone

Incoming governors must attend the governors-elect training seminar for the zone in which they were elected and will serve. Upon request, the institute conveners may make an exception in extenuating and mitigating circumstances.

## **Materials**

The *District Governor's Manual* (233) is an integral part of the governors-elect training seminar, and incoming governors are expected to read it to prepare for GETS. Because each chapter in the manual corresponds to a session in this leaders' guide and includes worksheets and appendixes that will be used during the sessions, participants should bring their copies of the manual with them to GETS.

## **Room setup guidelines**

The convener should provide the GETS training team with an appropriate meeting space, including a room that is large enough to comfortably conduct group activities during the training, and the following equipment:

- Tables and chairs for participants, arranged in a U shape to promote facilitated discussion

\* RRFCs and RCs serving in 2011-12 are preferred.

- Podium or table for training leader
- LCD projector or laptop computer
- Flip chart with easel, paper, and markers

## Preparing for GETS

GETS training leaders should prepare for the training with the following materials:

- GETS Leaders' Guide sessions
- Slides for sessions they are facilitating
- Seminar agenda (typically provided by the institute convener)
- *District Governor's Manual*
- [RI website Training for Trainers section](#)
- *District Training Manual* (246)

## How to Use the Session Guides

Session guides are designed to help training leaders facilitate a meaningful discussion on each topic. Although the session guides provide training leaders with a basic instructional framework, they cannot replace the local Rotary knowledge and experience of each training leader. Training leaders are encouraged to customize their sessions with their own knowledge and expertise in order to provide a program relevant to the governors-elect in their zone.

Training leaders may discuss additional topics, as time permits, and vary presentation approaches to help maintain participants' interest during the entire program. Creativity, innovation, and local expertise will inspire participants and enhance the training.

All session guides use a standard format that includes the following components:

### Facilitated discussion

Session guides provide the framework for leading participants in facilitated discussions. In these discussions, participants are asked to respond to questions that draw on their knowledge and experience as Rotarians. Training leaders should remain flexible, allowing group discussions to flow while ensuring the topic is covered. For more information on facilitated discussions, consult the *District Training Manual*.

### Discussion questions

Discussion questions are sample questions that training leaders can pose to participants to encourage discussion about a key concept.

### Sample responses

Sample responses are examples of answers participants might give to a discussion question. Training leaders may wish to use the sample responses to encourage discussion if participants are having difficulty responding to a discussion question. Not all sample responses have to be shared with participants.

## **Key points**

Key points are concise statements that help training leaders emphasize important concepts. These points should be shared with the group. Training leaders are encouraged to restate these ideas in their own words.

## **Training leader's notes**

Training leader's notes contain information, suggestions, and directions to help training leaders facilitate sessions.

## **Slide prompts**

Slide prompts indicate when a slide should be displayed to introduce a session or illustrate key points. The slides for this guide are provided on a flash drive for GETS team leaders and at [www.rotary.org](http://www.rotary.org) so training leaders can customize the content.

## **Worksheet/appendix prompts**

Worksheet and appendix prompts signal the training leader to refer to worksheets and appendixes in the *District Governor's Manual*, where they are listed sequentially by chapter. The governors-elect should use these pages as instructed during the sessions. The appendixes are also included at the end of each session guide for the training leader's reference. Training leaders are encouraged to write in the page numbers of appendixes and worksheets into their leaders' guide to provide governors-elect with a quick reference to them during the training.

## **Attendance Sheet**

Because GETS training is mandatory, the training team should track attendance. RI will send an attendance sheet to complete and return immediately after the training. This information will be used to help coordinate make-up training and process expense reports.

## **Evaluations**

Evaluations encourage feedback from participants and trainers that can be used to improve subsequent training sessions. Comparing GETS evaluations across all zones is critical to the improvement process. The RI Board requires that all governors-elect and GETS training leaders complete an evaluation of GETS. Evaluation forms will be sent electronically to governors-elect and trainers to complete immediately following their GETS.

## **Opening Plenary Session (30 minutes)**

The opening plenary session is an opportunity to address all governors-elect and sets the tone for the seminar. Remarks should serve as a framework to inform, motivate, and inspire participants throughout the meeting. Training leaders are encouraged to include an activity at this time to help governors-elect get to know each other.

### **SHOW SLIDE**

Welcome to the 2011 Governors-elect Training Seminar

## **Getting-to-Know-You Activity (15 minutes)**

### *Training leader's notes*

- Plan an activity that will allow participants to get to know each other better and build strong connections for the training they will experience together.
- Pair participants with the person sitting next to them. Ask the members of each pair to get acquainted with each other by sharing something about themselves. This is an opportunity to use your creativity as a trainer to invoke interesting discussion among partners.
- Some ideas for discussion could include leadership topics:
  - Describe a leader who has inspired you.
  - Describe the moment you became a Rotarian.
  - Share a goal for GETS and a goal for the year as district governor.
- Other ideas for discussion could be more personal and creative:
  - Share one thing most people don't know about you.
  - If you were stranded on an island with a book, your favorite food, and famous person, what would they be?
  - Describe your favorite hobby.
- Ask all participants to share one thing they learned about their partner.

## **Introduction of GETS Trainers (5 minutes)**

### **SHOW SLIDE**

Your GETS Training Team

## **Purpose of GETS (10 minutes)**

### **SHOW SLIDE**

Purpose of GETS

### *Training leader's notes*

- Explain how the governors-elect training seminar provides district leaders with the knowledge and skills necessary to support clubs in reaching their goals
- Explain that the training is designed in three components: The *District Governor's Manual*, GETS, and the International Assembly

- Explain the concept of facilitated discussion (using the experiences and knowledge in the room to share best practices)
- State group guidelines, such as taking turns speaking, welcoming all comments, and limiting the use of mobile phones, to ensure the discussions are effective
- Ask the participants to amend or add to the list of group guidelines to encourage their participation and interest in the training experience
- Review the seminar agenda, including times for breaks and meals
- Explain that there will be an opportunity to discuss any issues not covered during the sessions at the question-and-answer session at the end of each day's training
- Remind governors-elect that they will be using worksheets in the *District Governor's Manual* throughout the training sessions and that they should bring their copy of the manual to every session
- Explain that separate training will take place during the Foundation sessions for governors-elect participating in the Future Vision pilot. One session will include all districts, and one will be conducted separately.

# Session 1: Responsibilities and Strategic Planning

(60 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Understand their responsibilities as governor-elect and governor
2. Work with their district and clubs to create a strategic plan

## Session Outline

INTRODUCTION	5 MINUTES
Responsibilities	10 minutes
Strategic Planning	40 minutes
Review	5 minutes

## Materials

### Slides

1.1-1.6

### DISTRICT GOVERNOR'S MANUAL

Appendix 3: RI Strategic Plan

Appendix 4: Strategic Planning Guide

Appendix 5: Planning Calendar

### Worksheets

Notes

Strategic Planning Assessment

## **Introduction (5 minutes)**

### **SHOW SLIDE 1.1**

Introduction

### **SHOW SLIDE 1.2**

Learning Objectives

### **REFER TO WORKSHEET**

Notes

*Training leader's note*

- Encourage participants to use the notes page to write down ideas for their district throughout the session.

## **Responsibilities (10 minutes)**

*Training leader's notes*

- Refer participants to chapter 1 of the *District Governor's Manual* for a summary of responsibilities.
- Ask a volunteer to write responses to the questions below on a flip chart.

***What additional responsibilities does your district assign to the governor?***

***What do you feel is the most important responsibility you'll have as governor, and why?***

***What responsibilities do you feel will be the most challenging?***

*Training leader's note*

- Refer participants to Appendix 5: Planning Calendar as a tool to organize many of the responsibilities asked of governors.

## **Strategic Planning (40 minutes)**

### Key points

- RI has a strategic plan with three priorities, each supported by a set of goals.
- Clubs and districts are encouraged to use the priorities of the RI Strategic Plan as a basis for developing their own plans.

### **REFER TO APPENDIX 3**

#### RI Strategic Plan

#### *Training leader's notes*

- Pair participants with the person sitting next to them.
- Ask each pair to briefly discuss how the priorities and goals listed on the worksheet relate to their club and district activities.
- Allow five minutes for discussion.
- Ask various pairs to share their responses.

### **SHOW SLIDE 1.3**

#### Strategic Planning

#### KEY POINTS

- A key responsibility of the governor-elect is to create a vision for the district or build on an existing strategic plan to ensure continuity beyond their term in office.
- A strategic plan incorporates long-term goals of three to five years to help achieve the vision that is set for the district.
- Districts should align their strategic plans with the RI Strategic Plan.

### ***How many of you have a strategic plan in your district?***

### ***What are the benefits of strategic planning?***

#### *Sample responses*

- *Provides continuity in leadership, service projects, and Rotary Foundation activities*
- *Helps clubs and districts focus on short-term goals*
- *Provides direction for the clubs and districts to achieve long-term goals*

### ***Who should you involve in the process?***

### **SHOW SLIDE 1.4**

#### Who to Involve

## KEY POINTS

- Clubs should be highly involved in the district strategic plan.
- Members of the district leadership team should also be involved in developing a strategic plan for the district.

### ***How can your assistant governors help clubs create a strategic plan?***

#### *Sample responses*

- *Encourage presidents-elect to set long-term goals.*
- *Work with presidents-elect to set annual goals using the Planning Guide for Effective Rotary Clubs.*
- *Meet with the club leadership team to facilitate the strategic planning process.*
- *Encourage club presidents to work with members to develop a strategic plan at the club assembly.*

### ***If you already have a strategic plan, how will you help to ensure its success?***

#### *Sample responses*

- *Evaluate and adjust the plan to ensure relevancy.*
- *Communicate plan to Rotary clubs.*
- *Ensure key district and club activities are aligned with plan.*

### ***What are the key components of your strategic plan?***

## **REFER TO APPENDIX 4**

### Strategic Planning Guide

## KEY POINTS

- The Strategic Planning Guide in the *District Governor's Manual* is a resource for clubs and districts to begin their long-range planning if they are new to the process, or build on an existing plan.
- Clubs and districts should begin or build on their long-term planning process by
  - Identifying the purpose, strengths, and weaknesses of the club or district
  - Defining the expectations and vision of the club or district
  - Developing specific goals, objectives, and actions for achieving the vision

### ***How many of you have assessed the strengths and weaknesses of your district?***

#### KEY POINT

- Before a strategic plan can be developed, districts must evaluate their readiness for long-range planning.

#### REFER TO WORKSHEET

##### Strategic Planning Assessment

##### *Training leader's notes*

- Divide participants into groups of no more than five.
- Ask them to discuss the questions on the worksheet. Allow 10 minutes for discussion.
- Refer them to Appendix 4: Strategic Planning Guide while answering the questions.
- Ask each group to share its responses.

#### SHOW SLIDE 1.5

##### Supporting the Strategic Plan

#### KEY POINTS

- Once a strategic plan has been developed, it should be reviewed annually to keep efforts focused.
- The district should allocate sufficient resources to carry out the plan.
- The plan should be revised every three to five years so it is still relevant and challenging.

## **Review (5 minutes)**

### **SHOW SLIDE 1.6**

Review of Learning Objectives

*Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

# Session 2: Your District Leadership Team

(60 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Appoint an effective leadership team for the district
2. Develop strategies for managing volunteers
3. Promote the best practices listed in the Club Leadership Plan to clubs in the district

## Session Outline

Introduction	5 minutes
Selecting the District Team	10 minutes
Managing the District Team	15 minutes
Supporting Clubs	25 minutes
Review	5 minutes

## Materials

### Slides

2.1-2.9

### District Governor's Manual

Appendix 8: *Planning Guide for Effective Rotary Clubs*

### Worksheets

Notes

District Appointments

Case Studies: Managing Relationships

Sample Club Committee Structure

Case Study: Best Practices for a Vibrant Club

## **Introduction (5 minutes)**

### **SHOW SLIDE 2.1**

Introduction

### **SHOW SLIDE 2.2**

Learning Objectives

### **REFER TO WORKSHEET**

Notes

*Training leader's note*

- Encourage participants to use the notes page to record ideas for their district's leadership plan.

### **SHOW SLIDE 2.3**

District Leadership Plan

#### **KEY POINTS**

- The District Leadership Plan is an operational structure for RI districts.
- Common features include assistant governors, standard committees, and systems for continuity in leadership.
- The District Leadership Plan helps the governor and district leadership team better serve the clubs and enables the district to function more effectively.

### **SHOW SLIDE 2.4**

Ensuring Continuity

#### **KEY POINT**

- The current district governor, governor-elect, and governor-nominee should reach consensus on the following decisions related to district administration:
  - District strategic plan
  - District appointments that last more than one year
  - District service projects that last more than one year

## Selecting the District Team (10 minutes)

### KEY POINTS

- The district leadership team carries out the vision of the governor and the RI president.
- Delegating responsibilities to the district team allows governors to manage the district effectively.
- Governors-elect should select team members who support the goals of the district.

### REFER TO WORKSHEET

District Appointments

### ***What should you consider when selecting candidates for district appointments?***

#### *Sample responses*

- *Experience as a former club or district officer*
- *Experience relevant to the position*
- *Membership in good standing in a club within the district*
- *Success at the club level*
- *Representation of diversity in the district*

### KEY POINTS

- Qualifications for each committee position are specified in appendix 6 of the *District Governor's Manual*.
- Governors should consider giving preference to past district governors and governor-nominees.

### ***How can past district governors help select your district's leadership team?***

### ***How can you ensure continuity in the leadership team?***

#### *Sample responses*

- *Appoint members who will move up through their committee over a three-year period.*
- *Work with the governor-nominee to identify Rotarians in the district who could serve during the next Rotary year.*
- *Add depth to committees by appointing vice chairs or cochairs.*

## **SHOW SLIDE 2.5**

### District Planning Guide

#### KEY POINTS

- The District Planning Guide is a resource to help the district assess its strengths, weaknesses, opportunities, and risks and set goals for the year.
- Governors should ensure that their assistant governors and committee chairs support the goals in the guide.

## **Managing the District Team (15 minutes)**

### KEY POINTS

- Once governors-elect establish the district team, it's important to focus on how it will be managed to support clubs effectively.
- Strategies for managing and motivating volunteers on the district team differ greatly from those used in a business environment.
- Governors will be managing Rotarians with different work styles and personalities.

### ***How will you manage team members with different work styles?***

### REFER TO WORKSHEET

Case Studies: Managing Relationships

#### *Training leader's notes*

- If one of the scenarios is not culturally appropriate for your zone, do not assign it to a group.
- Divide participants into groups of no more than five people and assign a scenario to each group.
- Ask each group to discuss the scenario and the questions that follow. Allow five minutes for discussion.
- Ask each group to share its responses.

### ***What are some situations from your own district that you've encountered or anticipate dealing with?***

### ***Based on the scenarios from the case studies, how will you monitor the performance of your district team?***

#### *Sample responses*

- *Ask assistant governors to complete monthly checklists or reports on clubs.*
- *Meet with district chairs regularly to gauge their progress toward goals.*
- *Track assignments and goal completion.*
- *Convene a midyear leadership meeting with the entire team.*

### ***How will you work with clubs that have a negative opinion of the district?***

#### KEY POINTS

- Assistant governors are key components of the District Leadership Plan.
- Assistant governors will play a critical role in managing volunteers at the club level.

***How will you work with assistant governors to support clubs?***

## Supporting Clubs (25 minutes)

***How can governors support clubs in their districts?***

***How can the best practices outlined in the Club Leadership Plan support clubs?***

### KEY POINTS

- District leadership exists to support clubs.
- *Be a Vibrant Club: Your Club Leadership Plan* lists 10 recommended best practices of effective Rotary clubs.
- The guide offers examples and resources that clubs can use to become more dynamic and effective.
- Suggest that clubs compare their current practices with the best practices recommended in the guide and implement the recommended practices.
- *Be a Vibrant Club: Your Club Leadership Plan* can be found at [www.rotary.org](http://www.rotary.org).

***How do clubs in your district feel about the Club Leadership Plan?***

### *Training leader's note*

- The revised publication offers general best practices that any club could implement, while emphasizing club individuality.

### **SHOW SLIDE 2.6**

Be a Vibrant Club: Your Club Leadership Plan

### KEY POINTS

- Governors should promote the new publication and challenge clubs to become more dynamic.
- Key features of the guide include:
  - Ten best practices of effective Rotary clubs
  - Questions to consider when evaluating current club practices
  - Examples of how to implement each best practice
  - Resources for further exploration of each best practice

### **SHOW SLIDES 2.7–2.8**

Best Practices of Effective Rotary Clubs

## KEY POINT

- The best practices include
  - Developing long-range goals that address the elements of an effective club
  - Setting annual goals that align with the club's long-range goals using the *Planning Guide for Effective Rotary Clubs* (see appendix 8)
  - Encouraging club assemblies to involve members in the planning process and to keep them informed of Rotary activities
  - Promoting clear communication between club leaders, club members, and district leaders
  - Supporting continuity in leadership for club and service projects
  - Amending club bylaws to reflect the practices of the club, including committee structure and the roles and responsibilities of club leaders
  - Providing opportunities to increase fellowship among club members
  - Ensuring that every member is active in a club project or function
  - Developing a comprehensive training plan
  - Assigning committees that support your club's needs, including:
    - Club administration
    - Membership
    - Public relations
    - Service projects
    - The Rotary Foundation

***Which of the recommended best practices are clubs in your district already doing?***

***Which recommended best practices do clubs in your district need help with implementing?***

## REFER TO APPENDIX 8

*Planning Guide for Effective Rotary Clubs*

## KEY POINT

- District governors and assistant governors should encourage clubs to use the *Planning Guide for Effective Rotary Clubs* to set annual goals in conjunction with the club's long-range plan.

***How have clubs in your district adapted the recommended club committee structure to their needs?***

## **REFER TO WORKSHEET**

### Sample Club Committee Structure

#### *Training leader's notes*

- Explain that the Sample Club Committee Structure worksheet provides options for structuring club committees based on the size of clubs in the district.
- Remind participants that if the current committee structure is working, it is not necessary for clubs to change to the five standing committees.
- Remind participants that the recommended committee structure is only one of the best practices listed in the Club Leadership Plan, and that the intention is to align the club with major operational activities and with the structure of the district.

### ***How will you and your assistant governors help clubs become more innovative and vibrant?***

#### KEY POINT

- Governors should work with their assistant governors to identify areas that each club is struggling with and help them implement the best practices for effective Rotary clubs.

## **REFER TO WORKSHEET**

### Case Study: Best Practices for a Vibrant Club

#### *Training leader's notes*

- Pair participants with the person sitting next to them.
- Ask each pair to discuss the scenario and the questions that follow. Allow five minutes for discussion.
- Ask various pairs to share their responses.

## **Review (5 minutes)**

### **SHOW SLIDE 2.9**

Review of Learning Objectives

*Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

# Session 3: Developing Leaders

(60 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Manage effective training seminars for club and district leadership teams
2. Build enthusiasm for incoming officer training seminars and continuing education

## Session Outline

Introduction	5 minutes
Managing Training Seminars	25 minutes
Building Enthusiasm for Training Seminars	25 minutes
Review	5 minutes

## Materials

### Slides

3.1-3.5

### District Governor's Manual

### Worksheets

Notes

Case Studies: Building Enthusiasm for Training Seminars

## Introduction (5 minutes)

### SHOW SLIDE 3.1

Introduction

### SHOW SLIDE 3.2

Learning Objectives

### REFER TO WORKSHEET

Notes

#### *Training leader's note*

- Encourage participants to use the notes page to write down ideas for managing and promoting training seminars in their districts.

#### KEY POINTS

- Because of the annual turnover of leadership, developing new club and district leaders is critical to the continuity and success of each district.
- One of the governor-elect's responsibilities is to train others at the district level.
- Chapter 3 of the *District Governor's Manual* lists the training meetings convened by the governor-elect and governor.

### SHOW SLIDE 3.3-3.4

Incoming Club and District Leaders

Continuing Education

#### KEY POINTS

- The RI Board recommends the following training seminars for incoming club and district leaders:
  - District team training seminar
  - Presidents-elect training seminar
  - District assembly
  - District membership seminar
- The RI Board recommends the following training seminars for continuing education:
  - District Rotary Foundation seminar
  - Leadership development program
  - District leadership seminar

## **Managing Training Seminars (25 minutes)**

***How many of you have already appointed your district trainer?***

### **KEY POINTS**

- The governor-elect provides guidance, support, and overall direction for training, and the district trainer implements the program.
- RI sent Rotary training and membership materials in the July mailing. Governors-elect should give the leaders' guides to their district trainer.

***How many of you have training committees in your district?***

***What is the role of your district trainer in relation to the committee?***

### *Sample responses*

- *Acts as committee chair*
- *Manages logistics involved with training events*
- *Conducts training sessions for committee members*

### *Training leader's notes*

- Pair participants with the person sitting next to them.
- Ask participants to discuss how they will work with their training committee or district trainer.
- Ask various pairs to share their responses.

***In addition to working with your district trainer, how can you prepare for your district training seminars?***

***Think about past training seminars you've attended. What made them successful? What would you do differently?***

***What motivational and team building activities can you offer at district training events?***

### **REFER TO WORKSHEET**

Notes

*Training leader's note*

- Encourage participants to write down strategies they will incorporate into their training seminars.

KEY POINTS

- Having a clear vision of a successful event will help governors reach their goal.
- Governors should encourage district trainers to conduct a needs assessment before training seminars to assess knowledge and interest levels and to ensure that the curriculum is relevant.
- Governors should also encourage the use of evaluations to help measure the success of their training seminars.

***How will you measure the success of your training seminars?***

KEY POINTS

- To allow flexibility in the training cycle, districts are encouraged to combine events or hold them sequentially at their discretion.
- Districts that span large geographical areas may need to consider alternatives to face-to-face training to accommodate Rotarians who are unable to travel to a training event.

***How can you provide flexibility to meet the training needs of your district?***

***How many of you use technology to train in your districts?  
Please describe.***

KEY POINTS

- Web conferencing is an effective way to enhance or replace face-to-face training. Web conferencing tips can be found on the RI website.
- E-learning can also replace face-to-face training. The Rotary E-Learning Center on the RI website has e-learning modules and information.
- Governors are encouraged to promote the use of social networking sites among Rotarians in their district who can use them before and after training to connect with each other and continue to exchange ideas.

***How many of your districts have club-level trainers?***

#### KEY POINT

- The RI Board recommends that club presidents appoint a trainer to ensure that all club-level training needs are met.

### ***How can you encourage your presidents-elect to appoint a club-level trainer?***

#### *Sample responses*

- *Promote the benefits of a club trainer at the presidents-elect training seminar (PETS).*
- *Ask assistant governors to work with club presidents-elect to appoint a trainer and set training-related goals for their year.*
- *Highlight success stories of club-level training in the governor's monthly communication or district website.*

#### KEY POINTS

- Governors are encouraged to promote the club-level leadership development program approved by the RI Board to develop the personal leadership skills of club members.
- *Leadership Development: Your Guide to Starting a Program* is a resource designed to assist clubs in the development of a leadership program and is available on the RI website.

## **Building Enthusiasm for Training Seminars (25 minutes)**

### KEY POINT

- Once training seminars have been planned, governors-elect should build enthusiasm around the events to encourage interest and attendance.

***What has inspired you to attend seminars in the past?***

***What exciting benefits will Rotarians in your district take away from your training events?***

***How will you creatively promote training seminars?***

### *Sample responses*

- *Post YouTube videos to cover program highlights*
- *Create an event Facebook page*
- *Extend personal invitations to district leaders*

### **REFER TO WORKSHEET**

Case Studies: Building Enthusiasm for Training Seminars

### *Training leader's notes*

- If one of the scenarios is not culturally appropriate to your zone, do not assign it to a group.
- Divide participants into groups of no more than five people and assign a scenario to each group.
- Ask each group to discuss the scenario and the questions that follow. Allow five minutes for discussion.
- Ask each group to share its responses.
- Remind participants that the case studies will not cover all the possible scenarios that district governors will encounter.

## **Review (5 minutes)**

### **SHOW SLIDE 3.5**

Review of Learning Objectives

*Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

## Session 4: Running Your District

(60 MINUTES)

### Learning Objectives

At the end of this session, governors-elect will be able to

1. Identify the resources available through the RI Secretariat
2. Understand their administrative responsibilities

### Materials

**District Governor's Manual**

**Worksheet**

Notes

### *Training leader's notes*

- In the context of this session, the Secretariat consists of RI World Headquarters in Evanston, Illinois, USA, and the seven international offices around the world. It does not include Rotary International in Great Britain and Ireland (RIBI), which is an administrative territorial unit of Rotary International, with its own officers, district structure, and secretariat.
- The session materials will be prepared by the Club and District Support (CDS) staff member.
- Trainers should consult with their CDS representative for more information.

# Session 5: Communicating with Rotarians

(60 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Communicate with clubs regularly and effectively
2. Understand how to deliver a meaningful speech
3. Prepare for an effective district conference

## Session Outline

Introduction	5 minutes
Communicating with Clubs	15 minutes
Official Visit	25 minutes
Preparing for the District Conference	10 minutes
Review	5 minutes

## Materials

### Slides

5.1-5.5

### District Governor's Manual

Appendix 5: Planning Calendar

### Worksheets

Notes

Speech Delivery Feedback

### *Training leader's notes*

- Before GETS, ask governors-elect to prepare a two-minute speech about why they joined Rotary and to bring it with them to this session.
- In a small group activity, participants will take turns delivering their speeches and offering feedback.
- Consider creating other opportunities throughout the training for governors-elect to practice this speech, for example, before or after each meal.

## **Introduction (5 minutes)**

### **SHOW SLIDE 5.1**

Introduction

### **SHOW SLIDE 5.2**

Learning Objectives

#### **KEY POINTS**

- The governor's communication responsibilities include monthly communication with clubs, the official visit, and the district conference.
- Good communication is essential to the effectiveness of the district.
- Chapter 5 of the *District Governor's Manual* addresses communication.

#### **REFER TO WORKSHEET**

Notes

*Training leader's note*

- Encourage participants to use the notes page to record ideas for communication.

## Communicating with Clubs (15 minutes)

### KEY POINTS

- District governors typically address all clubs in the district through a monthly communication.
- The governor's monthly communication can take many forms, including an electronic newsletter, a video message or conference, or an e-mailed link to an updated district website.
- The two-year Planning Calendar (for district governors-elect and district governors) includes deadlines for submitting forms to RI and reminders of RI and district events for each month. These dates can be included in the monthly communication.

### REFER TO APPENDIX 5

Planning Calendar

### ***What should your monthly communication include?***

#### *Sample responses*

- *Official visit photos and future visit schedule*
- *Links to club websites featuring successful service projects*
- *Public relations successes in the district*
- *RI and Rotary Foundation programs*
- *Schedule of events*

### ***Who should receive your monthly communication?***

#### *Sample responses*

- *Club presidents*
- *Club secretaries*
- *Assistant governors*
- *Past district governors*
- *RI Club and District Support representatives*
- *Local newspapers or other media*
- *Rotaract and Interact clubs in your district*

### KEY POINT

- Beyond the monthly communication, district governors will need to communicate regularly with their district team, clubs, and Rotarians.

**What methods of communication are available to you? Please describe what methods are best for different situations.**

*Sample responses*

- *E-mail: time-sensitive topics, promoting events*
- *Teleconferencing or web conferencing: team meetings, project management*
- *Website: promoting events, posting announcements*
- *Social media: promoting events, discussion*
- *Postal mail: promoting events, recognition*
- *Personal phone calls: recognition, handling confidential issues*

## **Official Visit (25 minutes)**

### ***What is the purpose of your official visit?***

#### *Sample responses*

- *To see how the club is progressing toward its goals*
- *To let clubs know that the district is there to support them*
- *To find out what the club needs from the district*
- *To bring attention to district goals and events*
- *To motivate and inspire Rotarians to participate in service activities*
- *To recognize the contributions of Rotarians in the district*
- *To promote the district conference*

### ***What are some innovative ways you can make official visits more meaningful?***

#### *Sample responses*

- *Research the club's outstanding service projects and other achievements.*
- *Compliment the club on its strengths.*
- *Leave time at the end of the address for questions, comments, and dialogue.*
- *Plan visits around a service project, event, or fundraiser.*
- *Tailor the speech by highlighting certain club members and projects that have made a difference in the community.*

#### **KEY POINTS**

- **Governors should use their allotted time to engage club members and emphasize the district's role of supporting clubs.**
- **Because they deliver their speech to all clubs in the district, governors can make a great impact on many people during their year in office.**

### ***Think of the best speech you've heard in Rotary. What made it so effective?***

#### **REFER TO WORKSHEET**

Notes

#### **KEY POINTS**

- **A key component of the official visit is the speech.**

- After visiting every club in the district, district governors have the opportunity to influence and motivate many Rotarians with their speech.
- Before they take office, governors-elect should dedicate time to preparing their speech to improve areas of weakness and maximize impact.

### **SHOW SLIDE 5.3**

#### Tips for an Effective Speech

#### KEY POINT

- Tips for an effective speech:
  - Grab the audience's attention with a powerful opening line.
  - To keep an audience engaged, tell a personal story.
  - Include only relevant details that move the story along.
  - Close with a call to action.

### **REFER TO WORKSHEET**

#### Speech Delivery Feedback

#### *Training leader's notes*

- Allow 15 minutes for this exercise.
- Pair participants with the person sitting next to them.
- Ask each pair to take turns practicing a two-minute speech they prepared in advance on why they joined Rotary.
- Ask participants to evaluate their partners immediately following their speech by providing constructive feedback using the Speech Delivery Feedback worksheet.
- Encourage participants to look critically at both the content and the delivery style.
- Ask various pairs for general feedback on the exercise.

### ***What can you do if you are very uncomfortable with public speaking?***

#### *Sample responses*

- *Work with a speech coach.*
- *Explore alternative approaches to working with clubs, such as small group chats before and after the meeting for club members.*
- *Ask district committee chairs to accompany you at the meeting and to deliver a speech on their area of expertise.*

## ***How do you plan to promote your official visits?***

### *Sample responses*

- *In the monthly communication*
- *On the district website*
- *Through assistant governors*
- *Through personal invitations*

## **Preparing for the District Conference (10 minutes)**

### KEY POINTS

- In addition to monthly correspondence and the official visit, governors communicate through the district conference.
- The purpose of the district conference is to further the goals of Rotary through fellowship, inspirational addresses, and the discussion of club and district affairs.

### **SHOW SLIDE 5.4**

#### District Conference

### KEY POINT

- Governors should use the district conference to educate, motivate, and recognize Rotarians; inspire members; and enhance the public image of Rotary in the local community.

### ***How many of you have started planning your district conference?***

#### *Training leader's note*

- Ask for a volunteer to write down responses to the questions below on a flip chart.

### ***What program features are you planning to include?***

### ***How can you make the program exciting for the attendees?***

### ***What elements would you change from previous years?***

### ***How do you plan to promote the conference?***

#### *Sample responses*

- *Monthly communication*
- *Official visit*
- *Invitations to all Rotarians in the district*

## **Review (5 minutes)**

### **SHOW SLIDE 5.5**

Review of Learning Objectives

*Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

## Session 6: Promoting a Positive Public Image

(45 MINUTES)

### ***Learning Objectives***

At the end of this session, governors-elect will be able to

1. Prepare for successful club and district public relations
2. Share the story of Rotary with external audiences
3. Discuss how social networking tools can promote a positive public image

### ***Session Outline***

Introduction	5 minutes
Successful Public Relations	15 minutes
Telling Rotary's Story	20 minutes
Review	5 minutes

### ***Materials***

#### **Slides**

6.1-6.5

#### ***District Governor's Manual***

Appendix 15: Key Rotary Messages

#### **Worksheets**

Notes

Telling Rotary's Story

## **Introduction (5 minutes)**

### **SHOW SLIDE 6.1**

Introduction

### **SHOW SLIDE 6.2**

Learning Objectives

#### **KEY POINTS**

- The governor's responsibilities include promoting a positive public image.
- Governors should encourage active public relations efforts at the club and district levels.
- Chapter 6 of the *District Governor's Manual* addresses public relations.

#### **REFER TO WORKSHEET**

Notes

*Training leader's note*

- Encourage participants to use the notes page to record ideas for public relations.

## **Successful Public Relations (15 minutes)**

### KEY POINT

- One of the top priorities of the RI Strategic Plan is to enhance public image and awareness.

### ***Why is public image and awareness so important to Rotary?***

### **SHOW SLIDE 6.3**

#### Effective Public Relations

### KEY POINT

- Through enhanced public image and awareness, clubs will be able to
  - Gain support and resources for projects
  - Promote and support fundraising efforts
  - Attract qualified candidates for membership
  - Build links with other community organizations
  - Recognize Rotary club members for their contributions to the community

### ***What are some common perceptions of Rotary?***

#### *Training leader's notes*

- Encourage participants to share both positive and negative perceptions of Rotary for this discussion.
- Remind participants that they will play a key role changing the negative perceptions of Rotary by sharing success stories.

### KEY POINTS

- Rotary is a very successful humanitarian organization; however, some perceptions don't focus on the good work of the organization.
- In recent focus groups conducted by RI, some key findings included:
  - A lack of awareness about what Rotary accomplishes
  - A belief that Rotary is elite and secretive, with only older and wealthy members
  - A strong perception that women are not allowed into Rotary
- District governors are responsible for leading a public relations team that will help focus perceptions on the good work of Rotary.

### ***How can your district's public relations efforts change these perceptions of Rotary?***

**How many of you have appointed your district’s public relations chair or committee?**

**What are the duties of the district’s public relations chair and committee?**

*Sample responses*

- *Promote Rotary stories to the media and general public*
- *Work with other committees to identify newsworthy activities and events in the district to share Rotary with the community*
- *Provide training, support, and guidance to club public relations committees*

**KEY POINTS**

- The district public relations committee should help train club public relations committees.
- Rotary public image coordinators can assist district public relations committees in training clubs.
- Clubs should plan ahead and budget to cover strategic television, radio, print, or billboard placement costs.

**What public relations activities do you budget for in your district?**

*Sample responses*

- *Television, radio, and print ads*
- *Websites and billboards*
- *Special event promotion, such as a Rotary Day event, service project, marathon, fundraiser for a Rotary project or program*
- *Exhibits and displays to feature throughout the community - particularly during special events*

**Whose district has participated in the PR grants program?  
Describe how you used the grant.**

*Sample responses*

- *Placed Humanity in Motion or “This Close” public service announcements (PSAs) in local newspaper*
- *Coordinated with local television station to broadcast Humanity in Motion polio PSAs*

- *Placed Humanity in Motion PSAs on literacy and water on backlit billboards at local airports*
- *Developed billboards with peace PSAs*
- *Conducted an End Polio Now lighting on a major landmark and coordinated an event around it.*

#### KEY POINTS

- PR grants are available to districts only, for amounts up to \$15,000 beginning in 2011-12.
- Districts must match at least one-third of the total amount requested.
- Beginning in 2011-12, a \$1,000 unmatched bonus will be offered to each district participating in a multidistrict grant.
- Professionally produced Humanity in Motion and “This Close” PSAs are available at [www.rotary.org/humanityinmotion](http://www.rotary.org/humanityinmotion).
- Clubs should plan ahead and budget for one-third of the PR grant match or other strategic television, radio, print, or billboard placement costs.
- A budget should include sufficient funds to cover nonprofit rates for media placements to promote what Rotary is and does.

#### ***What public relations training do your clubs currently receive?***

#### ***How can your assistant governors help clubs with their public relations activities?***

##### *Sample responses*

- *Work with club public relations committees to set long-term goals.*
- *Follow up with club public relations committees to develop a public relations plan using Effective Public Relations: A Guide for Rotary Clubs.*
- *Consult with Rotary public image coordinators on outreach ideas or guidance on a PR grant application.*

## Telling Rotary's Story (20 minutes)

### KEY POINTS

- Public relations involves reaching the general public with the story of Rotary.
- Knowing how and when to approach the media to promote activities is an important aspect of successful public relations.
- *Effective Public Relations: A Guide for Rotary Clubs* includes tips on how to reach out to the media and a calendar of newsworthy events and themes.
- The Rotary PR Tips newsletter offers innovative ideas for clubs and districts to promote Rotary in their communities. Rotarians can sign up to receive the free e-mail newsletter at [www.rotary.org/newsletters](http://www.rotary.org/newsletters).

### ***What club or district activities might be newsworthy?***

#### *Sample responses*

- *Local projects related to Rotary or The Rotary Foundation*
- *Stories about Rotary International or Foundation scholarship and exchange program participants (Rotary Peace Fellows, Ambassadorial Scholars, Group Study Exchange team members, or Rotary Youth Exchange students)*
- *Human-interest stories about people who benefited from Rotary service*
- *PolioPlus activities, particularly in polio-endemic areas*

### KEY POINT

- The governor is often the spokesperson for Rotary in the district.

### REFER TO WORKSHEET

Telling Rotary's Story

### SHOW SLIDE 6.4

Telling Rotary's Story

#### *Training leader's notes*

- Pair participants with the person sitting next to them.
- Ask each pair to consider how they would answer the questions on the worksheet in 25 words or less. Allow five minutes for discussion.
- Encourage participants to write their responses on the worksheet.
- Ask various pairs to share their responses.

### ***What is Rotary?***

### ***Who are Rotarians/Rotary club members?***

## ***What does Rotary do?***

### **REFER TO APPENDIX 15**

#### Key Rotary Messages

#### KEY POINT

- Governors are encouraged to incorporate the key Rotary messages into their public relations materials and speeches.

## ***How many of you use social media sites such as Facebook, Twitter, LinkedIn, Bebo, and Orkut? What has been your personal experience?***

#### *Sample responses*

- *Allows for two-way communication*
- *Good for communicating quickly*
- *Good for maintaining relationships across geographic locations*
- *Easy way to connect with younger generations*

#### KEY POINTS

- Social media is no longer considered just a trend but a viable and accepted communications vehicle.
- Social media provides a platform for Rotary members to connect with one another.
- Social media also provides a powerful public image tool that can increase traffic to district websites or Rotary.org.

## ***How can social networking enhance the public image of clubs and districts? What social networking tools has your clubs or district used?***

#### KEY POINT

- Tips for social networking:
  - Keep information updated and relevant.
  - Coordinate the messages among the various social networking tools to maintain a consistent message.
  - Add value. Provide only necessary information about your clubs or districts.
  - Allow respectful discussion, using a participatory style.
  - Ask for help. Look for a communication expert in your district to guide your social networking activities.

## **Review (5 minutes)**

### **SHOW SLIDE 6.5**

Review of Learning Objectives

*Training leader's notes*

- *Answer participants' questions.*
- *Review the learning objectives to ensure that all topics were covered sufficiently.*
- *Thank participants.*

Adjourn

# Session 7: Strengthening Membership

(60 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Identify and address membership-related issues in the district
2. Align the district's membership goals and priorities with the RI Strategic Plan
3. Use the resources available from the district, zone, and RI to achieve the district's membership goals

## Session Outline

Introduction	5 minutes
Identifying Membership Issues	10 minutes
Addressing Membership Issues	30 minutes
Setting Membership Goals	10 minutes
Review	5 minutes

## Materials

### Slides

7.1-7.5

### District Governor's Manual

### Worksheets

Notes

Case Study: Retention

Case Study: Recruitment

Case Study: Organizing New Clubs

Case Study: Diversity

### *Training leader's notes*

- It is recommended that the Rotary coordinator conduct this session.

## Introduction (5 minutes)

### SHOW SLIDE 7.1

Introduction

### SHOW SLIDE 7.2

Learning Objectives

### REFER TO WORKSHEET

Notes

*Training leader's note*

- Encourage participants to use the notes page to write down questions or comments they'd like you to address, as well as ideas they hear throughout the session to incorporate into their district plans.

## ***What will your membership responsibilities be?***

### SHOW SLIDE 7.3

Membership Responsibilities

#### KEY POINT

- Governors' membership responsibilities include:
  - Organizing new clubs to meet the needs of younger professionals and professionals in varying demographic groups within a community
  - Encouraging clubs to embrace an innovative and flexible culture
  - Strengthening existing clubs by encouraging clubs to be actively engaged in RI programs, service, and maintaining relevancy within the community
  - Promoting club membership growth and development through membership diversity in classification and profession, age, gender, ethnicity, etc.

## ***What other membership responsibilities will you have?***

*Training leader's note*

- Refer participants to chapter 7 of the *District Governor's Manual* for a full list of responsibilities.

## Identifying Membership Issues (10 minutes)

### SHOW SLIDE 7.4

Goals of the RI Strategic Plan

#### KEY POINTS

- Governors' membership responsibilities are directly related to the goals of the revised RI Strategic Plan, which include:
  - Improving member recruitment and retention
  - Starting new, dynamic clubs
  - Promoting diversity
  - Fostering club innovation and flexibility
- District membership goals should address each of these areas.

*Training leader's note*

- Ask a volunteer to write responses to the question below on a flip chart.

***In looking at the membership-related goals of the RI Strategic Plan, which ones are issues in your district?***

*Training leader's notes*

- After the volunteer has listed the issues on the flip chart, ask participants to vote on the top two issues they would like to discuss in depth.
- The two issues will be discussed in the related case studies in the next section.

## Addressing Membership Issues (30 minutes)

### REFER TO WORKSHEETS

Case Study: Retention

Case Study: Recruitment

Case Study: Organizing New Clubs

Case Study: Diversity

#### *Training leader's notes*

- Referring to the top two issues written on the flip chart, select the two related case studies from the worksheets.
- Divide participants into groups of no more than five people.
- Ask each group to discuss the first case study and the questions that follow. Allow 10 minutes for discussion.
- Ask participants to refer to chapter 7 of the *District Governor's Manual* while discussing the case studies.
- Ask each group to share its responses.
- Ask each group to discuss the next case study and the questions that follow. Allow 10-15 minutes for discussion.
- Ask each group to share its responses.
- Discuss other relevant case studies as time allows.

## **Setting Membership Goals (10 minutes)**

***What membership goals are part of the district's strategic plan?***

***What actions will you take to accomplish your goals?***

***What resources will be critical to accomplishing your membership goals?***

### **KEY POINTS**

- The Rotary Presidential Citation includes membership goals that align with the RI Strategic Plan.
- Governors-elect will receive more information about these and other goals at the International Assembly.

## **Review (5 minutes)**

### **REFER TO WORKSHEET**

Notes

*Training leader's note*

- Encourage participants to use the notes page to write down strategies they will take back to their district.

***What is one membership strategy you'll take back to your district?***

### **SHOW SLIDE 7.5**

Review of Learning Objectives

*Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

# Session 8A: Future Vision Plan (All Districts)

(60 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Discuss the fundamentals of the Future Vision Plan
2. Identify ways their districts can prepare for the transition to the Future Vision Plan
3. Determine ways to partner with pilot and nonpilot districts on projects

## Session Outline

Introduction	5 minutes
Future Vision Plan Overview	10 minutes
Preparing for the Future Vision Plan	40 minutes
Review	5 minutes

## Materials

### Slides

8A.1-8A.10

### District Governor's Manual

### Worksheets

Notes

Sustainability

Pilot District Partnerships with Nonpilot Districts

### *Training leader's notes*

- All participants will start session 8 together, using session 8A. Participants then separate into two groups, according to participation in the Future Vision pilot. Use session 8B with nonpilot districts and session 8C with pilot districts.
- It is recommended that the current regional Rotary Foundation coordinator (RRFC) conduct this session.
- All governors-elect should participate in this session so that nonpilot districts can understand how to prepare and transition to the Future Vision Plan and how pilot districts can act as resources.

## **Introduction (5 minutes)**

### **SHOW SLIDE 8A.1**

#### Introduction

##### *Training leader's notes*

- Introduce yourself as the regional Rotary Foundation coordinator, or RRFC, for participants' districts.
- Explain to participants that there will be a series of Foundation sessions:
  - 8A: Future Vision Plan (joint session with pilot participants)
  - 8B: Leading Your Foundation (for nonpilot districts)
  - 8C: Future Vision Pilot (for pilot districts)

### **SHOW SLIDE 8A.2**

#### Learning Objectives

### **REFER TO WORKSHEET**

#### Notes

##### *Training leader's note*

- Encourage participants to use the notes page to write down questions or comments they'd like you to address, as well as ideas they hear throughout the session to incorporate into their district plans.

## Future Vision Plan Overview (10 minutes)

### *Training leader's note*

- Ask the question below to ensure that everyone has a basic understanding of the Future Vision Plan.

### ***Who can give an overview of the Future Vision Plan?***

#### **SHOW SLIDE 8A.3**

##### Purpose of Future Vision Plan

#### KEY POINT

- The purpose of the Future Vision Plan is to
  - Simplify Foundation programs and processes consistent with the mission
  - Increase the impact of service efforts by concentrating on the areas of focus
  - Offer program options to help achieve both global and local goals
  - Increase the sense of ownership at the district and club levels by transferring more decisions to the districts
  - Gain greater understanding of The Rotary Foundation's work
  - Enhance Rotary's public image

#### **SHOW SLIDE 8A.4**

##### Two Grant Types

#### KEY POINT

- The Future Vision Plan has two types of grants:
  - **Rotary Foundation District Grants** are block grants made to districts to support smaller projects both locally and internationally. Districts may use up to 50 percent of their District Designated Fund for one grant annually and administer the grant with minimal Foundation involvement.
  - **Rotary Foundation Global Grants** support larger projects with sustainable, high-impact outcomes in the six areas of focus.

#### **SHOW SLIDE 8A.5**

##### Areas of Focus

#### KEY POINT

- The areas of focus for Rotary Foundation Global Grants are:
  - Peace and conflict prevention/resolution
  - Disease prevention and treatment
  - Water and sanitation
  - Maternal and child health

- Basic education and literacy
- Economic and community development

***For those participating in the pilot, what has been the biggest challenge in planning?***

## Preparing for the Future Vision Plan (40 minutes)

### SHOW SLIDE 8A.6

Planning for Larger Projects

#### KEY POINT

- Governors-elect should start preparing their district by adjusting existing projects and activities or selecting new ones that are aligned with the areas of focus and are more sustainable.

***For those of you in pilot districts, how were you able to transition activities to fit the areas of focus? Give examples of global grants that your district is proposing this year.***

***What activities are you currently doing in your district that may match the areas of focus?***

***How can you make existing projects sustainable?***

### REFER TO WORKSHEET

Sustainability

*Training leader's notes*

- Divide participants into groups of no more than five people.
- Have each group
  - Review the first three project examples and how they became more sustainable.
  - Discuss how to make the last three projects more sustainable.
- Allow 10 minutes for discussion.
- Ask each group to share its responses.

#### KEY POINT

- Districts can begin planning for larger grant projects by
  - Identifying a partner for a global grant
  - Conducting a needs assessment
  - Identifying an activity based on the areas of focus
  - Collaborating with other clubs and districts

***Considering the available DDF in your district, how can clubs and the district make the transition from applying for smaller grants to applying for larger grants and involving more Rotarians in projects?***

KEY POINTS

- The Future Vision Plan encourages more collaboration between clubs and districts on larger projects and activities.
- Working with more partners takes time and coordination. Governors-elect can begin the process now in preparation for the full rollout of the plan.

***How else can you prepare your district for participation in the Future Vision Plan?***

SHOW SLIDE 8A.7

Preparing for Future Vision

KEY POINT

- To prepare for Future Vision, governors-elect in nonpilot districts should
  - Start implementing or refining grant-management and stewardship processes to prepare for qualification and support next year's DGEs during the club and district qualification process
  - Implement good stewardship and grant management practices using the district memorandum of understanding as a guide
  - Consider creating a transition committee that becomes familiar with the Future Vision Plan
  - Pair with a pilot district
  - Begin planning activities within the six areas of focus
  - Stay current with reporting on open grants, scholarships, and Group Study Exchange teams

***Has anyone worked on a project that involved multiple clubs or districts in one country or zone? What was the impact of the project, compared with one that your club or district planned on its own?***

*Training leader's note*

- If participants can't think of examples, provide an example of your own or share the following ones:

- All clubs in a Turkish district helped implement a water project supported by a Health, Hunger and Humanity (3-H) Grant. Under Future Vision, this project could be carried out with a global grant in the area of water and sanitation.
- Districts in Bangladesh and India brought national health and sanitation experts to address the arsenic contamination in their shared water supply. Under Future Vision, this could be a global grant that incorporates a vocational training team and a humanitarian project in the area of water and sanitation.

***Who has longstanding partnerships with districts that are now part of the pilot? How can both groups still work together on projects?***

**REFER TO WORKSHEET**

Pilot District Partnerships with Nonpilot Districts

**SHOW SLIDE 8A.8**

Partnering on Projects

**KEY POINTS**

- Pilot and nonpilot districts may partner with each other on district grants.
- Only pilot districts may partner on global grants.
- Only nonpilot districts may partner on Matching Grants.
- Nonpilot districts may donate DDF to pilot districts for global grants, and pilot districts can donate DDF to nonpilot districts for Matching Grants.

*Training leader's notes*

- Allow 10 minutes for this activity.
- If governors-elect from nonpilot districts are interested in pairing with pilot districts to help transition to the Future Vision Plan, ask participants to split into groups so everyone from a nonpilot district is assigned to someone from a pilot district.
- Ask each group to determine how nonpilot districts will work with the pilot district to transition to the Future Vision Plan.
- If time allows, have the groups report on how they plan to work together.

***What tools or methods exist to help clubs find partners?***

*Sample responses*

- *Matchinggrants.org/global (for global grants)*
- *Matchinggrants.org (for Matching Grants)*
- *ProjectLINK (searchable database of community service projects at [www.rotary.org](http://www.rotary.org))*
- *Rotarian Action Groups related to the areas of focus*

- *RI Convention*
- *Personal travel*
- *Ask clubs to share projects that require a partner and take that information along while traveling to international meetings.*

## **Review (5 minutes)**

### **SHOW SLIDE 8A.9**

Future Vision Resources

#### **KEY POINTS**

- Participants can request more information by e-mail (futurevision@rotary.org for Future Vision and fvqualification@rotary.org for qualification and stewardship).
- Additional details on the Future Vision Plan are available at [www.rotary.org/en/fvdistrict](http://www.rotary.org/en/fvdistrict).

#### *Training leader's note*

- Check the RI website for updates to the Future Vision Plan.

### **SHOW SLIDE 8A.10**

Review of Learning Objectives

#### *Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

# Session 8B: Leading Your Foundation

(120 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Work with their Foundation resources effectively
2. Develop strategies for distributing DDF effectively
3. Motivate clubs to increase their annual giving
4. Develop strategies for identifying and developing potential donors
5. Work with clubs to set fundraising goals
6. Identify opportunities to celebrate Foundation successes

## Session Outline

Introduction	5 minutes
Foundation Support Team	15 minutes
Distributing DDF	30 minutes
Fundraising	30 minutes
Setting Fundraising Goals	20 minutes
Celebrating Successes	15 minutes
Review	5 minutes

## Materials

### Slides

8B.1-8B.12

### District Governor's Manual

### Worksheets

Notes

SHARE DDF Options

Case Study: Distributing DDF

Identifying Potential Donors

### *Training leader's notes*

- All participants will start session 8 together, using session 8A. Participants then separate into two groups, according to participation in the Future Vision pilot. Use session 8B with nonpilot districts and session 8C with pilot districts.
- It is recommended that a current regional Rotary Foundation coordinator (RRFC) conduct this session.
- Some of the slides in this session will need to be customized with contact information and regional issues.

## **Introduction (5 minutes)**

### **SHOW SLIDE 8B.1**

Introduction

### **SHOW SLIDE 8B.2-8B.3**

Learning Objectives

### **REFER TO WORKSHEET**

Notes

#### *Training leader's note*

- Encourage participants to use the notes page to write down questions or comments they'd like you to address, as well as ideas they hear throughout the session to incorporate into their district plans.

## **Foundation Support Team (15 minutes)**

### **SHOW SLIDE 8B.4**

Your Regional Rotary Foundation Coordinators

### **SHOW SLIDE 8B.5**

RRFC Foundation Responsibilities

### **SHOW SLIDE 8B.6**

How RRFCs Can Help

### **SHOW SLIDE 8B.7**

Your Zone Team

#### **KEY POINTS**

- Assistant RRFCs are similar to assistant governors, but on the zone level.
- Rotary Foundation alumni coordinators help districts connect with Foundation alumni.

### ***Who else can help you with your Foundation responsibilities?***

#### *Sample responses*

- *District Rotary Foundation committee chair and subcommittee chairs*
- *Foundation staff*
- *Assistant governors*

#### **KEY POINT**

- Governors will be working closely with the district Rotary Foundation committee chair to manage the Foundation activities in the district.

### ***How can you partner with your district Rotary Foundation committee chair to effectively manage the Foundation activities in your district?***

## **Distributing DDF (30 minutes)**

***How will you work with your Foundation team to achieve a shared vision for your district?***

***How will you manage requests to use DDF for areas outside of your district's vision?***

### **KEY POINTS**

- Governors should work with the zone and district Foundation teams to distribute their DDF effectively among Foundation programs.
- Once the grant is approved by the Trustees, the DDF will be debited from the district's account.

### **REFER TO WORKSHEETS**

*SHARE* DDF Options

*Training leader's notes*

- Divide participants into groups of no more than four people.
- Ask groups to review the worksheet and discuss how they would like to distribute funds during their year. This worksheet is similar to what the governors-elect will receive in January as part of the *SHARE* Kit.
- Allow five minutes for discussion.

### **REFER TO WORKSHEET**

Case Study: Distributing DDF

*Training leader's notes*

- Ask each group to read the case study and discuss the questions on the worksheet.
- Allow 10 minutes for discussion.
- Ask each group to share its ideas.

***How does your district handle the process of distributing DDF?***

*Training leader's note*

- Allow governors-elect an opportunity to stand up and stretch before moving into the discussion about fundraising.

## **Fundraising (30 minutes)**

### KEY POINTS

- Rotary Foundation program participation relies on the fundraising efforts of clubs and districts.
- The governor's fundraising efforts will have an impact on the district's future, so the governor should carefully consider areas for fundraising.
- Governors should develop ways to motivate their clubs to donate toward future programs.

***What is the per capita giving in your district?***

***What types of fundraising activities have been successful in your district?***

***How many of you have clubs that don't contribute to The Rotary Foundation?***

***What are their reasons for not giving?***

***What challenges do you anticipate in motivating clubs to donate?***

### *Sample responses*

- *Fatigue in giving to PolioPlus*
- *Concerns about program changes*
- *Competition with club foundations*
- *Unaware of the Foundation's impact*

***How will you motivate these clubs to start giving?***

### *Training leader's notes*

- Ask participants to form small groups of three or four people.
- Ask each group to discuss how they can encourage nongiving clubs to contribute to The Rotary Foundation. Allow five minutes for discussion.
- Ask groups to share their ideas.

## ***How can you motivate clubs or individuals to give more?***

### **KEY POINT**

- An important role of the governor is to work with the district Rotary Foundation committee chair to identify and cultivate potential donors.

## ***How will you identify potential donors?***

### **REFER TO WORKSHEET**

#### Identifying Potential Donors

#### *Training leader's notes*

- Ask participants to find a new partner for this discussion.
- Ask participants to list the characteristics of potential donors for each type of goal listed, along with the goal they are considering for their district.
- Allow 10 minutes for discussion.
- Ask various pairs to share their responses.
- Encourage participants to revisit the worksheet with their district Rotary Foundation committee chairs.

## ***Who can help your district identify and cultivate potential donors?***

#### *Sample responses*

- *RRFCs*
- *Assistant RRFCs*
- *Rotary Foundation alumni coordinators*
- *Zone challenge coordinators*

## ***How will you work with the zone team to cultivate potential donors?***

## ***With several programs to contribute to, how will you prioritize fundraising efforts in your district?***

## **Setting Fundraising Goals (20 minutes)**

### KEY POINTS

- Contributions to the Annual Programs Fund through the Every Rotarian, Every Year initiative are the primary source of funding for Foundation programs.
- Club and district goals support the worldwide goal.
- This goal is announced each year at the RI Convention.
- The goal for 2012-13 will be announced in June 2012.

### **SHOW SLIDE 8B.8**

#### Permanent Fund Goal

### KEY POINTS

- The Permanent Fund goal is US\$1 billion by the year 2025.
- Individual Rotary clubs are asked to set their own goals in support of the worldwide goal.
- In addition to supporting club goals, governors need to set goals for their district.

#### *Training leader's note*

- Ask a volunteer to record responses to the question below on a flip chart.

### ***What has been the district's history for giving?***

### ***Does the district have long-term goals for supporting the Foundation?***

### ***What fundraising goals are you considering for your year of service?***

### **SHOW SLIDE 8B.9**

#### Strategies for Goal Setting

### KEY POINTS

- District governors, along with their district leadership team, should work with clubs to set goals higher than the previous year and monitor their achievement.
- Governors should discuss club goals with incoming presidents before the presidents-elect training seminar (PETS) and collect their club goal forms during the training.

### ***Have you started working with club presidents to set their Annual Programs Fund and Permanent Fund goals?***

***How will you work with them on their goal-setting process?***

***What other fundraising goals are you encouraging clubs to set?***

***How will you monitor clubs' progress toward goals?***

## **Celebrating Successes (15 minutes)**

### KEY POINTS

- Participants will serve as governors during the last year of current Rotary Foundation programs (2012-13).
- Governors should celebrate the success of the district's activities in these programs.

### ***Which Foundation programs does your district have experience with?***

#### *Training leader's note*

- Allow participants five minutes to share their district's activities with different Foundation programs.

### ***What would be the benefits of celebrating the success of programs that will not continue beyond 2012-13?***

#### *Sample responses*

- *Recognizes those Rotarians who have dedicated their efforts to the success of these programs*
- *Further communicates the transition to the new grant model to club members and leaders*
- *Highlights how these activities can now be achieved under the new model*

### ***How can your district celebrate the past successes of these activities?***

#### *Sample responses*

- *Invite alumni from the Group Study Exchange and Ambassadorial Scholarships programs to an event celebrating their successes, and invite a Rotarian to speak about the benefits of vocational training teams and scholarships under global grants.*
- *Present a slideshow of images from all of the humanitarian projects that the district participated in over the past few years. Point out the projects that were related to one of the areas of focus.*

## **Review (5 minutes)**

*Training leader's note*

- Consider discussing regional Foundation program information using slide 8B.10 below.

### **SHOW SLIDE 8B.10**

Regional Foundation Information/Updates

### **SHOW SLIDE 8B.11- 8B.12**

Review of Learning Objectives

*Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

# Session 8C: Future Vision Pilot

(120 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Understand how to apply for Rotary Foundation grants
2. Discuss how their district is maintaining its qualified status
3. Identify effective ways to promote fundraising under the Future Vision Plan
4. Discuss the new district structure

## Session Outline

Introduction	5 minutes
Foundation Grants	35 minutes
Qualification	30 minutes
Funding Model and Fundraising	20 minutes
District Structure	15 minutes
Resources	10 minutes
Review	5 minutes

## Materials

### Slides

8C.1-8C.16

### *District Governor's Manual*

### Worksheets

Notes

Global Grants Business Cycle

District Grants Business Cycle

Sample District Grant Spending Plan

Allocating DDF

Funding Model

### *Training leader's notes*

- All participants will start session 8 together, using session 8A. Participants then separate into two groups, according to participation in the Future Vision pilot. Use session 8B with nonpilot districts and session 8C with pilot districts.
- It is recommended that a regional Rotary Foundation coordinator (RRFC) conduct this session.
- If you have more than 120 minutes available for this training, adjust the agenda as necessary and consider adding time for a break.

- Consider the size of your group for the worksheet activities. Small groups can discuss the questions together as one group. Larger groups can be split into groups of three to five participants for discussion.
- Have copies of the district memorandum of understanding and the grant terms and conditions for reference.

## **Introduction (5 minutes)**

### **SHOW SLIDE 8C.1**

#### Introduction

##### *Training leader's notes*

- Introduce yourself as the regional Rotary Foundation coordinator for participants' districts.
- Explain to participants that this session will cover the funding model, grants business cycle, and qualification.

### **SHOW SLIDE 8C.2**

#### Learning Objectives

### **REFER TO WORKSHEET**

#### Notes

##### *Training leader's notes*

- Encourage participants to use the notes page to write down ideas for their district throughout the session.
- Discuss your role with pilot districts and how RRFCs can assist district leaders.

## **Rotary Foundation Grants (35 minutes)**

### **SHOW SLIDE 8C.3**

Global Grants Business Cycle

### **REFER TO WORKSHEET**

Global Grants Business Cycle

#### **KEY POINTS**

- All global grant proposals, applications, and reporting are submitted online through Member Access.
- In order for the proposal to be accepted, it needs to
  - Have an international partner that is qualified
  - Address one or more of the areas of focus
  - Be sustainable and measurable
  - Have a minimum project budget of US\$30,000
- Once the proposal is accepted, applicants are invited to complete an application in Member Access.
- Progress reports need to be completed at least every 12 months, and the final report should be submitted two months after the project is completed.
- Reporting is essential, both for determining whether changes are needed within the pilot and to help the Foundation measure Rotary's impact on world needs.

### **SHOW SLIDE 8C.4**

District Grants Business Cycle

### **REFER TO WORKSHEET**

District Grants Business Cycle

#### **KEY POINTS**

- The district Rotary Foundation committee chair (DRFC) submits the district grant application in Member Access.
- Funds are transferred into the account the district indicated during the qualification process.
- Once the payment arrives, the DRFC works with the finance committee to distribute the funds to clubs.
- The DRFC submits a report to the Foundation once funds have been dispersed to clubs, but no later than 12 months after the payment was received.

### **REFER TO WORKSHEET**

Sample District Grant Spending Plan

## KEY POINTS

- The spending plan is intended to help districts plan how funds will be spent, but it has some flexibility.
- District grant coordinators in Evanston can answer questions about how much needs to be detailed.
- The online report form is prepopulated with the district's spending plan, which simplifies and streamlines the reporting process.

## REFER TO WORKSHEET

### Allocating DDF

#### *Training leader's notes*

- Allow 25 minutes for this activity.
- Ask participants to work in pairs on the worksheet for 15 minutes.
- Have participants share reports to the group on how they determined which requests would be fulfilled.

## Qualification (30 minutes)

### SHOW SLIDE 8C.5

District Qualification

### ***How has qualification helped your district manage Rotary Foundation grants?***

#### *Sample responses*

- *Prepares districts for increased grant management responsibility*
- *Improves oversight of grant funds*
- *Provides districts and their clubs with the resources needed to meet Foundation requirements and successfully participate in grant activities*

#### KEY POINT

- The MOU requirements ensure that districts
  - Have financial and stewardship tools necessary for managing grant funds
  - Do their due diligence in managing grant funds
  - Fully understand Foundation requirements

### ***What will you need to do to maintain qualified status through the next two years?***

#### KEY POINT

- Districts maintain qualified status by
  - Continuing to implement and follow the MOU
  - Updating their online qualification if any information changes

### ***What is your district's process for document retention?***

#### KEY POINT

- Document retention means establishing electronic and physical files to maintain information related to grants and qualification.

### ***Are you using a district Rotary Foundation audit committee or an independent financial assessment?***

### ***What process does your district use for reporting misuse of grant funds?***

## KEY POINTS

- Establishing a system to track, investigate, and resolve reports of misuse can help districts respond quickly and effectively.
- Districts should try to solve the problem on their own first.
- Districts should notify RI's Stewardship Department of reports of misuse.

## SHOW SLIDE 8C.6

### Club Qualification

## KEY POINTS

- If Rotary clubs wish to apply for a global grant, they must be qualified by their district.
- The district decides whether its clubs need to be qualified to be eligible for district grant funds.
- Districts hold at least one grant management seminar annually to offer clubs the opportunity to qualify. This training can be held as a separate meeting or in conjunction with presidents-elect training seminar, district assembly, or district conference.
- Clubs need to send one or more members in order to complete the training requirement for qualification.
- Training materials are provided by the Foundation, including a grant management manual for club members to use as a resource.
- Districts will need to
  - Determine if there are additional district requirements beyond the two Foundation requirements of reading, signing, and implementing the club MOU and attending a grant management seminar. Additional district requirements should be added as a separate document.
  - Maintain records of which clubs are qualified
  - Confirm in the global grant application that clubs are qualified to receive grants

## ***What additional requirements will your district add to club qualification?***

### *Sample responses*

- *Clubs must be qualified to receive district grant funds.*
- *Local laws are covered.*
- *Clubs must be up- to- date on reporting of all grants.*

## ***Do you foresee a need to change some of these requirements for next year?***

## ***How can you ensure clubs are implementing the club MOU?***

### *Sample responses*

- *Assign grant subcommittee members to work with clubs on implementing the club MOU.*
- *Review clubs' grant files to confirm proper implementation of grant management practices.*

### **KEY POINT**

- Districts may review club operations to determine
  - Who is managing the club's qualification requirements
  - The bank account is set up to meet guidelines
  - Whether the club has implemented a financial management plan and document retention system

## ***How does your district plan to qualify its clubs for the second year of the pilot?***

## ***What will you do differently to qualify your clubs for the third year of the pilot?***

## ***How is the qualification process going?***

## **Funding Model and Fundraising (20 minutes)**

### **SHOW SLIDE 8C.7**

Funding Model

### **REFER TO WORKSHEET**

Funding Model

*Training leader's notes*

- Allow 20 minutes for this activity.
- Review the worksheet with participants using the key points below for discussion.

### **SHOW SLIDE 8C.8**

Funding Model

#### **KEY POINTS**

- PolioPlus remains the corporate program of Rotary International.
- Rotary Peace Centers will continue to operate in the same manner.
- With the new funding model, the district has more control over its District Designated Fund (DDF).

### **SHOW SLIDE 8C.9**

Funding Model

#### **KEY POINTS**

- Districts never lose their DDF. Any unused DDF from a district grant is returned to the district's DDF account and may be used later with global grants or donated to PolioPlus, Rotary Peace Centers, or other districts.
- More money is available at the district's discretion in the form of district grants.
- Alternatively, districts have the choice to participate in more sustainable long-term activities with global grants.

### **SHOW SLIDE 8C.10**

Funding Model

#### **KEY POINTS**

- World Fund provides a match for DDF in global grants.
- The minimum World Fund award amount for global grants is US\$15,000.
- Districts have more responsibility for determining how funds will be distributed to clubs and the district.
- Governors-elect should ensure that a policy is in place for the district's global and district grant application process.
- Having a policy helps to create transparency in decision making.

**What is your district's policy on distributing DDF for Rotary Foundation grants?**

**How could you use your district policy to encourage contributions to The Rotary Foundation?**

KEY POINT

- Districts cannot require clubs to contribute to The Rotary Foundation or the district in order to be qualified.

**How can you maximize the amount your district spends in DDF and World Fund funds?**

**How will you explain to clubs the importance of continuing to give to the Annual Programs Fund under the Future Vision Plan?**

*Sample responses*

- *Increased donations to the Annual Programs Fund result in more available DDF for clubs and districts to implement smaller, local activities.*
- *With more funds, we can support larger activities that can have a greater, long-term impact on our communities and the world.*
- *By giving to The Rotary Foundation, Rotarians work together to have a greater impact in changing lives and doing good in the world.*

KEY POINT

- Grant funds are generated from Rotarian contributions. Practicing good stewardship helps ensure that funds are used properly.

**How will you ensure that clubs use the grant funds appropriately?**

*Sample responses*

- *Refer clubs to the club MOU when establishing a financial management plan.*
- *Hold annual district Rotary Foundation grant management seminars for clubs to learn grant management and stewardship practices.*
- *Create a system for tracking district grant funds.*
- *Lead by example.*

## **District Structure (15 minutes)**

### **SHOW SLIDE 8C.11**

#### District Structure

#### KEY POINTS

- Under the Future Vision Plan, the district Rotary Foundation committee has three subcommittees:
  - PolioPlus
  - Grants
  - Fundraising
- Some responsibilities have moved to other district committees, based on the committee's expertise.
- A district may appoint other subcommittees as necessary.
- Responsibilities for subcommittees are more general, allowing districts more flexibility on organizing subcommittee members.

***What is your district's current district structure?***

***Will you make any changes to the district structure in 2012-13?***

***How will you divide the responsibilities for grants and fundraising among the members of each subcommittee?***

***What about the new structure works for your district, and what has been challenging?***

## Resources (10 minutes)

### SHOW SLIDE 8C.12

Rotary.org Resources

#### KEY POINTS

- The RI website has the most updated materials on the Future Vision Plan.
- Most information can be found under Members → Running a district → Future Vision → Resources.

### SHOW SLIDE 8C.13

Member Access

#### KEY POINTS

- Districts can qualify, apply for district and global grants, and view the status of grants online.
- To use the Future Vision Pilot Site, district leaders must have a Member Access account.

### SHOW SLIDE 8C.14

Resources

#### *Training leader's note*

- A list of grant coordinators (RI staff) is available online if you would like to share the name of their grant coordinators with participants.

#### KEY POINTS

- Human resources include:
  - Regional Rotary Foundation coordinator
  - Grant coordinator for district and global grants
  - Stewardship coordinator for qualification/stewardship questions
  - Other pilot districts
- Informational resources include:
  - Future Vision Pilot group on LinkedIn
  - *Future Vision Pilot News* monthly newsletter (subscribe at [www.rotary.org/newsletters](http://www.rotary.org/newsletters))

## **Review (5 minutes)**

### **SHOW SLIDE 8C.15**

Review of Learning Objectives

### **REFER TO WORKSHEET 1**

Notes

### **SHOW SLIDE 8C.16**

Questions

#### *Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Using the notes page, ask participants to share something they learned during the session and an action they will take as a result of this session. Participants can share with the person next to them or with the entire group.
- Thank participants.

Adjourn

# Session 9: Supporting Successful Service

(60 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Work with clubs and the district to align service goals with the RI Strategic Plan
2. Motivate clubs and districts to perform significant service projects
3. Identify opportunities to develop service connections between your district and others
4. Minimize the risk associated with activities and events in their district

## Session Outline

Introduction	5 minutes
Developing Service Goals	25 minutes
Making Service Connections	15 minutes
Minimizing Risk	10 minutes
Review	5 minutes

## Materials

### Slides

9.1-9.7

### District Governor's Manual

### Worksheets

Notes

Developing Service Goals

Service Project Risk Management

## **Introduction (5 minutes)**

### **SHOW SLIDE 9.1**

Introduction

### **SHOW SLIDE 9.2**

Learning Objectives

### **REFER TO WORKSHEET**

Notes

#### *Training leader's notes*

- Encourage participants to use the notes page to write down ideas for partnering with other governors-elect at the International Assembly.
- Refer participants to chapter 9 of the *District Governor's Manual* for a summary of responsibilities.

## Developing Service Goals (25 minutes)

### SHOW SLIDE 9.3

#### RI Strategic Plan Service Goals

#### KEY POINTS

- The RI Strategic Plan includes several service-related goals.
- Governors should encourage clubs and districts to align their service goals to the goals of the RI Strategic Plan, including:
  - Create a balance of activities in all Avenues of Service
  - Increase sustainable service in New Generations programs and the areas of focus
  - Create significant projects both locally and internationally
  - Emphasize vocational service
  - Publicize action-oriented service

***Which of these goals do you want to focus on in your year?***

#### REFER TO WORKSHEET

#### Developing Service Goals

#### *Training leader's notes*

- Allow 15 minutes for this activity.
- Using the Developing Service Goals worksheet, ask participants to review the five service-related goals of the RI Strategic Plan and rate their district's performance.
- Ask participants which areas they rated the lowest, and divide them into groups that share areas needing the most improvement. For instance, if five participants rated "publicize action-oriented service" as a 1 or 2, group them together to discuss how their districts can improve in this area.
- Ask each group to discuss the areas needing improvement and record their ideas on the worksheet.
- Have each group share its responses, allowing for discussion within the larger group if time allows.
- Encourage participants to refer to this worksheet when completing their District Planning Guide.

***How can you encourage your clubs to select projects that are relevant to the priorities of the organization?***

*Sample responses*

- *Ask assistant governors to work with their clubs to set service goals that are related to the RI Strategic Plan.*
- *Identify experts in the district to support club projects in the areas of focus.*
- *Create or modify the district's strategic plan to incorporate the service-related goals.*
- *Promote the service-related goals in the official visit speech and governor's monthly communication.*

**KEY POINT**

- Once service goals are set, it is important for governors to motivate their district service committees, assistant governors, and club presidents to achieve them.

***What steps will you take to motivate your team to support Rotarians in service?***

*Sample responses*

- *Provide oversight and support to district committees so they can support clubs and service projects.*
- *Serve as a liaison to counterparts in other districts when forming partnerships.*
- *Support the work of club service committees.*
- *Ensure that assistant governors develop and assist clubs in their progress toward service goals.*
- *Promote program participation through regular contact with assistant governors and clubs in the district.*

**KEY POINTS**

- Governors should motivate their clubs to publicize service efforts.
- Clubs conducting service projects that are visible to the community are more likely to sustain and increase membership and to increase donations to The Rotary Foundation.

## **Making Service Connections (15 minutes)**

### **SHOW SLIDE 9.4**

#### Making Service Connections

##### KEY POINTS

- The Rotary Volunteers and World Community Service programs were phased out on 30 June 2011.
- RI is developing enhanced resources to support Rotary service connections for international service projects, fellowship visits, and international volunteer opportunities through a resource that will augment the current Rotary Friendship Exchange program.
- Governors-elect will be asked to appoint a district chair to support this new Rotary Service Connection activity and are encouraged to identify an enthusiastic Rotarian to focus on developing partnerships between districts for fellowship and service opportunities.
- Fellowship visits between Rotarians in different countries connect Rotarians more closely with one another, providing an opportunity to build relationships and collaborate.
- Governors should coordinate with one another and encourage their district chairs to make contact with their counterparts in other districts to foster the development of personal Rotary connections that may lead to successful future club service projects.

### ***How will you find new partners for projects or new project ideas?***

### **SHOW SLIDE 9.5**

#### ProjectLINK

##### KEY POINTS

- Clubs and districts can use ProjectLINK, a searchable database of club and district community service projects in need of
  - Volunteers
  - Funding
  - Donated goods
  - Partners for a Rotary Foundation grant
- Because ProjectLINK also highlights examples of complete projects, it is a good resource for Rotarians looking for sample projects in specific subjects.
- Clubs and districts can consult with Rotarian Action Groups, which work in support of service projects on specific issues such as water and HIV/AIDS.

- District governors will be approached by Rotarian Action Groups seeking permission to contact clubs in their districts. Governors may determine whether they wish to promote the activities of any action group to clubs in the district.
- Rotary coordinators can also provide assistance with projects and programs.

### ***How will you continue to motivate clubs to keep service a priority in your district?***

#### *Sample responses*

- *Promote successful projects during official visits, through the governor's monthly communication, and on the district website.*
- *Encourage clubs to have a program participant speak at their meetings.*
- *Recognize clubs or individual Rotarians for their outstanding service efforts.*

### **SHOW SLIDE 9.6**

#### Recognition

#### KEY POINT

- Recognition is most effective when it is
  - **Positive.** Only mention the positive aspects of what was done.
  - **Immediate.** Recognize the person right away — don't wait.
  - **Close.** Do it in the person's regular environment, in front of peers.
  - **Specific.** Recognize individual behaviors that stood out.
  - **Shared.** Promote recognition among peers, not just from the top down.

#### *Training leader's notes*

- Methods for recognizing others differ around the world.
- Only cover this section if it is appropriate to your culture.

### ***How is recognition used in your district?***

#### ***Is it effective?***

#### ***How could it be improved?***

## **Minimizing Risk (10 minutes)**

### **KEY POINT**

- Successful service projects depend on the ability to minimize the risk associated with activities and events.

### **REFER TO WORKSHEET**

Service Project Risk Management

#### *Training leader's notes*

- Divide participants into groups of no more than five people.
- Ask each group to discuss the questions on the worksheet.
- Allow five minutes for discussion.
- Ask each group to share its responses.

## **Review (5 minutes)**

### **SHOW SLIDE 9.7**

Review of Learning Objectives

*Training leader's notes*

- Answer participants' questions.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

# Session 10: Preparing for the International Assembly

(40 MINUTES)

## Learning Objectives

At the end of this session, governors-elect will be able to

1. Understand the program of the International Assembly
2. Prepare for the International Assembly

## Session Outline

Introduction	5 minutes
International Assembly Program	20 minutes
Preparing for the International Assembly	10 minutes
Review	5 minutes

## Materials

### Slides

10.1-10.15

### District Governor's Manual

### Worksheet

Notes

### *Training leader's notes*

- A [video](#) promoting the International Assembly is available at [www.rotary.org](http://www.rotary.org) (Members → Events → International Assembly).
- If you have access to audiovisual equipment, consider showing this video during the session.

## **Introduction (5 minutes)**

### **SHOW SLIDE 10.1**

Introduction

### **SHOW SLIDE 10.2**

Learning Objectives

### **REFER TO WORKSHEET**

Notes

#### *Training leader's notes*

- Consider conducting this session as a panel discussion with recent RI training leaders.
- Encourage participants to use the notes page to write down ideas during this session and to list action items in preparation for the International Assembly.
- Refer participants to chapter 10 of the *District Governor's Manual* for an overview of the meeting.

## International Assembly Program (20 minutes)

### KEY POINT

- At the International Assembly, governors-elect learn the organization's strategic priorities and goals and other important information they will need to incorporate into their plan for the year.

### *Training leader's notes*

- Show slides 10.3-10.8 when discussing the corresponding key points below.
- Not all key points have corresponding slides.

### **SHOW SLIDE 10.3**

Plenary Sessions

### **SHOW SLIDE 10.4**

Group Discussion Sessions

### **SHOW SLIDE 10.5**

Informational Booths

### **SHOW SLIDE 10.6**

President-elect Photo Sessions

### **SHOW SLIDE 10.7**

International Festival Talent Night

### **SHOW SLIDE 10.8**

International Fellowship Dinner and Dance

### KEY POINT

- The International Assembly typically includes:
  - **Plenary sessions.** Sessions featuring keynote speakers and short presentations highlighted by audiovisuals. Simultaneous interpretation is provided in French, Italian, Japanese, Korean, Portuguese, and Spanish.
  - **Group discussion sessions.** Discussions based on plenary session topics with about 20 other governors-elect, facilitated by a training leader. Sessions are conducted in English, French, Japanese, Korean, Portuguese, and Spanish. .
  - **Club and District Support sessions.** Small-group meetings conducted by RI staff addressing regional concerns and administrative responsibilities, and resources available through RI.
  - **Informational booths and Rotary Bookstore.** Resources including RI and Foundation staff, convention information, licensed merchandise, Rotary's newest publications and videos, candid photos of the assembly, and the latest Rotary news online.

- **President-elect photo sessions.** Photo sessions with the president-elect and his spouse. Governors-elect and their spouses are assigned by district to a specific session.
- **International Festival Talent Night.** An opportunity for governors-elect, spouses, and other participants to showcase their talents and cultures through colorful dress, music, song, and dance.
- **International Fellowship Dinner and Dance.** Event that includes the Grand March, a parade of participants in national dress, followed by photo opportunities.

## **SHOW SLIDE 10.9**

### Governor-elect Materials

#### KEY POINT

- Governors-elect will receive the following materials at the International Assembly:
  - The *Governor-elect's Workbook*, which includes a collection of learning objectives, resources, and areas in which participants may record ideas and action items for their districts
  - USB flash drive with core resources
  - CD-ROM with text of many International Assembly speeches

#### *Training leader's notes*

- Remind participants that they will **not** need to bring the *District Governor's Manual* with them to the International Assembly.
- Remind participants that the distribution of specific regional/district information, promotional materials, publications, or gifts are not allowed in the plenary hall or group discussion rooms.

## **SHOW SLIDE 10.10**

### Spouses Plenary Sessions

## **SHOW SLIDE 10.11**

### Roundtable Discussion Sessions

## **SHOW SLIDE 10.12**

### Cultural Exchange

#### KEY POINTS

- A special training program has also been designed for the spouses of International Assembly participants.
- Spouses' attendance at the assembly is not mandatory, but full participation in all spouses program activities is required for those who do attend.
- The spouses program for the International Assembly typically includes:
  - Plenary sessions
  - Roundtable discussion sessions

- Panel discussions
- Cultural exchange
- The materials for the International Assembly include resource materials to support the roundtable discussions and areas to record ideas and action items.

## **Preparing for the International Assembly (10 minutes)**

### KEY POINT

- Specific program information for district governors-elect and their spouses is included in the International Assembly registration book.

### **SHOW SLIDE 10.13**

Preparing for the Assembly

### KEY POINT

- Governors-elect can also prepare for the International Assembly by
  - Reviewing manuals and publications received throughout the year
  - Reading mailings from the RI president, president-elect, assembly moderator, and general secretary
  - Assessing their progress in preparing for their year of service and identifying which areas they need additional information
  - Identifying which governor-elect classmates they hope to connect with and contacting them prior to the event (using the District Governor Exchange)
  - Considering which key RI staff they need to visit while at the assembly
  - Planning for purchases of merchandise at the RI Marketplace

### **SHOW SLIDE 10.14**

Preparing Spouses for the Assembly

### KEY POINT

- Governors-elect can help their spouses prepare for the International Assembly by encouraging them to
  - Talk with the current district governor's spouse about the International Assembly
  - Prepare questions and success stories to share with other spouses

***What questions do you have about the assembly?***

## **Review (5 minutes)**

### **SHOW SLIDE 10.15**

Review of Learning Objectives

*Training leader's notes*

- Answer participants' questions.
- Encourage participants to contact their Club and District Support representative with any remaining questions or concerns.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

Adjourn

## **Closing Plenary Session (15 minutes)**

The closing plenary session of the governors-elect training seminar should summarize the seminar's learning objectives and discussions and motivate governors-elect to build on what they've learned.

### *Training leader's note*

- Explain that an evaluation will be sent to governors-elect electronically immediately following the training.

### **SHOW SLIDE**

After GETS

## **Summary of Accomplishments and Future Action (10 minutes)**

### *Training leader's notes*

- Highlight significant areas of discussion and key points.
- Discuss what governors-elect have learned and how this knowledge will help them during their year in office by
  - Encouraging them to continue exchanging ideas with one another before and throughout their year in office
  - Reminding them that they are to motivate, inspire, and lead their district teams and clubs
  - Reminding them of the importance of setting attainable goals and using all available resources
  - Encouraging them to work as a team with the current governor and governor-nominee to ensure continuity and continuous improvement for the district
  - Emphasizing that the International Assembly will build on what they have learned at GETS and allow them to finalize plans for their year
  - Encouraging them to attend the 2012 and 2013 conventions so they may further develop their leadership skills and knowledge of current Rotary policies and programs

### **SHOW SLIDE**

Thank you for attending GETS!

## **Recognition (5 minutes)**

### *Training leader's notes*

- Thank and acknowledge governors-elect for their participation and outstanding work during GETS.
- Acknowledge that Rotarians are busy individuals.
- Express appreciation for their commitment to their districts and Rotary.
- Thank the GETS training team and others involved in the planning and execution of GETS.