Governors-nominee Training Seminar Leaders' Guide

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This is the 2009 edition of the *Governors-nominee Training Seminar Leaders' Guide.* This publication 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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Getting Started

Over the past several years, governor-nominee training has become an increasingly popular adjunct meeting to Rotary institutes. Recognizing this, the 2007-08 RI Board approved the development of resources that will provide additional support to zones conducting governor-nominee training.

Training for governors-nominee is optional. If held, it can be a full-day seminar or incorporated into the existing training program the zone provides. Ideas for sessions on several topics have been provided. The RI Board encourages use of this curriculum. Trainers should select topics and structure the program to meet their participants' needs.

Purpose of the Governors-nominee Training Seminar

The governors-nominee training seminar is intended to help governors-nominee learn about the district, observe current practices, and prepare for their term of service, as outlined in the Rotary Code of Policies.

This guide contains one-hour sessions on the following topics:

- District governor-nominee responsibilities
- Getting to know the district
- Financial management
- Communication
- District conference
- Creating a calendar

The topics are related to the district governor-nominee responsibilities listed in the Rotary Code of Policies. If you have an existing training program for governors-nominee, feel free to integrate these topics and modify the sessions to make them culturally relevant to your participants.

This leaders' guide provides a brief introduction, speaking points, discussion questions, and suggested activities for each topic. Develop each session by selecting the components that are most relevant to your district.

Participant Materials

Participant materials for governor-nominee training are available at www.rotary.org; search "governor-nominee training." The materials include information and resources for each topic, including a workbook that corresponds with the suggested group activities described in this guide. Trainers should provide copies of the workbook for participants and encourage them to use the summary sheets to record ideas they would like to take back to their districts. The workbook pages should also be printed for your own reference as a trainer. Consider contacting the governors-nominee early to inform them of these resources and preparation materials.

Trainer Materials

Some of the suggested activities use materials that need to be requested before the training begins. The following items can be ordered or accessed through www.rotary.org:

- *Manual of Procedure* (035)
- *Official Directory* (007)
- *RI Catalog* (019)
- Rotary Code of Policies
- *District Conference Manual* (800)
- *Governor-nominee Workbook*

Training for Governors-elect and Governors-nominee

The training outlined in this guide is relevant to the role of the governor-nominee. Therefore, training for governors-nominee should not duplicate the GETS curriculum.

> You are strongly encouraged to work with the GETS trainers to ensure that the programs build on each other. Having a clear understanding of the roles of governors-nominee, governors-elect, and governors will help to achieve this goal. Governors-nominee should be aware of the topics that will be covered at GETS so they will know what to expect from the training they'll receive.

The following Board- and Trustee-recommended topics are covered at GETS:

- Responsibilities and goal setting
- District Leadership Plan
- Communication
- Developing district leaders
- Membership development
- Rotary Foundation fund development and *SHARE*
- Rotary Foundation programs
- Service projects
- Your support from RI
- International Assembly preview

Interactive Activities

Training leaders can choose to incorporate interactive activities into sessions to refocus attention and maintain participant interest. Conducting interactive activities also creates an atmosphere that allows participants to express ideas and apply what they have learned in the session. A balance of facilitated discussion and activities will maximize participant retention of material. Below are some examples:

- **Opening district governor-nominee training activity**

  At the beginning of the training, post three pieces of flip chart paper around the room. Title each piece with one of the following headings: District Governor-nominee, District Governor-elect, and District Governor. When a participant asks a question about when an activity should be done, ask them to write it on a sticky note and place it on one of the flip charts under the heading they think is appropriate.

- **"Getting to know you"**

  Participants share something about themselves on a given topic to get acquainted with one another and begin thinking about the session topic. If participants do not know each other, this activity creates a more comfortable learning environment that promotes participation.

- **Pair and share**

  Participants independently consider a question, discuss it with a partner, and then share ideas with the entire group, if time allows. Pairing ensures that everyone has an opportunity to share their own ideas.

- **Voting**

  Participants can indicate their preference among a list of topics on a flip chart by placing a mark next to the one or two they are most interested in. This activity quickly assesses participant needs and concerns.

- **Small groups**

  Dividing participants into small groups increases the dialogue and incorporates movement during the session. Participants can be grouped based on a common interest, such as a hobby, or randomly by assigning numbers. Groups of three to five individuals are recommended.

- **Role play**

  Participants act out assigned roles to demonstrate a specific idea or situation. This strategy works best with small groups where participants do not feel inhibited.

- **Closing activity**

  At the end of the session, participants think about one new thing they learned and an action they will take because of what they learned. This activity allows participants to reflect on what they have learned and plan how they will implement it.

Evaluation

Have participants complete an evaluation immediately following the training. This data will be useful when planning future governor-nominee training, as well as training for governors-elect. Another evaluation can also be completed 6-12 months after the seminar to help identify what skills participants applied and the topics that need more attention.

Sample Governor-nominee Evaluation Form

We appreciate your time and thoughtful answers to the following questions. Your feedback is vital to assessing the success of our training methods and will help improve future governors-nominee training seminars.

TOPIC	BEFORE GOVERNOR-NOMINEE TRAINING			AFTER GOVERNOR-NOMINEE TRAINING		
	No knowledge	Somewhat knowledgeable	Knowledgeable	No knowledge	Somewhat knowledgeable	Knowledgeable
District Governor-nominee Responsibilities						
Getting to Know the District						
Financial Management						
Communication						
District Conference						
Creating a Calendar						

Comments:

Program Presentation

Please rate the following statements using the options below:

	Agree	Somewhat agree	Somewhat disagree	Disagree	Not applicable
Topics discussed during group discussions were relevant to me as a governor-nominee.					
The timing of the training topics was appropriate.					
The group came up with practical ideas I plan to use.					
Training leaders facilitated group discussions well.					
The variety of training methods employed during the training was sufficient.					
The interactive activities used during the training were effective.					
The workbook was a helpful tool during the training.					
The governor-nominee section of the Rotary Web site provided useful information for preparing for my role as governor.					

Comments:

The overall duration of the training was: ☐ Too short ☐ Appropriate ☐ Too long

Please use the space below to provide suggestions on how the topics discussed can be improved for future governors-nominee.

Session 1: District Governor-nominee Responsibilities

The responsibilities of governors-nominee provide the basis for this training. Governors-nominee should become familiar with their responsibilities and work with the governor and governor-elect to help prepare for their role as governor.

Speaking points

- Review the governor-nominee responsibilities outlined in worksheet 2 (Responsibility Checklist):
  - Beginning to prepare for the role of governor
  - Fostering continuity by working with past, current, and incoming district leaders to support effective clubs
  - Analyzing the district's strengths and weaknesses with background material provided by the immediate past governor, governor, and governor-elect
  - Reviewing the district organization (District Leadership Plan) and club administrative framework (Club Leadership Plan)
  - Attending district meetings when possible, at the invitation of the district governor or district governor-elect
  - Participating in district committees or other activities, as suggested by the district governor or district governor-elect
  - Selecting a site for the district conference to be held during your year of service, with the agreement of the majority of the current club presidents or majority of the club presidents serving in the governor-nominee's year
  - Attending training in leadership skills, if available
  - Attending district governor-nominee training, if offered, or seeking other training, if available

Discussion questions

What additional responsibilities does your district assign the governor-nominee?

What responsibilities do you feel are most important?

What responsibilities do you feel will be the most challenging?

What responsibilities are you unfamiliar with?

How can you learn more about these responsibilities?

Suggested activities

Worksheets 1-2

Individual work: Refer participants to worksheet 2 (Responsibility Checklist) in the workbook. Ask them to share additional responsibilities with the group.

Group work: Have the *RI Catalog, Official Directory, Manual of Procedure,* and Rotary Code of Policies available. Have participants form small groups and assign one document to each group. Ask each group to search for the following items to become familiar with these documents:

- District conference voting procedures (*Manual of Procedure*)
- Club officer information (*Official Directory*)
- District Leadership Plan (Rotary Code of Policies)
- RI theme postcards (*RI Catalog*)

Action item: Ask participants to use the summary sheet to write down one idea from this session that they will take back to their districts. If time permits, ask them to share with the group.

Session 2: Getting to Know the District

Governors-nominee should become familiar with their district's and clubs' organizational structures. They should also work closely with their governor and governor-elect to create greater continuity within the district leadership team. This is especially important for strategic planning, district appointments, district service projects lasting more than one year, and Rotary Foundation activities.

Speaking points

- Provide an overview of the District Leadership Plan.
  - Refer participants to worksheet 4 (District Committees) and review their primary functions.
- Provide an overview of the Club Leadership Plan including:
  - Background information
  - Best practices
  - Recommended committees
- Explain that governors-nominee should know which clubs follow the Club Leadership Plan.
- Explain that governors-nominee should identify which district appointments they'll be making as governor-elect.
- Refer participants to worksheet 5 (District Planning Guide) and encourage them to review the current one with their governor for an assessment of their district.
- Explain that governors-nominee should become familiar with each club in the district.
- Explain the importance of reviewing membership trends in the district to understand the membership opportunities that exist.
- Explain the importance of creating continuity in the district by working with the governor and governor-elect to develop or refine the district's strategic plan.
- Explain that the governor and governor-elect should provide the governor-nominee with opportunities to observe and participate in various meetings. Governors-nominee will bring new ideas and see new ways to enhance district events. Encourage participants to take worksheet 6 (District Observation Form) with them when observing district events.

Discussion questions

How is your district structured?

Which district activities would you like to become more familiar with?

How can your clubs benefit from operating on the Club Leadership Plan?

What should you consider when selecting candidates for district appointments?

Where do you see opportunities for growth for new and existing clubs in your district?

How have you been working with the governor and governor-elect to maintain continuity within the district?

Does your district have a strategic plan? How does strategic planning affect your goals?

Suggested activities

Worksheets 3-7

Individual work: Ask participants to review worksheet 5 (District Planning Guide). Encourage them to consider how they can use it to assess their district's strengths and weaknesses, so they can start thinking about their goals for the district.

Group work: Ask participants to work in groups or pairs to brainstorm a list of what can be observed in district meetings. Encourage them to use worksheet 6 (District Observation Form) when attending district events.

Post-training activity: Encourage participants to use worksheet 7 (Strategic Planning Guide) when developing their district's strategic plan.

Action item: Ask participants to use the summary sheet to write down one idea from this session that they will take back to their districts. If time permits, ask them to share with the group.

Session 3: Financial Management

Governors-nominee should begin thinking about their fiscal responsibilities, such as managing the district's finances, practicing good stewardship, and ensuring that the district complies with all local laws, including tax and nonprofit laws.

Speaking points

- Explain that districts may establish one or more district funds for the administrative or service activities for Rotary, and should ensure that
  - Decisions about the fund are voted on at the district assembly, PETS, or district conference
  - The fund is not controlled by a single individual
  - An annual statement and report of income and expenditures of the fund are presented to all clubs
- Explain that it is the governor's responsibility to ensure that clubs pay their dues on time.
- Provide an overview of how to reduce liability when planning activities and events for their year as governor by asking these questions:
  - What can go wrong?
  - If something goes wrong, how will I or the district respond?
  - How will any losses be paid for?
  - How can the activity be changed to lessen the chance of something going wrong?

Discussion questions

What are the responsibilities of the district finance committee? How does the governor work with this committee?

How can you help clubs that are struggling with their finances?

How does your district handle risk management for events?

What controls does your district have in place to ensure proper stewardship of funds within the district?

Suggested activities

Worksheets 8-11

Group work: In groups, ask participants to review worksheet 9 (Financial Management Best Practices Checklist) and worksheet 10 (Sample Financial Controls) in the workbook. Have them discuss any additional controls not currently in place in the district.

Case study: In groups, ask participants to discuss one or both of the scenarios on worksheet 11 (Financial Management Case Studies).

Action item: Ask participants to use the summary sheet to write down one idea from this session that they will take back to their districts. If time permits, ask them to share with the group.

Session 4: Communication

Communication is necessary to foster effective clubs, achieve goals, coordinate club visits, encourage membership growth, increase support for The Rotary Foundation, and promote the work of the district outside of Rotary.

Speaking points

- Explain how governors are responsible for organizing and sharing information with district chairs, assistant governors, and clubs.
- Discuss different methods of communication within the district.
- Discuss the functions of the district public relations committee and the resources available to support public relations efforts.
  - Humanity in Motion materials (at www.rotary.org)
  - Key Rotary messages (worksheet 14)
  - *Rotary PR Tips* newsletter (subscribe at www.rotary.org/newsletters)
  - Other resources (public relations page on RI Web site at www.rotary.org; search "public relations")

Discussion questions

How can you communicate with volunteers? What motivates them?

How are messages communicated within the district? What is your district's communication plan?

What role does the governor play in public relations in the district?

How does your district public relations committee work with the local media?

Suggested activities

Worksheets 12-14

Individual work: Ask participants to stand up at various times throughout the training to give a one minute speech about why they joined Rotary, a Rotary moment, tips for public speaking, or their vocation.

Flip chart activity: Write the following case study on a flip chart. In small groups, have participants discuss the following scenario:

> You are coordinating a districtwide service project. What steps would you take to promote it, and who would you need to communicate with?

Group work: In small groups, have participants discuss the flow of communication in their district, including what's working and what should change. Ask them to use worksheet 13 (District Communication Plan) and draw/describe how information flows from the governor, committees, and assistant governor to the club and how information flows from the club to the governor.

Action item: Ask participants to use the summary sheet to write down one idea from this session that they will take back to their districts. If time permits, ask them to share with the group.

Session 5: District Conference

The district conference is a time for celebration, fellowship, inspirational addresses, and the discussion of club and district affairs. Planning can begin as early as the term of the governor-nominee, who, with the approval of the RI Board, may choose the conference site based on a vote of the majority of club presidents-nominee in the district.

Speaking points

- Ensure that governors-nominee start thinking about
  - Selecting the time and place of the district conference
  - Observing other district conferences in their zone
  - Appointing their district conference committee, subcommittees, and aide to the president's representative
  - Serving on the district conference committee in preparation for his or her term
  - Promoting their district conference
- Explain the importance of understanding the role of the RI president's representative.
- Refer governors-nominee to appendix 3 of the *District Conference Manual* (800) for general planning and contract guidelines.

Discussion questions

What action, if any, have you taken to start planning your district conference?

When is your district conference typically held?

Are you currently serving on a district conference committee?

What did you like about previous district conferences you've attended?

What would you improve?

Suggested activities

Worksheets 15-16

Group work: In groups, ask participants to discuss best practices for planning the district conference, program elements they would like to include, and committees to appoint and serve on. Encourage them to record their ideas on worksheet 16 (District Conference Checklist).

Action item: Ask participants to use the summary sheet to write down one idea from this session that they will take back to their districts. If time permits, ask them to share with the group.

Session 6: Creating a Calendar (18-24 Months)

Governors-nominee should start planning for their years as governor-elect and governor. In order to prepare, they should consider observing a variety of district meetings, attending the RI Convention, and organizing leadership training for their district.

Speaking points

- Discuss how the governors-nominee will plan for the following activities and refer to worksheet 18 (Your Calendar):
  - Have photographs taken
  - Order business cards
  - Attend district meetings
  - Attend training meetings convened by the governor-elect and the governor
  - Attend official visits made by the governor (refer to worksheet 19, Official Visit Observation Form)
  - Attend the governor's recognition events
  - Attend the RI Convention
  - Prepare both a short and long version of a résumé to include in the district Web site or for introductions
  - Create or revise a district organizational chart
  - Become familiar with the district's operating policies and deadlines
  - Create files for each club in the district
  - Visit the Web sites of clubs in the district as a way to identify potential leaders and learn about club projects
  - Write job responsibilities for each district position
  - Prepare a brief presentation, a nondenominational invocation, and a new member induction ceremony (to have on hand in case of last-minute requests to present)

Discussion questions

What else can you do as governor-nominee to prepare for your year as governor-elect and governor?

Suggested activities

Worksheets 17-19

Individual work: Have participants review worksheet 18 (Your Calendar). Ask them to write in the dates that they will attend the district meetings listed and to list any other planning activities.

Action item: Ask participants to use the summary sheet to write down one idea from this session that they will take back to their districts. If time permits, ask them to share with the group.