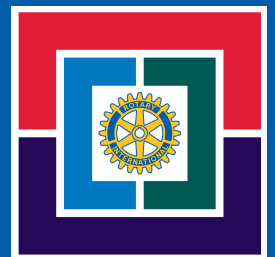


# 2009 INTERNATIONAL ASSEMBLY

18-25 January 2009 • San Diego, California, USA

## Leaders' Guide



## INTRODUCTION

The *2009 International Assembly Leaders' Guide* has been prepared to help you facilitate the discussions on the 14 topics approved by the 2009 International Assembly Committee. The guide provides a detailed outline of the content to be covered and suggested methods of developing accompanying visual aids.

While you are encouraged to be flexible and sensitive to group dynamics during discussions, it is imperative that you cover the content outlined in each session of this guide. This will ensure that each governor-elect receives clear, standardized training and preparation based on the recommendations of the president-elect and the 2009 International Assembly Committee.

The leaders' guide provides the framework for training leaders to lead facilitated discussions, in which participants are asked to respond to questions that draw on their knowledge and experience as Rotarians. Training leaders should remain flexible, allowing group discussions to flow while using discussion questions to guide the direction and pace of the dialogue. You should be prepared to facilitate discussion. Note any critical issues that could be discussed during the Leaders' Seminar preparation.

The *2009 International Assembly Leaders' Guide* coincides with the *Governor-elect's Workbook*, which each district governor-elect receives on the first day of the International Assembly. A copy of the workbook is included in the binder of the leaders' guide sessions; however, you will receive the final printed edition of the workbook at the Leaders' Seminar.

## **How to Use the Leaders' Guide**

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

### **Discussion questions**

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

### **Sample responses**

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

### **Key points**

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

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

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

### **Refer to Workbook Page TBD**

Workbook pages refer to the *Governor-elect's Workbook*, which includes a variety of activities that are directly related to the material in the *2009 International Assembly Leaders' Guide*.

### **Daily Summary and Evaluation Session**

At the end of each day, a daily summary and evaluation session is provided. During this 15-minute session, you will have the opportunity to discuss any possible issues that were not covered during the group discussion sessions. For example, if you had questions to be addressed later, the daily summary and evaluation time allows you time to ask the governors-elect to consider those issues.

In addition, district governors-elect will be asked to fill out a daily evaluation form. The evaluation asks the governors-elect to reflect on the plenary speakers and the group discussion room sessions for the day. It is important that each governor-elect completes the daily evaluation form in order to improve future assembly programs.

## SESSIONS

- 1 Focusing on the 2009-10 RI Theme
- 2 Expanding Membership Globally: Recruitment and Retention
- 3 Expanding Membership Globally: Organizing New Clubs
- 4 Increasing Rotary's Capacity to Provide Service, Part 1
- 5 Increasing Rotary's Capacity to Provide Service, Part 2
- 6 Participating in The Rotary Foundation
- 7 Achieving Our Foundation Goals for 2009-10
- 8 Supporting Our Rotary Foundation
- 9 Emphasizing Rotary's Unique Vocational Service Commitment
- 10 Sharing Safe Practices and Service to Youth
- 11 Promoting a Positive Public Image for Rotary
- 12 Optimizing Leadership Talents within RI
- 13 Recognizing RI's Collective Potential
- 14 Taking the RI Strategic Plan to the Club Level

# SESSION 1

## FOCUSING ON THE 2009-10 RI THEME

Date: Monday, 19 January 2009

Session time: 10:55-12:15

Duration: 80 minutes

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### LEARNING OBJECTIVES

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

1. Discuss the 2009-10 RI theme and its applications in the coming year
2. Inform clubs of the resources available to support the theme
3. Discuss the 2009-10 Presidential Citation and resource groups
4. Communicate the requirements of the 2009-10 Presidential Citation

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### WORKBOOK

Page 10	2009-10 Theme Bag Contents
Page 11	2009-10 RI Theme
Page 12	Resources to Prepare for Presidents-elect Training Seminar
Page 13	Summary

---

### TIMELINE

Introduction	10:55
2009-10 Theme Bag	11:15
2009-10 RI Theme	11:25
2009-10 Presidential Citation	11:55
Review	12:10
Adjourn	12:15

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## TRAINING LEADER'S NOTE

The governor-elect workbooks and the 2009-10 theme bags are placed with each tent card before the session. These materials are tailored to the language needs of each governor-elect, and some are in languages other than the six commonly used at the International Assembly. The tent cards have been placed with regard to language abilities, physical challenges, and other considerations; please do not rearrange them.

---

## INTRODUCTION

10:55 (20 min.)

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### Training leader's notes

- Welcome governors-elect to the 2009 International Assembly.
  - Briefly introduce yourself.
  - Introduce the role of the facilitator, and emphasize the importance of governor-elect participation.
  - Introduce the RI staff representative.
  - Inform participants that, in order to maximize the amount of time spent discussing important Rotary issues, the beginning of this session is the only time they will formally introduce themselves during the group discussion sessions. Encourage participants to greet each other and informally introduce themselves before each session that has new assigned seating.
  - Each governor-elect should briefly cover the following points: name, district number, city, country.
-



## REFER TO *GOVERNOR-ELECT'S WORKBOOK*



### KEY POINTS

- The workbook is a tool for governors-elect during the group discussion sessions this week.
- Governors-elect should bring the workbook with them to each session to take notes or write new ideas from the discussion.
- The workbook includes a summary page with space for additional notes at the end of each session.
- The emergency procedures are outlined in the workbook.
- Participants should wear the International Assembly badge in the hotel, but not when outside of the hotel.

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## 2009-10 THEME BAG

11:15 (10 min.)



### REFER TO WORKBOOK PAGE 9

#### FOCUSING ON THE 2009-10 RI THEME

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Training leader's note

— Review the learning objectives.

---



### REFER TO WORKBOOK PAGE 10

#### 2009-10 THEME BAG CONTENTS

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Training leader's notes

— Ask governors-elect to go through their bags to make sure they have everything.

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— If anyone is missing items, let the RI staff representative know. Materials will be replaced after the session.

---

 **KEY POINTS**

- Limited quantities of theme-related materials are available through the Publication Sales booth.
- Bulk orders can be placed through Rotary International or on the RI Web site.
- Additional quantities of the president-elect's theme tie and scarf are available at The Rotary Foundation booth for a donation to the Foundation.

## Do you have any questions about the resources you have just received?

---

**2009-10 RI THEME**

**11:25 (30 min.)**



**REFER TO WORKBOOK PAGE 11**  
**2009-10 RI THEME**

## How will you promote the 2009-10 theme?

 **KEY POINTS**

- The Board recognizes that the annual RI theme is of great importance in furthering the program of Rotary each year.
- All Rotarians are encouraged to present and emphasize *only* the annual theme at district

conferences, at other district meetings, in printed materials, and during official visits.

- The use of other themes is discouraged.



### **REFER TO WORKBOOK PAGE 12**

### **RESOURCES TO PREPARE FOR PRESIDENTS-ELECT TRAINING SEMINAR**



#### **KEY POINTS**

- The *RI Theme Brochure 2009-10* (in the theme bags) is an important resource for governors-elect to share with club leadership at PETS and district assembly meetings.
- Governors-elect will receive quantities of the theme brochure and other materials for PETS in the mail at their homes.



#### **KEY POINT**

- President-elect Kenny has appointed resource groups to support the following five emphases:
  - Health and Hunger
  - Literacy
  - Water
  - Youth Service
  - Public Image

**How will you use the resource groups to support the emphases?**

---

## 2009-10 PRESIDENTIAL CITATION

11:55 (15 min.)

### KEY POINTS

- To recognize the accomplishments of clubs during 2009-10, President-elect Kenny asks clubs to participate in the Presidential Citation Program. (The brochure is in the theme bags.)
- To receive a Presidential Citation, clubs must complete the membership goal and one activity from three different categories listed in the citation.
- District governors will qualify for a 2009-10 Presidential Citation if 50 percent or more of the clubs in the district qualify for a citation.
- The Presidential Citation supports the organization's commitment to the RI Strategic Plan.

## How will you use the Presidential Citation to motivate clubs in your district?

### KEY POINTS

- Governors are responsible for collecting the citation forms from their Rotary, Rotaract, and Interact clubs for their files and for submitting a list to RI headquarters for the entire district.
- The list must arrive at RI headquarters by 15 April 2010.
- All certificates will be sent to governors in one mailing near the end of the Rotary year.

- It is not possible to guarantee that the certificates will arrive in time for individual district assemblies.

## Who will assist you in processing the Presidential Citations in 2009-10?

### KEY POINT

- A district leader can be designated to assist in Presidential Citation processing.

---

## REVIEW

12:10 (5 min.)



### REFER TO WORKBOOK PAGE 13 SUMMARY

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#### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

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## ADJOURN

12:15

## **SESSION 2**

# **EXPANDING MEMBERSHIP GLOBALLY: RECRUITMENT AND RETENTION**

Date: Monday, 19 January 2009

Session time: 15:15-16:15

Duration: 60 minutes

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### **LEARNING OBJECTIVES**

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

1. Discuss strategies to recruit diverse members into Rotary
2. Determine best practices for retaining Rotary members
3. Review the 2009-10 membership recognition program

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### **WORKBOOK**

Page 15	RI Strategic Plan Priorities and Goals
Page 16	Recruitment Ideas and Retention Ideas
Page 17	Diversity in Membership
Page 18	Diversity: Challenges and Solutions
Pages 19-20	2009-10 Membership Goals and Recognition
Page 21	Summary

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### **TIMELINE**

Introduction	15:15
Recruitment	15:20
Retention	15:40
Diversity in Membership	15:55
Recognition Program	16:05
Review	16:10
Adjourn	16:15

---

Training leader's note

- You will need to prepare flip chart materials for this session in advance.
- 

---

## INTRODUCTION

15:15 (5 min.)



### REFER TO WORKBOOK PAGE 15

### RI STRATEGIC PLAN PRIORITIES AND GOALS

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Training leader's note

- As governors-elect arrive, have them refer to the workbook page referenced above, and give them a few minutes to review the information.
- 

### KEY POINT

- This exercise is an opportunity to reflect on your district's opportunities and challenges in terms of RI Strategic Plan Priority 4: Expand Membership Globally in Both Numbers and Quality.

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Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
-



**REFER TO WORKBOOK PAGE 14**  
**EXPANDING MEMBERSHIP GLOBALLY: RECRUITMENT**  
**AND RETENTION**

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Training leader's note  
— Review the learning objectives.

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---

**RECRUITMENT**

**15:20 (20 min.)**



**KEY POINTS**

- Membership growth and development is achieved through recruitment, retention, and organizing new clubs.

---

Training leader's notes  
— We will discuss all three aspects of membership growth and development.

---



**REFER TO WORKBOOK PAGE 16**  
**RECRUITMENT IDEAS**

**What are you personally doing to support membership?**

**Have you invited a prospective member to your club?**

## How will you communicate the importance of growth to individual Rotarians in your district?

Sample responses

- *Have assistant governors regularly communicate and promote the importance of membership among clubs.*
- *Encourage clubs to hold a club assembly that emphasizes the importance of membership and communicates their membership goals.*
- *Encourage clubs to emphasize each individual Rotarian's responsibility to membership.*
- *Encourage clubs to conduct assessments on membership issues, such as new classifications, diversity, identifying prospective members, club projects, etc.*
- *Communicate the importance of membership through your monthly newsletter.*

### KEY POINTS

- The regional Rotary International membership coordinators (RRIMCs) can provide support to districts struggling with membership issues.
- A current list of RRIMCs is available at the Membership Services booth and in the *Official Directory*.
- RI has developed several tools to help clubs and districts with membership issues. These tools are available through the RI Web site and the *RI Catalog*.

## What strategies have clubs in your district used to recruit new members into Rotary?

** KEY POINT**

- Bringing in new members is only one aspect of membership development. Another is membership retention.



**REFER TO WORKBOOK PAGE 16**  
**RETENTION IDEAS**

## **What are some strategies for retaining members in Rotary clubs?**

---

**Training leader's note**

- Ask governors by a show of hands how many have an experience working with the Retention Model and Termination Profile offered by Rotary International to share.
- 

## **How will you assist your clubs that have difficulty with retention?**

## **Are clubs in the district offering any leadership training programs for members?**

## **0** KEY POINTS

- The new RI Board-recommended leadership development program can help as a retention tool.
- The new publication *Leadership Development: Your Guide to Starting a Program* (250) has information.

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### Training leader's note

- Governors-elect will receive a gratis copy of *Leadership Development: Your Guide to Starting a Program* (250) in session 12 when leadership development is discussed in more detail.
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## DIVERSITY IN MEMBERSHIP

15:55 (10 min.)



### REFER TO WORKBOOK PAGE 17 DIVERSITY IN MEMBERSHIP

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#### Training leader's note

- Before the start of the session, develop a flip chart listing the characteristics that define diversity.

#### KEY POINTS

- Characteristics that may define diversity in a region include profession, age, ethnicity, gender, religion, political affiliation, and education.
- The future success of Rotary depends on its leaders' ability to make it meaningful, relevant, and attractive to the community.
- A diverse membership provides an accurate reflection of the community, thereby increasing the local relevance of the club.



### REFER TO WORKBOOK PAGE 18 DIVERSITY: CHALLENGES AND SOLUTIONS

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#### Training leader's notes

- Ask participants to turn to their neighbor, discuss the following questions, and take notes in their workbooks.

- 
- After five minutes, gather all groups together and facilitate the discussion of the questions.
- 

**What does diversity mean in your region?**

**What challenges do you have in your district with respect to diversity?**

**How will you motivate clubs to target their recruitment efforts toward a more diverse and accurate representation of their community?**

---

## **RECOGNITION PROGRAM**

**16:05 (5 min.)**



**REFER TO WORKBOOK PAGES 19-20**

**2009-10 MEMBERSHIP GOALS AND RECOGNITION**



### **KEY POINTS**

- President-elect Kenny is challenging clubs and districts to achieve a net membership increase of one member per club, a retention rate of 80 percent, and one or two new clubs per district.
- An awards program has been developed for the 2009-10 Rotary year for membership development achievements. The Membership Services booth can provide more information.
- Recognition will be available for clubs and districts that achieve their goals.

## What strategies will you use to achieve the membership goals?

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### REVIEW

16:10 (5 min.)



**REFER TO WORKBOOK PAGE 21  
SUMMARY**

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Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

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### ADJOURN

16:15

# SESSION 3

## EXPANDING MEMBERSHIP GLOBALLY: ORGANIZING NEW CLUBS

Date: Monday, 19 January 2009

Session time: 16:35-17:35

Summary and evaluation time: 17:35-17:50

Duration: 60 minutes for session topic, 10 minutes for daily summary, and five minutes for daily evaluation

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### LEARNING OBJECTIVES

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

1. Identify the importance of organizing new clubs
2. Identify challenges of and solutions for organizing new clubs
3. Review a case study on strategies for organizing new clubs

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### WORKBOOK

Page 23	The Importance of Organizing New Clubs
Page 24	Organizing New Clubs: Identifying Challenges and Sharing Solutions
Page 25	Case Studies: New Clubs
Page 26	Summary

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### TIMELINE

Introduction	16:35
Importance of Organizing New Clubs	16:40
Identifying Challenges	16:50
Sharing Solutions	17:00
Case Studies	17:15
Review	17:30
Daily Summary	17:35
Daily Evaluation	17:45
Adjourn	17:50

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Training leader's note

- You will need to prepare flip chart materials for this session in advance.

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## INTRODUCTION

16:35 (5 min.)

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Training leader's notes

- Welcome governors-elect.
- Introduce the RI staff representative.

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**REFER TO WORKBOOK PAGE 22**  
**EXPANDING MEMBERSHIP GLOBALLY: ORGANIZING**  
**NEW CLUBS**

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Training leader's note

- Review the learning objectives.

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- KEY POINTS**
- Membership growth and development is also achieved through the organization of new clubs.
  - RI President-elect Kenny encourages all districts to form one or two new clubs in 2009-10.

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## THE IMPORTANCE OF ORGANIZING NEW CLUBS

16:40 (10 min.)



**REFER TO WORKBOOK PAGE 23**  
**THE IMPORTANCE OF ORGANIZING NEW CLUBS**

### **Why is organizing new clubs essential to the future of Rotary?**

Sample responses

- *New clubs offer service to areas not previously covered.*
- *Growth in membership over the last 10 years has come primarily from the organization of new Rotary clubs.*
- *The demand for service is greater than ever. Rotary needs to grow in order to fill that need.*
- *With current time demands on business professionals, it is beneficial for large communities to offer alternative meeting times to accommodate varying schedules.*
- *New clubs provide an opportunity for groups that do not fit into the current club.*



**REFER TO WORKBOOK PAGE 23**  
**DISTRICT GOVERNOR'S ROLE IN ORGANIZING NEW  
CLUBS**

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Training leader's note

- Ask governors-elect to take five minutes to review the responsibilities listed in the workbook for organizing new clubs.
- 

**Can anyone briefly outline the role of the district governor in organizing new clubs?**

**How can you tell whether an area will be able to support a new club?**

**Has your district chartered new clubs within the last two years?**

---

**IDENTIFYING CHALLENGES**

**16:50 (10 min.)**



**REFER TO WORKBOOK PAGE 24**

**ORGANIZING NEW CLUBS: IDENTIFYING CHALLENGES  
AND SHARING SOLUTIONS**

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Training leader's note

- Ask governors to work in pairs to create a list of challenges they might face in attempting to organize new Rotary clubs.
  - Allow 10 minutes for this activity.
- 

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## SHARING SOLUTIONS

17:00 (15 min.)



**REFER TO WORKBOOK PAGE 24**

**ORGANIZING NEW CLUBS: IDENTIFYING CHALLENGES  
AND SHARING SOLUTIONS**

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Training leader's notes

- Before the session, write the heading "Organizing New Clubs: Challenges" on a flip chart.
  - Ask a volunteer to record the group's answers on the chart.
- 

**Can anyone share a few challenges you've identified with the group?**

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Training leader's notes

- Request a minimum of five different challenges governors may face.
  - Ask governors by a show of hands which challenge they consider to be most difficult.
  - Once the group has identified the most challenging aspect of organizing new clubs, facilitate discussion on how to overcome this problem.
  - Allow 10 minutes for discussion.
- 

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## CASE STUDIES

17:15 (15 min.)



### **REFER TO WORKBOOK PAGE 25 CASE STUDIES: NEW CLUBS**

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Training leader's notes

- Remind governors that case studies offer an opportunity to reflect on situations they might face and how they would respond.
  - Ask governors, working individually or in pairs if needed, to review the case studies in the workbook and answer the questions for each one. Allow 10 minutes for this activity.
  - Facilitate discussion of the case study with the remaining few minutes.
-

## What possible outcomes did you identify from this case study?

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### REVIEW

17:30 (5 min.)



**REFER TO WORKBOOK PAGE 26  
SUMMARY**

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#### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
-

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## **DAILY SUMMARY**

**17:35 (10 min.)**

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Training leader's notes

- Summarize the main topics of the day.
  - Address any remaining questions.
- 

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## **DAILY EVALUATION**

**17:45 (5 min.)**

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Training leader's notes

- The RI staff representative will distribute and collect the daily evaluation.
  - Thank participants.
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## **ADJOURN**

**17:50**

# SESSION 4

## INCREASING ROTARY'S CAPACITY TO PROVIDE SERVICE, PART 1

Date: Tuesday, 20 January 2009

Session time: 09:55-10:55

Duration: 60 minutes for session topic

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### LEARNING OBJECTIVES

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

1. Identify what issues exist in the Rotary community with respect to water and sanitation
2. Develop strategies for addressing the president-elect's emphasis within the district
3. Set effective goals that will address the president-elect's emphasis

---

### WORKBOOK

Page 28	Water
Page 29	Draft Goals
Page 30	Summary

---

### TIMELINE

Introduction	09:55
Conduct Needs Assessment and Define Solutions	10:00
Goals	10:40
Review	10:50
Adjourn	10:55

---

Training leader's note

- You will need to prepare flip chart materials for this session in advance.

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---

## INTRODUCTION

09:55 (5 min.)

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Training leader's notes

- Welcome governors-elect.
- Introduce the RI staff representative.

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**REFER TO WORKBOOK PAGE 27**  
**INCREASING ROTARY'S CAPACITY TO PROVIDE SERVICE**

---

Training leader's note

- Review the learning objectives.

---



**REFER TO WORKBOOK PAGE 28**  
**WATER**



### KEY POINTS

- RI President-elect Kenny requests that Rotarians focus their efforts on water, health and hunger, and literacy to help maintain continuity from previous years.
- He asks Rotarians to conduct needs assessments, see that needs are addressed in a practical and

sustainable way, and cooperate with community and institutional leaders.

- Water is an issue that affects every individual.

---

## **CONDUCT NEEDS ASSESSMENT 10:00 (40 min.) AND DEFINE SOLUTIONS**

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Training leader's notes

- Split the governors-elect into four groups.
  - Ask each group to refer to the section in the workbook that relates to water.
  - Give groups 10 minutes to discuss water and sanitation issues, and then 10 minutes to talk about some possible solutions.
  - Ask each group to select one person to present its ideas, allowing 20 minutes for all groups to share their results.
  - If time permits, facilitate discussion on some of the issues discussed by the small groups.
- 

---

Training leader's note

- As the governors discuss water issues, encourage them to reflect on the following questions:
    1. What global water issues exist?
    2. Which populations do these issues affect?
    3. What impact can Rotary have?
-

**What are some challenges you've identified regarding water and sanitation issues?**

**What are some possible solutions that you plan to implement for your district?**

---

**GOALS**

**10:40 (10 min.)**



**REFER TO WORKBOOK PAGE 29  
DRAFT GOALS**

**What goals will you set for your year to support water issues?**

---

Training leader's notes

- Ask participants to draft goals for implementing the emphasis on water using the workbook page referenced above.
  - Allow 10 minutes for participants to work on this exercise independently or with a neighbor.
-

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## REVIEW

10:50 (5 min.)



### REFER TO WORKBOOK PAGE 30 SUMMARY

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#### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

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## ADJOURN

10:55

# SESSION 5

## INCREASING ROTARY'S CAPACITY TO PROVIDE SERVICE, PART 2

Date: Tuesday, 20 January 2009

Session time: 11:15-12:15

Duration: 60 minutes for session topic

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### LEARNING OBJECTIVES

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

1. Identify what issues exist in the Rotary community with respect to health and hunger and literacy
2. Develop strategies for addressing these issues within the district
3. Set effective goals that will address these issues

---

### WORKBOOK

Page 32	Health and Hunger
Page 33	Literacy
Page 34	Draft Goals
Page 35	Summary

---

### TIMELINE

Introduction	11:15
Conduct Needs Assessment and Define Solutions	11:20
Goals	12:00
Review	12:10
Adjourn	12:15

---

Training leader's note

- You will need to prepare flip chart materials for this session in advance.

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## INTRODUCTION

11:15 (5 min.)

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Training leader's notes

- Welcome governors-elect.
- Introduce the RI staff representative.

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**REFER TO WORKBOOK PAGE 31  
INCREASING ROTARY'S CAPACITY TO PROVIDE  
SERVICE, PART 2**

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Training leader's note

- Review the learning objectives.

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**REFER TO WORKBOOK PAGES 32-33  
HEALTH AND HUNGER AND  
LITERACY**

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## CONDUCT NEEDS ASSESSMENT 11:20 (40 min.) AND DEFINE SOLUTIONS

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### Training leader's notes

- Split the governors-elect into four groups.
  - Ask each group to refer to the section in the workbook that relates to health and hunger and literacy.
  - Give groups five minutes to discuss some of the issues related to health and hunger, and then 10 minutes to talk about some possible solutions to these issues.
  - Ask each group to select one person to present its ideas, allowing five minutes for groups to share their results with all participants.
  - Repeat so that governors have the same amount of time to discuss literacy issues and solutions.
  - If time permits, facilitate discussion on some of the issues discussed by the small groups.
- 

### Training leader's note

- As the governors discuss health and hunger and literacy issues, encourage them to reflect on the following questions:
    1. What global health and hunger and literacy issues exist?
    2. Which populations do these issues affect?
    3. What impact can Rotary have?
-

**What are some challenges you've identified regarding health and hunger and literacy issues?**

**What are some possible solutions that you plan to implement for your district?**

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**GOALS**

**12:00 (10 min.)**



**REFER TO WORKBOOK PAGE 34  
DRAFT GOALS**

**What goals will you set for your year to support some of these issues?**

---

Training leader's note

- Ask participants to draft goals for implementing the emphases using the workbook page referenced above. Allow 10 minutes for participants to work on this exercise independently or with a neighbor.
-

---

## REVIEW

12:10 (5 min.)



### REFER TO WORKBOOK PAGE 35 SUMMARY

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#### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

---

## ADJOURN

12:15

# SESSION 6

## PARTICIPATING IN THE ROTARY FOUNDATION

Date: Tuesday, 20 January 2009

Session time: 15:50-16:50

Summary and evaluation time: 16:50-17:05

Duration: 60 minutes for session topic, 10 minutes for daily summary, and five minutes for daily evaluation

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### LEARNING OBJECTIVES

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

1. Discuss the advantages and disadvantages of participating in the pilot phase of the Future Vision Plan
2. Understand the Future Vision pilot district application timeline
3. Develop strategies for effectively allocating the District Designated Fund (DDF)

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### WORKBOOK

Page 37	The Rotary Foundation Future Vision Plan: A Foundation for the Future
Page 38	Case Study: Allocating District Designated Fund
Page 39	Summary

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### TIMELINE

Introduction	15:50
Future Vision Pilot Districts	15:55
Allocating DDF	16:10
Case Study	16:25
Review	16:45
Daily Summary	16:50
Daily Evaluation	17:00
Adjourn	17:05

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Training leader's note

- Depending on how many governors-elect in your room indicate their district's interest in participating in the Future Vision Plan pilot, you may need to adjust the following topic time allotments.
- 

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## INTRODUCTION

15:50 (5 min.)

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Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
- 



**REFER TO WORKBOOK PAGE 36**

**PARTICIPATING IN THE ROTARY FOUNDATION**

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Training leader's note

- Review the learning objectives.
-

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**FUTURE VISION  
PILOT DISTRICTS**

**15:55 (15 min.)**

**Raise your hand if your district is considering applying for participation in the pilot phase of the Future Vision Plan.**

**What are the advantages of participation in the pilot?**

**What are the disadvantages of participation in the pilot?**

** KEY POINTS**

- Districts that participate in the pilot will play a critical role in shaping the future of The Rotary Foundation, as they will have the opportunity to recommend changes to the new grant model during the pilot phase.
- Nonpilot districts should stay well informed of the progress of the pilot districts so that they are prepared when all districts begin using the new grant structure in 2013-14.



**REFER TO WORKBOOK PAGE 37  
THE ROTARY FOUNDATION FUTURE VISION PLAN: A  
FOUNDATION FOR THE FUTURE**

---

Training leader's note

- Allow governors-elect a few moments to review the timeline of the Future Vision Plan.
  - Remind governors-elect that if their district participates, they will not serve as governor during the implementation of the pilot, but they will be involved in the application and qualification process.
  - Remind governors that further questions about the Future Vision Plan can be answered at the Foundation booth in the Elizabeth Foyer or e-mailed to [newgrantspilot@rotary.org](mailto:newgrantspilot@rotary.org).
- 

**How have the leaders in your district communicated about the rationale to apply or not to apply for the pilot?**

**What are some strategies for gaining support for pilot participation from at least two-thirds of the clubs in your district?**

---

**ALLOCATING DDF**

**16:10 (15 min.)**

**🗨️ KEY POINTS**

- Regardless of participation in the Future Vision Plan pilot, all districts will operate under the

current Rotary Foundation programs structure for the 2009-10 year.

- Basic information about *SHARE* was discussed at the governors-elect training seminars.
- Governors-elect also need to understand how to effectively and fairly manage funds throughout the year.

## What strategies do you have for deciding how your district will use its District Designated Fund (DDF)?

---

### CASE STUDIES

16:25 (20 min.)



#### REFER TO WORKBOOK PAGE 38

#### CASE STUDIES: ALLOCATING THE DISTRICT DESIGNATED FUND (DDF)

---

#### Training leader's notes

- Ask governors-elect, working individually or in pairs if needed, to review the case study in the workbook and answer the accompanying questions.
  - Remind them that case studies offer an opportunity to reflect on a situation they might encounter in their district as governor and how they would respond.
  - Give them 10 minutes to review the case study and answer the questions.
-

- 
- Facilitate discussion of the case study with the remaining 10 minutes.
  - Refer governors-elect to *Best Practices for Managing District Simplified Grants* (156) for more on how to distribute District Simplified Grant funds.
- 

**What possible outcomes did you identify from this case study?**

**How do you allocate funds differently for**  
**- Larger vs. smaller clubs?**  
**- High-giving clubs vs. nongiving clubs?**

---

## **REVIEW**

**16:45 (5 min.)**



**REFER TO WORKBOOK PAGE 39  
SUMMARY**

---

Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

---

## **DAILY SUMMARY**

**16:50 (10 min.)**

---

Training leader's notes

- Summarize the main topics of the day.
  - Address any remaining questions.
- 

---

## **DAILY EVALUATION**

**17:00 (5 min.)**

---

Training leader's notes

- The RI staff representative will distribute and collect the daily evaluation.
  - Thank participants.
- 

---

## **ADJOURN**

**17:05**

# SESSION 7

## ACHIEVING OUR FOUNDATION GOALS FOR 2009-10

Date: Wednesday, 21 January 2009`

Session time: 10:20-11:20

Duration: 60 minutes

---

### LEARNING OBJECTIVES

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

1. Identify The Rotary Foundation's goals for 2009-10
2. Define strategies for supporting the Foundation's goals for 2009-10 in your district
3. Establish a plan for supporting the 2009-10 Foundation goals in your district

---

### WORKBOOK

Pages 41-43 Strategies for Supporting Foundation Goals

Page 44 Summary

---

### TIMELINE

Introduction	10:20
Strategies for the Goals	10:30
Review	11:15
Adjourn	11:20

---

---

Training leader's note

- You will need to prepare flip chart materials for this session in advance.
- 

---

## INTRODUCTION

10:20 (10 min.)

---

Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
- 



**REFER TO WORKBOOK PAGE 40**

**ACHIEVING OUR FOUNDATION GOALS FOR 2009-10**

---

Training leader's note

- Review the learning objectives.
- 

### **KEY POINT**

- As mentioned in the plenary session, there are many exciting plans for the future of The Rotary Foundation.



**REFER TO WORKBOOK PAGES 41-43**

**STRATEGIES FOR SUPPORTING FOUNDATION GOALS**

## **0 KEY POINTS**

The goals are

- Fulfill our promise to eradicate polio
- Achieve a better world through:
  - Peace and conflict prevention/resolution
  - Disease prevention and treatment
  - Water and sanitation
  - Maternal and child health
  - Basic education and literacy
  - Economic and community development
- Implement The Rotary Foundation Future Vision Plan
- Support Every Rotarian, Every Year and the Permanent Fund

**Which goal is most relevant to your district? Why?**

---

**Training leader's notes**

- Before the session, write the two questions below on a flip chart.
  - Refer governors-elect to the same workbook pages referenced above.
  - Split the governors-elect into four groups and assign each group a goal to discuss. Ask each group to determine what strategies can be carried out at the district level to help achieve their assigned goal.
  - Ask the governors-elect to consider the questions on the flip chart while they are strategizing.
  - After 15 minutes, bring the group back together to discuss the strategies for each goal.
  - Allow approximately five minutes for group discussion about the strategies for each goal.
- 

**Who in your district will you involve to help you meet these goals?**

**How will you promote these goals in your district?**

---

## REVIEW

11:15 (5 min.)



### REFER TO WORKBOOK PAGE 44 SUMMARY

---

#### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

---

## ADJOURN

11:20

# SESSION 8

## SUPPORTING OUR ROTARY FOUNDATION

Date: Wednesday, 21 January 2009

Session time: 15:45-16:45

Summary and evaluation time: 16:45-17:00

Duration: 60 minutes for session topic, 10 minutes for daily summary, and five minutes for daily evaluation

---

### LEARNING OBJECTIVES

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

1. Identify the primary fundraising activities of The Rotary Foundation
2. Develop strategies to address multiple fundraising priorities

---

### WORKBOOK

Pages 46-49 Balancing Fundraising Priorities

Page 50 Summary

---

### TIMELINE

Introduction	15:45
Polio Update	15:50
Balancing Fundraising Priorities	16:00
Review	16:40
Daily Summary	16:45
Daily Evaluation	16:55
Adjourn	17:00

---

Training leader's notes

- You will need to prepare flip chart materials for this session in advance.
- 

---

## INTRODUCTION

15:45 (5 min.)

---

Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
- 



**REFER TO WORKBOOK PAGE 45**

**SUPPORTING OUR ROTARY FOUNDATION**

---

Training leader's note

- Review the learning objectives.
- 

### **KEY POINTS**

- As International PolioPlus Committee Chair Bob Scott mentioned, this is an exciting time for the Foundation.
- This morning, Trustee Chair-elect Glenn Estess shared his goals, which included eradicating polio.

## **Why is meeting the polio fundraising challenge so important?**

Sample responses

- *Will accomplish the goal of global polio eradication*
- *Ensures Rotary's integrity (keeping the promise to eradicate polio, commitment to the children of the world and to the Gates Foundation to raise the matching funds)*
- *Provides a public relations opportunity of increased visibility of Rotary in the global community*
- *Provides an opportunity for sponsorship from local businesses and corporations*
- *Provides an opportunity to involve the community, reach new volunteers, and build membership*
- *Helps build fundraising for the future*

## **How can this challenge help your district's current polio eradication fundraising efforts?**

---

## BALANCING FUNDRAISING PRIORITIES

16:00 (40 min.)

### KEY POINT

- District governors are presented with multiple fundraising priorities by The Rotary Foundation.

---

#### Training leader's note

- Before the start of the session, develop a flip chart that reads:  
Fundraising for the Foundation:  
*Rotary's polio fundraising challenge*  
*Annual Programs Fund*  
*Permanent Fund*  
*Rotary Centers*
- 

## What are the specific goals for each of these four fundraising needs?

---

#### Training leader's note

- The goals for the four fundraising needs are listed below.
- 

### KEY POINTS

- Rotary's polio fundraising challenge is an important opportunity to fulfill our promise to eradicate polio.
- Every Rotarian, Every Year, which raises money for the Annual Programs Fund, encourages every Rotarian to give to The Rotary Foundation at least once a year.

- The Trustees have set a goal of raising US\$1 billion for the Permanent Fund by 2025 (in net assets and expectancies).
- The Trustees have set a goal of securing US\$95 million for the Rotary Centers by 2015 to give long-term stability to the program.



**REFER TO WORKBOOK PAGES 46-49  
BALANCING FUNDRAISING PRIORITIES**



**KEY POINTS**

- All the goals discussed work toward one common goal, supporting The Rotary Foundation.
- District governors are tasked with balancing the fundraising priorities in order to address all goals set by The Rotary Foundation.

---

Training leader's notes

- Split the governors-elect into four groups.
  - Allow the groups five minutes discussing the characteristics of the four fundraising priorities and the districts' current activities with each. Groups may also identify additional priorities specific to their districts.
  - Allow the groups 5 minutes to discuss similarities and differences between the priorities.
  - Allow the groups 10 minutes to discuss strategies for balancing fundraising priorities.
  - Ask each group to select one person to present its ideas, allowing 20 minutes for all groups to share their results with all participants.
-

- 
- If time permits, facilitate discussion on some of the issues discussed by the small groups.
- 

---

## REVIEW

16:40 (5 min.)



### REFER TO WORKBOOK PAGE 50 SUMMARY

---

#### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Remind participants that the RI staff representative will distribute and collect the daily evaluations.
  - Thank participants.
-

---

## **DAILY SUMMARY**

**16:45 (10 min.)**

---

Training leader's notes

- Summarize the main topics of the day.
  - Address any remaining "questions for later".
- 

---

## **DAILY EVALUATION**

**16:55 (5 min.)**

---

Training leader's notes

- The RI staff representative will distribute and collect the daily evaluation.
  - Thank participants.
- 

---

## **ADJOURN**

**17:00**

# SESSION 9

## EMPHASIZING ROTARY'S UNIQUE VOCATIONAL SERVICE COMMITMENT

Date: Friday, 23 January 2009

Session time: 09:45-10:45

Duration: 60 minutes

---

### LEARNING OBJECTIVES

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

1. Communicate the importance of vocational service
2. Explain how participation in vocational service projects supports effective clubs
3. Understand the governor's role in relation to vocational service

---

### WORKBOOK

Page 52	Vocational Service
Page 53	RI Strategic Plan Priorities and Goals
Page 54	The Four-Way Test and Declaration of Rotarians in Businesses and Professions
Page 55	Summary

---

### TIMELINE

Introduction	09:45
Importance of Vocational Service	09:50
Revitalizing Vocational Service	10:00
Emphasizing Vocational Service	10:25
Review	10:40
Adjourn	10:45

---

Training leader's note

- You will need to prepare flip chart materials for this session in advance.
- 

---

## INTRODUCTION

09:45 (5 min.)



**REFER TO WORKBOOK PAGE 51  
LEARNING OBJECTIVES**

---

Training leader's note

- Review the learning objectives.
- 



**REFER TO WORKBOOK PAGE 52  
VOCATIONAL SERVICE**

**How would you define vocational service?**

**What is the purpose of vocational service?**

---

## **IMPORTANCE OF VOCATIONAL SERVICE** 09:50 (10 min.)

### **🗣️ KEY POINT**

Vocational Service:

- Focuses on the promotion of high ethical standards in all occupations
- Encourages the contribution of members' vocational talents to address problems and needs of society
- Recognizes the worthiness of all useful occupations
- Promotes a fair workplace environment
- Builds on the classification principle to ensure club membership is representative of the community
- Provides networking opportunities for members

**What impact can Rotarians have in terms of vocational service to their communities?**

**What impact can Rotarians have in terms of vocational service within their clubs?**

**Why is vocational service important for Rotarians?**

---

**REVITALIZING VOCATIONAL SERVICE**      10:00 (25 min.)

**What are some specific projects that could be done to revitalize vocational service?**

Sample responses

- *Create or update technology labs in local schools*
- *Assist elderly in the community with obtaining/developing computer skills and using the Internet and e-mail*
- *Have Rotary club members share their business expertise by hosting workshops for small business owners*
- *Provide work experience opportunities to students*
- *Organize mock job interviews for students finishing schooling*
- *Present vocational awards to encourage excellence in the workplace*

**Has anyone's district participated in the Rotary Volunteers program?**

**How does Rotary Volunteers support vocational service?**

Sample responses

- *Encourages Rotarians to offer their vocational service skills in all types of volunteer activities, at home and abroad*
- *Allows Rotarians to share their wide range of expertise in support of humanitarian projects around the world*

## How can you promote the importance of vocational service in your district?



**REFER TO WORKBOOK PAGE 53**

**RI STRATEGIC PLAN PRIORITIES AND GOALS**

---

Training leader's note

- Ask the governors-elect to work quietly or in pairs to review the goals of the RI Strategic Plan.
  - Each participant should develop a plan of action for the three goals.
  - Inform participants that they have 10 minutes to develop these goals.
-

---

## EMPHASIZING VOCATIONAL SERVICE

10:25 (15 min.)

### KEY POINTS

- Rotary's focus on vocational service has its roots in the founding of the organization.
- The original intent of the young lawyer Paul Harris was to bring together a circle of business and professional acquaintances.
- The use of the classification principle – the guideline by which Rotary club membership is determined – ensures that each club has among its members a cross-section of a community's business and professional population.
- Vocational service also incorporates the importance of ethics.
- The RI Board and the RI Strategic Planning Committee have included vocational service as a goal for the entire organization because of Rotary's history and commitment to vocational service.



### REFER TO WORKBOOK PAGE 54

- THE FOUR-WAY TEST
- DECLARATION OF ROTARIANS IN BUSINESSES AND PROFESSIONS

**Can anyone share their personal experience with The Four-Way Test?**

**How has it become more meaningful in your life?**

**How can it become more meaningful to Rotarians in your district?**

**How do you demonstrate high ethical standards in Rotary and your profession?**

**As a Rotary leader, how can you promote ethical behavior among Rotarians?**

Sample responses

- *Lead by personal example*
- *Remind clubs that when selecting new members, integrity and ethics are key requirements*
- *Select only Rotarians with high ethical standards to serve on district committees*

---

## REVIEW

10:40 (5 min.)



**REFER TO WORKBOOK PAGE 55  
SUMMARY**

---

Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

---

## ADJOURN

10:45

# SESSION 10

## SHARING SAFE PRACTICES AND SERVICE TO YOUTH

Date: Friday, 23 January 2009

Session time: 11:10-12:10

Duration: 60 minutes

---

### LEARNING OBJECTIVES

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

1. Communicate the benefits of Rotary's youth programs and the need for youth protection measures
2. Review the district governor's responsibilities for maintaining abuse and harassment prevention policies and procedures
3. Identify strategies in support of upholding these policies and procedures

---

### WORKBOOK

Page 57	Benefits of Youth Programs
Page 58	Statement of Conduct for Working with Youth
Page 59	District Governor's Responsibilities
Page 60	Benefits of Abuse and Harassment Prevention Policies
Page 61	Maintaining Youth Protection Procedures
Page 62	Summary

---

### TIMELINE

Introduction	11:10
Benefits of Youth Programs	11:15
Abuse and Harassment Prevention	11:25
Supporting Our Youth	11:45
Review	12:05
Adjourn	12:10

---

## INTRODUCTION

11:10 (5 min.)

---

Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
  - Review emergency information.
- 



**REFER TO WORKBOOK PAGE 56**

**SHARING SAFE PRACTICES AND SERVICE TO YOUTH**

---

Training leader's notes

- Review the learning objectives.
  - Have participants raise their hands in response to the question below.
- 

**How many districts represented in this room participate in Youth Exchange, Interact, or RYLA?**

---

## BENEFITS OF YOUTH PROGRAMS 11:15 (10 min.)



**REFER TO WORKBOOK PAGE 57**

**BENEFITS OF YOUTH PROGRAMS**

**What are some benefits of Rotary's youth programs?**

**How can you improve the quality of the youth programs in your district?**

**How do you plan to get more Rotarians involved in these programs?**

**How will you promote Interact, RYLA, and Youth Exchange for future participants?**

**What are some positive experiences you have had working with Rotary's youth programs?**

**🗨️ KEY POINTS**

- Rotarians must support and maintain all Rotary youth programs to encourage volunteer service and promote international understanding among youth.
- District governors are ultimately responsible for the activities of their committees, including those for Interact, RYLA, and Youth Exchange.
- Youth protection policies help ensure that everyone involved in youth programs is protected, including Rotarians.

## Do you offer any other opportunities for youth other than through the Rotary International programs?

Sample responses

- *Scouting programs*
- *EarlyACT*
- *Mentor programs*

---

### ABUSE AND HARASSMENT PREVENTION

11:25 (20 min.)

#### KEY POINTS

- RI has a zero-tolerance policy regarding abuse and harassment.
- In an effort to reaffirm its commitment to safeguarding young people involved in Rotary activities, the RI Board of Directors approved a statement of conduct for working with youth.
- This statement applies to all Rotary youth program participants, including Youth Exchange, RYLA, and Interact, and to other club and district youth activities, such as scouts and mentoring.



**REFER TO WORKBOOK PAGE 58  
STATEMENT OF CONDUCT FOR  
WORKING WITH YOUTH**

---

Training leader's notes

- Allow governors-elect a few minutes to write down actions they will take to support this statement of conduct in the space provided.
  - If time permits, ask if any governors-elect would like to share their action steps with the group.
- 



**REFER TO WORKBOOK PAGE 59**  
**DISTRICT GOVERNOR'S RESPONSIBILITIES**

**KEY POINTS**

- RI has established responsibilities for each officer within the district in support of this statement.
- The workbook outlines the responsibilities of district governors to help protect youth involved in Rotary programs. The responsibilities listed are from the *Abuse and Harassment Prevention Training Manual and Leaders' Guide*.

---

Training leader's notes

- Allow governors-elect a few minutes to review their responsibilities.
  - Ask a volunteer to record responses to the question below on a flip chart.
-

## What actions has your district already implemented to help protect youth program participants?

Sample responses

- *Met minimum requirements for district Youth Exchange certification*
- *Developed written districtwide abuse and harassment prevention policies*
- *Appointed a district youth protection officer*



**REFER TO WORKBOOK PAGE 60**

**BENEFITS OF ABUSE AND HARASSMENT PREVENTION POLICIES**

## What are the benefits of abuse and harassment prevention policies?

Sample responses

- *The incidence of abuse and harassment can be reduced , and the effects of abuse and harassment can be mitigated, with proper response.*
- *Making it known that your organization takes abuse seriously can help deter potential abusers.*
- *A district's youth program may be more attractive to prospective students and host families when they know they can depend on someone to protect participants.*
- *Clear and systematic crisis policies and procedures protect the interests of all volunteers.*
- *District officers can be confident that the protective measures applied by exchange partners in the Youth Exchange program are similar to their own district's protective measures.*

**REFER TO WORKBOOK PAGE 61****MAINTAINING YOUTH PROTECTION PROCEDURES**

---

**Training leader's notes**

- Assign the governors-elect to small groups to review the following four questions listed in the workbook.
  - After 10 minutes, bring the group back together to facilitate discussion of the questions.
- 

**If an incident were to occur, who in your district would you communicate with?****Sample responses**

- *District youth protection officer*
- *Individuals involved in the incident*
- *District Interact, RYLA, or Youth Exchange committees*

**🗝️ KEY POINTS**

- RI requires that any incidents of abuse be reported to law enforcement agencies.
- Written allegations and reporting guidelines will help the district respond consistently and quickly.
- A contact person should be designated in advance, and that person should contact RI within 72 hours of an incident or report of an allegation.
- A district youth protection officer may be appointed to help train and work with those involved in youth programs and to investigate all reports of abuse or harassment.

## **Who can help you review and evaluate your youth protection procedures?**

### **☛ KEY POINTS**

- It is important that districts maintain updated policies and properly train the leaders who manage youth programs.
- Regular review and ongoing training in the district will help ensure that all Rotarians involved in youth programs know the policies and procedures and recognize that they are relevant and useful.
- Many Rotarians and other Rotary and community leaders can be used as resources to review and evaluate youth programs, including youth program committee members, past district governors, lawyers, law enforcement professionals, mental health professionals, insurance professionals, social workers, and youth leaders.

## **How will you appropriately communicate incidents to all Rotarians involved in your district's youth programs?**

## **How will you ensure the continuity of your district's youth protection procedures?**

---

## REVIEW

12:05 (5 min.)



**REFER TO WORKBOOK PAGE 62  
SUMMARY**

---

### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

---

## ADJOURN

12:10

# SESSION 11

## PROMOTING A POSITIVE PUBLIC IMAGE FOR ROTARY

Date: Friday, 23 January 2009

Session time: 15:20-16:20

Summary and evaluation time: 16:20-16:35

Duration: 60 minutes for session topic, 10 minutes for daily summary, and five minutes for daily evaluation

---

### LEARNING OBJECTIVES

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

1. Recognize the importance of public relations and strategies for working with the media
2. Discuss how to promote public relations efforts among clubs and within the district
3. Understand Rotary's public image campaign, Humanity in Motion, and how clubs and districts can use it

---

### WORKBOOK

Page 64	Working with the Media
Page 65	Working with the Media: Challenges and Strategies
Page 66	Key Rotary Messages
Page 67	Rotary's Most Effectively Promoted Stories
Page 68	Summary

---

### TIMELINE

Introduction	15:20
Working with the Media	15:25
Public Relations in Clubs and Districts	15:50
Humanity in Motion Campaign	16:05
Review	16:15
Daily Summary	16:20
Daily Evaluation	16:30
Adjourn	16:35

---

Training leader's notes

- A copy of the *Humanity in Motion V* collection of public service announcements (PSAs) will be placed at each participant's seat before the session. Copies of the PSAs will also be mailed to club presidents this month. *Humanity in Motion V* and other public relations materials are available at the PR booth.
  - *RVM: The Rotarian Video Magazine* will also be placed at each seat. The DVD is a free copy for each governor-elect. An annual subscription to *RVM* is available for US\$30 per year.
- 

---

## INTRODUCTION

15:20 (5 min.)

---

Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
- 



**REFER TO WORKBOOK PAGE 63**

**PROMOTING A POSITIVE PUBLIC IMAGE FOR ROTARY**

---

Training leader's note

- Review the learning objectives.
-

## How does the public image of Rotary affect the organization?

Sample responses

- *Membership recruitment, particularly of younger, more diverse members*
- *Promoting fundraising efforts*
- *Supporting polio eradication activities*

### KEY POINTS

- Grassroots efforts are the most effective type of public relations.
- Rotary's greatest asset is its 1.2 million members in more than 33,000 clubs around the world who can share the Rotary story.
- District governors' efforts to encourage clubs and districts to share their Rotary story are vital for Rotary to remain relevant and grow.

---

## WORKING WITH THE MEDIA

15:25 (25 min.)

## What are some types of media that can help promote Rotary in your district?

Sample responses

- *Television*
- *Newspapers*
- *Radio*
- *Billboards*
- *Magazines*
- *Internet*



**REFER TO WORKBOOK PAGE 64**  
**WORKING WITH THE MEDIA**

**What tips or successful steps could be added to the list in your workbook?**



**REFER TO WORKBOOK PAGE 65**  
**WORKING WITH THE MEDIA: CHALLENGES AND STRATEGIES**

---

Training leader's notes

- Allow the governors-elect a few moments to list a few strategies they've used when working with the media.
  - If time permits, ask a few governors-elect to share some of their strategies.
- 

**Who has experience in successfully working with the media? How was it done?**

Sample responses

- *Invited local media staff to join Rotary clubs or to speak at club meetings*
- *Sponsored media staff to travel with Rotarians to an international project*
- *Encouraged journalists to participate in the Group Study Exchange program*

## KEY POINTS

- Before meeting with a journalist, district governors should prepare and practice responses to questions they may be asked.
- It is helpful to practice a few key messages about Rotary.



## REFER TO WORKBOOK PAGE 66 KEY ROTARY MESSAGES

---

### Training leader's notes

- Ask governors-elect to refer to the corresponding workbook page.
  - Give participants 5-10 minutes to develop their districts' key Rotary message to be used when speaking with the media.
  - Ask one or two to share their messages with the group.
- 

## How would you describe Rotary in one sentence?

---

## PUBLIC RELATIONS IN CLUBS AND DISTRICTS

15:50 (15 min.)

## What successful public relations initiatives has your district used in the past?

## Who will help you improve Rotary's public image within your district?

### KEY POINTS

- Public relations and media professionals from the district should serve as resources for improving the district's image.
- Rotary International's Public Relations Division can also be consulted for additional public relations ideas and resources. Visit the PR booth here at the International Assembly for more information.

---

#### Training leader's note

- Ask a governor-elect to record participants' responses to the question below on a flip chart.
- 

## How can you motivate clubs to initiate public relations efforts?

### Sample responses

- *Include PR training and success stories in your PETS, district assembly, and district conference.*
- *Highlight clubs' public relations successes in your monthly newsletter and at district meetings.*
- *Recognize clubs for their public relations efforts with district awards.*

**🗝️ KEY POINT**

- Involving other organizations and community groups increases the reach and impact of Rotary's work.

## **Who in your community can you partner with to enhance Rotary's public image?**

Sample responses

- *Local newspapers, television, radio*
- *Local businesses and civic groups*
- *Other nongovernmental organizations and nonprofits*
- *Other local Rotary clubs*



**REFER TO WORKBOOK PAGE 67**

**ROTARY'S MOST EFFECTIVELY PROMOTED STORIES**

**🗝️ KEY POINT**

- Research from RI headquarters has shown that the Rotary stories listed in the workbook have generated positive coverage about Rotary in many media markets.

---

## **HUMANITY IN MOTION CAMPAIGN**

**16:05 (10 min.)**

**🗝️ KEY POINTS**

- Humanity in Motion, Rotary's global public image campaign, includes public service announcements for television, radio, print, billboard, and Internet

media; newspaper supplement stories and photos; and posters.

- Humanity in Motion aims to appeal to a diverse audience to educate the public about Rotary and to provide ready-made materials for clubs and districts to tailor to their local communities.

## **Do you know any clubs or districts that have used Humanity in Motion campaign materials?**

## **What other resources are available to help promote Rotary's public image?**

Sample responses

- This Is Rotary *brochure*
- What's Rotary? *card*
- Media Crisis Handbook
- Effective Public Relations: A Guide for Rotary Clubs
- Rotary PR Tips *newsletter*
- *Public Relations Grants*
- *District public relations committee chair*

### **🗨️ KEY POINTS**

- The Public Relations Grants pilot project was designed to assist districts in reaching the general public by promoting Rotary and improving its public image.
- PR grants have helped districts place RI-produced television and radio PSAs, billboards, banners, and newspaper supplements throughout communities in the district.

- The PR grants pilot project will continue in 2009-10. Details are available at the Public Relations booth.

## Have any clubs in your district applied for a PR grant from Rotary International?

---

### REVIEW

16:15 (5 min.)



**REFER TO WORKBOOK PAGE 68  
SUMMARY**

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#### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
-

---

## DAILY SUMMARY

16:20 (10 min.)

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Training leader's notes

- Summarize the main topics of the day.
  - Address any remaining "questions for later".
- 

---

## DAILY EVALUATION

16:30 (5 min.)

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Training leader's notes

- The RI staff representative will distribute and collect the daily evaluation.
  - Thank participants.
- 

---

## ADJOURN

16:35

# SESSION 12

## OPTIMIZING LEADERSHIP TALENTS WITHIN RI

Date: Saturday, 24 January 2009

Session time: 9:50-11:10

Duration: 80 minutes

---

### LEARNING OBJECTIVES

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

1. Identify the elements of effective leadership and ethical behavior
2. Discuss behavior and communication styles in order to effectively manage leaders within the district
3. Motivate leaders to serve Rotary beyond the club level and provide them with service opportunities

---

### WORKBOOK

Page 54	The Four-Way Test
Page 54	Declaration of Rotarians in Businesses and Professions
Pages 70-71	Leadership Qualities
Pages 72-73	Behavior Styles
Page 74	Summary

---

### TIMELINE

Introduction	09:50
Elements of Effective Leadership	09:55
Style Assessment	10:15
Motivating Future Leaders	10:35
Management Skills	10:50
Review	11:05
Adjourn	11:10

---

Training leader's note

- A copy of *Leadership Development: Your Guide to Starting a Program* will be placed at each governor-elect's seat before the session.
- 

---

## INTRODUCTION

09:50 (5 min.)

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Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
- 



### REFER TO WORKBOOK PAGE 69

### OPTIMIZING LEADERSHIP TALENTS WITHIN RI

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Training leader's note

- Review the learning objectives.
- 

### KEY POINTS

- District governors are in a unique position to guide a qualified group of leaders dedicated to furthering their service in Rotary.
- Identifying and motivating these leaders in the district is critical to supporting effective clubs.
- Governors are to uphold high ethical and moral standards as they manage their team of volunteers.

- The RI Strategic Plan emphasizes the importance of optimizing our leadership talents.

---

Training leader's note

- Remind governors-elect that The Four-Way Test and the Declaration of Rotarians in Businesses and Professions, which they discussed in the Vocational Service session, are important Rotary values for the discussion on leadership as well.
- 

---

## ELEMENTS OF EFFECTIVE LEADERSHIP

09:55 (20 min.)

### What is your definition of *leadership*?



**REFER TO WORKBOOK PAGES 70-71  
LEADERSHIP QUALITIES**

---

Training leader's notes

- Ask governors-elect to reflect on a leader they admire, perhaps someone who has had an impact on their life, such as a parent, teacher, manager, etc.
  - In the workbook space provided, ask them to list which leadership characteristics they admire in that individual.
  - Allow 10 minutes for this activity.
-

## What leadership qualities are most critical to fulfilling Rotary's mission?

Sample responses

- *Honesty*
- *Integrity*
- *Dignity*
- *Fairness*
- *Respect for others*

---

**STYLE ASSESSMENT**

**10:15 (20 min.)**

## Have any of you ever conducted a self-assessment of your personality type? What type of assessment have you done?

Sample responses

- *Myers-Briggs Type Indicator*
- *Keirsey Temperament*
- *DISC*



**REFER TO WORKBOOK PAGES 72-73**  
**BEHAVIOR STYLES**

---

Training leader's note

- Some participants may be more familiar with self-assessments than others.
  - Allow governors-elect 10 minutes to review the four styles listed in the workbook and answer the accompanying questions.
- 

**🗝️ KEY POINTS**

- All styles get results.
- There is no single “best” style.
- Although each of us has characteristics of all four styles, we typically have a primary and secondary style.
- We all use each of the styles in different situations.

## **Why is it important to consider your behavioral style as a Rotary leader?**

### Sample responses

- *Look for a balance of other behavioral types on your team.*
- *Knowledge of your own skills and assets as a leader helps you understand your strengths and weaknesses.*

---

## **MOTIVATING FUTURE LEADERS 10:35 (15 min.)**

**🗝️ KEY POINTS**

- Given the annual turnover of Rotary leaders, it is important to continually develop future leaders capable of serving Rotary at and beyond the club level.

- Motivating members to get involved and to pursue future leadership positions requires a variety of strategies.

## **What are some considerations to keep in mind while working to motivate volunteers?**

## **How is motivating volunteers different from motivating employees?**

---

Training leader's note

- Ask a governor-elect to record participants' responses to the question below on a flip chart.
- 

## **When will you have the opportunity to assist club officers?**

Sample responses

- *Training at PETS*
- *Training at the district assembly*
- *Through assistant governors*

## **What can you do to identify and motivate future leaders?**

Sample responses

- *Ask them to serve.*

- *Encourage your assistant governors to proactively identify Rotarians with the potential to serve.*
- *Hold a district leadership seminar.*
- *Be considerate of a Rotarian's time.*
- *Provide recognition to the future district leaders.*

---

## **MANAGEMENT SKILLS**

**10:50 (15 min.)**

**What management skills are important in a volunteer organization?**

**What successful management practices has your district implemented?**

**Why is delegation important as district governor?**

**How will you manage conflict between Rotarians?**

---

## **REVIEW**

**11:05 (5 min.)**



**REFER TO WORKBOOK PAGE 74  
SUMMARY**

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Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

---

**ADJOURN**

**11:10**

# SESSION 13

## RECOGNIZING RI'S COLLECTIVE POTENTIAL

Date: Saturday, 24 January 2009

Session time: 11:30-12:30

Duration: 60 minutes

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### LEARNING OBJECTIVES

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

1. Identify the causes of conflict and the benefit of building consensus
2. Discuss why individuals experience situations differently
3. Write your personal vision about why you are a Rotarian

---

### WORKBOOK

Page 76 Visual Perception and Object of Rotary

Page 77 Vision of Rotary

Page 78 Summary

---

### TIMELINE

Introduction 11:30

Causes of Conflict 11:35

Visual Perception 11:45

Personal Vision 12:00

Review 12:25

Adjourn 12:30

---

## INTRODUCTION

11:30 (5 min.)

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Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
- 



**REFER TO WORKBOOK PAGE 75**

**RECOGNIZING RI'S COLLECTIVE POTENTIAL**

---

Training leader's note

- Review the learning objectives.
- 

---

## CAUSES OF CONFLICT

11:35 (10 min.)

**What are some of the common causes of conflict among district leadership?**

**How will you work to develop positive working relationships with your team?**

**REFER TO WORKBOOK PAGE 76  
VISUAL PERCEPTION**

---

Training leader's notes

- Allow governors a few minutes to look at the illustration in the workbook.
  - The picture is an illusion. There are two ways of viewing the image: (1) an old woman with a large nose and slight smile, or (2) a profile of a young woman with long hair and a necklace.
- 

**How old is the woman in the picture?**

---

Training leader's note

- Ask governors-elect to answer the questions below by a show of hands.
- 

**Who sees the old woman?****Who sees the young woman?**

---

Training leader's note

- Take a few moments to allow participants to work with their neighbors to ensure that everyone sees the old woman AND the young woman in the picture.
- 

## What does this exercise illustrate?

### KEY POINTS

- Each individual sees things in his or her own way through the filter of personal experience.
- As Rotarians, it is important to remember to value these differences in each other.
- All perspectives are valued and important.
- We can all help each other see the bigger picture. Working together, we can have a greater impact as Rotarians.

---

**PERSONAL VISION**

**12:00 (25 min.)**



**REFER TO WORKBOOK PAGE 76  
THE OBJECT OF ROTARY**

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Training leader's notes

- Refer to the Object of Rotary to remind governors-elect of Rotary's founding principles.
  - Ask the governors-elect to take a few moments to visualize what Rotary will be like 10 years from now.
- 

## **What characteristics will define Rotary 10 years from now? What will Rotary look like in 2019?**



### **REFER TO WORKBOOK PAGE 77 VISION OF ROTARY**

---

Training leader's notes

- Divide governors into four or five groups.
  - Provide each group with a few sheets of flip chart paper and markers.
  - Give them 20 minutes to write down some of the characteristics they envision of Rotary in 2019.
  - Provide five minutes for groups to share results and facilitate discussion about the different visions of Rotary.
-

---

## REVIEW

12:25 (5 min.)

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### Training leader's note

- Ask the governors-elect to think about what you've learned about yourself and Rotary today that will help you become a more effective Rotary leader.
- 



### REFER TO WORKBOOK PAGE 78 SUMMARY

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### Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
- 

---

## ADJOURN

1:30

# SESSION 14

## TAKING THE RI STRATEGIC PLAN TO THE CLUB LEVEL

Date: Saturday, 24 January 2009

Session time: 14:20-15:20

Summary and evaluation time: 15:20-15:35

Duration: 60 minutes for session topic, five minutes for daily summary, and 10 minutes for International Assembly evaluation

---

### LEARNING OBJECTIVES

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

1. Discuss the importance of the RI Strategic Plan and strategic planning
2. Help clubs formulate their goals at PETS and the district assembly
3. Discuss what you've learned during the International Assembly and reflect on the overall training experience

---

### WORKBOOK

Pages 80-82 RI Strategic Plan 2007-10

Page 83 Strategic Planning

Page 84 Overview of the *Planning Guide for Effective Rotary Clubs*

Page 85 Summarize the Week

Page 86 Summary

### TIMELINE

Introduction	14:20
Strategic Planning	14:25
Helping Clubs Set Goals	14:40
Summarize the Week	15:00
Review	15:15
Daily Summary	15:20
International Assembly Evaluation	15:25
Adjourn	15:35

---

Training leader's note

- You will need to prepare flip chart materials for this session in advance.
- 

---

## INTRODUCTION

14:20 (5 min.)

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Training leader's notes

- Welcome governors-elect.
  - Introduce the RI staff representative.
- 



**REFER TO WORKBOOK PAGE 79**

**TAKING THE RI STRATEGIC PLAN TO THE CLUB LEVEL**

---

Training leader's note

- Review the learning objectives.
- 

### KEY POINTS

- To ensure an effective year, district governors-elect must plan their year by setting goals that reflect the vision they have for their district.
- They will also assist clubs in the goal-setting process to meet the overall goals of the district.
- As you have learned this week, President-elect Kenny views the RI Strategic Plan as an important aspect of your training here.
- The RI Strategic Plan is a vehicle to achieving the 2009-10 RI theme.



REFER TO WORKBOOK PAGES 80-82  
RI STRATEGIC PLAN 2007-10

**Why is the RI Strategic Plan important?**

**How will you promote the RI Strategic Plan to clubs in your district?**

**How will you use the RI Strategic Plan to achieve the 2009-10 RI theme?**

---

**STRATEGIC PLANNING**

**14:25 (15 min.)**

**🔑 KEY POINTS**

- As you learned at the governors-elect training seminar and in the *District Governor's Training Manual*, individuals, clubs, and districts can develop a long-range plan to serve as a framework for establishing goals and objectives.
- The strategic planning process should include a wide variety of perspectives to help ensure commitment and continuity among the Rotary members who will carry out the plan.
- It may be helpful to have an unbiased facilitator or small group of facilitators run strategic planning meetings.

---

Training leader's note

— Before the session, prepare a flip chart that reads:

1. Where are we now?
  2. Where do we want to be?
  3. How do we get there?
  4. How are we doing?
- 



**REFER TO WORKBOOK PAGE 83  
STRATEGIC PLANNING**

**Why is long-term strategic planning important for Rotary districts and clubs?**

**Does anyone have a five-year strategic plan for their district?**

**What strategic plans did you develop at your governors-elect training seminar?**

**Has anyone been able to brainstorm a vision for your district with your district team? If so, what is your district's vision?**

** KEY POINTS**

- At PETS and the district assembly, district governors-elect will work with clubs to set club goals for the year.
- These goals should be developed within the framework of the district's strategic plan.
- Because district and club goals will support and depend on each other for success, both levels of goals must be made with full participation and communication.
- The *Planning Guide for Effective Rotary Clubs* is an important goal-setting tool for governors and assistant governors to help clubs set goals and then monitor progress toward achieving them.
- The planning guide should be used in conjunction with the goals outlined in the RI Strategic Plan.

**REFER TO WORKBOOK PAGE 84**

**OVERVIEW OF THE *PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS***

**How will you involve clubs in the goal-setting process for your district?**

**What specific goals will you ask clubs to set to support district goals?**

## How can you monitor club progress toward goals?

Sample responses

- *Through assistant governors*
- *Using the Planning Guide for Effective Rotary Clubs*
- *Using the Club Leadership Plan*

---

Training leader's notes

- Use a flip chart to record responses to the question below.
  - Record challenges on one piece of paper and solutions on another.
- 

## What challenges might you have in working with clubs on their goals, and how will you address them?

## How will you address goal setting at PETS and the district assembly?

### KEY POINTS

- The standard RI curriculum for PETS includes a session dedicated to goal setting, which uses the *Planning Guide for Effective Rotary Clubs* as a handout.
- The standard RI curriculum for the district assembly includes developing an action plan to help meet goals.

## How many clubs in your district have a club trainer? How do you plan to work with your club trainers during your year?

### KEY POINT

- The RI Board recommends appointing a club trainer.

---

## SUMMARIZE THE WEEK

15:00 (15 min.)



### REFER TO WORKBOOK PAGE 85 SUMMARIZE THE WEEK

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#### Training leader's notes

- Give each participant five minutes to write down what they've learned and what questions they still have from this week of training.
  - Encourage governors-elect to provide specific answers on what they've learned, rather than general responses.
  - After five minutes, go around the room and ask governors-elect one by one to share what they've learned and what questions they still have; allow them to pass if they prefer not to share their responses.
  - Remind governors-elect to speak **slowly and clearly** when sharing what they've learned so that all participants may understand each other.
-

**🗨️ KEY POINT**

- This discussion provides an opportunity for district governors-elect to help each other reflect on the experiences of the assembly.

**What have you learned this week?**

**What remaining questions do you have about making your year as governor successful?**

**What resources will you use to help answer your remaining questions?**

---

**REVIEW**

**15:15 (5 min.)**



**REFER TO WORKBOOK PAGE 86  
SUMMARY**

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Training leader's notes

- Be sure that all questions have been answered.
  - Review the learning objectives to ensure that all topics were covered sufficiently.
  - Thank participants.
-

---

## DAILY SUMMARY

15:20 (5 min.)

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Training leader's notes

- Summarize the main topics of the day.
  - Address any remaining questions.
-

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## INTERNATIONAL ASSEMBLY EVALUATION

15:25 (10 min.)

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Training leader's notes

- Thank participants for their dedication and hard work.
  - Ask governors-elect to be constructive and honest so the program can be improved for next year's participants.
- 

### KEY POINT

- Many elements of this year's International Assembly resulted from comments made on previous evaluations.

---

Training leader's notes

- The RI staff representative will distribute and collect the evaluations.
  - Training leaders may leave the room at this time.
  - When finished, governors-elect may hand their evaluation to the RI staff representative and leave the room quietly.
- 

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## ADJOURN

15:35



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