



LEAD YOUR DISTRICT

Governor
2020-21





2019 COUNCIL ON LEGISLATION ESSENTIAL CHANGES FOR CLUBS AND DISTRICTS

(The numbers in parentheses identify the relevant legislative enactments and the chapter references refer to Lead Your Club: President.)

Attendance

Make ups. Rotarians can make up for an absence at their club meeting within the same Rotary year. (19-35) – Chapter 3

Club Board

President. A club president's term can be extended for up to one year when their successor has not been selected. (19-22) – Chapter 2

Club Finances

Financial reporting. The annual meeting for the election of officers includes the club's mid-year financial report with current and previous year income and expenses. (19-24) – Chapter 2

Satellite club financials. A satellite club's financial statement may be audited or reviewed. (19-29) – Chapter 4

Club dues increased. In 2019-20, member dues are 34.00 per half year. To improve service to clubs, RI semiannual dues were increased by \$.50 for each of the next three years — to US\$34.50 per half year in 2020-2021, US\$35.00 per half year in 2021-2022 and US\$35.50 per half year in 2022-2023. (19-82) – Chapter 4

Changing Club Name or Location

Notification extension. Proposed changes to a club's name or locality are provided to each member and the governor at least 21 days (currently 10 days) before changes are voted on. (19-26) – Chapter 4?

Modernized language. There are no longer classification restrictions on forming a club in a locality. A club may be formed even if one or more clubs are already organized in the locality. The locality of a club that conducts its activities primarily online shall be worldwide or as the club board determines. (19-28) – Chapter 4

Club Rules

Modernized language. The *Standard Rotary Club Constitution's* language was modernized and streamlined to help with flow and readability. No substantive changes were made to the policies.

Download the new easy to understand version, which all clubs are required to use. (19-30 and 19-116) – Chapter 4

Elections

Club voting strength. A club's voting strength is determined by the number of members on its 1 July club invoice. (19-49) – Chapter 4

District dues. Clubs may only vote for the member and alternate member of the nominating committee for director if they have paid their district dues and are not indebted to the district as determined by the governor. (19-54) – Chapter 4

Membership

Rotaract clubs. Just like Rotary clubs, Rotaract clubs are now members of Rotary International. While there are no operational changes for Rotaract clubs or the Rotary clubs that sponsor them, this provision elevates the status of Rotaract clubs and allows RI to increase support and resources to help them grow. (19-72) – Chapter 3

Diversity. Clubs need a well-balanced membership that celebrates diversity. (19-18) – Chapter 5

Classification. The classification limitation has been removed, so clubs may now determine for themselves the appropriate number of members in a particular classification. In addition, elected or appointed public officials are no longer prohibited from joining a club using the classification associated with their office. (19-37 and 19-39) – Chapter 4

Small clubs. A governor may request the RI Board to terminate clubs with fewer than six members. (19-70) – Chapter 4



This is the 2019 edition of Lead Your District: Governor, the reference manual and GETS workbook for district governors serving in the 2020-21 Rotary year. The information in this publication is based on the Constitution and Bylaws of Rotary International, the Rotary Code of Policies, and The Rotary Foundation Code of Policies. Please refer to those documents for exact Rotary policy. Changes to the documents listed above by the Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.

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INTRODUCTION



Rotary

Congratulations on your position as district governor. You can use this manual to prepare for your responsibilities before attending your governors-elect training seminar and the International Assembly. You'll use it as a workbook at GETS, so take it with you. This manual is also available on My Rotary. You can use it to access the resources online wherever you see underlined text.

As a member of Rotary's global network of more than 35,000 Rotary clubs, you have access to a wealth of Rotary services and resources through My Rotary, the members' area of Rotary's website. You'll find information, resources, and publications translated into nine languages; club and district data; the Grant Center, where you'll apply for and manage Rotary grants; and support from staff at Rotary headquarters and international offices. To use My Rotary, go to my.rotary.org and create your account.

COMMENTS

If you have questions or comments about this manual or any of Rotary's training resources, please contact:

Learning and Development

Email: learn@rotary.org

Phone: +1-847-866-3000

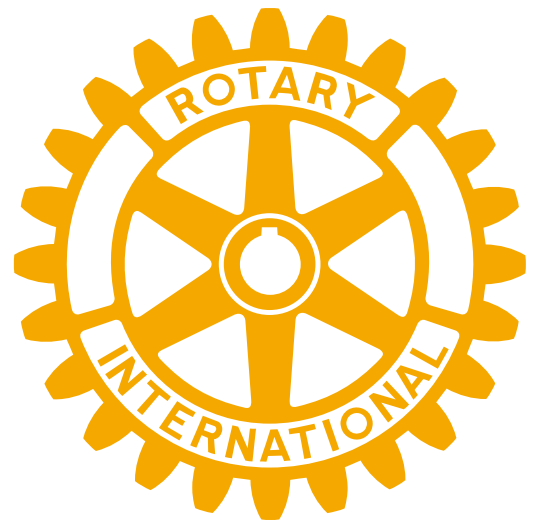


TOGETHER, WE

CONNECT

Rotary unites problem solvers around the globe behind one goal: to do more good. Our members are driven to bring communities together to create lasting change. Connecting to make things better — that's what people of action do. **Learn more at [Rotary.org](https://www.rotary.org).**

Rotary  PEOPLE OF ACTION



YOUR ROLE AS DISTRICT GOVERNOR

As governor, you lead your district, engage and inspire members, and promote rotary in your community.

RESPONSIBILITIES

AS GOVERNOR-ELECT

- Attending the governors-elect training seminar (introduction)
- Setting district goals for the year that align with the district strategic plan and Rotary's strategic plan (chapter 1)
- Appointing assistant governors and district committee chairs and reporting them in My Rotary (chapter 2)
- Conducting district meetings, including the district team training seminar, presidents-elect training seminar, and district training assembly (chapter 3)
- Planning for the district conference (chapter 3)
- Reviewing clubs' status with the governor, in preparation for the International Assembly (chapter 2)
- Attending the International Assembly (chapter 11)

AS GOVERNOR

- Conducting, implementing, or reviewing district strategic planning with the governor-elect and governor-nominee (chapter 1)
- Strengthening clubs (all chapters)
- Starting clubs (chapter 6)
- Promoting membership growth and engagement by working with district leaders and club presidents to set realistic membership goals for each club (chapter 6)
- Managing online membership leads with your district membership committee chair, including promptly reviewing and assigning leads to clubs (chapter 6)
- Supporting The Rotary Foundation through fundraising and grant activities (chapters 7 and 8)
- Serving as a spokesperson for your district and Rotary when appropriate (chapter 9)
- Helping the governor-elect plan and prepare for incoming officer training meetings (chapters 2 and 3)
- Conducting district events, including the district conference (chapter 3) and a Vibrant Club workshop (chapters 6, 7, and 9)
- Supervising the district leadership team (chapter 2)
- Encouraging open communication among clubs, as well as between clubs and RI (chapter 4)
- Officially visiting each club (through meetings with one or more clubs), to raise awareness of important Rotary issues, support struggling clubs, motivate club members to participate in service, and recognize members' contributions (chapter 5)
- Communicating at least monthly with each club president and secretary (chapter 4)
- Fostering continuity by working with past, current, and incoming district leaders (chapters 1 and 2)
- Transferring district files to the governor-elect at the end of your year (chapter 2)
- Reviewing clubs' status with the district governor-elect before the International Assembly and offering recommendations for strengthening weak clubs (chapter 2)
- Assigning the governor-elect responsibilities related to committees, administration, or events (chapters 2 and 3)
- Ensuring that district nominations and elections are conducted according to the RI Constitution and Bylaws and other RI policies (chapter 10)
- Inquiring regularly about the activities of Rotarian organizations operating in the district (chapter 8)
- Following the District Governor Code of Ethics (Rotary Code of Policies section 19.010.1.)
- Performing such other duties as an officer of Rotary
- When preparing for your year of service, using the planning calendar (appendix 9) to note important dates
- Preparing an expense report showing how your district has used the RI funding allocation, and submitting this to RI by the date prescribed (chapter 10)
- Preparing an annual statement and report of district finances, and sharing this with Rotary and all clubs by 30 September in accordance with RI Bylaws section 16.060.4. (chapter 10)

STRATEGIC PLANNING

Becoming a district governor can be overwhelming if you don't have a plan for your year. To prepare for your term as 2020-21 governor, you need to understand your role and responsibilities, set goals, and create a plan for achieving them. Once that work is completed, you will be ready to take action.

As you progress through your year, review all that you have accomplished by measuring the success of your goals. As Rotarians in your district reflect on your year, they will remember the impact you made through thoughtful planning and teamwork.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Working with past, current, and future district leaders, set district goals for the year that align with your district's and Rotary's strategic plans	Follow the District Governor Code of Ethics
Contact your regional leaders (RRFC, RC, RPIC, and E/MGA) for resources or support to help you achieve your goals	Work with past, current, and incoming district leaders to follow or implement the strategic plan

KEY RESOURCES

- [Strategic Planning Guide](#)
- rotary.org/strategicplan
- [Manual of Procedure](#)
- [Rotary coordinators](#)

ROTARY'S STRATEGIC PLAN

Rotary's strategic plan unifies the direction of Rotary International and The Rotary Foundation and identifies our strategic priorities. Review the [strategic plan](#) on My Rotary, and consider how your district's plan can align with it.

DISTRICT STRATEGIC PLAN

Setting goals and creating a strategic plan for achieving them should be a team effort. Work with your current governor and governor-nominee to review the district strategic plan and make any needed edits, or develop a multiyear strategic plan if one isn't in place, to maintain focus and continuity. Districts and clubs with strategic plans report higher levels of satisfaction and success than those without them. Use the [District Planning Guide](#) to assess your district's strengths, weaknesses, opportunities, and risks, and to set goals for the coming year. Ask your current governor, district committee chairs, assistant governors, and Club and District Support (CDS) representatives for the information needed to complete the guide. You can also download [statistical reports](#) about your district from [My Rotary](#) to help you complete it.

Using the statistical reports, your Rotary coordinator (RC) can help you identify trends in the district, develop goals, and implement your plan. Consider consulting club leaders about their priorities to find out which goals matter most, and to involve them in the district's plan.

CLUB GOALS

To set attainable goals, a club president-elect should look at past club accomplishments, member interests, and the club's capacity to achieve goals. Encourage club presidents-elect to enter their annual goals in [Rotary Club Central](#), where they can also see information on their clubs' past performance.

A club strategic plan is helpful for setting annual goals. Clubs can use the [Strategic Planning Guide](#) to create a long-term plan if they don't have one. To identify relevant long-term goals, clubs can evaluate their activities and membership satisfaction by using the [Rotary Club Health Check](#) and [Member Satisfaction Survey](#). Clubs can also use the guide [Be a Vibrant Club: Your Club Leadership Plan](#) and online membership courses for ideas on engaging members and incorporating those ideas into long-term planning.

As a district leader, you can view a summary of your clubs' goals and achievements or those of a specific club. If a club is unable to enter goals, a district leader can edit a club's data on its behalf. Club presidents receive an email notice after any change in their club's data. Remind club secretaries to keep club officers' email addresses current, either in Rotary's member database or through their club management system. Take a course on [Rotary Club Central](#) in the [Learning Center](#) to become more familiar with its tools for districts and clubs.

Work closely with your assistant governors to review each club's goals at the beginning of the Rotary year, as well as their achievements as the year nears an end. Club goals may adjust during the year as needed.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What other responsibilities does the governor of your district have?
- Which goals from the current year will continue into your term?
- How will you measure and track progress toward the goals you have set?
- What are your district's strengths and weaknesses?
- How can you help clubs align their goals with the district's priorities?
- How can you work with clubs to create a strategic plan?
- How can you encourage clubs to enter their goals in Rotary Club Central?
- How can you ensure continuity in long-term strategic planning?



ROTARY'S VISION STATEMENT

Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.

To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the next five years.

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

INCREASE OUR ABILITY TO ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

ROTARY'S CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:



FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant, but thriving.



JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION rotary.org/strategicplan

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Large empty rectangular area for taking notes on strategic planning.

One idea I will use from this session is:



District strengths (such as diverse membership)	District weaknesses (such as poor public image)

Opportunities for the district (such as new businesses in the area, growing population)	Challenges for the district (such as economic decline in the area, other activities that compete for members' time)

PART 2

Review the objectives under the priority you discussed.

Think about the strengths, weaknesses, opportunities, and challenges you listed in the chart in part 1. Now, write specific examples of how your district already represents at least one of the objectives through your strengths. Then list what your district can do to use its opportunities, or address its weaknesses and challenges, by supporting at least one of those objectives.

Strengths: How does our district currently exemplify this objective?	Weaknesses, opportunities, or challenges: In the future, how can our district work toward this objective?
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Objective	

Objective	

Objective	

Objective	



Welcome
**YOUNGER
PROFESSIONALS**
into your club
and share your
passion and energy for
DOING GOOD



LEARN HOW AT
Rotary.org/engaging-younger-professionals

LEADING YOUR TEAM

Being a successful district governor requires a strong district leadership team. This team includes assistant governors, district committee chairs, and incoming and past governors. If you share responsibilities with your team, you'll have more time to innovate, develop leaders, and motivate Rotarians to participate in projects, programs, and activities. Use the [District Planning Guide](#) to work with your leadership team on planning your year.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Review and update your district's policy, such as the role of past district governors and the coordination of multiyear projects	Ensure that the district leadership team carries out its duties
Appoint assistant governors and district committee chairs as needed to fill vacancies	Make sure that district committees support the work of club committees
Work with the governor-nominee and current governor to ensure continuity	Work with your team effectively to maximize your impact during your term
Conduct planning meetings with your district leadership team and outline your expectations	Motivate your team and resolve any conflicts that arise
Start forming your team and building relationships	Recognize outstanding efforts of Rotarians in your district through awards and other public appreciation

KEY RESOURCES

- Past district governors
- [Regional leaders](#) (regional Rotary Foundation coordinators, Rotary coordinators, Rotary public image coordinators, and endowment/major gifts advisers)
- International Assembly training leaders

APPOINTING TEAM MEMBERS

Selecting members of your leadership team is a joint effort. Work with your predecessors and successors to select appropriate people for each open position. When making district appointments, consider these tips:

- Consider two- to three-year terms, and stagger appointments so that returning leaders will always be in place to guide new team members.
- Appoint Rotarians based on their demonstrated leadership abilities and potential for growth, selecting leaders from as many clubs as possible.
- Choose a combination of experienced district leaders and Rotarians who have not yet served at the district level.
- When offering a position, be clear about your expectations, explain the position's responsibilities, and get a commitment to serve.

Finish your appointments as a governor-elect several months before you convene your district team training seminar, where you will confirm each member's responsibilities, district goals, and reporting procedures. District appointments should be reported to RI by 31 December.

YOUR DISTRICT LEADERSHIP TEAM

Encourage your assistant governors and district committees to work together to support clubs and collaborate on shared projects and goals.

Assistant governors play an important role, because they are the most familiar with your district's clubs. Work closely with your assistant governors to stay up-to-date on your clubs' practices, accomplishments, and weaknesses. See the Assistant Governors online courses in the [Learning Center](#) to find out more about their role.

District committees support club and district activities related to their areas of expertise and help achieve district goals.

Appendix 2 has more information about assistant governors, as well as required and optional committees and their responsibilities. You can establish additional committees as needed.

CREATING CONTINUITY

To improve continuity in the district, work with your predecessor and successors, especially on activities that last more than one Rotary year, such as strategic planning, district appointments, district service projects, and managing District Designated Funds and global grants. Your advisory council of past district governors offers history and experience useful in long-range planning.

As governor, consider giving the governor-elect and governor-nominee the opportunity to request specific responsibilities or assignments on district committees so they can gain experience. Help prepare your successor by:

- Assigning responsibilities to the governor-elect
- Updating the governor-elect before the International Assembly on the status of clubs
- Discussing the information presented at the International Assembly after the governor-elect returns
- Transferring district files to the governor-elect at the end of your term

SUPPORTING CLUBS

The district leadership team supports the district's clubs. Encourage the team to review information in [Rotary Club Central](#) to decide what kind of support would most benefit each club. Your team can help clubs update their practices by using the suggestions in [Be a Vibrant Club: Your Club Leadership Plan](#), by encouraging flexibility and innovation, and by taking the [membership courses](#) in the Learning Center. Your Rotary coordinator can also help by identifying regional best practices for healthy clubs, along with potential ways to create strong and dynamic clubs.

A few clubs may need special attention from you and other district leaders. These clubs generally have difficulty meeting membership, financial, or other minimum standards set by the RI Board of Directors. To be considered functional, a club should meet these minimum standards:

- Meets regularly
- Implements service projects that address the needs of the local community and communities in other countries
- Accepts the visit of the assistant governor, governor, or any officer of Rotary International
- Pays per capita dues to RI
- Subscribes to a Rotary World Magazine Press publication
- Maintains liability insurance appropriate for the region (United States only)
- Acts in a manner consistent with the RI Constitution and Bylaws and Rotary Code of Policies
- Pays RI membership and district dues without outside assistance
- Keeps membership lists current in Rotary's database by using My Rotary or one of the club management systems; also works with club secretaries to keep membership data current
- Resolves club disputes amicably
- Maintains cooperative relations with the district
- Cooperates with RI by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, the associate foundations, and the international offices of the Secretariat
- Completes the election review process established in the RI Bylaws section 11.070.5.

Work with assistant governors, who are your liaisons to club leaders, to support clubs that are rated nonfunctioning. Assistant governors can regularly guide these clubs and inform you of their progress.

DELEGATION

During your year as district governor, much of your time will be devoted to club visits, training events, and other meetings. Your district leadership team will support you and help you achieve your district goals. To have a successful year, you will find it necessary to delegate tasks to your team members and to communicate with them regularly. Each committee chair will take appropriate tasks to their committees to complete. Check their progress often and advise them as necessary.

As a district leader, you can also delegate your administrative tasks on My Rotary by asking team members to do Rotary business online on your behalf. This temporary permission, known as “delegation,” is not intended to relieve you of your district governor duties; it simply extends the access to My Rotary that you get as a district governor to another district leader with a My Rotary account. Those who receive delegation won’t be able to view your personal information, such as your profile, contribution history, or discussion group activity. They can, however, access the same tools and sensitive information that you have as a district governor, including Monthly Contribution Reports, club ratings in Rotary Club Central, and district appointments. See [How to Delegate Your Online Access](#) for more information.

MOTIVATION

Your role as the leader of your district is to motivate fellow district leaders to be knowledgeable and enthusiastic about Rotary and take action to achieve goals. Like you, your team members are volunteers who value their time. Keep expectations reasonable and show appreciation for their efforts.

If you don’t know everyone on your district leadership team, make an effort to do so. What motivates Rotarians varies, so once you get to know your team members more, you can better motivate them.

INDIVIDUAL AND CLUB RECOGNITION

One way to show appreciation for Rotarians’ commitment is to recognize them with an award. Awards motivate Rotarians and honor them for their service. Besides Rotary International and Rotary Foundation honors, your district may have several of its own awards. For details on awards, and your responsibilities for each, see rotary.org/awards.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What factors should you consider when selecting Rotarians for district positions?
- How will you check on your team during the year?
- What support will your district's clubs need to be successful?
- How can past district governors support clubs in the district?
- How will you delegate responsibilities to reach goals without overtasking anyone?
- How will you motivate your team and other Rotarian volunteers?

APPENDIX 2

DISTRICT LEADERSHIP TEAM

All members of the district leadership team are expected to:

- Work with the governor, governor-elect, governor-nominee, and assistant governors to plan strategies for achieving goals
- Promote and attend district training meetings and the district conference
- Relay information between Rotary International, the district, and club members
- Work closely with club leaders to offer support and guidance
- Connect and interact with their regional Rotary Foundation coordinators, Rotary coordinators, Rotary public image coordinators, and endowment/major gifts advisers and share their experience and knowledge of the districts they serve
- Make sure clubs get materials from the Secretariat, RI committees, and the regional leader team

The following changes to district committees will take effect 1 July 2019:

- **Combined:** The district membership attraction and engagement committee and the district new club development committee will merge into the district membership committee.
- **Change of Responsibilities:** Some obligations of the vocational service committee and the youth service committee will be transferred to the community service committee.
- **Change of Responsibilities:** Some obligations of the Rotary Community Corps and Rotary Fellowships committees will be transferred to the community service committee.
- **Eliminated:** The member benefit committee and the district club service committee will be eliminated.
- **Required:** The following committees and subcommittees are required:
 - Finance
 - Membership
 - Public image
 - Rotary Foundation
 - Fundraising
 - Grants
 - PolioPlus
 - Rotary Peace Fellowships
 - Stewardship
 - Training

You can find resources for running a district committee in [Lead Your District: Committee Chair](#).

ASSISTANT GOVERNORS

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

QUALIFICATIONS

(effective July 2020)

Minimum criteria for assistant governors:

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

Additional criteria:

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

RESPONSIBILITIES

(effective July 2020)

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

ALUMNI

This committee manages relationships with district alumni and helps clubs with alumni relations.

QUALIFICATIONS

Give preference to:

- Rotary alumni
- Those with professional experience working with alumni

RESPONSIBILITIES

- Work with other district committees, particularly the membership, Foundation, scholarship, and programs committees (e.g., Interact, Rotaract, RYLA, Rotary Youth Exchange), to engage alumni in club and district activities.
- Identify alumni and their skills or status (speaking, project handling, potential member, donor to Foundation and Rotary programs, etc.) and help clubs and the district connect with these alumni.
- Raise awareness of how to work with alumni to maintain their relationship with Rotary.

In My Rotary, club officers can access the Program Participants and Alumni report, which includes names, program details, and contact information for all former Rotary program participants associated with your district.

- Encourage alumni to report their data to RI by creating profiles on My Rotary, and work with fellow district chairs to ensure that RI recognizes former program participants as such.
- Follow privacy and youth protection policies and local law.
- Support and coordinate alumni associations and alumni events, where appropriate.

COMMUNITY SERVICE

This committee promotes programs, activities, and resources related to community service and offers additional support for Rotaract and Interact clubs.

QUALIFICATIONS

Give preference to:

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

RESPONSIBILITIES

- Motivate clubs to work with community members to identify issues they could address through humanitarian projects.
- Highlight successful service efforts, Rotary programs, and resources that help strengthen projects.
- Promote vocational service by encouraging club members to use their talents and professional skills to plan and carry out service projects.
- Encourage clubs to organize a Rotary Community Corps (RCC), and encourage district-level RCC meetings to exchange project ideas.
- Collaborate with other district committees, such as the district international service and Rotary Foundation committees.
- Help the club community service chairs carry out their responsibilities.
- Organize district-level meetings for club community service chairs, coinciding with the district conference, district training assembly, and other gatherings, to provide opportunities to exchange ideas and promote projects.
- Identify ways that clubs and local service organizations can cooperate on service projects by sharing information and helping clubs to set goals.
- Request regular reports on successful projects from club community service chairs for promotion through the governor's monthly letter and Rotary Showcase, and pass them on to RI for possible publication.
- Organize exhibits of outstanding community service projects at district and zone meetings.
- Coordinate districtwide community service activities.
- Promote resources for service and engagement, including Rotary Fellowships and Rotarian Action Groups.
- Facilitate district recognition for clubs or individuals who advance the principles of Rotary, including vocational service and empowering and engaging young people.
- Promote opportunities for local clubs to partner with Rotary's service and project partners.

CONVENTION PROMOTION

This committee promotes attendance at the annual Rotary convention to Rotarians throughout the district.

QUALIFICATIONS

Give preference to those with:

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

RESPONSIBILITIES

- Attend club and district meetings to promote the convention.
- Be a local resource for convention materials and information.
- Help the zone-level RI Convention Promotion Committee member assigned to your district.
- Contact potential registrants.
- Contribute convention articles and information to district newsletters, publications, and directories.
- Translate important convention information into local languages, if necessary.
- Add a link at riconvention.org to your district website.

Many convention promotion committees also:

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

DISTRICT CONFERENCE

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

QUALIFICATIONS

Give preference to the governor-elect, governor-nominee, or those with:

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

RESPONSIBILITIES

- Recommend the district conference venue and make logistical arrangements.
- Coordinate conference finances to achieve maximum attendance.
- Promote conference attendance, emphasizing new Rotarians, new clubs, and representation from every club.
- Invite external audiences, such as the media, community leaders, and beneficiaries of Rotary's programs.

- Consider including time in the agenda to report on Rotary Foundation activities, if no other district meeting has offered or plans to offer such a report.
- Provide a relevant, motivational, and informative program.

DISTRICT PROGRAMS

These committees promote district groups, programs, and activities, providing guidance to Interact, Rotaract, and Rotary clubs. Districts often have a specific committee for each of the programs or groups, with additional support for Rotaract and Interact clubs. Rotary offers resources for these committees:

- Interact
- Rotaract
- Rotary Friendship Exchange
- Rotary Youth Exchange
- Rotary Youth Leadership Awards (RYLA)

For district Rotaract committees, Rotary International recommends that the district Rotaract chair (a Rotarian) and the district Rotaract representative (a Rotaractor) co-chair the committee. Also, the committee should have an equal number of Rotarians and Rotaractors.

QUALIFICATIONS

Give preference to those who have club-level experience with the particular program or activity. The governor-nominee should serve on the district Youth Exchange committee.

RESPONSIBILITIES

- Coordinate districtwide efforts related to the program.
- Promote program participation through regular contact with assistant governors and clubs.
- Promote successful programs by inviting their participants to speak at events and to encourage clubs to get involved.
- Consult [Rotary coordinators](#) to identify program expertise in your region.
- Help club program committee chairs carry out their responsibilities.
- Encourage clubs to decide whether the program can address local needs.
- Identify potential ways for district programs to cooperate with local non-Rotary service groups.
- Encourage participants of one program to participate in others offered in the district.
- Promote publication of program goals and achievements in Rotary and non-Rotary media in the district.

FINANCE

This committee supervises district funds by reviewing and studying the amount of per capita levy and district administration expenses. It also prepares annual reports on the district's finances. The district treasurer serves as an ex officio member of the committee and has voting privileges. The chair should serve a three-year term.

QUALIFICATIONS

Give preference to:

- Those with previous service as club treasurer
- Accounting or finance professionals

RESPONSIBILITIES

- In cooperation with the governor, create a district budget to be submitted to clubs at least four weeks before the district training assembly, and to be approved at a meeting of incoming club presidents.
- Review and recommend the amount of per capita levy. Any per capita levy needs approval from at least three-fourths of the incoming club presidents at PETS or at the district training assembly, or from a majority of electors present and voting at a district conference.
- Ensure that proper income and expense records are kept.
- Prepare an annual financial report to present at a meeting according to RI Bylaws section 16.060.4.
- Ensure that a committee member (preferably the treasurer) and the district governor are the authorized signatories for district bank accounts. Any withdrawal requires both signatures. The bank account should be held in the name of the district.
- Consider working with the district Rotary Foundation committee chair to disburse grant funds and ensure that proper records of grant activity are kept for reporting purposes.

District governors in the United States should appoint a district insurance representative to help communicate with clubs about the U.S. Rotary Club and District Liability Insurance Program.

INTERNATIONAL SERVICE

This committee works to enhance the quality of the district's humanitarian efforts by identifying resources and experts to advise on international service projects and global grants. The chair should serve a three-year term to ensure consistency and continuity in developing projects and grants with great impact and sustainability.

QUALIFICATIONS

Give preference to:

- Past district governors
- Past regional Rotary Foundation coordinators
- Past assistant regional Rotary Foundation coordinators

RESPONSIBILITIES

- Encourage club and district involvement in international service.
- Promote higher awareness of resources and strategies to improve projects and global grants.
- Create a district resource network composed of local experts with experience in project planning and implementation, Rotary's areas of focus, and Rotary grants, who will serve as advisers and help clubs improve projects and global grants.

- Identify and recruit experts with relevant experience and technical skills by collaborating with:
 - District governors
 - Rotary Foundation committee
 - Grants subcommittee
 - Community service committee
 - Alumni committee
 - Rotarian Action Groups
 - The Rotary Foundation Cadre of Technical Advisers
 - District Rotaract representatives
 - Rotary Peace Fellows
- Establish direct lines of communication and accountability for all types of international service, with emphasis on connecting clubs to a host or international partner, and on furthering global grant international relationships.
- Motivate and support clubs in their efforts to join with international clubs on service projects and grants.

MEMBERSHIP

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

QUALIFICATIONS

Give preference to the governor-nominee, past district governors, past Rotary coordinators, past assistant Rotary coordinators, or those with:

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

RESPONSIBILITIES

GENERAL:

- Plan, promote, and conduct a Vibrant Club workshop in consultation with the governor and district trainer, as well as the district public image and Rotary Foundation chairs.
- Work with and communicate regularly with the district governor and club leaders to ensure that your clubs and district achieve their membership goals.
- Maintain communication with other district committees.
- Work with the Rotary coordinator to plan membership activities in the district.
- Encourage clubs to develop and implement innovative membership development strategies.
- Ensure that clubs have access to membership resources available on My Rotary and that membership changes are reported promptly to Rotary International.
- Ensure that each club fills the position of membership committee chair and reports that person's name on My Rotary.
- Help club membership committee chairs carry out their responsibilities.

ATTRACTION:

- Assist clubs' recruitment efforts, paying special attention to small and weak clubs.
- Encourage each club to strive to represent the demographic composition of the community's professionals.
- Check your membership leads regularly and work with your district governor to determine who will manage the leads and assign them to clubs, and then follow up with clubs to make sure they take action on the leads.

ENGAGEMENT:

- Coordinate districtwide membership development activities.
- Encourage clubs to strive for Rotary or presidential recognition.
- Visit clubs to speak about innovation, flexibility, diversity, and ways to engage members.

NEW CLUB DEVELOPMENT:

- Identify communities without Rotary clubs that have a population capable of meeting the requirements for chartering a new club.
- Find communities where additional Rotary clubs could form without detracting from current clubs' service.
- Assist in organizing and establishing new clubs.

TRAINING REQUIREMENT

The chair and committee members should attend a regional seminar held by the Rotary coordinator or complete the [online membership courses](#) in Rotary's Learning Center.

NOMINATING

This committee nominates the most qualified Rotarian available to serve as governor. The terms of reference for the committee are determined at the district conference. For details, contact your Club and District Support representative.

RESPONSIBILITIES

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

PUBLIC IMAGE

This committee promotes Rotary to external audiences and fosters understanding, appreciation, and support for the organization's programs. It also helps Rotarians understand that effective external publicity, favorable public relations, and a positive image will help Rotary further its mission.

QUALIFICATIONS

Give preference to past Rotary public image coordinators, past assistant Rotary public image coordinators, or those with:

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

RESPONSIBILITIES

- Maintain contact with the district governor and key committee chairs to stay informed about district projects and promotable activities — particularly those that interest the public.
- Promote Rotary to external audiences, such as the media, community leaders, potential partner groups, program beneficiaries, and the public.
- Contact the media with newsworthy stories of district projects and events, and put district and club stories on social media.
- Promote the use of Rotary's Brand Center, social media channels, and Rotary Showcase, and show clubs how these tools will help them.
- Promote the use of People of Action campaign materials, and show how they will benefit your district and clubs.
- Give Rotary public relations materials to clubs and encourage them to make public outreach a priority.
- Encourage clubs to develop content on their website that appeals to the public.
- Seek opportunities for low-cost or free placements with media outlets in the district.
- Promote Rotary initiatives, such as PolioPlus, grant successes, alumni activities, and awards.

TRAINING REQUIREMENT

Committee members should attend public image workshops held in conjunction with Rotary training meetings, as well as the regional seminar held by the Rotary public image coordinator (RPIC).

ROTARY FOUNDATION

This committee helps the governor educate, motivate, and inspire Rotarians to participate in Foundation programs and fundraising. It serves as a liaison between the Foundation and club members. The district governor is an ex officio member of the committee and has voting privileges. The committee chair should serve as an ex officio member of all subcommittees to stay informed of their progress and directly support them as needed. The chair will serve a three-year term.

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

- Fundraising — coordinates the district's fundraising goals for the Annual Fund, PolioPlus Fund, and Rotary's Endowment, soliciting gifts and educating Rotarians about their gift options
- Grants — helps clubs apply for Rotary grants and encourages participation in district grants and global grants
- PolioPlus — supports Rotary's commitment to eradicate polio and encourages participation in PolioPlus activities

- Rotary Peace Fellowships — encourages clubs to participate in the Rotary Peace Centers program and manages clubs' applications
- Stewardship — oversees the qualification of clubs to participate in grants and is responsible for ensuring the careful management of Rotary grant funds and for educating Rotarians on how to manage grants properly and effectively

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

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

QUALIFICATIONS

Give preference to:

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

RESPONSIBILITIES OF THE CHAIR

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

- Ensure that all clubs interested in participating in Rotary grants are able to qualify.
- Confirm that clubs applying for global grants are qualified.
- Collaborate with the international service chair and district governor to identify Rotarian experts who can serve on the district resource network as advisers and help clubs improve projects and global grants.

TRAINING REQUIREMENT

All members of the district Rotary Foundation committee are expected to attend a regional Rotary Foundation seminar conducted by a regional Rotary Foundation coordinator (RRFC).

TRAINING

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

QUALIFICATION

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

RESPONSIBILITIES

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

Empty space for taking notes.

One idea I will use from this session is:



GETS WORKSHEET

FROM CONFLICT TO RESOLUTION

In your groups, discuss your assigned conflict scenario and determine how you would arrive at a resolution. Include each step involved. Note that each conflict may have more than one resolution.

Scenario 1: Underperforming committee chair

It’s halfway through the year, and one of your first-year committee chairs, who was recommended by a respected past district governor, isn’t meeting your expectations. He doesn’t communicate with committee members and hasn’t made progress on any of the committee’s goals. The committee members are frustrated and are talking about stepping down.

Consider the perspective of the committee chair. What challenges could he be facing? Why might he be struggling?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 2: Clubs not working with district

Over the past few years, a few of your clubs have developed a negative attitude toward the district, and they avoid working with district leaders. You would like them to work with the assistant governor to ensure that they receive resources and support from the district and continue to be strong clubs.

What might have caused the clubs’ negative perception of the district? What support might they need that they aren’t receiving?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 3: The importance of the district training assembly

A few clubs in the district say that they don't see any value in sending their club officers to the district training assembly. One president-elect tells you that she isn't attending because she thinks it is a repetition of PETS, and she is not encouraging her officers to attend.

Why might the president-elect have this perception? What other factors might contribute to her decision not to attend?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 4: Uncooperative team members

You have been asked to teach your district about Rotary's new strategic plan. Some of your team members don't see the value of the new plan or how it applies to your district, but you need their support to explain it to clubs.

What might your team be concerned about? Why might they resist this idea?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 5: Disagreement between team members

Your public relations, membership, and Foundation committees are trying to work together to arrange and promote a district fundraising event that is open to the public. The chairs of the committees don't agree on the venue or the approach to publicity. One of the chairs comes to you for direction without telling the others.

What might the chair be seeking from you? How might the other chairs react to your conversation?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 6:

Your trainer may have asked you to think of a conflict that you have encountered or anticipate encountering in your district. Tell a partner about it and summarize it here. Then address the questions below.
Your conflict:

What might the person whose goals are in conflict with yours be thinking? What might be motivating that person?

State the desired resolution:

List the steps you will take to reach that resolution:

After each group has shared its steps and resolutions with all participants, write down 3-5 conflict resolution strategies that each group had in common.

Common strategies:

1.

2.

3.

4.

5.

Keep these strategies in mind for any conflicts that arise after GETS. Review the course about understanding conflict in the [Learning Center](#) for even more tips, and continue to look for ways to develop skills that will make you a trusted and successful manager of conflict in your district.



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PLANNING YOUR EVENTS

Rotary club and district leaders change annually, and new Rotary leaders are continually needed. While serving as governor-elect and governor, you are responsible for overseeing the training events for incoming and future Rotary leaders. You also plan the district conference. Early in your year as district governor-elect, start preparing for this conference to make it a success for you and Rotarians in your district.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Appoint members, including the district trainer, to the district training committee	Convene your district conference and oversee the event
Convene role-based training, including: <ul style="list-style-type: none"> • District team training seminar • Presidents-elect training seminar (PETS) • District training assembly 	Appoint an aide to the RI president's representative, as well as a conference secretary to record the proceedings
Approve substitute PETS attendees for presidents-elect who cannot attend	Promote the conference during club visits and on the district website
Ensure that each Rotary club has a training plan (including leadership development and new member orientation), and promote the role of a club trainer	Ensure that the RI president's representative and his or her partner receive the hospitality and courtesy appropriate to the RI president (see the Rotary Code of Policies for updated Rotary protocol)
Select the date and venue for your district conference	Make sure that clubs receive a written report of the conference proceedings within 30 days of the event
Appoint the district conference committee chair and members	Send the president's representative report to presidential.services@rotary.org
Visit other district conferences for ideas	Report on Rotarian Action Group and Rotary Fellowship activities for the year at the district conference
Submit the date, location, and other district conference details by 1 February on My Rotary	

KEY RESOURCES

- [Lead Your District: Training](#)
- rotary.org/trainers
- [Five Steps to a Successful District Conference](#)
- [Manual of Procedure](#)

DISTRICT TRAINING COMMITTEE

Your district's training committee, chaired by the district trainer, will help you with the Rotary training meetings you are responsible for as governor-elect and as governor. Under your supervision, this committee plans the training events, including logistics and program content, and conducts them. As the convener, you have final authority over the program, venue, speakers, training leaders, and other meeting elements. For details on the responsibilities of the district trainer and the training committee, refer to [Lead Your District: Training](#) and other resources at rotary.org/trainers. Appendix 2 summarizes Rotary training events.

ROTARY TRAINING MEETINGS

Since Rotary clubs and districts change leadership annually, training is critical to maintain Rotary's continuity and success. Every year, a series of consecutive training meetings supporting Rotary's strategic plan focuses on district and club leaders. Each meeting has a recommended but flexible time frame and curriculum, allowing for changes that reflect the needs of the district and participants. We recommend that district training meetings be held in a location within the district to reduce the cost of attendance.

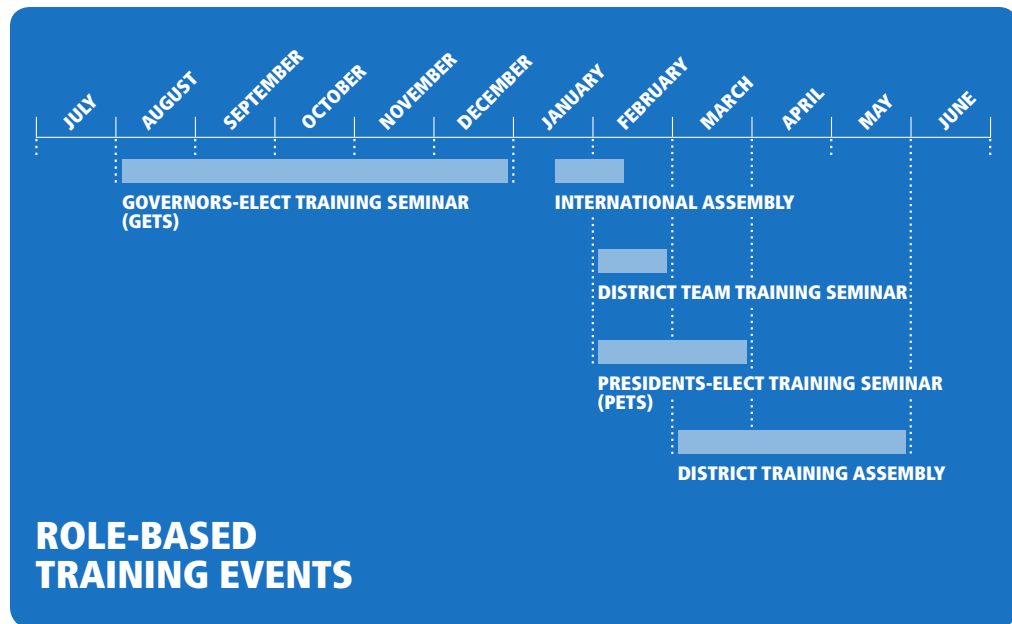
Rotary International offers many resources to support the training meetings for club and district leaders, including leader's guides for every RI Board-recommended meeting. Find those guides at rotary.org/trainers.

Courses for trainers are available in the [Learning Center](#). Encourage your district trainer and committee to take the courses by signing in to My Rotary and choosing Learning and Reference, then Learning Center.

During the training meetings you convene, your main responsibilities are to motivate participants to exchange ideas and take action.

ROLE-BASED TRAINING MEETINGS

As governor-elect, you attend GETS and the International Assembly to prepare for your year as governor. After these training seminars, you will begin training your district leadership team, club presidents, and other incoming club leaders to prepare them for their roles.



TOPIC-BASED TRAINING MEETINGS

As governor, you convene meetings for club members to further develop their Rotary knowledge. Holding training meetings during the year informs members of trends in the organization, develops leadership skills, and offers networking opportunities. For these topic-based meetings, you and your district training committee have discretion on the time frame and other details, such as who convenes and organizes each meeting. The governor and governor-elect should work together to decide what works best for the district. As you plan your training meetings, consult with your regional Rotary Foundation coordinator, Rotary coordinator, Rotary public image coordinator, or endowment/major gifts adviser, who can offer their expertise on a variety of topics. For details on each of these meetings, see [Lead Your District: Training](#) or the leader’s guides for each of these events.

DISTRICT CONFERENCE

District conferences take place each year to inspire and motivate Rotarians, celebrate the achievements of the past Rotary year, and build confidence to achieve the goals for the upcoming year. The conference should appeal to all Rotarians in the district.

Hold your conference at a time and place agreeable to you and a majority of club presidents. The event dates and location can be decided as early as your term as governor-nominee, with help from the current club presidents or those who will be president during your term. Avoid scheduling your conference during the Rotary institute, the International Assembly, Rotary Convention, and holidays; the dates for these and other RI meetings are available at My Rotary or from your CDS representative. Consider holding your conference with another district. For details about planning and promoting your district conference, refer to [Five Steps to a Successful District Conference](#).

CLUB TRAINING

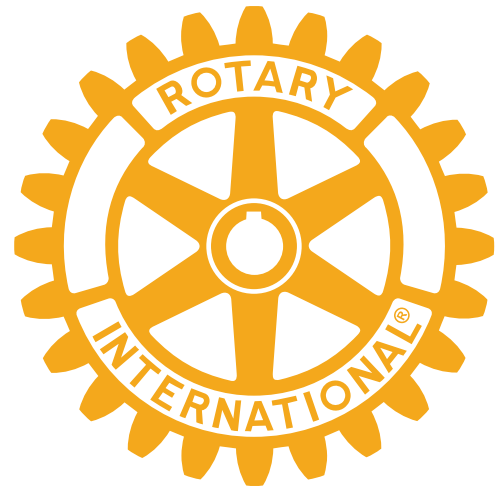
Clubs are encouraged to have a trainer to:

- Provide orientation for new members
- Give current members the opportunity to learn more about Rotary
- Offer all members an opportunity to build leadership skills
- Identify and address any other club training needs

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What learning opportunities does your district offer in addition to Rotary-recommended events?
- What makes training seminars successful in your district?
- How will you motivate Rotarians to attend training meetings?
- How will you support the development of future district governors?
- What features of your district conference will interest Rotarians and their families?
- How will you ensure wide promotion of your district conference?
- What will you do to make sure that your district conference is a celebratory event, in addition to being the forum where Rotary business is transacted?
- How will you use Rotary's Learning Center to supplement training and provide an alternative for those who cannot attend in person?



ROTARY TRAINING EVENTS

ROLE-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR-ELECT

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
<p>District Team Training Seminar February</p>	<p>Assistant governors and district committee leaders learn about their roles and set goals with the district leadership team.</p>	<p>District training committee</p>	<p>Trainers Assistant governors Committees</p>
<p>Presidents-elect Training Seminar (PETS) February or March</p>	<p>Club presidents-elect learn their role and work with assistant governors to set goals.</p>	<p>District training committee</p>	<p>Trainers Presidents</p>
<p>District Training Assembly March, April, or May (after PETS)</p>	<p>Club presidents-elect develop leadership skills; other incoming club leaders learn about their roles; together, club leaders set goals.</p>	<p>District training committee</p>	<p>Trainers Presidents Secretaries Treasurers Committees</p>

TOPIC-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
<p>Vibrant Club Workshop Determined by district (Starting July 2020)</p>	<p>Club presidents, club membership committee chairs, club Rotary Foundation committee chairs, and interested Rotarians learn about membership, the Foundation, and public image.</p>	<p>District Rotary Foundation committee District membership committee District public image committee District training committee</p>	<p><u>Trainers (coming soon)</u></p>
<p>Grant Management Seminar Determined by district</p>	<p>Club presidents-elect (or appointees) learn how to manage Rotary grants.</p>	<p>District Rotary Foundation committee District training committee</p>	<p><u>Trainers (for in-person seminars)</u> <u>Trainers (for online seminars)</u> <u>Participants</u></p>
<p>Rotaract District Leadership Training Anytime after club open elections and before 30 June</p>	<p>Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and non-Rotarians learn about Rotaract.</p>	<p>District Rotaract representative</p>	<p><u>District Rotaract Representative</u></p>

Large empty rectangular area for taking notes, bounded by a dotted line.

One idea I will use from this session is:



MAKING A TRAINING EVENT SUCCESSFUL

Choose one role-based training event and one topic-based training event from the lists below. Then, write down a goal and a question you have for each event, and discuss them with your partner. Write down a tip or suggestion from your partner that addresses your question. Then offer a tip or suggestion to address your partner’s question.

Role-Based Training Events

EVENT	One goal I have for this event	One question I have regarding this event	Suggestion from partner
District Team Training Seminar			
Presidents-elect Training Seminar (PETS)			
District Training Assembly			

Topic-Based Training Events

EVENT	One goal I have for this event	One question I have regarding this event	Suggestion from partner
Vibrant Club Workshop (replaces the District Rotary Foundation Seminar, District Membership Seminar, and District Public Image Seminar 1 July 2020)			
Grant Management Seminar			
Rotaract District Leadership Training			

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SET CLUB GOALS?**



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CONNECTING WITH CLUBS

As district governor, you will need to communicate with Rotarians, Rotary leaders and staff, community leaders, the media, prospective members, project recipients, and the public. Communicating well and often will foster effective clubs, achieve goals, encourage membership growth, and increase Rotary Foundation support. Being aware of different communication styles and working on your own communication skills will enhance your success.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Refine your district's communication plan	Communicate with clubs each month

KEY RESOURCES

- [Brand Center](#)
- [Official Directory](#)
- [Manual of Procedure](#)
- [Your Rotary public image coordinator](#)

COMMUNICATION PLAN

Communication is essential to the effectiveness of any team. To support effective clubs, district leaders must work together and communicate often.

Though district leaders can communicate with one another and with clubs in various ways, assistant governors interact with clubs most frequently, so you may prefer to route all information through them. District committees can send information to clubs through the assistant governors assigned to those clubs. The assistant governor can then provide specific club information to the district committees. Another approach is to have district committees work directly with club committees. Whichever communication plan your district uses, all those involved should review and support it at the district team training seminar.

DISTRICT WEBSITE

Your district website is not only a helpful tool for Rotarians, but also an outward-facing site where the public can learn more about Rotary. To make it more useful for members, consider having a section only for them. Many district websites include these features:

- An events calendar listing upcoming district meetings and club visits
- A message for clubs (which can be your monthly communication)
- Notes on how clubs in the district have attracted new members
- Profiles of club service projects
- A list of all clubs in the district, including links to their websites
- Updates on district goals
- A brief résumé of the governor's background, with the governor's photo
- Contact information for district leaders

For the public section of your site, make contact information easy to find, avoid Rotary jargon, and regularly refresh your content, including images. Consult with your Rotary public image coordinator for strategies to improve your site.

Encourage clubs to have their own websites to promote Rotary, advertise club and district events and activities, and share Rotary resources and news via RSS feeds. Clubs should also be encouraged to direct a website or [Facebook](#) page toward the public. Refer to the [Quick Start Guide for Club Websites](#) for inspiration and guidelines.

Suggest that any clubs using ClubRunner, DACdb, and other club management systems follow the [approved steps](#) to link their member database with Rotary's.

Find everything you need to create club and district communications that reflect Rotary's look and feel at the [Brand Center](#). The site is home to Rotary logos, templates, ads, images, videos, event resources, People of Action campaign materials, and more.

SOCIAL MEDIA

Communicating through social media can foster networking and collaboration among Rotarians and non-Rotarians, while telling your story and increasing awareness of Rotary. Visit Rotary's official social networking pages on [Facebook](#), [Twitter](#), and [Instagram](#) to post images, videos, and stories for your district and the community.

GOVERNOR'S MONTHLY COMMUNICATION

The governor is required to communicate with each club president and secretary in the district at least once a month. This gives news and reminders to club leaders about the district and Rotary International. Your communication can take many forms, including an electronic newsletter, a video message, or a message on your district website. Whatever form you use, you may also want to make it available to assistant governors, past district governors, and Interact and Rotaract clubs. Work with an editor to decide on the content and frequency of your regular communication, and contact your RPIC for strategies to maximize its effectiveness. This communication should:

- Inform members about important Rotary updates
- List upcoming district deadlines
- Give updates on district projects
- Highlight club activities, such as new clubs admitted and names of new Rotarians
- Motivate club leaders to use Rotary Club Central to list their goals and celebrate their accomplishments
- Motivate clubs to pursue club goals, plan for upcoming events and observances, and promote district initiatives
- Recognize the service of committees, Rotarians, and club and district programs
- Recognize the financial contributions of Rotarians and community organizations
- Recommend helpful Rotary resources

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- Which aspects of your district's communication policy work well, and which need improvement?
- How will you communicate with clubs regularly?
- What social media channels should your district use?
- How will you make sure club members' needs are heard and addressed?
- How can you emphasize membership, one of Rotary's top organizational priorities, in your district events and messaging?
- What support or resources will you need from your Rotary public image coordinator?

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One idea I will use from this session is:



GETS WORKSHEET

ENHANCING YOUR COMMUNICATION WITH CLUBS

How will you communicate information to clubs? How will you convey news from clubs to your district team? You'll be assigned one of the communication methods listed below. Consider what kind of messages it's best suited for. Develop your plan by answering the questions as shown in the example. Remember that each question can have more than one answer. The chart lists ideas you might consider.

Methods of communication:

- A message on the district website
- A post on Facebook, Twitter, Instagram, or other social media
- A monthly communication such as a newsletter, a video message, or a blog post
- A phone call
- An email

Example:

- Method: An email
- What is the message? The club attendance policy has changed.
- Who needs to receive it? Club members, club presidents, district leaders
- Who should send the message? Assistant governors
- Why send it this way? The news is timely and important.

Potential messages	Potential recipients/senders	Potential reasons for using this method
Highlighting a great project	Recipients Club members in your district	Information is concise and has good images
Thanking a Rotarian in your district for a significant donation to The Rotary Foundation	Club officers District leaders	Information could be inspiring for members
Clubs in your district are struggling with attendance and haven't reached their goals	Committee members Rotarians around the world	Information is timely and important for clubs to know
A club member has been given a prestigious international award	Non-Rotarians (potential members)	The more people you contact, the better
Soliciting opinions from club members on your next district project	Senders District governor Assistant governors	The content of this message is sensitive
The district conference dates and location have been selected	District chairs Event organizers	A dialogue is the best way to be sure everyone understands

Method of communication:

What is the message?

Who needs to receive it?

Who should send the message?

Why send it this way?

MAXIMIZING CLUB VISITS

Club visits, whether from the governor or assistant governor to one club or multiple clubs at once, give members the opportunity to get support and guidance from an experienced district leader.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Schedule your club visits and confirm dates with clubs	Visit each club in your district through either a multiclub meeting or a single-club meeting
	Rate clubs in Rotary Club Central after each visit to identify those that may need additional support

KEY RESOURCES

- [Your CDS representative](#)
- [Rotary Club Central](#)

CLUB VISITS

During your year as governor, you will visit clubs, either separately or in multiclub meetings. The goal of these visits is to motivate and inspire members and offer district-level support for improving their communities.

Here are some tips for giving talks to clubs in your district:

- Emphasize that district leaders are there to help them.
- Motivate club members to participate in service projects and encourage clubs to let the community know about their projects and activities.
- Encourage them to be flexible and innovative to rejuvenate their clubs, attract new members, and keep current members satisfied (refer them to rotary.org/flexibility, [Be a Vibrant Club: Your Club Leadership Plan](#), [Strengthening Your Membership: Creating Your Membership Development Plan](#), and [Enhancing the Club Experience: Member Satisfaction Survey](#)).
- Highlight important Rotary issues.
- Recognize outstanding club projects and individual Rotarian contributions.
- Encourage all club members to attend the district conference.

- Emphasize the importance of incoming club leaders' attendance at district training meetings.
- Encourage club leaders to use the [Rotary Club Health Check](#) to identify issues that need attention and create a membership plan that addresses those areas. Recommend the [online membership courses](#) as a resource.
- Meet with the president and other club leaders. Attend a club meeting or assembly and talk with members about club activities, issues, and how the district can support its efforts. This open communication will lead to a productive relationship throughout the year.

LOGISTICS

Work with the assistant governor assigned to the club to decide the best time for your visit. Ask assistant governors to identify clubs that will require an early visit, including those that are new, have low membership, or are not meeting minimum standards. As club advisers, assistant governors can discuss with you a club's strengths, weaknesses, and needs, offering insight and potential steps for improvement.

To have the biggest impact on club members, you should schedule the visit to coincide with a specific occasion, such as a charter night, induction ceremony, new member orientation program, award presentation, special program, Rotary Foundation event, or intercity meeting.

You can group visits to neighboring clubs or according to their meeting schedules, or you can conduct intercity meetings. Your Rotary funding for travel expenses reflects the assumption that you will visit neighboring clubs consecutively.

Once you have set your visit dates, send club presidents your itinerary so that they can confirm the details. Send club leaders your final itinerary and post it on the district's website.

RATE CLUBS IN ROTARY CLUB CENTRAL

The Rate Clubs feature in [Rotary Club Central](#) lets you keep track of your club visits and report on each club's practices, accomplishments, and challenges.

During your governor-elect year, you can view the ratings and comments for all clubs in the district. In your governor year, you and your assistant governors can use the feature to rate clubs and comment after each club visit. Assistant governors can view, rate, and comment only for clubs in their assigned club groups.

These ratings and comments will serve as a reference for you, your assistant governors, and your successors. Once all clubs' ratings are final, you should confirm them by 1 June. Final comments and ratings should reflect the state of the club based on all club visits. Clubs do not have access to the ratings or comments.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What innovative ideas do you have for your club visits?
- What will you do to prepare for your club visits?
- How will you assess the health of your clubs?
- How will you make sure club members' concerns are heard and addressed?
- How will you recognize clubs that reach the goals they set in Rotary Club Central?
- How will you emphasize the importance of tracking achievements in Rotary Club Central?



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One idea I will use from this session is:



WHAT ARE YOU WAITING FOR? BE A VIBRANT CLUB



Be a Vibrant Club guide includes:

- A club success story from your region
- Ideas for your club to try
- Resources for your club on My Rotary

Get your free copy at
shop.rotary.org

Rotary 

STRENGTHENING YOUR MEMBERSHIP

You joined Rotary because you wanted to make a difference. Together, with more than a million members in 35,000 clubs worldwide, our global community’s impact has never been greater. Our ability to provide service in communities around the world depends on active, engaged members.

Governors are in a unique position to influence membership growth. You and your team can help clubs become stronger, more dynamic, and more successful at keeping members active and engaged.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
When necessary, appoint your district’s membership committee chair and report that person’s name on My Rotary; encourage him or her to appoint committee members who reflect the diversity of the district	Organize new clubs to meet the needs of a wide range of prospective members
Explore the online membership courses to learn strategies to increase membership	Ensure a member of your district membership committee (preferably the chair) attends a regional membership seminar or takes the relevant online courses to learn strategies clubs can use to increase membership
Work with assistant governors to help ensure clubs have set membership goals in Rotary Club Central and have a plan to achieve those goals	Work with the membership, public image, and Rotary Foundation committees to organize a Vibrant Club workshop
	Assign online membership leads on My Rotary to appropriate clubs and see that those clubs take action

KEY RESOURCES

- [Membership resources](#) on My Rotary
- [Club Flexibility page](#) on My Rotary
- [Online membership courses](#) in Rotary’s Learning Center
- [Your Rotary coordinator](#)

MEMBERSHIP IN YOUR REGION

Membership challenges vary from region to region. Work with your membership committee and Rotary coordinator to identify the challenges in your area. Study your district's membership reports on My Rotary. Ask your Rotary coordinator when your regional membership seminar will be held, and have your district membership chair attend so he or she can learn tactics for attracting new members, increasing member diversity, and engaging current members so retention improves. Your district membership chair works closely with club membership committees to attract, engage, and educate club members. For ideas on how to develop strategies with clubs, see appendix 3, Club Membership Committee Checklist.

As governor, you are also responsible for starting new clubs in your district. Look for places where a new Rotary club could thrive, such as in areas without an existing club or where current clubs aren't meeting the needs of potential members. Visit My Rotary to learn about [flexible options](#) for clubs and to find more information on [starting Rotary clubs](#).

DISTRICT MEMBERSHIP COMMITTEE

Your district membership committee should help clubs attract and engage members by working with clubs to set realistic goals, connecting them with available resources, and implementing strategies appropriate for the district. To provide continuity of leadership, the chair is appointed to a three-year term. If you will appoint the chair, you will receive a nomination form from Rotary in November (or you can find it in the District Administration section of My Rotary). Work with the next two governors for your district to agree on an appointee. Work with the chair to ensure the committee reflects the diversity of the district and is large enough to support your clubs.

One of the committee's responsibilities is to help plan and conduct a Vibrant Club workshop, where members can learn strategies to create strong, vibrant clubs; enhance their public image; and find out more about The Rotary Foundation. To prepare, the district membership committee chair and session facilitators should attend a regional membership seminar or take the [membership courses](#) in the Learning Center to build expertise on the strategies, tools, and resources they will cover at the district seminar. Work with your membership, Rotary Foundation, public image, and district training committees to plan this workshop, as well as separate events for new members at your district training assembly or conference.

Enter your district appointments in My Rotary so that the committee can receive membership leads and resources from Rotary International. For more information on this committee, see appendix 2, District Leadership Team.

ATTRACTING NEW MEMBERS

Vibrant Rotary clubs have active members and make a positive impact on their communities. When clubs are thriving, they naturally attract the interest of potential members. Some clubs may hold events where they actively market their club. In the [Brand Center](#), Rotary provides a variety of materials, including a customizable brochure and other templates, that clubs can use to promote themselves and Rotary. Prospective members may express their interest to a club member or on [Rotary.org](#). However clubs meet prospective members, [creating a positive experience](#) is important. Prospective members are more likely to join a club that accommodates their busy schedules, doesn't impose rigid rules, and offers fun, valuable experiences. They are more likely to stay in a club that reflects the values that were promoted to them.

MANAGING MEMBERSHIP LEADS

Rotary receives thousands of [membership leads](#) from people around the world interested in joining Rotary. You, your membership committee chair, assistant governors, and executive secretary, if you have one, will receive an email alert when a membership lead is assigned to your district. You, the chair, and the executive secretary can access information about the leads, follow up with them, and assign them to clubs on [My Rotary's District Administration](#) pages. Consider asking your assistant governors and membership committee chairs to help match prospective members with a club that meets their needs. Decide who will manage your district's membership leads so your team doesn't duplicate efforts. Check with clubs that don't take action on their assigned leads (you'll receive another email if no action is taken within 60 days). Find more information in the [Online Membership Leads](#) course in Rotary's Learning Center.

ENGAGING MEMBERS

Rotary research shows that participating in service projects and having fun with fellow members are the primary reasons that people join and stay in Rotary. Most members who leave do so within two years of joining.

Remember that clubs with active and involved members are more likely to keep them. Help your clubs engage their members by:

- Asking members to serve on committees
- Giving them active roles at meetings
- Asking for their opinions, and implementing some new ideas they suggest
- Asking them to participate in service projects
- Having them mentor new members
- Putting their expertise and skills to use and recognizing them for their efforts, including planning and implementing projects and advising on service activities
- Encouraging participation at the international level through groups such as Rotary Fellowships and Rotarian Action Groups, or events such as project fairs and the international convention

- Changing the meeting format and schedule for variety
- Offering different membership types
- Inviting Rotaractors to be members

Encourage clubs to engage Rotarians at all stages of their membership to help them maximize their Rotary experience and continue to find value in it. When you have clubs with engaged members who are fulfilling their desire to improve their communities and connect with others, they will stay in the club and will reflect a positive image. Engaged members have fun, and this also attracts new members.

CLUB READINESS FOR CHANGE

An important aspect of your role is to help clubs assess their strengths and weaknesses and to provide guidance. The [Rotary Club Health Check](#) and [Enhancing the Club Experience: Member Satisfaction Survey](#) can help clubs identify areas to improve. Inspire clubs to act on the results that each of these assessment tools reveal. This will help them grow and evolve into a club that meets the needs of its current members and is more attractive to potential members. Encourage club leaders to create a culture of innovation by asking members to suggest new ideas and try new activities. Your assistant governors can coach club leaders to help them [explore creative ideas](#) and envision strategies they can carry out. Consult with your Rotary coordinator about ways your clubs can use flexibility options to improve their member experience.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What opportunities exist for organizing new clubs in your district?
- How can you help increase membership in the clubs in your district?
- How can you maximize the membership leads made available to you on My Rotary?
- How can clubs break from traditions and rules that prevent them from adapting to members' needs?
- How can you help clubs live the brand and reflect the values of Rotary?
- What strategies for engaging existing members will you promote to clubs?
- What can you do to promote membership diversity as a key component of membership growth?
- What support or resources will you need from your Rotary coordinator?



CLUB MEMBERSHIP COMMITTEE CHECKLIST

The role of the club membership committee is to write and follow an action plan to attract and engage members. An effective committee should be composed of five to 15 motivated members to guide the implementation of your membership plan. The committee's composition should allow for continuity from one year to the next and should represent the full diversity of your club's membership and your community.

1. Identify:

- Complete the member diversity and classification assessments, found in Membership Assessment Tools, yearly. Identify individuals in the community who fill gaps in the club's membership or exhibit interest in Rotary's ideals.
- Ask all members to complete the Identifying Prospective Members Worksheet at least yearly.
- Regularly go to the Club Administration area of My Rotary to manage the member leads assigned to your club.
- Meet at least monthly to review prospective members and their status in the membership process.
- Ask current members who are assigned to each prospective member to move them to the next step of the membership process.

2. Introduce:

- Select the most appropriate club members to engage prospective members. Keeping each prospective member's particular interests in mind, explain how your club can help them pursue their passions.
- Periodically hold events for prospective members to introduce them to Rotary, your club, and our core values.
- Invite the people you identified as prospective members to attend a service project or meeting.
- Tell qualified prospective members about your club, what to expect at meetings, and the networking, social, and service opportunities your club offers.

3. Invite:

- Designate the appropriate club member to invite each prospective member to join.
- Hold a meaningful ceremony to induct new members. Include their families and involve the entire club.
- Give new members a welcome kit that includes club and Rotary resources that they will find useful.
- Celebrate the addition of new members to your club. Announce it on your club's website, social media pages, and newsletter.

4. Engage:

- Welcome new members both through an orientation program and by involving them in the club.
- Assign a mentor to each new member to share professional expertise, community knowledge, and Rotary information.
- Engage each club member in a service project or club committee.
- Check in with all current members using the Member Satisfaction Survey at least yearly.

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One idea I will use from this session is:



GETS WORKSHEET

HELPING CLUBS ADDRESS THEIR MEMBERSHIP CHALLENGES

With your group, review **one** of the following scenarios. On the following page, describe a membership challenge the club might face, and determine at least one strategy and one resource (person or publication) that may help the club address it. Then identify how you would work with the club to help it meet its goal.

Scenario 1

One of your evening clubs has consistently connected with younger professionals in the area. They regularly induct 2 or 3 new members each year but lose the same number, due to conflicting obligations such as work and family. The club's new president has come to you seeking advice on how her club can keep members from leaving due to other obligations and otherwise grow its membership.

Scenario 2

Your district includes a club with well-respected business and community leaders. They consistently donate to the Foundation and partner with another club to conduct the same service project every year. Because of their consistency, the club does not believe it has a membership challenge. Yet there has been very little change to their membership roster, and you have noticed that every member of the club is over 60 years old.

Scenario 3

A club in your district has a few dedicated members who usually fill the leadership roles. The other members attend and pay their dues but rarely volunteer to help with projects, serve in leadership positions, or otherwise get involved. The club leaders know that the club isn't accomplishing all that it could but don't know how to address the problem.

Scenario 4

One of your club membership chairs has noticed that a number of small businesses in the area are owned and operated by women, but his club has few female members. He believes his club is open to inducting more women, but he worries that the current gender imbalance and some members' attitudes and comments may put off potential candidates.

Scenario 5

One of your clubs has made an effort to invite more women, younger professionals, and recent retirees to their meetings. Nevertheless, they have not seen a significant change to their membership numbers in the last five years. None of the groups of people they are reaching out to seems interested in joining a Rotary club, and club leaders don't know where else to look for prospective members. The club's board has reached out to your team for help.

Describe a membership challenge this club might be facing.

Describe at least one strategy that could strengthen this club's membership.

List at least one resource (person or publication) that could offer the club additional strategies.

How would you and your district team support the club?

How and when would you follow up with the club to determine if any progress has been made based on your suggested strategies?

MANAGING YOUR FOUNDATION ACTIVITIES

You will need a strong team to help you carry out your Foundation-related responsibilities. Your district Rotary Foundation committee has a structure in place to help you achieve your goals. Be sure to appoint qualified and interested Rotarians to fulfill these important roles, and communicate with them regularly.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
In consultation with the governor and governor-nominee, if known, fill open positions on the district Rotary Foundation committee and its subcommittees	Work with the district Rotary Foundation committee chair to: Plan, coordinate, and evaluate all Foundation activities Authorize the use of the District Designated Fund for grants, programs, and donations
Encourage clubs in your district to set Foundation goals and enter them in Rotary Club Central	Attend the regional Rotary Foundation seminar
Discuss the use of the District Designated Fund with the district Rotary Foundation committee and the district governor	Work with the membership, public image, and Rotary Foundation committees to organize a Vibrant Club workshop
Authorize the district memorandum of understanding to ensure your district qualifies to participate in grants	Encourage every Rotarian in your district to contribute to the Foundation every year
Educate incoming club presidents on the Foundation and help them set fundraising goals at PETS	Recognize clubs and Rotarians that support the Foundation
	Promote proper stewardship of Foundation funds
	Get ideas from your regional Rotary Foundation coordinator about strategies for giving, grants, and participation in The Rotary Foundation
	Work with your endowment/major gifts adviser to develop a major gifts strategy and to identify major giving opportunities

KEY RESOURCES

- [Lead Your District: Rotary Foundation Committee](#)
- [The Rotary Foundation Reference Guide](#)
- rotary.org/donate
- endpolio.org
- [Your regional Rotary Foundation coordinator](#)
- [Your endowment/major gifts adviser](#)
- Your End Polio Now zone coordinator

DISTRICT ROTARY FOUNDATION COMMITTEE

The district Rotary Foundation committee serves as the liaison between the Foundation and Rotarians in the district. The committee, by helping with the Vibrant Club workshop and other tasks, will educate Rotarians about the Foundation and motivate them to participate.

The district Rotary Foundation committee chair must have significant knowledge about the Foundation and experience with its activities. The chair helps coordinate all committee activities and serves as an ex officio member of all subcommittees. The chair and the governor have signatory authority for the District Designated Fund on behalf of the district.

To provide continuity for district Foundation projects, the chair is appointed to a three-year term. If you will appoint the chair, you will receive a nomination form from Rotary in November (or you can find it in the [District Administration section](#) of My Rotary). Work with the next two governors for your district to agree on a Rotarian to select. The current chair can be reappointed for an additional three-year term if all three governors consent. Note that you cannot serve as district Rotary Foundation committee chair while serving as governor.

SUBCOMMITTEES

To help the committee carry out its responsibilities, form subcommittees to complete various tasks. Include these five subcommittees:

- Fundraising
- Grants
- PolioPlus
- Rotary Peace Fellowships
- Stewardship

The chairs of each subcommittee should be members of your district Rotary Foundation committee. You can form additional subcommittees as needed.

See descriptions of the subcommittee structure in appendix 4, Foundation Committee Responsibilities. For details, go to [Lead Your District: Rotary Foundation Committee](#).

FOUNDATION TRAINING

Information on The Rotary Foundation is included in sessions in the [Grant Management Seminar Leaders' Guide](#), and [A Guide to Global Grants](#). Your [regional Rotary Foundation coordinator](#) and your district Rotary Foundation committee will help you with these events. For details, see chapter 3.

RAISING FUNDS FOR THE ROTARY FOUNDATION

In the past 100 years, Rotarians and friends of Rotary have funded over \$4 billion in programs and created a lasting impact for people around the world. Without financial resources, the activities that let Rotarians do good in the world would not be possible. Contributions sent to the Foundation can be directed to areas such as the Annual Fund, the Endowment, the PolioPlus Fund, and specific global grants.

FOUNDATION FUNDING

The Rotary Foundation's SHARE system transforms contributions into grants and programs. Its three-year funding cycle gives districts time to plan and select projects, and enables the Foundation to use the investment earnings to pay for operating expenses, including fundraising and general administration.

How it works

At the end of the Rotary year, your district's contributions to the Annual Fund-SHARE go into two subfunds — 50 percent to the District Designated Fund (DDF) and 50 percent to the World Fund — for use three years after they have been invested.

After three years, your district uses the DDF to participate in grants and programs and to donate (for example, to PolioPlus, to an area of focus, or to the Rotary Peace Centers). The Foundation uses the portion credited to the World Fund to support grants and programs available to all districts.

Similarly, contributions to Endowment-SHARE support your district as well. Instead of the contribution going into two subfunds, the earnings off the contribution are split. Also, instead of a one-time impact on your District Designated Funds, the earnings add to your DDF each year. For example, a \$25,000 gift could generate 5 percent in earnings, or \$1,250. That would then be split, with \$625 going to the DDF and \$625 to the World Fund in perpetuity, ensuring your district and the Foundation will have steady income far into the future.

Note that 5 percent of Annual Fund contributions will be earmarked for operating expenses or building the Foundation's operating reserve. These funds will be used only when net investment returns are not sufficient to cover operating expenses; the DDF is not affected. Learn more about this [funding model](#).

CLUB CONTRIBUTION GOALS

Your district's clubs should set goals for the coming year regarding their PolioPlus Fund, Annual Fund, and Endowment contributions. They should enter the goals in Rotary Club Central by 1 May. Setting these goals online provides incentive for club leaders to increase giving over the prior year, to document and build a history of club giving, and to give a framework for district leaders to gauge fundraising efforts. During your year as governor, support clubs' efforts to achieve their fundraising goals. You can monitor their progress in Rotary Club Central.

ANNUAL FUND

The Annual Fund is the primary source of support for Foundation activities. The money is spent every year to carry out Rotarians' international and local service efforts. Contributions can be directed to SHARE, the World Fund, an approved Foundation grant, or one of the Foundation's six areas of focus. Note: Contributions directed to the World Fund, an approved Foundation grant, and the six areas of focus are not included in the district's SHARE calculation and do not add to the District Designated Fund.

ROTARY'S ENDOWMENT

The Endowment ensures a strong future for The Rotary Foundation by providing a continuous stream of income to meet the rising demand for Foundation programs. Contributions are invested, and the earnings from that investment are available for spending. Within the Endowment, contributions can be designated to SHARE, the World Fund, the Rotary Peace Centers, or any of the areas of focus. Donations to the Endowment take the form of outright gifts, bequests, or life-income agreements. Contact your endowment/major gifts adviser (E/MGA) to support you in pursuing these types of gifts.

POLIOPLUS FUND

The PolioPlus Fund supports the immunization activities of Rotary and the other major partners of the Global Polio Eradication Initiative — the World Health Organization, UNICEF, and U.S. Centers for Disease Control and Prevention — providing needed resources in polio-endemic or at-risk countries and regions.

Rotary also works in partnership with the Bill & Melinda Gates Foundation. Starting in July 2017, every \$1 Rotary contributes in support of polio eradication through 2020 will be matched 2-to-1 by the Gates Foundation, up to \$50 million per year. Funding is urgently needed, not only to stop transmission of polio in the remaining countries where it's endemic, but also to protect more than 400 million children living in polio-free areas. Encourage continued support of the PolioPlus Fund, emphasizing that contributions of any amount make a big impact.

PolioPlus Partners is a Rotary Foundation program that directly supports Rotary's national PolioPlus committees for polio eradication activities, such as raising awareness of immunizations and disease surveillance. Districts are encouraged to contact the national PolioPlus committee chairs to learn more about eradication activities in polio-affected countries.

For year-end financial figures and notable achievements, see the [Rotary International and The Rotary Foundation Annual Report](#). For a pocket-size leaflet with recent Foundation statistics, see [Rotary Foundation Facts](#).

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- How will your district structure its Rotary Foundation committee?
- What are the priorities of your district's clubs when it comes to spending District Designated Funds?
- How does your district determine the optimum use of its District Designated Funds?
- How will you motivate and inspire every Rotarian to give every year?
- How can you encourage Rotarians to create a lasting legacy by donating to the Endowment?

APPENDIX 5

FOUNDATION COMMITTEE RESPONSIBILITIES

DISTRICT ROTARY FOUNDATION COMMITTEE

Role	Responsibilities
Chair	<ul style="list-style-type: none">• Work with the district training committee to conduct Foundation sessions at the presidents-elect training seminar and district training assembly.• Review global grant applications.• Report all Foundation activities to the district governor.• Provide one of two authorizing signatures for use of the District Designated Fund.• Confirm that club sponsors of global grant applications are qualified.• Oversee the district's qualification process, including authorization of the district memorandum of understanding, management of the district MOU plans, and completion of a grant management seminar.• Serve as liaison to RI district committees.• Provide support to club Foundation committees.• Ensure that grant activities are reported at a district meeting that has invited all club members.• Help the governor conduct a Vibrant Club workshop.
PolioPlus subcommittee	<ul style="list-style-type: none">• Encourage donations.• Organize district PolioPlus activities.• Ensure recognition of exemplary polio eradication activities.• Give presentations on PolioPlus.• Coordinate with PolioPlus committees and governmental agencies.• Offer guidance for District Designated Fund distribution.
Grants subcommittee	<ul style="list-style-type: none">• Serve as a resource on Rotary grants.• Educate clubs on the terms and conditions of grant awards.• Work with the district Rotary Foundation committee chair to disburse grant funds and ensure proper reporting.• Enforce the district's policy for distributing grant funds.
Fundraising subcommittee	<ul style="list-style-type: none">• Help clubs set and achieve fundraising goals.• Organize club and district fundraising activities.• Motivate, promote, and advise clubs on Foundation fundraising initiatives.• Coordinate donor appreciation events within the district.• Offer guidance on District Designated Fund distribution.
Stewardship subcommittee	<ul style="list-style-type: none">• Oversee the qualification of clubs.• Ensure stewardship practices are implemented as outlined in the district memorandum of understanding.• Report misuse or irregularities in grant-related activities to The Rotary Foundation and conduct local investigations.• Approve the annual financial assessment and ensure it is distributed to clubs.• Monitor and evaluate the management of grants.• Ensure that grants avoid conflicts of interest.

Role	Responsibilities
Rotary Peace Fellowships subcommittee	<ul style="list-style-type: none"> • Promote and encourage participation in the Rotary Peace Centers program. • Conduct orientation for Rotary Peace Fellows, scholars, and vocational training teams.
Optional reported subcommittees	<p>Possible roles and subcommittees include:</p> <ul style="list-style-type: none"> • Paul Harris Society coordinator • Annual Fund subcommittee • Endowment/major gifts subcommittee • Scholarship subcommittee • Vocational training team subcommittee

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One idea I will use from this session is:



GETS WORKSHEET

ENGAGING DONORS AND SPENDING FOR GOOD

It's important for you to build a culture of giving within your district by engaging and educating members, thanking donors, and allocating District Designated Funds (DDF) in a way that clearly demonstrates the good you do in your community.

Part 1: Engaging and Educating

Many Rotarians already give to The Rotary Foundation but may not know how their donations are being used. Newer members may not be familiar with the recognition levels or know what their gift to the Foundation can accomplish. With a partner, discuss the questions under your assigned topic:

Engaging members and donors	
How can you share progress on district fundraising goals with members and donors?	
How can you share grant updates with members and donors?	
How can you encourage members to increase their support of the Foundation?	
How do you (or others in your district) recognize and thank regular donors?	

Educating new members

What are your clubs doing to educate new members about the Foundation?

What materials would you recommend that clubs share with new members?

How can you help clubs get new members involved in the work of The Rotary Foundation?

How do you (or others in your district) recognize and thank first-time donors?

Part 2: Spending Your DDF

As governor, you can help make your District Designated Funds (DDF) policy more transparent and champion the use of these funds. With a partner, discuss these questions:

How much DDF will be available in your governor year?	
In general, what percentage of your district's DDF is spent on district grants each year? On global grants? In total?	
What are your district's funding priorities? Based on those priorities, how will you allocate your funds?	
When and how are clubs in your district notified that DDF is available and that they may submit grant proposals to the district?	
How many of your clubs apply for district grants? How can you encourage more clubs to apply?	

TAKE A FRESH APPROACH TO CREATING A MEANINGFUL CLUB EXPERIENCE

*We have resources
to help you ...*

FIND AND ATTRACT NEW MEMBERS

*Creating a Positive
Experience*

WELCOME PROSPECTIVE MEMBERS

*Club brochure
template*

ENGAGE CURRENT MEMBERS

*Member Satisfaction
Survey*

ASSESS AND STRENGTHEN YOUR CLUB

*Rotary Club
Health Check*

DEVELOP NEW CLUBS

*Starting a
Rotary Club*

Available for download
rotary.org/membership

SERVICE AND GRANTS

It is important that Rotary clubs are active in service, that this service truly improves its beneficiaries' quality of life, and that the impact is visible to raise community awareness of Rotary. Effective service projects help clubs maintain their members' enthusiasm for Rotary and encourage them to start new service efforts. Rotary grants enable Rotarians to carry out service that improves health, supports education, alleviates poverty, and more. Rotary districts coordinate club participation in Rotary grants and programs, and encourage meaningful involvement with young leaders to ensure a vibrant future of service.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Appoint chairs to service-related district committees	Ensure that district programs comply with Rotary policies and local laws, and that no personal financial profit is made from the district's activities
Work with assistant governors to ensure clubs set service goals in Rotary Club Central	Work with the governor-elect, governor-nominee, and past district governors to ensure continuity on service projects lasting more than one year
Serve on your district's Rotary Peace Fellowships selection committee	Receive and evaluate requests to contact Rotary clubs in your district to collaborate on projects
Determine whether to hold the grant management seminar as governor-elect or governor and begin planning it	Involve inbound, outbound, and returning Rotary Peace Fellows in district and regional events
Complete the grant qualification process for your district	Serve on the Rotary Peace Fellowships selection committee and as an ex officio voting member of the district Rotary Foundation committee
Conduct a Rotaract leadership training seminar during the district training assembly	Report to the district on all Rotary grant activity to ensure transparency and stewardship of funds
Learn more about the youth programs in your district	Endorse the Statement of Conduct for Working With Youth, and ensure that appropriate risk management measures are in place to protect all program participants

AS GOVERNOR-ELECT	AS GOVERNOR
	Approve the organization of all Interact and Rotaract clubs, and Rotary Community Corps
	Send your monthly communication to Interact and Rotaract clubs, highlighting opportunities for them to participate in service projects
	Obtain or maintain certification for your district's Youth Exchange program and ensure the program is conducted within RI guidelines

KEY RESOURCES

- [Empower Leaders](#) page on My Rotary
- [Lifecycle of a Project](#)
- rotary.org/grants
- [Community Assessment Tools](#)
- [Courses on Rotary grants](#) in the Learning Center
- [Your regional Rotary Foundation coordinator](#)
- [Rotary grants staff](#)

PLANNING FOR SERVICE

A priority of Rotary's strategic plan is to focus and increase humanitarian service. All Rotarians are responsible for participating in service projects that improve the quality of life in their community and communities around the world.

Rotary Club Central provides reports and trends on your district's service goals and activities. This can help you plan your year of service projects and see what service goals your district's clubs have set. You can check their progress in Rotary Club Central. Encourage sustainable service, focusing on youth programs, grants, Rotary Peace Centers, and the [six areas of focus](#) locally and internationally, which align with these specific causes:

- Promoting peace
- Fighting disease
- Providing clean water
- Saving mothers and children
- Supporting education
- Growing local economies

TAKE ACTION

Rotarians conduct service projects at home and abroad through five avenues of service, which are the foundation of club activity:

- Club Service
- Vocational Service
- Community Service
- International Service
- Youth Service

Think about how your district can team with various groups in the Rotary family, such as alumni, Interact clubs, Rotaract clubs, Rotary Community Corps, Rotary Peace Fellows, and others to widen the scope of your projects and increase their impact. Coordinate districtwide efforts related to service and identify ways to cooperate with local organizations.

Rotary has a long history of providing services to youth. Young leaders can contribute to service projects and be resources for programs such as Rotary Youth Exchange. As governor, you support clubs, programs, and cultural exchange opportunities for young leaders, as well as service and professional development connections between clubs and young leaders, to strengthen the future of Rotary. Your service committee supports activities and coordinates with other committees to engage youth and young leaders. Depending on your district's activities, appoint committees for these programs:

INTERACT

Interact is Rotary's service club for young people ages 12-18. The program allows participants to carry out fun, meaningful service projects while developing leadership skills and meeting new friends. An Interact club must have a Rotary club sponsor and may be based either in a school or in a community.

ROTARACT

Rotaract is a Rotary-sponsored service organization for young adults ages 18-30, designed to promote personal development by building leadership and professional skills through service. Rotaract clubs need to have a Rotary club sponsor. Encourage your Rotaract clubs to elect a district Rotaract representative to serve as a program ambassador and as a leader and resource for club officers in your district.

NEW GENERATIONS SERVICE EXCHANGE

This program allows young adults up to age 30 the opportunity to discover their strengths while using their skills to help others. These exchanges may be reciprocal or one-way, designed for individuals or groups, and can last up to six months. District youth service committee chairs or New Generations Service Exchange contacts coordinate the exchanges, which receive support from the district and from connections with The Rotary Foundation committee and the

chairs of the community, international, and vocational service committees. All exchanges need to have a strong vocational or humanitarian service element. Encourage your committees to coordinate with one another to plan customized exchanges for young professionals.

ROTARY YOUTH EXCHANGE

Rotary Youth Exchange gives students ages 15-19 the opportunity to meet people from other countries and experience different cultures. The program offers two types of exchanges:

- Long-term exchange — students live with more than one host family and attend school in the host country for an academic year.
- Short-term exchange — students visit the host country for several days or weeks. This exchange does not include an academic program and often takes place when schools are not in session.

For more information on planning and carrying out student exchanges, see the Youth Exchange Handbook.

ROTARY YOUTH LEADERSHIP AWARDS (RYLA)

Rotary Youth Leadership Awards give young people an opportunity to develop their leadership skills. Young men and women, selected by their local Rotary clubs, are invited to leadership training meetings, which Rotarians organize, fund, and implement. These events can happen at the club, district, or multidistrict level. You can promote leadership skills by empowering young people, including Rotaractors and RYLA alumni, to design RYLA programs. See the Rotary Youth Leadership Awards handbook for more information on starting or improving a RYLA event.

Youth Protection

As governor, you are responsible for the supervision and control of all youth programs and activities. Setting district guidelines and implementing youth protection procedures will help ensure the safety of youth program participants. Consider appointing a youth protection officer to foster safe operations across all youth programs.

The Rotary Youth Protection Guide contains more information about district leaders' role in protecting youth, including guidelines on providing a safe and secure environment.

ROTARIAN ACTION GROUPS

Rotarian Action Groups are international associations of Rotarians, family members, program participants, and alumni who assist and support clubs, districts, and groups of districts in planning and implementing service projects related to a specific topic. Though each action group is administered independently, all operate in accordance with Rotary policies and with the recognition of the RI Board of Directors.

ROTARY FELLOWSHIPS

Rotary Fellowships unite Rotarians, family members, program participants, and alumni worldwide in friendship and service, the exchange of ideas, and the pursuit of international understanding based on common interests or vocations. Though each fellowship is administered independently, all operate within formal program guidelines and with the recognition of the RI Board of Directors.

ROTARY FRIENDSHIP EXCHANGE

Rotary Friendship Exchange gives Rotarians, their families, and their friends the opportunity to stay in the homes of Rotary members in other countries. These reciprocal visits advance international understanding through personal contact across national boundaries. This program immerses participants in an intercultural experience that fosters partnerships between districts. This often leads to fellowship and service, as well as enhancing the vocational skills of newcomers to their careers.

ROTARY COMMUNITY CORPS

The Rotary Community Corps program promotes self-reliance among community groups and encourages participants to identify and address community needs. Rotary clubs sponsor these groups of adult, non-Rotarian volunteers, guiding the corps on community and vocational projects.

You can promote club service projects and encourage clubs to do so as well. Clubs can post successful projects on Rotary Showcase.

ROTARY GRANTS

Rotary offers grants that support a wide variety of projects, scholarships, and vocational training that Rotarians are doing around the world.

DISTRICT GRANTS

District grants fund smaller, short-term activities — including humanitarian projects, scholarships, and vocational training teams — that address needs in your community and communities abroad. You can use up to half of your District Designated Fund (DDF) to receive one district grant annually.

GLOBAL GRANTS

Global grants support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. Encourage your clubs to use Rotary Ideas to find international partners for global grants, promote interactive volunteer opportunities, or crowdfund from their community.

All grants require effective stewardship, including reporting of activities. RI conducts a world reporting analysis of each district's compliance with reporting requirements for paid grants. Your district and regional leadership will receive an email each quarter with your world reporting compliance percentage and grant

status data. If a district is less than 70 percent compliant and has more than one grant overdue for four quarters in the Rotary year, the district may be suspended.

If The Rotary Foundation has not received a grant report for 18 months, reminder notifications are sent to sponsors. If a report remains overdue for 30 months, the club may risk termination by the Board of Directors. Work with your Rotary Foundation committee chair and stewardship subcommittee chair to promote compliance with Rotary Foundation grant requirements and ensure the immediate reporting of any concerns to The Rotary Foundation.

The international service chair can help connect your clubs with local or regional experts who can serve as advisers during the project planning process to help improve global grants. Your regional Rotary Foundation coordinator can offer guidance and expertise on grants, grant management, and fundraising.

Grant Management Seminar

Each year, districts hold a grant management seminar for club members. To qualify for grant participation, each club is required to send at least one representative to the seminar. Encourage clubs to send members likely to apply for global grants, so they can learn how to plan, implement, monitor, and evaluate grant projects.

The training can take place with other district meetings or as a separate meeting. It can also be a series of webinars, online courses, or a combination of any or all options. Find details in the [Grant Management Seminar Leader's Guide](#) for trainers and [A Guide to Global Grants](#) for participants.

Note: District grant funds can cover the costs of the grant management seminar.

ROTARY PEACE CENTERS

Funding Rotary Peace Fellows is a global effort. The Rotary Foundation provides Rotary Peace Fellowships at six Rotary Peace Centers around the world to people interested in earning either a professional development certificate in peace and conflict studies or a master's degree in a range of disciplines related to peace and security. Peace fellowships are funded separately from district and global grants. Districts are not required to contribute funds to Rotary Peace Centers in order to endorse candidates. However, all districts are encouraged to allocate some of their District Designated Funds (DDF) to support the Rotary Peace Centers.

Peacebuilder Districts support the Rotary Peace Centers by allocating a minimum of \$25,000 in DDF donations each year. They continue to donate \$25,000 annually to maintain their Peacebuilder District standing. To learn more about Peacebuilder Districts, go to [Rotary Peace Centers](#).

Fellowship candidates submit applications to the district by 31 May. Your selection committee interviews all applicants and submits endorsed applications to The Rotary Foundation by 1 July. For information on selecting qualified applicants, see the [Rotary Peace Centers Program Guide for Rotarians](#).

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- Will you conduct the grant management seminar in person, online, or by webinar?
- How can you ensure that seminar attendees will also be the Rotarians applying for global grants?
- How can your district create or expand its network of experts who can guide clubs and help improve projects and global grants?
- How will you motivate Rotarians to participate in service projects?
- How can you team with youth programs and other groups on a project?
- How can your district practice good stewardship for the grants it receives?
- How can you promote the peace centers program to your clubs?
- How can you encourage your clubs to invest in youth programs?
- How will you ensure your district offers a safe environment for youth participants in Rotary activities?
- What support or resources will you need from your regional Rotary Foundation coordinator?

APPENDIX 6

DISTRICT AND GLOBAL GRANTS

	District Grants	Global Grants
<i>Funding</i>	District applies for one annual block grant (up to 50% of DDF) and distributes smaller amounts to clubs for projects.	Clubs and districts apply for a minimum World Fund award of \$15,000 for a total project budget of at least \$30,000.
	No World Fund match	World Fund match of 1-to-1 for DDF money and one-half-to-1 for cash
	Foundation awards grant to district. District distributes funds to clubs.	Foundation awards grants.
<i>Partner</i>	Partners can be local or international, but none is required; district must be qualified.	Both international partner and host partner must be qualified.
<i>Scope or Vision</i>	Related to the Foundation's mission	Aligned with an area of focus: <ul style="list-style-type: none"> • Peace and conflict prevention/ resolution • Disease prevention and treatment • Water and sanitation • Maternal and child health • Basic education and literacy • Economic and community development
	Short-term, one-time, smaller in scope	Long-term, sustainable, measurable
<i>Activity Type</i>	Educational, vocational, or humanitarian	Educational, vocational, or humanitarian
<i>Planning</i>	Shorter planning process	Longer planning process starting with a required community assessment
<i>Involvement</i>	Active Rotarian participation	Active Rotarian participation

RISK MANAGEMENT FOR YOUTH PROGRAMS

It's important to know the risks, such as injury, illness, and abuse, involved in youth activities so that participants can make good choices to deal with these risks. Although awareness alone cannot prevent incidents, it can lead to thoughtful discussions and planning that can reduce incidents and their effects. Consider developing a risk management program for working with youth that includes these steps:

- Develop and implement a district youth protection policy to prevent and address any potential physical, sexual, or emotional abuse or harassment.
- Establish a code of behavior for adults and youth involved in a program. Screen adults before they work with youth.
- Maintain clear policies for any travel by youth, and have systems to communicate specific information with parents or guardians.
- Obtain the governor's approval for any activities involving minors that occur outside their local community or include overnight stays.
- Review your district's policies to ensure that they align with the Rotary guidelines developed by the Board for each youth program.
- Explore the risks and insurance needs in sponsoring a youth program or event. Consider these questions:
 - What happens if someone is injured?
 - What happens if a natural disaster occurs?
 - Work to minimize potential losses by:
 - Buying liability insurance coverage that is adequate for your region
 - Developing an emergency plan and practicing it at least once during the program
 - Teaching participants about safe behavior during the program

While these steps are required for Youth Exchange district certification, they are also recommended for districts that participate in Interact, RYLA, or any other youth activity. When conducting a service project where volunteers will be working directly with young people, review the [Rotary Youth Protection Guide](#) for screening and training information. Make sure your clubs are familiar with the guidelines for working with youth. Take the [Protecting Youth Program Participants](#) course in the Learning Center to learn more.

Clubs and districts are urged to contact their insurance brokers or agents to check if their insurance policies provide adequate coverage for their youth programs. Insurance becomes a complex issue when multiple districts or clubs sponsor a program, because each organization's coverage may differ. All participants, including youth and organizers, are urged to verify that their health and life insurance will provide adequate coverage during a program. Many health insurance policies provide only limited coverage outside a certain area, so this precaution is especially important when participants travel or live away from home. In these cases, participants must obtain a travel medical and accident insurance policy that provides these types of coverage:

- Medical expense reimbursement
- Emergency evacuation
- Repatriation of remains
- Accidental death and dismemberment

Consult legal counsel before signing an agreement or contract with any organization, contractor, or service provider. These documents may contain waivers or an indemnity and hold harmless agreement that might try to release a party from liability and transfer the risk to the club or district. Rotary International is not liable for any illness or injury to people, including participants, volunteers, and organizers, or for damage to any property.

Large empty rectangular area for taking notes.

One idea I will use from this session is:



PROMOTING ROTARY'S PUBLIC IMAGE

Promoting Rotary's public image is important because it promotes awareness and enhances understanding about how Rotary clubs address the challenges affecting communities around the world.

As governor, you have an important role to play in helping Rotarians talk about how they make a difference in their communities. A positive image will help your district raise awareness of Rotary, attract and engage members, increase contributions to The Rotary Foundation, and garner partnerships, volunteers, and support for local projects.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Appoint a chair to the district public image committee	Serve as a spokesperson for your district and Rotary
Budget for the district's public relations needs	Work with the membership, public image, and Rotary Foundation committees to organize a Vibrant Club workshop
Work with assistant governors to ensure that clubs set public image goals in Rotary Club Central	Encourage clubs to have a public image plan, and consider appointing a district public image chair
	Ensure that the district's website and social media sites are updated regularly
	Promote service projects effectively and encourage clubs to share their projects' impact through Rotary Showcase and Rotary Club Central
	Encourage clubs to use the People of Action campaign to tell their stories

KEY RESOURCES

- [Your Rotary public image coordinator](#)
- [Brand Center](#)
- [Press Center](#)
- [Voice and Visual Identity Guidelines](#)

- [People of Action Campaign Guidelines](#)
- [Messaging Guide](#)
- [Event Planning Guide](#)

RAISING AWARENESS OF ROTARY

You'll find many ways to make the community more aware of Rotary, including:

- Sponsoring special events (for example, marathons, recycling efforts, or fundraisers for a Rotary project or program)
- Creating exhibits that can be featured in museums, historical societies, city halls, or libraries
- Advertising in newspapers, magazines, billboards, buses, airports, or train stations
- Establishing communication with the public relations staff of other organizations that your district is involved with
- Cultivating relationships with journalists and key media contacts in your media market
- Linking local Rotary projects to relevant issues in your community
- Promoting stories, particularly to news media and social media, about members working through Rotary to make the world a better place
- Encouraging Rotarians to wear their Rotary lapel pins and talk about the organization
- Having Rotarians post information on a club or district website or social media sites, or refer members of their community to Rotary.org
- Go to the [Brand Center](#) and [Press Center](#) for resources to enhance your district's public image.

Public image affects all areas of Rotary. Measure the impact of your efforts by conducting focus groups, interviews, and surveys with your target audiences, and benchmarking your membership numbers, Foundation contributions, and other areas before implementing your plans.

DISTRICT PUBLIC IMAGE COMMITTEE

Your public image committee raises awareness of Rotary by promoting it to local media and giving public image advice to clubs. Appoint club members to your committee who are professionals in media, journalism, public relations, communications, advertising, or marketing, or have experience in successful club-level public image activities. For details, see appendix 2, District Committees.

STRENGTHENING THE ROTARY BRAND

The Rotary brand strengthens when members live it. Rotarians are people of action, vision, and commitment, who solve real problems in communities around the globe. The way you talk about Rotary can affect the public's perception of it. You can bring Rotary's story to life by:

- Telling stories about the value that Rotary brings to communities
- Encouraging clubs to promote Rotary’s brand and to use the public image resources locally
- Using Rotary’s brand and messaging at district events and in district communications
- Encouraging clubs to achieve the public image goals for the Rotary Citation
- Remember these strategies when communicating with Rotarians, prospective members, the public, donors, and community partners.
- Your district public image chair and Rotary public image coordinator can help you share Rotary’s successes with the community; media; local, civic, and government leaders; nongovernmental organizations; and similar entities. They can also use the Rotary story to enhance membership and retention, expand Rotary service, and inspire friends, fans, and donors to further support Rotary. Your assistant governors can also work with clubs to reflect Rotary’s core values.

PROMOTING THE ROTARY BRAND

The Rotary logo identifies Rotary clubs and their members in every part of the world. Rotary International owns trademarks and service marks (referred to as Rotary Marks) for the benefit of Rotarians worldwide.

RI depends on you, as governor, to work with your clubs to ensure they understand how to use Rotary Marks. When you reproduce Rotary Marks, follow the guidelines approved by the RI Board of Directors in the Rotary Code of Policies, which allows Rotary clubs, districts, or other Rotary entities to use the Rotary Marks. (Rotary entities include Rotary International, The Rotary Foundation, Rotary clubs or groups of clubs, Rotary districts or groups of districts, Rotary Fellowships, Rotarian Action Groups, and administrative territorial units of Rotary International. Individual RI programs are not considered Rotary entities.) The marks may not be altered, modified, obstructed in any way, or reproduced other than in their complete form.

Rotary’s [Brand Center](#) offers resources for Rotary members to plan events, maximize social media’s impact, and customize their logos, stationery, campaign ads, event fliers, PowerPoint presentations, and more to easily apply Rotary’s brand. You’ll also find messaging guidelines, with tips for communicating to multiple audiences, and guidelines for writing about Rotary and using the Rotary Marks. Merchandise bearing the Rotary Marks should be bought from one of Rotary’s licensed vendors. If you have questions about licensing, contact RI’s Licensing Section at rilicensingservices@rotary.org.

Raise club awareness of these resources and help club and district leaders understand how to use them. Your district public image chair can work with clubs to ensure their websites and materials are current with Rotary’s messaging.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- How do you explain what Rotary is?
- How can you encourage your clubs to use storytelling to promote their projects?
- What innovative ideas do you have to promote Rotary?
- Who in your community can you partner with to enhance Rotary's public image?
- What district projects, activities, or special events would interest the public?
- How can you encourage clubs to use the resources in the Brand Center to keep their messaging and promotional materials current?
- How can you help clubs live the Rotary brand?
- What support or resources will you need from your Rotary public image coordinator?

APPENDIX 8

KEY POINTS FOR TALKING ABOUT ROTARY

Here are messages to help you develop key points before media interviews and speeches to external audiences.

INTRODUCTORY PRIMARY MESSAGE

- Every day, in our communities and around the world, our neighbors face tough challenges — conflict, disease, and lack of clean water, health care, education, and economic opportunity.

SUPPORTING MESSAGE

- Rotarians have a vision of what’s possible for their neighbors. They mobilize other leaders and experts to take action and see it through.

ABOUT ROTARY — PRIMARY MESSAGES

- Rotarians are people of action, driven by a desire to create opportunities, strengthen communities, and find solutions to the tough challenges that affect people around the world.
- Rotary is a community of 1.2 million men and women from all continents, cultures, professions, and experiences who connect through our local clubs.
- Rotary clubs tackle projects of every scale and inspire fellow Rotarians, friends, neighbors, and partners to share their vision, exchange ideas for lasting solutions, and take action to bring those ideas to life.

SUPPORTING MESSAGES

- Together with our partners, neighbors, and friends, we’re:
 - Promoting peace — encouraging dialogue to foster understanding within and across cultures
 - Fighting disease — educating and equipping communities to stop the spread of life-threatening or preventable diseases
 - Providing clean water — building local solutions to bring clean water and sanitation services to more people every day
 - Saving mothers and children — expanding access to quality care so mothers and children can live and grow stronger
 - Supporting education — expanding access to education and empowering educators to inspire more children and adults to learn
 - Growing local economies — creating opportunities for individuals and communities to thrive financially and socially
 - Eradicating polio — uniting the world to end polio, once and for all
- Rotary is a trusted partner and resource. With members and projects in almost every part of the globe, there’s no limit to the good we can do.

Rotary's top philanthropic goal is to eradicate polio worldwide.

- Rotary and its partners are close to eradicating polio, having achieved a 99.9 percent reduction in cases since 1988.
- Rotary's chief role is fundraising, advocacy, and mobilizing volunteers.
- Rotary's contributions to the global polio eradication effort will exceed more than \$2.2 billion and countless volunteer hours to protect more than two billion children in 122 countries from polio.
- Rotary is working to raise an additional \$50 million per year through 2020 for polio eradication, to be matched 2-to-1 by the Bill & Melinda Gates Foundation.

Rotary builds peace and international understanding not only through education and humanitarian service but also by developing young leaders.

- More than 900 graduates of the Rotary Peace Centers master's degree program are in key decision-making positions in governments, corporations, and organizations around the world.
- Rotary's humanitarian projects help prevent the underlying causes of conflict, such as poverty, illiteracy, and lack of clean water.
- Rotary's Youth Exchange program fosters international goodwill by enabling over 8,000 high school students to live and study abroad each year in 115 countries.
- Rotary's Interact and Rotaract programs develop young leaders by promoting volunteer service, leadership, and professional growth.

Empty space for taking notes.

One idea I will use from this session is:



GETS WORKSHEET

TELLING YOUR PEOPLE OF ACTION STORY

During your year as governor, clubs throughout your district will have opportunities to promote Rotary to members of your community. You want to encourage them to tell a story that shows how they identified a challenge, worked together to address it, and made an impact locally. Once you understand how to tell a People of Action story, you can help clubs in your district do the same.

Choose a service project from the last year that you believe shows a Rotary club from your district making a real impact locally.

PEOPLE OF ACTION

PROJECT:

Imagine you've been contacted by a local news organization to explain Rotary's impact in the community. Consider the following questions to help you develop your People of Action story. Take notes in the spaces provided. Then share your story with a partner.

1. What problem or challenge in your community was this project designed to solve?

2. How did the club take action to solve the problem?

3. What was the impact of this project? In other words, how did the club improve the lives of people in your community? Try to provide at least two key outcomes and statistics to support your answer.

4. Who do you want to hear this story?

5. What do you want the people who hear this story to do? (Learn more? Donate to your cause? Join you at an upcoming event? Visit your website or your social media channels?)

AFTER GETS

In the coming year, consider the many opportunities your clubs will have to promote Rotarians as people of action. Here are a few ways you can make the People of Action campaign more successful:

- Contact the club you were thinking about during the activity and ask officers if they have used this story for a People of Action ad — if not, ask them if they would consider creating one.
- Tell stories about Rotarians in your district as people of action during your club visits.
- Work with your public image committee to inspire your clubs to use the campaign. Challenge each of them to develop a People of Action ad during your year as governor.
- Share your successes with Rotary at pr@rotary.org.

**WHERE CAN YOU FIND
THE TOOLS YOU NEED
TO PROMOTE YOUR CLUB?**



BRAND CENTER
PUTS THEM ALL IN ONE PLACE



WWW.ROTARY.ORG/MYROTARY

YOUR SUPPORT FROM ROTARY

District governors have a variety of administrative responsibilities, many of them financial. Your Club and District Support representatives are your main resource for questions related to these responsibilities.

NOTE: Your CDS representative will lead a session called Your Support From Rotary, about Rotary International resources and your administrative responsibilities. Read the information in this section, which covers additional administrative responsibilities, before you attend GETS.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Submit these to Rotary through My Rotary: <ul style="list-style-type: none"> • District committee appointments • Rotary International and Rotary Foundation Expense Statement for the International Assembly 	Supervise all district nominations and elections
Appoint a district secretary or district executive secretary, if needed	Submit the Governor-nominee Form to Rotary
In cooperation with the governor and district finance committee, create a district budget	Oversee all district funds
Work with the district finance chair to establish or change the per capita levy as needed	Submit the District Governor Expense Statement to RI by 31 July following your term as governor For districts participating in the governor funding test, submit your expense report to your district finance chair by 31 July following your term as governor

KEY RESOURCES

- [Your Club and District Support representative](#)
- [Lead Your District: Finance Committee](#)
- [Council resources](#)
- [Manual of Procedure](#)
- [RI Bylaws](#)

FINANCIAL MANAGEMENT

Your fiscal duties as district governor include managing the district's finances, encouraging good stewardship, providing an annual report to clubs, and ensuring that the district complies with all applicable local laws, including tax and nonprofit laws. Find more information about district finances in [Lead Your District: Finance Committee](#). For general information about club and district finances, see the [Manual of Procedure](#).

Most districts have a district fund, used for financing district-sponsored projects and for administering and developing Rotary in the district. This fund is established by resolution of the district conference and only needs to be created once. Ensure that:

- Decisions about the fund, including the district levy, are voted on at the district training assembly, presidents-elect training seminar, or district conference as needed.
- The fund is not controlled by one person.
- The district per capita levy finances the district fund. The annual budget should help set an appropriate levy amount. The per capita levy may be established or changed by at least three-fourths of the incoming club presidents at PETS or the district training assembly, or by a majority of the electors present and voting at a district conference. Once established, the levy requires additional approval only if the amount needs to change.

DISTRICT BUDGETS

The district finance committee reviews the necessary costs of administration and helps prepare a budget of expenditures that should be submitted to clubs at least four weeks before the district training assembly and be approved at a meeting of the incoming club presidents at the training assembly.

District budgets should include funds to support the governor and governor-elect (in addition to the governor's funding from Rotary) as they prepare for and perform the responsibilities of office. Besides the official Rotary activities within the district, you might need to participate in special club or district events. In accordance with RI policy, the club or district should cover the expenses associated with these additional activities. The district fund should also cover the expenses of any visit to your district by the RI director for your zone or any other RI or Rotary Foundation officer invited to your district.

HANDLING DISTRICT FUNDS

It's essential to maintain separate bank accounts for specific funds and to designate the chair of the appropriate committee as one of the signatories. For instance, if your district raises funds for a multidistrict Rotary Youth Exchange, a bank account should designate the chair as one of the signatories, and preferably the district governor or the treasurer as the other signatory. The district budget and the annual statement and report of district finances should include specific funds with separate bank accounts.

Select one member of the district finance committee to act as treasurer and keep proper records of income and expenditures for each of your district's funds. You and the treasurer will supervise the funds, which should be held in a bank account in the district's name. For more information on this committee, see appendix 2.

ANNUAL STATEMENT AND REPORT OF DISTRICT FINANCES

After your year is over, work with the district finance committee to prepare an annual statement and report of district finances, which should mention all sources of district funds, including:

- All funds received by or on behalf of the district from fundraising activities
- Funds of The Rotary Foundation, including grants
- All district committees' financial transactions
- All of the governor's financial transactions by or on behalf of the district
- All district fund expenditures
- All funds from RI to the governor

When the report is ready, have a qualified accountant or audit committee independently review it. After the review, the report should be discussed and formally approved at the next district meeting. If it is not adopted then, it should be moved for discussion and adoption at the district conference. Make sure to provide 30 days' notice so all clubs can send a representative. If the annual statement has not been discussed and approved at the district conference, plan for its formal adoption at a separate meeting, also to be announced with 30 days' notice, and to be held within three months of the district conference. If no such meeting takes place, a ballot-by-mail must be conducted within 60 days after the end of the district conference.

Also, you need to submit a copy of your district's annual statement and report of district finances to your Club and District Support representative, along with confirmation that it has been independently reviewed and shared with your district's clubs, within 12 months following your term. Otherwise, until the district financial statement is shared with your clubs and RI, and adopted by the clubs, you will not be eligible for:

- Any expense reimbursements from RI, even if RI has validated your submitted expense report
- Any RI volunteer appointment or assignment
- Any district office
- Any Rotary Foundation appointment or assignment
- Any RI or Rotary Foundation award

ROTARY FUNDING

As governor, you will receive funding from Rotary International to help you fulfill your official responsibilities in the district. In February of your year as governor-elect, you'll be advised of your estimated funding amount, which the RI Board of Directors determines. In July, you will receive 70 percent of the estimated funds. These funds, provided in your designated currency, subsidize some of the personal expenses you incur in three categories: club visits (as governor), training meetings you conduct and attend (as governor-nominee, governor-elect, and governor), and office expenses (as governor-nominee, governor-elect, and governor). They are not intended to cover expenses incurred by the district, such as the district conference venue rental, publication of a district directory, hardware purchases, and salaries for any paid staff.

To receive any part of the remaining 30 percent, you must submit your final expense report no later than 31 July after your governor term. This report should document your use of the initial 70 percent of items related to your prescribed RI duties and any additional expenses you incurred, up to the remaining 30 percent of your funding. The second payment is made as a reimbursement after you have submitted the final expense report.

Note: For districts in the new governor funding process, the district finance committee will receive and distribute Rotary funds for the governor.

TAXES

Check local and national tax codes to see which, if any, forms the district and its clubs must file. For example, an incorporated district or club may need to file additional tax forms. Work with the district finance committee and your assistant governors to educate clubs about these requirements. For example, all clubs in the United States are required by law to submit an informational return every year to the Internal Revenue Service.

DISTRICT INCORPORATION

Districts may seek the RI Board's approval to incorporate as long as at least two-thirds of their clubs support it.

If you are considering incorporating your district, contact your [Club and District Support representative](#) before you begin the process.

FUNDRAISING

Most Rotary clubs and districts engage in fundraising. Promote these guidelines on your district website:

- Report raised funds in accordance with local laws.
- Require the chair of an event to sign for charitable expenses.
- Specify what the event proceeds will support when promoting fundraising events.
- Establish a procedure for sending contributions to The Rotary Foundation.
- Issue receipts to donors if your fundraising qualifies as a tax-deductible event.

Voluntary contributions from Rotarians and friends of Rotary make Rotary Foundation grants possible. Find more information in [The Rotary Foundation Reference Guide](#).

RISK MANAGEMENT

Whether holding meetings, running fundraising events, or working with youth, you have risk management responsibilities and awareness as part of your role. In this context, the term “risk management” is an active strategy to identify beforehand any causes of possible loss and steps that could lessen the financial impact of a possible loss. To manage risks:

- Review the activities from the perspective of: “What can go wrong?”
- Modify an activity or event to lessen the risk.
- Use contracts and agreements to clearly define roles and responsibilities of all those involved (consult local legal counsel to draft and review legal documents).
- Follow established policies, procedures, and guidelines.

Being proactive can help reduce the effects of losses. In your role, you can set the tone for your district and its clubs. Being aware of risk and managing it will help protect Rotarians, program participants, and district assets.

INSURANCE

Travel

Travel medical and accident insurance will cover you and your partner for travel to and from the International Assembly. Your International Assembly registration packet will include specific information.

Liability

Your district should secure appropriate liability insurance to cover the district and all district officers. The cost of this insurance is not reimbursable as part of your Rotary funding. To obtain insurance, contact a local insurance professional.

During your term as district governor, while you are acting within the course and scope of RI (not the district), the RI general liability and directors and officers liability insurance policies will cover you.

If you are aware of an insurance claim, or an incident that may lead to a claim, contact your CDS representative immediately.

LIABILITY COVERAGE FOR U.S. DISTRICTS

The U.S. Rotary Club & District Liability Insurance Program covers districts in the United States and its territories and possessions. The program includes general liability and directors and officers/employment practices liability insurance policies. All active U.S. clubs fund this program.

DISTRICT NOMINATIONS AND ELECTIONS

Unless excused by the RI Board, districts need to use a nominating committee procedure, ballot-by-mail, or vote at the district conference for all district elections. No member, alternate member, or candidate for membership on a nominating committee is eligible to be nominated for any office being considered by that committee. Each district selects its governor-nominee and a member of the committee that nominates the zone's RI director. Refer to the RI Bylaws for details on the selection of these positions.

GUIDELINES FOR DISTRICT ELECTIONS

Rotarians and election candidates will:

- Learn and follow the rules for district elections
- Consult with knowledgeable Rotarians over any concerns that a current or new assignment could give the appearance of campaigning
- Not undertake personal initiatives to gain visibility, personal recognition, or favor
- Not respond in kind to another candidate's improper activities
- Not communicate with or visit clubs involved in the election, except to fulfill necessary functions

Nominating committee for governor-nominee

The process for selecting the governor-nominee in your district must be completed between 36 and 24 months before the day this Rotarian will take office as district governor. If a nominating committee procedure is used for the governor-nominee, at least three members should serve on that committee. Committee members should serve a maximum of three one-year terms. As governor, you should remind all candidates for governor-nominee that, if selected, they must attend the governors-elect training seminar and the International Assembly; anyone who cannot attend these two meetings should not accept the nomination.

Your Club and District Support representative will provide election timetables that the RI Board recommends for selecting the governor-nominee.

As governor, you should certify the name of your district's governor-nominee to RI within 10 days of selection. Do so by submitting the Governor-nominee Form to your CDS representative.

Nominating committee for RI director

Every four years, a zone nominates a member of one of its clubs to serve a two-year term on the RI Board of Directors. Any club in the zone can nominate any member of any district in the zone, as long as the member fulfills the qualifications for director.

Each zone's nominating committee consists of a past governor from each district in the zone. Your district should select a nominating committee member at the district conference, choosing from all the nominations submitted by clubs in the Rotary year before the nominating committee meets. Members should be past district governors at the time they are elected to the committee. In certain cases, a ballot-by-mail can be held to select this Rotarian. Depending on when your zone nominates a director, your district may not need to choose a nominating committee member during your year as governor.

Ballot-by-mail

If your district is unable to nominate its governor-nominee through a nominating committee system, your district may choose between voting at the district conference and holding a ballot-by-mail.

When issuing a ballot-by-mail to nominate a governor, the current governor sends each club one ballot. If your district is authorized to select its Council representative or a member of the nominating committee for RI director through ballot-by-mail, use this procedure:

- Follow the instructions on the ballot provided by the RI office serving your district.
- Send one ballot to each club in your district, with instructions to return it to you by a specified deadline. Any club with more than 25 members is entitled to one more vote for each additional 25 members or major fraction of this number. For example, clubs with 39 members get two votes, as do clubs with 57 members.
- Appoint a three-member balloting committee to validate and count the ballots at an announced time and date.
- Each candidate or a representative of each candidate should be present during the opening and counting of the ballots.
- Have the committee validate the ballots before counting begins, to ensure that the ballots have been completed properly.

The candidate who receives the highest number of votes is nominated, and the candidate who receives the second-highest number of votes is the alternate, except in the case of governor-nominee.

COUNCIL ON LEGISLATION AND COUNCIL ON RESOLUTIONS

The Council on Legislation, Rotary’s legislative body, meets every three years and will next meet in 2022. The Council will consider two types of legislation: enactments, which seek changes to RI’s constitutional documents, and position statements proposed by the RI Board. A club or a district conference may propose enactments, but any enactments that a club submits must be voted on at the district conference or district legislation meeting and be endorsed by the district. If there is not enough time at the district conference to vote in person on a proposed enactment, you, as governor, can obtain the endorsement of your district’s clubs through a ballot-by-mail.

You are encouraged to appoint a committee of Rotarians with past Council experience, including the district representative to the Council, to help your district prepare and understand proposed legislation. In the Rotary year before the Council on Legislation meets, your district should submit any proposed enactments and confirmation of its endorsement by 31 December. These enactments should be reviewed and discussed at the district conference.

In the Rotary year in which the Council on Legislation meets, the district governor receives a copy of all duly proposed legislation. After the Council on Legislation, all clubs will receive a Report of Action, which lists all enactments and position statements adopted by the Council. If you are governor during this year, you and your clubs should review the adopted legislation and implement it starting the following Rotary year. Adopted enactments change the Constitution and Bylaws of Rotary International and the Standard Rotary Club Constitution. These enactments take effect on 1 July following the Council. Find details about the Council’s policies and procedures at My Rotary.

Council representatives will also participate in the Council on Resolutions, which meets online in October and November each year to consider resolutions that have been proposed and endorsed by a club, district, the RIBI general council or conference, or the RI Board. Resolutions need to be submitted to the general secretary by 30 June each year to be considered at the next Council on Resolutions, along with the governor’s confirmation that the district has endorsed the items.

To learn more, take the [How to Propose Enactments and Resolutions course](#) in the Learning Center.

COUNCIL ON LEGISLATION TIMELINE

	2022 Council
Representatives and alternates are selected	Rotary year 2019-20
Representatives and alternates are reported to Rotary International	30 June 2020
Proposed enactments are due to RI	31 December 2020
Proposed legislation is published	30 September 2021
Council on Legislation meets	April 2022
Report of Action is distributed	June 2022

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What would you like to ask your CDS representative?
- Who will help you with your administrative duties?
- How can you streamline your administrative duties?
- How will you ensure sound financial management of the district?
- How can you help your district prepare and understand proposed legislation?

APPENDIX 9

ROTARY'S ONLINE TOOLS

Resource	What is it?	Who adds or updates content?	Need help?
Rotary.org	Rotary.org is the public face of Rotary, designed to inform the public.	RI staff	website@rotary.org
My Rotary	My Rotary (my.rotary.org) has more detailed information for Rotarians and the family of Rotary. Users don't need to sign in to access some of the content. But with a My Rotary account, you can view and access information tailored to your Rotary role.	RI staff	
Profile and Connections	Rotarians and Rotaractors can manage and personalize their My Rotary profiles, and connect and message each other directly, without exposing personal email.	Rotarians and Rotaractors	rotary.social@rotary.org
Membership Leads	Find and manage online membership leads, or candidates who have expressed interest in Rotary, through My Rotary. District leaders can view leads and assign them to clubs through the Manage Membership Leads page. Clubs can use it to view and manage the status of the candidates assigned to them.	RI staff, current district and club leaders, membership chairs	membershipdevelopment@rotary.org
Discussion Groups	Rotary discussion groups offer a place for Rotarians, Rotaractors, Rotary Peace Fellows, and alumni to share their experiences and ideas with members of the Rotary family from around the world. All discussion groups can be found in My Rotary (must be signed in to access). Join an existing group or start a new one based on your interests.	Rotarians, Rotaractors, and program alumni	rotary.social@rotary.org
Rotary Ideas	Rotary Ideas allows Rotary clubs and districts, as well as Rotaract clubs, to seek resources for their service projects, such as partners, volunteers, or material and direct financial contributions through PayPal. Project listings can be posted on club or district websites, and the site is open to the public. Leaders are also encouraged to use the site to find projects to partner on and to make other contributions to projects happening in the Rotary community.	Rotary club leaders and Rotaract club presidents	rotary.social@rotary.org
Rotary Showcase	Rotary Showcase allows Rotarians and Rotaractors to share successful project stories, photos, and video with one another and the public. It also allows them to identify partners and report the project's contribution to Rotary's global impact. Data can be synchronized with Rotary Club Central.	Rotarians and Rotaractors	rotary.social@rotary.org

Resource	What is it?	Who adds or updates content?	Need help?
<u>Rotary Club Central</u>	Rotary Club Central allows club leaders to enter and update membership, service, and Foundation giving goals, which district leaders can view and edit. Leaders have access for the years before, during, and after their term. All Rotarians can view their club's goals. Service projects can be imported from the Grant Center and Rotary Showcase.	Club and district leaders	cds@rotary.org
<u>Events</u>	Rotarians and Rotaractors can register for the Rotary Convention and learn about other upcoming events.	RI staff	website@rotary.org
<u>Brand Center</u>	Rotarians can customize and download materials that use the new Rotary voice and visual identity guidelines.	RI staff	graphics@rotary.org
<u>Grant Center</u>	The Grant Center is for district qualification and applying for district and global grants.	Rotarians applying for grants	grants@rotary.org
<u>Learning Center</u>	The Learning Center provides e-learning materials to help Rotarians and others learn new skills, prepare for leadership roles, and use Rotary tools to accomplish their goals.	RI staff	learn@rotary.org

NOTES on Your Support From Rotary

Large empty rectangular area for taking notes, bounded by a dotted line.



Empty space for taking notes.

One idea I will use from this session is:



PROJECT LIFECYCLE KIT



**DISCUSSION GROUPS, ROTARY IDEAS,
AND ROTARY SHOWCASE**



WWW.ROTARY.ORG/MYROTARY

PREPARING FOR THE INTERNATIONAL ASSEMBLY

The International Assembly is a motivational training meeting where your class will come together to prepare for the coming year. Because every governor-elect will attend, it is an opportunity to exchange ideas and connect with Rotarians from around the world. The connections you make can become partnerships for service projects and cultural exchanges.

RESPONSIBILITIES

AS GOVERNOR-ELECT	AS GOVERNOR
Attend all scheduled sessions at the International Assembly	Brief the governor-elect on challenges and opportunities in the district

KEY RESOURCES

At the International Assembly, you will receive materials for use during the meeting and your year as governor, including the Governor-elect's Workbook and International Assembly Leadership Directory.

These resources supplement the materials in this manual. You will not need to take your manual to the assembly.

GETTING READY FOR THE ASSEMBLY

The International Assembly is a training meeting held in January 2020 in San Diego, California, USA (check the Rotary calendar for dates). Governors-elect and their partners will receive several communications from the president-elect in the months before the assembly, including program highlights and details on special events. Partners of governors-elect are invited to attend the event as full participants in the program. Simultaneous interpretation of general sessions is provided in eight languages: Chinese, English, French, Italian, Japanese, Korean, Portuguese, and Spanish.

You will receive a registration email in August or September that will include program highlights, travel information, and logistical details. All travel will be arranged through the Rotary International Travel Service. Please arrange travel after you receive your registration email. Rotary pays your travel, hotel, and food expenses. To report other appropriate expenses as outlined in the registration email, download the expense statement (on My Rotary, go to Manage, then choose Travel & Expenses).

In some years, attendees opt to bring a small gift for fellow governors-elect; in others, they are encouraged to donate to The Rotary Foundation in lieu of gifts. You will receive more information specific to your class before the assembly.

THE INTERNATIONAL ASSEMBLY EXPERIENCE

At the International Assembly, you will attend general sessions and breakout sessions as well as social events. The general sessions include inspirational speeches by Rotary leaders and other global leaders.

The breakout sessions provide an opportunity to learn about new Rotary initiatives, discuss plans for the upcoming year, and discover new ideas and strategies from other participants from around the world. Although the International Assembly program varies from year to year, common topics include The Rotary Foundation, public image, membership, and leadership.

You will also attend a session with your Club and District Support representative, who will be your primary contact during your years as governor-elect and governor. This session will include an overview of your Rotary funding, information on Rotary resources, and an opportunity for you to ask regionally specific questions.

Besides attending sessions, you and your partner can meet with other participants at social and networking events, banquet dinners, and optional host hospitality events. You are also encouraged to visit booths during your free time, where you can talk with Rotary International staff, learn about the upcoming Rotary Convention, or buy theme materials and other Rotary items.

PARTNER PROGRAM

Your partner is encouraged to attend the International Assembly to prepare for the upcoming year. Governor-elect partners of all levels of experience are welcome and have their own program, which may include expert-led presentations, networking activities, or breakout sessions. Partners attend general sessions with the governors-elect and, in some years, combined breakout sessions. Your registration materials will include registration information for your partner. Rotary will cover the cost of your partner's travel, hotel, and food. Governor-elect partner attendance at the assembly is not mandatory, but if your partner chooses to attend, full participation in the partner program is required.

QUESTIONS TO CONSIDER

Consider these questions in preparation for your governors-elect training seminar:

- What are your expectations for the International Assembly?
- What is the most important goal you would like to achieve at the International Assembly?
- How can you prepare for the International Assembly?

APPENDIX 10

PLANNING CALENDAR

Use this calendar to plan your years as district governor-elect and district governor. Deadlines and observances are on the left, and reminders are on the right. The current calendar refers to 2020-21 district governors unless otherwise noted.

ROTARY YEAR 2019-20

JULY 2019

1	Updated constitutional documents take effect	<p>RI sends Rotary training materials.</p> <p>The Rotary Foundation emails world reporting percentages for grant reporting to districts.</p> <p>Have new district officers authorize district qualification for Rotary grants.</p> <p>Lead by example and make your personal gift to the Annual Fund.</p> <p>In mid-July, RI emails July club invoices to all officers (email addresses must be current) or mails them to current secretaries.</p>
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AUGUST 2019 Membership and New Club Development Month

		<p>Prepare to attend your GETS in conjunction with the Rotary institute for your zone by reviewing membership and Rotary Foundation courses in the Learning Center.</p> <p>Foundation notifies districts that District Designated Funds unspent from the previous year are available.</p> <p>If clubs haven't received their club invoices, refer them to riclubfinance@rotary.org.</p> <p>RI sends 1 July club membership numbers and July month-end totals.</p> <p>RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater.</p>
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SEPTEMBER 2019 Basic Education and Literacy Month

30	Rotaract club membership rosters due	RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater. Clubs that do not have a \$0 balance and receive the 60-day reminder will not be eligible for the Rotary Citation.
30	Submit your completed Rotary funding questionnaire to your CDS representative	Foundation emails world reporting percentages for grant reporting to districts.

OCTOBER 2019 Economic and Community Development Month

2-8	Alumni Reconnect week	<p>Foundation notifies districts that any spendable earnings available from the Endowment Fund have been added to their District Designated Fund balance.</p> <p>Council on Resolutions takes place from 15 October to 15 November.</p> <p>RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater.</p>
24	World Polio Day	

NOVEMBER 2019 Rotary Foundation Month

4-10	Observe World Interact Week, including Interact anniversary (5 November)	RI may terminate clubs that have owed \$250 or more for 120 days or longer.
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DECEMBER 2019 Disease Prevention and Treatment Month

15	Last day for the best early registration rate for Rotary Convention; register at riconvention.org	Remind clubs to elect presidents-nominee.
31	Submit your district's committee appointments on My Rotary	
31	Submit your payee form for personal and DG funding before International Assembly	

JANUARY 2020 Vocational Service Month

		<p>Attend International Assembly (confirm dates on Rotary calendar).</p> <p>Foundation emails world reporting percentages for grant reporting to districts.</p> <p>Ask clubs to review historical achievements in Rotary Club Central and begin to think of goals for next year.</p> <p>In mid-January, RI emails January club invoices to all officers (email addresses must be current) or mails them to current secretaries.</p>
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FEBRUARY 2020 Peace and Conflict Prevention/Resolution Month

1	Submit date and details of your district conference on My Rotary	<p>Conduct district team training seminar.</p> <p>Conduct presidents-elect training seminar (February or March).</p>
23	Rotary's anniversary/World Understanding and Peace Day	<p>If clubs don't receive their club invoices, refer them to riclubfinance@rotary.org.</p> <p>RI sends email to each DGE with their individual Rotary funding amount.</p> <p>RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater.</p>

MARCH 2020 Water and Sanitation Month

10	Last day for clubs to submit their incoming club officer information for inclusion in the Official Directory through My Rotary	Clubs receive Rotary Convention credentials. Conduct district training assembly (March, April, or May).
9-15	Observe World Rotaract Week, including Rotaract anniversary (13 March)	Submit RI and Foundation expense report from the International Assembly to meetings.finance@rotary.org .
31	Remind Rotaract clubs to report their membership rosters through My Rotary	RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater. Clubs that do not have a \$0 balance and receive the 60-day reminder will not be eligible for the Rotary Citation.
31	Last day for discounted registration rate for Rotary Convention	

APRIL 2020 Maternal and Child Health Month

		Foundation emails world reporting percentages for grant reporting to districts. RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater. Clubs terminated in November are no longer eligible to be reinstated and must apply for a new charter.
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MAY 2020 Youth Service Month

15	Last day to complete payment requirements for 2019-20 district grants	Foundation notifies districts to check the amount of unused DDF to date for the year.
15	Remind clubs to send in their Foundation contributions before Rotary year-end (30 June)	Remind club presidents-elect to set their annual goals in Rotary Club Central. Remind clubs to update membership data on My Rotary (or their club management system). Email information about the Interactor elected as your district Interact representative and the Rotaractor elected as your district Rotaract representative to data@rotary.org . RI may terminate clubs that have owed \$250 or more for 120 days or longer.

JUNE 2020 Rotary Fellowships Month

10	Last day for promotional rate for 2021 Rotary Convention; register at riconvention.org .	Attend the Rotary Convention, 6-10 June in Honolulu, Hawaii, USA.
15	Remind clubs to send in their Foundation contributions before Rotary year-end	Remind Rotaract and Interact clubs, and their sponsor Rotary clubs, to report incoming club presidents and advisers through My Rotary.
30	Last day to make Foundation contributions to be credited to the current Rotary year	
30	Resolutions due for the 2020 Council on Resolutions	
30	Last day to enter achievements for the 2019-20 Rotary Citation	

ROTARY YEAR 2020-21

JULY 2020

1	Rotary Peace Fellowship applications due to The Rotary Foundation	RI emails information about your role in receiving online membership inquiries.
		The Rotary Foundation emails world reporting percentages for grant reporting to districts.
		You and your assistant governors can rate and comment on clubs in Rotary Club Central after you complete official visits.
		Ensure clubs set annual goals in Rotary Club Central.
		In mid-July, RI emails July club invoices to all officers (email addresses must be current) or mails them to current secretaries.
		Invoices for clubs with no officers on record will be sent to the governor.
		Lead by example and make your personal gift to the Annual Fund.
		Receive 70 percent of your funding from Rotary (unless participating in the new district governor funding test).

AUGUST 2020 Membership and New Club Development Month

Foundation notifies districts that District Designated Funds unspent from the previous year are available.
If clubs don't receive their club invoices, refer them to riclubfinance@rotary.org .
RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater.
RI sends 1 July club membership numbers

SEPTEMBER 2020 Basic Education and Literacy Month

30	Rotaract club membership rosters due	RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater. Clubs that do not have a \$0 balance and receive the 60-day reminder will not be eligible for the Rotary Citation.
		RI sends Rotary, Rotaract, and Interact citation certificates to current and immediate past governors.

OCTOBER 2020 Economic and Community Development Month

1	Submit nominations for the Service Award for a Polio-Free World to polioplus@rotary.org ; apply using the nomination form	Start the district governor-nominee selection process so it is completed before 30 June 2021.
1	Submit nominations for the 2020-21 Service Above Self Award; apply using the online nomination form	Council on Resolutions takes place from 15 October to 15 November.
24	World Polio Day	Foundation sends banners to Every Rotarian, Every Year clubs, 100% Foundation Giving clubs, 100% Paul Harris Society clubs, and Top Three Per Capita in Annual Fund Giving clubs from the previous year.
		Foundation emails world reporting percentages for grant reporting to districts.
		Foundation notifies districts that any spendable earnings available from the Endowment Fund have been added to their Designated District Fund balance.
		RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater.
		Clubs terminated in May are no longer eligible to be reinstated and must apply for a new charter.

NOVEMBER 2020 Rotary Foundation Month

1	District Rotary Foundation committee chairs submit nominations for the Citation for Meritorious Service with endorsement by district governor; apply using the online nomination form	Remind clubs to update membership data on My Rotary (or their club management system).
1-30	Host activities that celebrate the achievements of The Rotary Foundation	RI may terminate clubs that have owed \$250 or more for 120 days or longer.
2-8	Observe World Interact Week, including Interact anniversary (5 November)	

DECEMBER 2020 Disease Prevention and Treatment Month

15	Last day for the best early registration rate for Rotary Convention; register at riconvention.org	
31	Deadline for clubs to hold their annual meeting for election of club officers	
31	Last day to make Rotary Foundation contributions that will be credited to 2020	
31	Enactments for the 2022 Council on Legislation are due	

JANUARY 2021 Vocational Service Month

1	Submit nominations for the 2020-21 Rotary Foundation Distinguished Service Award; apply using the online nomination form	Foundation notifies districts of the following year's District Designated Fund amount and the maximum award available for the district grant.
31	U.S. only: Submit interim expense statements with receipts to your CDS representative	Remind clubs to add incoming officers on My Rotary. Foundation emails world reporting percentages for grant reporting to districts. RI may terminate clubs that have owed \$250 or more for 180 days or longer. In mid-January, RI emails January club invoices to all officers (email addresses must be current) or mails them to current secretaries. Invoices for clubs with no officers on record will be sent to the governor.

FEBRUARY 2021 Peace and Conflict Prevention/Resolution Month

23	Rotary's anniversary/World Understanding and Peace Day	If clubs haven't received their January club invoices, refer them to riclubfinance@rotary.org . RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater.
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MARCH 2021 Water and Sanitation Month

1	Submit nomination for 2020-21 Excellence in Service to Humanity Award; apply using the online nomination form	Clubs receive Rotary Convention credentials. RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater. Clubs that do not have a \$0 balance and receive the 60-day reminder will not be eligible for the Rotary Citation.
10	Last day for clubs to submit their incoming club officer information for inclusion on My Rotary to ensure inclusion in the Official Directory	
8-14	Observe World Rotaract Week, including Rotaract anniversary (13 March)	
31	Remind Rotaract clubs to report their membership rosters through My Rotary	
31	Last day for discounted registration rate for Rotary Convention	
31	Submit the governor-nominee form to your CDS representative when the nominee is selected	

APRIL 2021 Maternal and Child Health Month

Foundation emails world reporting percentages for grant reporting to districts.

RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater.

Clubs terminated in previous November are no longer eligible to be reinstated and must apply for a new charter.

MAY 2021 Youth Service Month

15 Last day to complete payment requirements for 2020-21 district grants Foundation notifies districts to check the amount of unused DDF to date for the year.

15 Remind clubs to send in their Foundation contributions before Rotary year-end (30 June) Remind clubs to update membership data on My Rotary (or their club management system).

Email information about the Interactor elected as your district Interact representative and the Rotaractor elected as your district Rotaract representative to data@rotary.org.

Remind club presidents-elect to set their annual goals in Rotary Club Central.

RI may terminate clubs that have owed \$250 or more for 120 days or longer.

JUNE 2021 Rotary Fellowships Month

15 Remind clubs to send in their Foundation contributions before Rotary year-end Remind Rotaract and Interact clubs, and their sponsor Rotary clubs, to report incoming club presidents and advisers through My Rotary.

16 Last day for promotional registration rate for Rotary Convention; register at riconvention.org Attend the Rotary Convention, 12-16 June in Taipei, Taiwan.

30 Last day to make Foundation contributions to be credited to the current Rotary year Confirm that all clubs have ratings and comments in Rotary Club Central.

30 Last day to enter achievements for the 2020-21 Rotary citations

30 Resolutions due for the 2021 Council on Resolutions

30 Deadline to submit governor-nominee form to your CDS representative

ROTARY YEAR 2021-22

JULY 2021

31	Your Rotary funding expense reports are due to CDS
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SEPTEMBER 2021 Basic Education and Literacy Month

30	Send your independently reviewed district annual statement and report of district finances to all clubs for discussion and approval in accordance with RI bylaws; send the report to Rotary after it has been adopted by the clubs
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OCTOBER 2021 Economic and Community Development Month

15	Council on Resolutions starts
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NOVEMBER 2021 Economic and Community Development Month

15	Council on Resolutions ends
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APRIL 2022 Maternal and Child Health Month

	Council on Legislation takes place.
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JUNE 2022 Rotary Fellowships Month

30	Send your district annual statement and report of district finances to Rotary with proof that it has been independently reviewed and approved by the clubs in accordance with RI Bylaws
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NOTES on Preparing for the International Assembly

Empty space for taking notes.

One idea I will use from this session is:



GETS WORKSHEET

ACTION STEPS AFTER GETS

You've just completed a two-day training session to help you prepare for your role as governor. It's important to reflect on your experience and begin thinking about what you need to do next. Consider the presentations and discussions of the last two days, and complete at least three of the prompts below. Then discuss your answers with a partner. Note any additional action items that you might include as a result of your conversation.

One thing I learned:	Because I learned this, I will:

One thing that surprised me:	Now that I know this, I will:

The first thing I'll tell my district team is:	The way I'll communicate this to them is:

Between now and the International Assembly, I will:	The person who will help me accomplish this is:

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REDESIGNED.
SIMPLIFIED.**

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