

GOVERNORS-
ELECT
TRAINING
SEMINAR (GETS)
LEADERS' GUIDE



ROTARY INTERNATIONAL®

This is the 2007 edition of the *Governors-elect Training Seminar Leaders' Guide*. It is intended for governors-elect training seminars held in the 2007-08 Rotary year. The information in this publication is based on the Constitution and Bylaws of Rotary International and the Rotary Code of Policies. Please refer to those documents for exact RI policy. Changes to the documents listed above by decisions from the RI Board of Directors or the 2007 Council on Legislation override policy as stated in this publication.

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Planning and Organization

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

The *Governors-elect Training Seminar Leaders' Guide* provides the necessary information for convening a governors-elect training seminar (GETS) according to the RI Board-recommended guidelines. The supporting slides for this publication are provided on a CD-ROM so they may be used with an LCD projector or printed as color transparencies.

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

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

Purpose of the Governors-elect Training Seminar

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

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

Board-recommended Topics

The specific content for the governors-elect training seminar is outlined in the Rotary Code of Policies. The following topics will be addressed within a recommended minimum training time of nine hours:

- Role and responsibilities
- District organization
- Membership development
- Developing effective leaders
- The Rotary Foundation¹
- Administration requirements of RI (the role of the Secretariat)
- International Assembly preview

Through instruction and discussion, the GETS training team encourages district governors-elect to begin setting district goals, organizing their district, planning district meetings, and using resources available from the Secretariat before they attend the International Assembly.

Logistics

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

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

Participants

Participants attending GETS should include:

- GETS training team
- Governors-elect from the zone

The number of governors-elect should not exceed 30.

GETS training team

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

- GETS training team leader
- Regional Rotary Foundation coordinator (RRFC)²
- Regional Rotary International membership coordinator (RRIMC)²

¹ The recommended minimum training time for Rotary Foundation topics is three hours, which should include an overview of The Rotary Foundation, its programs, and fund development.

² Current RRFCs and RRIMCs are preferred.

The GETS training team leader should be a recent RI training leader (preferably one who's served within the last three to five years). The team leader has the following responsibilities:

- Coordinate the GETS training team members.
- Distribute the GETS training materials to the governors-elect, if necessary.
- Collect evaluations from the governors-elect and GETS training team members, and submit them to RI.
- Monitor attendance of governors-elect, and report it to RI.

Governors-elect from the zone

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

Materials

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

Room setup guidelines

The convener should provide the GETS training team with the appropriate meeting space as well as the following equipment:

- Tables and chairs for participants, arranged in a U shape
- Podium or table for training leader
- LCD projector, laptop computer, or overhead projector
- Flip chart with easel, paper, and markers

Preparing for GETS

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

- "How to Use the Session Guides" (pages 4-5)
- Guides for sessions they are facilitating
- Slides and handouts for sessions they are facilitating
- Seminar agenda (typically provided by the institute convener)
- *GETS Training Team Handbook* (sent by RI in June)

How to Use the Session Guides

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

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

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

Facilitated discussion

Session guides provide the framework for leading participants in facilitated discussions. In these discussions, participants are asked to respond to questions that draw on their knowledge and experience as Rotarians. Training leaders should remain flexible, allowing group discussions to flow while ensuring the topic is covered. For more information on facilitated discussions, consult the *District Training Manual* (246-EN).

Discussion questions

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

Sample responses

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

Key points

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

Training leader's notes

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

Slide prompts

Slide prompts indicate when a slide should be displayed to introduce a session or illustrate key points. The slides for this guide are provided on CD-ROM and at www.rotary.org so training leaders can localize the content.

Appendix prompts

Appendix prompts signal the training leader to refer to worksheets in the *District Governor's Training Manual*, where they are listed sequentially by chapter. The governors-elect should use these worksheets as instructed during the sessions. The appendixes are also included at the end of each session guide for the training leader's reference.

Agenda Structure

The following sample GETS agenda presents a natural progression of topics that will prepare governors-elect for the International Assembly and, ultimately, their year in office. Training materials have been divided into 10 sessions that vary in length from 40 to 90 minutes. The sample agenda shows the recommended sequence of sessions.

Training leaders should modify the agenda to suit their region, including transitions, breaks, and meal periods. If additional topics are planned, training leaders are encouraged to develop leaders' guides to help conduct the sessions.

When implementing the agenda, training leaders should:

- Make topics more relevant to participants by using zone-specific examples to illustrate points.
- Apply culturally appropriate training techniques based on the needs of the region.
- Add interest to the program by using a variety of techniques, including panel discussions, audiovisual presentations, and group activities.

Sample Agenda

Start	Finish	Suggested Duration	Session
		30 min.	Opening Plenary Session Objective of GETS GETS and the International Assembly Concept of facilitated discussion Overview of training
		60 min.	Session 1 Responsibilities and Goal Setting
		60 min.	Session 2 District Leadership Plan
		60 min.	Session 3 Communication
		60 min.	Session 4 Developing District Leaders
		90 min.	Session 5 Membership Development
		90 min.	Session 6A Rotary Foundation Fund Development and <i>SHARE</i>
		90 min.	Session 6B Rotary Foundation Programs
		60 min.	Session 7 Service Projects
		60 min.	Session 8 Your Support from RI (presented by RI staff)
		40 min.	Session 9 International Assembly Preview
		15 min.	Evaluations and Closing Plenary Session Completion of evaluations Summary and recognition

Attendance Sheet

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

Evaluations

Evaluations encourage feedback from participants that can be used to improve subsequent training sessions. Comparing GETS evaluations across all zones is critical to the improvement process. Therefore, training leaders should not modify the evaluation forms in any way, and they should allow adequate time for participants to complete evaluations before leaving.

Governors-elect

The RI Board requires that all governors-elect complete an evaluation of GETS immediately after the seminar. The forms are sent to the GETS training team leader to be distributed to all participants at the end of the training. The team leader is responsible for collecting the completed forms before governors-elect leave the training and returning them to RI.

GETS training leaders

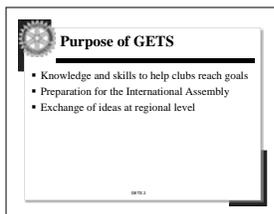
The RI Board requires that all GETS training leaders complete an evaluation of GETS. The evaluation addresses the success of the training session, support from RI, and logistical issues, as well as recommendations for improvement.

Opening Plenary Session



The opening plenary session is an opportunity to address all governors-elect and sets the tone for the seminar. Remarks should serve as a framework to inform, motivate, and inspire participants throughout the meeting.

SHOW SLIDE 1



SHOW SLIDE 2

Remarks should

- Explain how the governors-elect training seminar provides district leaders with the knowledge and skills necessary to support clubs in reaching their goals
- Explain the differences between the training at GETS and the International Assembly
- Explain the concept of facilitated discussion
- Review the seminar agenda, including times for breaks and meals
- Remind governors-elect that they will be using worksheets in the *District Governor's Training Manual* throughout the training sessions and that they should bring their copy of the manual to every session



SHOW SLIDE 3

Remarks should

- Introduce GETS trainers

SESSION 1

Responsibilities and Goal Setting

(60 minutes)

Learning Objectives

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

1. Work with the district teams to set well-defined goals for their year
2. Apply motivational strategies to help district teams accomplish their goals

Materials

Slides

4-7

Appendixes in

District Governor's Training Manual

4. District Inventory
6. Goals Worksheet
7. Action Plan Worksheet
8. Motivational Strategies
9. Summary

Session Outline

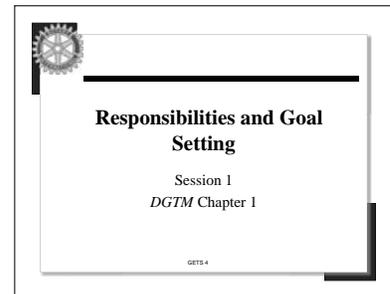
Introduction	5 minutes
Responsibilities	10 minutes
Setting Effective Goals	20 minutes
Motivating Rotarians to Accomplish Goals	20 minutes
Review	5 minutes

INTRODUCTION

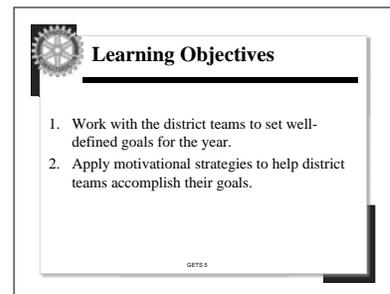
(5 MINUTES) _____ TO _____

 **SHOW SLIDE 4****Introduction***Training leader's notes*

- Introduce yourself to the participants.
- Explain your role in facilitating discussion among participants and helping them find answers to their questions.
- State group guidelines, such as taking turns speaking, welcoming all comments, and limiting the use of mobile phones, to ensure the discussions are effective.
- Ask the participants to amend or add to the list of group guidelines.
- Explain that issues not directly related to the topics in this leaders' guide will be placed on a "parking lot" and addressed during the question-and-answer session at the end of each day's training.

 **SHOW SLIDE 5****Learning Objectives** **REFER TO APPENDIX 9****Summary***Training leader's note*

- Encourage participants to use the summary sheet to write down goal-setting ideas for their district throughout the session.



RESPONSIBILITIES

(10 MINUTES) _____ TO _____

Training leader's notes

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

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

What responsibilities do you feel will be the most challenging?

SETTING EFFECTIVE GOALS

(20 MINUTES) _____ TO _____

Key points

- A key responsibility of the governor-elect is to set specific, well-defined goals.
- Well-defined goals are fundamental to establishing a clear direction for the district.
- Before defining goals, it is helpful to assess the current status of the district.

How many of you have begun the District Inventory?

 REFER TO APPENDIX 4

District Inventory

Key points

- The District Inventory is an assessment tool to help identify the district's strengths and weaknesses.
- After assessing the district using the district inventory, governors-elect can begin goal setting.

Training leader's note

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

What makes an effective goal?

 REFER TO APPENDIX 6

Goals Worksheet

Training leader's note

- Encourage participants to review the characteristics of an effective goal.
-

🗨️ Key points

- Effective goals are shared, measurable, challenging, achievable, and time specific.
- Effective goals can stimulate interest, encourage participation, and motivate the district to achieve more.

What other factors should you consider when setting goals for your year?

🗨️ SHOW SLIDE 6

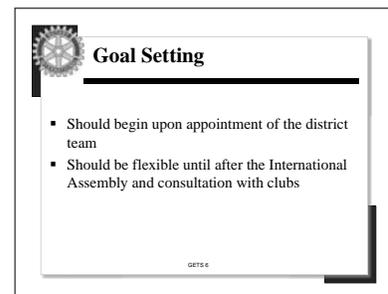
Goal Setting

When should you start setting your goals?

🗨️ Key points

- Goal setting can start as soon as the district team is appointed.
- Governors-elect should keep their plans flexible until after the International Assembly and consultation with clubs.

Who should you involve in the goal-setting process?



🗝️ Key point

- Assistant governors, district committee chairs, governors-nominee, current governors, and presidents-elect should help set goals.

Training leader's notes

- Ask a volunteer to record responses to the question below on a flip chart.
- Encourage participants to write down goals they may want to incorporate into their district on the bottom half of the Goals Worksheet.

What specific goals do you have for your district?

 REFER TO APPENDIX 7
Action Plan Worksheet

Training leader's notes

- Ask participants to choose a goal from the flip chart or Goals Worksheet and to develop possible action steps for accomplishing it using appendix 7.
- Allow some time for participants to work on this exercise independently or in pairs.
- Encourage them to complete the District Inventory and Goals Worksheet in the coming weeks to establish their goals.

MOTIVATING ROTARIANS TO ACCOMPLISH GOALS

(20 MINUTES) _____ TO _____

Key points

- Though it's important for governors-elect to set well-defined goals for the year, nothing can be achieved without the help of the district team.
- Because Rotarians are volunteers, what motivates them professionally may not motivate them in Rotary.
- Rotarians may be motivated by fellowship and networking opportunities, recognition, and the belief that their actions will benefit the community.

REFER TO APPENDIX 8 Motivational Strategies

Training leader's notes

- *Allow 10-15 minutes for this exercise.*
 - *Divide the participants into groups of no more than five people.*
 - *Ask each group to discuss successful motivational strategies in their districts.*
 - *Have each group choose one of the strategies they discussed and present it to the rest of the participants.*
 - *Encourage each participant to write down the strategies presented.*
-

How can you motivate new or current club members to join committees or help with projects?

How can you motivate your district team to achieve its goals?

Sample responses

- *Assign tasks based on team members' interests and skills.*
- *Involve the appropriate district chair or assistant governor in the goal-setting process.*
- *Recognize team members in the monthly letter or at the district conference.*

REVIEW

(5 MINUTES) _____ TO _____

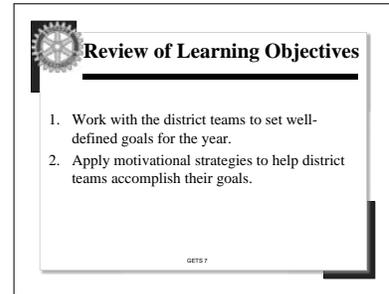
 **SHOW SLIDE 7**

Review of Learning Objectives

Training leader's notes

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

Adjourn



Review of Learning Objectives

1. Work with the district teams to set well-defined goals for the year.
2. Apply motivational strategies to help district teams accomplish their goals.

GETS 7

Appendix 4

District Inventory

Success of the district reflects success of the Rotary clubs. Use this inventory to assess how well the district is functioning. Data should be based on the preceding Rotary year. Information can be obtained from RI, the district governor, and district committees.

Membership Development

1. Net membership growth in existing clubs: _____
2. Number of new clubs: _____
3. Number of new members: _____
4. Number of clubs containing 25 or fewer members: _____
5. Monthly attendance average of all clubs: _____

Membership concerns:

Service to the Community

6. Number of Rotary Youth Exchange students
Hosted by district: _____
Sponsored by district: _____
7. Number of Interact clubs: _____
8. Number of Rotaract clubs: _____
9. Number of Rotary Community Corps: _____
10. Number of World Community Service projects: _____
11. Number of Rotary Foundation grants received for WCS projects: _____
12. Number of RYLA programs: _____
13. Number of Rotary Friendship Exchanges: _____
14. Number of registered Rotary Volunteers: _____
15. Number of non-RI Programs projects completed: _____

Service concerns:

The Rotary Foundation

16. Number of clubs participating in humanitarian programs

Matching Grants: _____

District Simplified Grants: _____

Individual Grants: _____

3-H Grants: _____

PolioPlus: _____

PolioPlus Partners: _____

17. District participation in educational programs:

Number of Ambassadorial Scholars

Nominated by clubs: _____

Sponsored by district: _____

Hosted by district: _____

Number of Group Study Exchange team members

Nominated by clubs: _____

Sponsored by district: _____

Hosted by district: _____

Number of Rotary Grants for University

Teachers awarded by district: _____

Number of Rotary World Peace Fellowships
nominations: _____

18. Contributions to The Rotary Foundation

Annual Programs Fund contributions:

Number of Rotary Foundation Sustaining
Members: _____

Restricted contributions: _____

Contributions to the Permanent Fund: _____

Cumulative total: _____

Percentage of members contributing: _____

Number of new Bequest Society Members: _____

Number of Arch Klumph Society Members: _____

Number of new Major Donors: _____

Current year goal (in US\$): _____

Will this be achieved? Yes No

How much of the District Designated Fund (DDF) was spent last year on

- Another district: _____
- Rotary Centers for International Studies: _____
- Low-income scholarship pool: _____
- World Fund: _____
- PolioPlus: _____
- Percent of DDF unused last year: _____

Rotary Foundation concerns:

Leadership Development

District Training Meetings

- 19. Attendance at the district team training seminar: _____
Number of clubs not represented: _____
- 20. Attendance at PETS: _____
Number of clubs not represented: _____
- 21. Attendance at district assembly: _____
Number of clubs not represented: _____
- 22. Attendance at district membership seminar: _____
Number of clubs not represented: _____
- 23. Attendance at the district leadership seminar: _____
Number of clubs not represented: _____
- 24. Attendance at district Rotary Foundation seminar: _____
Number of clubs not represented: _____

Most Recent District Conference

- 25. Total number of participants: _____
- 26. Percentage of clubs: _____

Leadership concerns:

Appendix 6

Goals Worksheet

Use the following worksheet to identify goals to support effective clubs in your district. Ensure that your goals are

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the district has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available.
- **Time specific.** A goal should have a deadline or timeline.

You will continue working on these preliminary goals at your governors-elect training seminar by developing specific action steps to meet them.

District _____ Goals for Rotary Year 20_____ - _____

- Goal: _____

Appendix 7

Action Plan Worksheet

Goal:
Result:

Action Step	Criteria for Measuring Progress	Person Responsible	Time Frame for Completing Step
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

Resources needed:

Appendix 8

Goal Setting: Motivational Strategies

Successful Motivational Strategies

1.
2.
3.
4.
5.

Strategies to Implement

1.
2.
3.
4.
5.

Appendix 9

Summary of Session 1: Responsibilities and Goal Setting

Resources

<i>Publication</i>	<i>Publication Number</i>
<i>Manual of Procedure</i>	035-EN
<i>Official Directory</i>	007-EN
<i>RI Membership Development and Extension Award</i>	901-EN
<i>Membership Development Booklet</i>	916-EN
<i>The Rotarian</i>	
Rotary Code of Policies	
Rotary World	

Additional Resources

District membership committee chair
Regional Rotary International membership coordinators (RRIMCs)
Rotary International membership zone coordinators (RIMZCs)
Assistant governors
RI Web site (www.rotary.org)
Member Access section of RI Web site
District Governors Forum

Goal-Setting Ideas to Implement

1.
2.
3.
4.
5.

SESSION 2

District Leadership Plan

(60 minutes)

Learning Objectives

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

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

Materials

Slides

8-16

Appendix in

District Governor's Training Manual

12. Summary

Handout

Case Studies: Managing Relationships

Session Outline

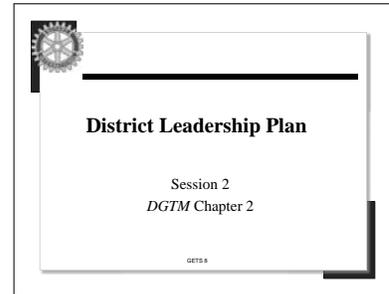
Introduction	5 minutes
Appointing the District Leadership Team	15 minutes
Club Leadership Plan	20 minutes
Managing Your District Team	15 minutes
Review	5 minutes

INTRODUCTION

(5 MINUTES) _____ TO _____

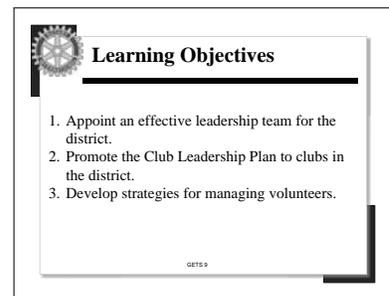
 **SHOW SLIDE 8**

Introduction



 **SHOW SLIDE 9**

Learning Objectives

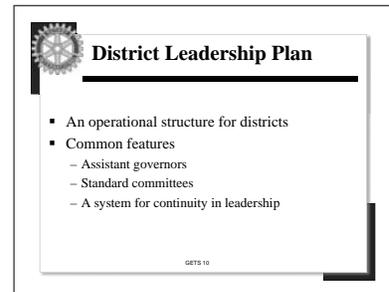


 **REFER TO APPENDIX 12**

Summary

Training leader's note

— *Encourage participants to use the summary sheet to record ideas for their district's leadership plan.*



 **SHOW SLIDE 10**

District Leadership Plan

 *Key points*

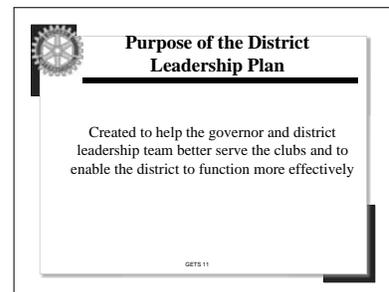
- The District Leadership Plan is an operational structure for RI districts.
- Common features include assistant governors, standard committees, and systems for continuity in leadership.

 **SHOW SLIDE 11**

Purpose of the District Leadership Plan

 *Key point*

- The District Leadership Plan was created to help the governor and district leadership team better serve the clubs and to enable the district to function more effectively.



APPOINTING THE DISTRICT LEADERSHIP TEAM

(15 MINUTES) _____ TO _____

Training leader's note

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

What should you consider when selecting candidates for district appointments?

Sample responses

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

Key point

- Specific qualifications for each position are given in appendix 11 of the *District Governor's Training Manual*.

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

How can you ensure continuity in the leadership team?

Sample responses

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

CLUB LEADERSHIP PLAN

(20 MINUTES) _____ TO _____

Key points

- The district leadership structure extends to clubs.
- The RI Board approved the Club Leadership Plan in November 2004 as the recommended administrative framework for all Rotary clubs.
- The Club Leadership Plan is not mandatory.
- Additional resources on the Club Leadership Plan can be found at www.rotary.org.

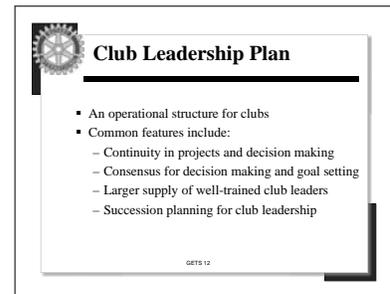
What percentage of clubs in your district have implemented the Club Leadership Plan?

Who can give an overview of the Club Leadership Plan?

SHOW SLIDE 12 Club Leadership Plan

Key points

- Governors should encourage and develop leadership and organization at the club level.
- The Club Leadership Plan is an operational structure for Rotary clubs. Common features include:
 - Continuity in projects and decision making
 - Consensus for decision making and goal setting
 - A larger supply of well-trained club leaders
 - Succession planning for club leadership



Club Leadership Plan

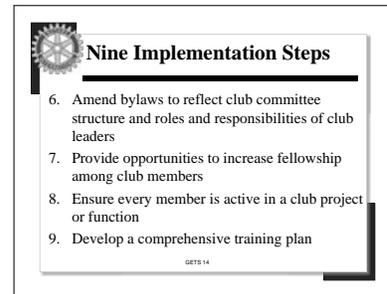
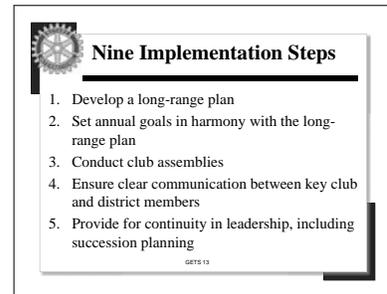
- An operational structure for clubs
- Common features include:
 - Continuity in projects and decision making
 - Consensus for decision making and goal setting
 - Larger supply of well-trained club leaders
 - Succession planning for club leadership

GETS 12

SHOW SLIDES 13-14
Nine Implementation Steps

Key point

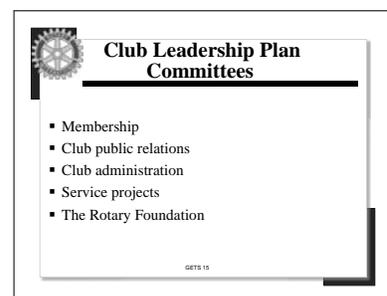
- Under the Club Leadership Plan, clubs are encouraged to create their own strategies to
 1. Develop a long-range plan
 2. Set annual goals in harmony with the long-range plan
 3. Conduct club assemblies
 4. Ensure clear communication between key club and district members
 5. Provide for continuity in leadership, including succession planning
 6. Amend bylaws to reflect the club committee structure and roles and responsibilities of club leaders
 7. Provide opportunities to increase fellowship among club members
 8. Ensure every member is active in a club project or function
 9. Develop a comprehensive training plan



SHOW SLIDE 15
Club Leadership Plan Committees

Key points

- The Club Leadership Plan recommends five standing committees based on the operational needs of the club.
- Club committees are charged with carrying out the club's annual and long-range goals based on the Avenues of Service.
- The five standing club committees of the Club Leadership Plan are membership, public relations, club administration, service projects, and The Rotary Foundation.



How will the Club Leadership Plan benefit clubs in your district?

How will you and your assistant governors help clubs to develop their leadership plans?

MANAGING YOUR DISTRICT TEAM

(15 MINUTES) _____ TO _____

Key points

- Once governors-elect establish the district team, it's important to focus on how it will be managed to support clubs effectively.
- The management and motivation of volunteers on the district team differs greatly from a business environment.

What are some techniques you will use to manage the district team?

Sample responses

- *Delegate tasks to appropriate district team members.*
- *Meet regularly with team members and chairs to discuss progress toward goals and to provide feedback on their performance.*
- *Hold team members accountable for their responsibilities.*
- *Provide a vision to motivate and inspire the team.*

Key point

- Governors should remember that they will be managing Rotarians with different work styles and personalities.

REFER TO HANDOUT

Case Studies: Managing Relationships

Training leader's notes

- *Distribute the case studies to participants. If one of the scenarios is not appropriate to your zone's culture, please remove it from the list.*
 - *Divide participants into groups of no more than five people and assign a scenario to each group.*
 - *Ask each group to discuss the questions from its assigned scenario. Allow five minutes for discussion.*
 - *Ask each group to share its responses with the entire group.*
-

Based on the scenarios on the handout, how will you monitor the performance of your district team?

Sample responses

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

🗨️ *Key points*

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

How will you work with assistant governors to support clubs?

REVIEW

(5 MINUTES) _____ TO _____

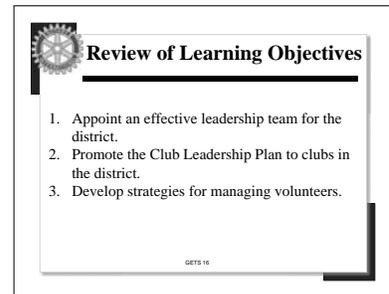
 **SHOW SLIDE 16**

Review of Learning Objectives

Training leader's notes

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

Adjourn



The slide features a gear icon in the top left corner. The title "Review of Learning Objectives" is centered at the top. Below the title is a list of three numbered items. At the bottom center, the text "GETS 16" is visible.

Review of Learning Objectives

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

GETS 16

Case Studies: Managing Relationships

As governor, you will need to manage Rotarians with different work styles. Read the scenarios below, and answer the questions that follow to practice how you will manage relationships within your team.

Scenario 1: Underperforming Committee Chair

Daniel is a first-year committee chair. It's halfway through the year, and he is not performing to your expectations. Daniel does not respond to committee members and has not made progress on any of the committee's goals. The committee members are frustrated, and they're threatening to step down if action is not taken.

How will you address the situation with Daniel?

How will you respond to the committee members' concerns?

Scenario 2: Clubs Not Working with Assistant Governors

In past years, some of the clubs in Governor Tanaka's district have preferred to work with the governor instead of the assistant governor. Your goal is to have them work with the assistant governor in accordance with the district leadership plan.

How can you help the assistant governor build trust with the club presidents?

What approach can you take with the club presidents so they feel confident working with the assistant governor?

Scenario 3: Strained Relationship with Assistant Governor

Maria, an assistant governor who has served for two consecutive years, has been very successful with her clubs. The clubs she works with have led the district in membership retention and annual giving. However, you do not get along well with Maria. She consistently disagrees with you on key issues and procedures. You would prefer to work with someone who is more of a team player.

Will you replace Maria? Why or why not?

If you decide to replace Maria, how will you communicate this choice to the clubs she works with?

If you decide not to replace Maria, what will you do to improve your working relationship with her?

Appendix 12

Summary of Session 2: District Leadership Plan

Resources

Publication

Publication Number

Manual of Procedure

035-EN

Additional Resources

Past district governors

Current governor

Governor-nominee

Current district leadership team

Club and District Support representative

District Leadership Plan Ideas to Implement

1.

2.

3.

4.

5.

SESSION 3

Communication

(60 minutes)

Learning Objectives

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

1. Effectively communicate with clubs through the official visit and monthly letter
2. Prepare for an effective district conference
3. Encourage successful club and district public relations programs

Materials

Slides

17-21

Appendixes in

District Governor's Training Manual

3. Planning Calendar
15. Summary

Handout

Official Visit Speech

Session Outline

Introduction	5 minutes
Communicating with Clubs	25 minutes
Preparing for the District Conference	10 minutes
Effective Public Relations	15 minutes
Review	5 minutes

INTRODUCTION

(5 MINUTES) _____ TO _____

 SHOW SLIDE 17

Introduction

 SHOW SLIDE 18

Learning Objectives

 *Key points*

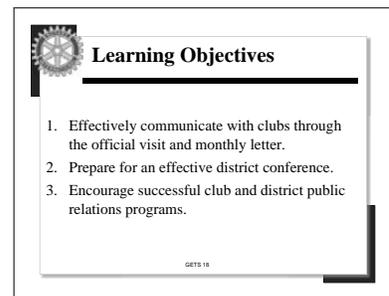
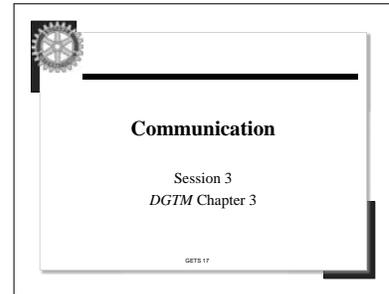
- Communication is essential to the effectiveness of any team.
- To achieve success, district leaders must understand their roles and responsibilities in communicating with other district leaders and clubs.
- The governor’s communication responsibilities include the official visit, monthly letter, district conference, and public relations.
- Chapter 3 of the *District Governor’s Training Manual* addresses communication.

 REFER TO APPENDIX 15

Summary

Training leader’s note

— *Encourage participants to use the summary sheet to record ideas for communication.*



COMMUNICATING WITH CLUBS

(25 MINUTES) _____ TO _____

Key point

- Two important methods for communicating with clubs are the official visit and monthly letter.

What is the purpose of your official visit?

Sample responses

- *To bring attention to district goals and events*
- *To motivate Rotarians to participate in service activities*
- *To recognize the contributions of Rotarians in the district*
- *To promote the district conference*
- *To promote the RI theme and the president's emphases for the year and explain how they apply to clubs*

Key points

- It can take eight hours of preparation to make an effective one-hour presentation.
- Governors can develop many skills to help deliver a successful speech.

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

What message would you like your audience to take away from your official visit speech?

What techniques can you use to connect with your audience and make your speech more effective?

Sample responses

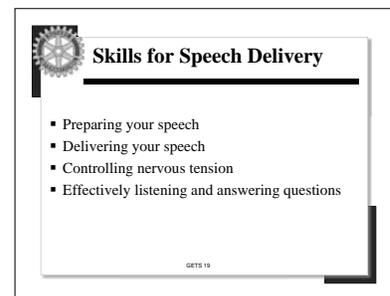
- *Research the club's outstanding service projects and other achievements.*
- *Compliment the club on its strengths.*
- *Include updates on district goals and events.*

SHOW SLIDE 19

Skills for Speech Delivery

REFER TO HANDOUT

Official Visit Speech



Training leader's notes

- *Distribute the Official Visit Speech handout to participants.*
- *Divide participants into groups of no more than five people and assign a part to each.*
- *Ask each group to discuss their assigned section and to add their own suggestions.*
- *Ask one person from each group to present the ideas discussed.*

Key point

- The governor's monthly letter is another effective way to communicate with clubs.

 REFER TO APPENDIX 3

Planning Calendar

Training leader's note

- Encourage participants to review the Planning Calendar for ideas for the monthly letter.
-

What should your monthly letter include?

Sample responses

- Attendance figures
- Governor's visit photos and future visit schedule
- RI theme
- RI and Rotary Foundation programs
- Schedule of events

Who should receive your monthly letter?

Sample responses

- Club presidents
- Club secretaries
- Past district governors
- RI Club and District Support representatives

PREPARING FOR THE DISTRICT CONFERENCE

(10 MINUTES) _____ TO _____

🗨️ *Key points*

- The purpose of the district conference is to further the goals of Rotary through fellowship, inspirational addresses, and the discussion of club and district affairs.
- The district conference should appeal to all Rotarians in the district and their families.

How many of you have begun planning for your district conference?

Who in your district helps plan or run the district conference and adjunct meetings?

How can your district conference benefit the clubs in your district?

Sample responses

- *Keeping the clubs updated on district goals and projects*
- *Inspiring Rotarians to continue the good works of Rotary*
- *Promoting fellowship among Rotarians*

How will you promote the district conference to attract Rotarians and their families?

Sample responses

- *Send a video of conference highlights from the previous year to each club.*
- *Announce details of upcoming conferences at each year's event.*
- *Hold the conference in the same location and weekend each year.*
- *Appeal to families with activities for children.*
- *Send a letter directly to spouses.*

EFFECTIVE PUBLIC RELATIONS

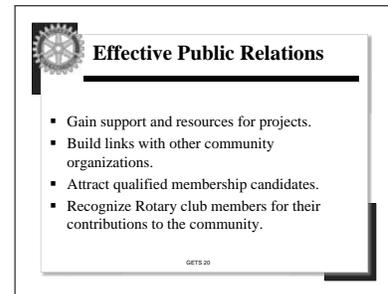
(15 MINUTES) _____ TO _____

SHOW SLIDE 20

Effective Public Relations

Key points

- Governors should encourage active public relations at the club and district levels.
- Through effective public relations, clubs will be able to
 - Gain support and resources for projects
 - Build links with other community organizations
 - Attract qualified membership candidates
 - Recognize Rotary club members for their contributions to the community



How will you work with your team to ensure successful public relations at the club and district level?

Sample responses

- *Have a district committee set specific public relations goals.*
- *Encourage assistant governors to follow up with club public relations committees on goals.*

REFER TO APPENDIX 15

Summary

Training leader's notes

- *Ask a volunteer to record participants' responses to the following question on a flip chart.*
 - *Encourage all participants to use the summary sheet to record these ideas.*
 - *Inform participants that public relations will also be discussed in the membership session.*
-

What club or district activities or events might be newsworthy?

Sample responses

- *District conference activities*
- *A local or international humanitarian project sponsored by the district or a club within the district*
- *Profiles of outstanding local Rotarians who volunteer their time and resources*
- *Interact and Rotaract activities*

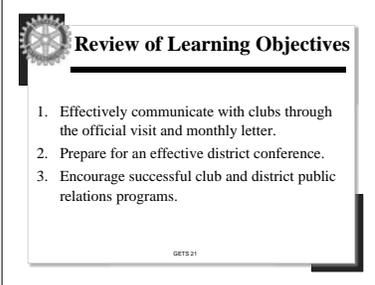
REVIEW

(5 MINUTES) _____ TO _____

 **SHOW SLIDE 21****Review of Learning Objectives**

Training leader's notes

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

Adjourn

 **Review of Learning Objectives**

1. Effectively communicate with clubs through the official visit and monthly letter.
2. Prepare for an effective district conference.
3. Encourage successful club and district public relations programs.

GETS 21

Official Visit Speech

The official visit speech is an important part of a district governor's duties. Consider the items below before your speech.

Part 1: Preparing Your Speech

- Who is your audience, and how large is the group?
- What is the purpose of your speech?
- What topics will you include?
- Where do you fit in the schedule? Who is speaking before and after you?
- How will you be introduced?
- How much time do you have to speak?
- How will you open your speech?
 - Rhetorical question
 - Surprising statement
 - Quotation
 - Joke (Be careful using humor.)
 - Challenge
- How will you end your speech?
 - Calling for action
 - Appealing to emotions
 - Making a prediction
 - Asking a rhetorical question
- What audiovisual equipment is available?
- What will be in the body of your speech?
 - Examples/narratives
 - Stories/anecdotes
 - Statistics
 - Testimony
 - Comparison/contrast
- How is the room set up?
 - Capacity
 - Seating arrangement

How can these elements affect your speech preparation? What has worked for you in the past? Choose one person from your group to present this section of the checklist to the rest of the participants, adding your group's own suggestions to the list of topics to consider.

Part 2: Delivering Your Speech

- Make eye contact with your audience as much as possible.
- Use gestures to help get your point across.
- Project your voice.
- Use appropriate voice inflections and intonation.
- Pause carefully to invoke thought among your audience.

How can these techniques help in your speech delivery? Choose one person from your group to present these ideas and any additional tips that may be useful for delivering an effective official visit speech.

Part 3: Controlling Nervous Tension

- Never admit nervousness.
- Realize your audience wants you to succeed.
- Know your material.
- Visualize yourself giving the speech.
- Focus on the message, not the medium.

How can these techniques help with controlling nervous tension? Choose one person from your group to present these ideas and any additional tips that may help a governor remain calm during a speech.

Part 4: Effectively Listening and Answering Questions

- Anticipate questions that may be asked.
- Repeat the question before giving an answer.
- Answer the question briefly.
- Pause and process difficult questions before answering.
- Admit if you don't know the answer.

How can these ideas help with effectively listening and answering questions? Choose one person from your group to present these ideas and any additional tips that may be helpful for listening under pressure.

Appendix 3

Planning Calendar

Use this calendar to help plan your years as district governor-elect and district governor. Suggestions for your monthly letter are included.

Year as District Governor-elect

July — Literacy Month

Receive Rotary reference publication mailing from RI.

August — Membership and Extension Month

Receive Rotary training meetings and membership mailing from RI.

September — New Generations Month

Prepare to attend your governors-elect training seminar in conjunction with the Rotary zone institute for your zone.

October — Vocational Service Month

RI sends estimated allocation questionnaire.

Deadlines:

- 1 District Meeting Dates form to RI (includes meetings convened as governor-elect and governor)
Applications for the next year's Group Study Exchange award (must be signed by district governor-elect and district governor) to The Rotary Foundation

November — Rotary Foundation Month

Receive bulk shipment from RI of *Club Officers' Kit* to forward to club presidents-elect before the presidents-elect training seminar.

The Rotary Foundation sends *SHARE* mailing to district leadership.

Deadlines:

- 1 Estimated allocation questionnaire to RI

December — Family Month

Receive bulk shipment from RI of materials to forward to assistant governors and district committee chairs before the district team training seminar.

December is the last month for early registration for the RI Convention.

January — Rotary Awareness Month

Attend International Assembly (see chapter 9 for specific dates).

Reminders:

- 15 Clubs must report next year's officers to their RI office.
The Rotary Foundation confirms next year's Group Study Exchange district pairings.

February — World Understanding Month

Attend International Assembly (see chapter 9 for specific dates).

Conduct district team training seminar.

Receive bulk shipment from RI of training and theme materials to be distributed to presidents-elect at the presidents-elect training seminar.

Reminders:

- 23 Observe Rotary's anniversary and World Understanding and Peace Day.

March

Conduct presidents-elect training seminar.

Deadlines:

- 1 District Appointments form to RI
SHARE Decision Worksheet (indicating any donations of District Designated Fund or program option to another district) to The Rotary Foundation

April — Magazine Month

Conduct district assembly.

Reminders:

- 15 Appoint host counselors for next year's incoming scholars.

May

Collect The Rotary Foundation Fund Development Club Goal Report Forms (Annual Programs Fund and Permanent Fund goals) from club presidents-elect.

Submit one Rotary Foundation Fund Development Club Goal Report Form for each club to The Rotary Foundation.

Deadlines:

- 15 Governors-elect Training Seminar (GETS) Expense Report to RI
RI and Rotary Foundation Expense Statement (for additional costs related to International Assembly attendance) to RI

June — Rotary Fellowships Month

Attend the RI Convention (check the RI Web site for dates).

Deadlines:

- 1 Itinerary for official visits to RI
- 15 Host counselor appointments for next year's scholars to The Rotary Foundation

Reminders:

- 15 RI mails July semiannual reports to incoming secretaries.

Year as District Governor

July — Literacy Month

Congratulations! Begin your year as district governor.

RI sends 70 percent of the estimated allocation.

Reminders:

- 1 Clubs owing in excess of US\$250 for six months are terminated.
Collect the *Planning Guide for Effective Rotary Clubs* from each club in the district.

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Enclose a tentative schedule of your official visits.
- Highlight a literacy project and encourage other literacy activities/projects.
- Remind club secretaries to complete the semiannual report, including dues payments. Promote use of Member Access to update membership information on a regular basis.
- Alert clubs to plan for Membership and Extension Month in August and New Generations Month in September.
- Urge clubs to update their classification survey, making a current list of filled and unfilled classifications.
- Encourage clubs to plan a membership program in August.
- Highlight the RI president's theme and emphases.
- Promote the district Rotary Foundation seminar and the district conference.
- Highlight district Foundation goals.
- Alert clubs of *SHARE* funds available for Humanitarian Grants Programs.
- Urge clubs to send applications for Rotary Foundation scholarship awards to the district subcommittee as soon as possible after 1 August.
- List your district-level appointees so club leaders will know who to contact.

August — Membership and Extension Month

Conduct district membership seminar (may be conducted in September).

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Urge clubs to review the Membership Development and Extension Award program (deadline is 15 May) and develop a membership plan for the year.
- Alert clubs to plan for Vocational Service Month in October.
- Remind clubs of opportunities to work with new generations.
- Encourage clubs to educate new members through an orientation program.

September — New Generations Month

Deadlines:

- 15 Service Above Self Award nominations due to RI

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Remind clubs about the benefits of Interact and Rotaract club sponsorship.
- Alert club presidents to plan for Rotary Foundation Month in November.
- Encourage participation in Rotary Youth Exchange by highlighting a club's involvement or publishing an article from a current or former Youth Exchange student.
- Alert clubs to plan for World Interact Week in November.

October — Vocational Service Month

RI mails Five-year Membership History report.

Deadlines:

- 1 Applications for Ambassadorial Scholarships, Rotary Grants for University Teachers, Individual Grants, and Group Study Exchange awards for the following year to The Rotary Foundation

Reminders:

- 1 Clubs that have not paid their semiannual dues receive reminder from RI.

- 15 RI mails data forms for next year's *Official Directory* to club secretaries.

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Alert clubs to plan for Family Month in December.
- Promote the RI Convention.
- Encourage clubs to recognize a Rotary Volunteer.

November — Rotary Foundation Month

Observe World Interact Week (week that includes 5 November).

Conduct district Rotary Foundation seminar (may be held earlier).

Deadlines:

- 15 The Rotary Foundation Distinguished Service Award nominations to The Rotary Foundation

Reminders:

- 15 The Rotary Foundation sends *SHARE* mailing to district leadership.
- 30 Clubs must update their membership lists in order to have an accurate semiannual report for January.

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Ask club secretaries to notify their RI office, district governor, and governor-elect of newly elected officers immediately after their election.
- Highlight World Interact Week.
- Report on the progress of Interact and Rotaract in the district.
- Remind clubs of Rotary Awareness Month in January.
- Promote Rotary Foundation activities in which the district is involved (Group Study Exchange, Matching Grants, PolioPlus Partners).
- Encourage clubs to contribute to The Rotary Foundation.

December — Family Month

Deadlines:

- 31 Last day for annual meeting for election of club officers
Service Award for a Polio-Free World nominations to The Rotary Foundation

Reminders:

- 1 The Rotary Foundation Global Alumni Service to Humanity Award nominations to zone committee
- 15 Next year's Rotary Foundation Scholarship awardees notified of their study institutions.
RI mails January semiannual reports to club secretaries.
- 31 Clubs must complete their semiannual reports and send dues payments. Nonpayment will result in termination.

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Remind club secretaries to complete the semiannual report, including dues payments. Promote use of Member Access to update membership information on a regular basis.
- Remind clubs that the halfway mark in the year is approaching and that a club assembly should be held to review the club's progress.
- Alert clubs to plan for World Understanding Month in February and Rotary's anniversary on 23 February, World Understanding and Peace Day.
- Remind clubs of the deadline for electing officers.

- Remind clubs of deadline for *Official Directory* information.
- Promote the presidents-elect training seminar, the district assembly, and the RI Convention.

January — Rotary Awareness Month

Submit information for next year's *Official Directory*.

The Rotary Foundation confirms next year's Group Study Exchange district pairings.

Select members of the nominating committee for governor.

Deadlines:

31 *U.S. governors only:* Interim expense statements with receipts to RI

Reminders:

- 1 Clubs with financial obligations to RI of more than US\$250 for six months are terminated.
- 15 Invitation to clubs to submit names for nomination for district governor

Items for Your Monthly Letter:

- Call for district governor nominations from Rotary clubs.
- Publish monthly attendance report for all clubs in the district.
- Remind clubs of membership goal and importance of meeting it.
- Remind clubs to submit officer information for the *Official Directory*.
- Remind clubs of available *SHARE* allocation.
- Alert clubs to plan for World Rotaract Week in March.
- Inform clubs of available world-competitive scholarships and scholarships based on District Designated Fund allocations, and include district deadline and contact information for the appropriate subcommittee chair.
- Promote the presidents-elect training seminar, the district assembly, and the RI Convention.

February — World Understanding Month

Reminders:

23 Observe Rotary's anniversary and World Understanding and Peace Day.

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Invite Rotary clubs to submit names for nomination for district governor.
- Highlight Rotary's anniversary on 23 February, World Understanding and Peace Day.
- Remind clubs to prepare for Magazine Month in April.
- Remind clubs to make reservations for the RI Convention.
- Promote the presidents-elect training seminar, the district assembly, and the RI Convention.

March

Observe World Rotaract Week (week that includes 13 March).

Clubs receive RI Convention credentials.

Deadlines:

- 15 Significant Achievement Award nominations to RI
 - Application forms from clubs wishing to participate in Club and District Projects Exhibition at the upcoming convention to RI
 - Receipt of club nominations for governor
- 30 Selection of nominee for governor by the nominating committee

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Remind clubs of 15 April deadline for the Presidential Citation award.
- Observe World Rotaract Week.
- Promote the district assembly and the RI Convention.

April — Magazine Month

Deadlines:

- 15 Presidential Citation award applications to RI

Reminders:

- 1 Clubs that have not completed their semiannual report receive reminder.
- 7 Publication of the name and club of the selected nominee for governor and announcement of 21 April as deadline for receipt of challenges
- 21 Receipt of challenging candidates for governor-nominee
- 30 Publication of notice of challenging candidates for governor-nominee to clubs

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Publish the name and club of the selected governor-nominee by 7 April and announce 21 April as the deadline for receipt by the governor of challenges.
- Publish a notice to clubs of challenging candidates to selected governor-nominee, if appropriate.
- Highlight a feature from one of RI's official magazines focusing on its connection to the district.
- Remind clubs to plan for Rotary Fellowships Month.
- Promote the district assembly and the RI Convention.

May

Deadlines:

- 15 Names of the winning clubs in the district for each Membership Development and Extension Award program category to RI
- Receipt of club resolutions concurring with challenge(s) to governor-nominee
- Public Relations Award nominations to RI
- District Governor's Report to RI

Reminders:

- 15 Collect *Memo of Club Visit* from assistant governors.
- 30 Clubs must update their membership lists in order to have an accurate semiannual report for July.

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Remind clubs that contributions to The Rotary Foundation must be received by 30 June to count toward the year's goal.
- Remind clubs to plan for Literacy Month.
- Promote the RI Convention.

June — Rotary Fellowships Month

Announce governor-nominee, and submit the Governor-nominee Data Form to RI.

RI mails July semiannual reports to incoming secretaries.

Attend the RI Convention (check the RI Web site for dates).

Deadlines:

- 1 Mailing of ballots for governor-nominee in a contested election
- Memo of Club Visit* for each club to RI
- 15 The Rotary Foundation Citation for Meritorious Service nominations to The Rotary Foundation
- 21 Receipt of ballots for governor-nominee in a contested election
- 30 *SHARE* allocations to The Rotary Foundation
- Counting ballots for governor-nominee in a contested election
- Receipt of Rotary Foundation contributions by The Rotary Foundation or designated fiscal agent

Reminders:

- 30 Clubs must complete their semiannual reports and send dues payments. Nonpayment will result in termination.

Note: Final district governor expense reports, including requests for reimbursement of expenses incurred in chartering a new club, are due by 30 September.

Items for Your Monthly Letter:

- Publish monthly attendance report for all clubs in the district.
- Publish the name of the Rotarian elected as governor-nominee.
- Remind clubs to have an annual audit conducted.
- Acknowledge help given by various clubs and club officers.
- Remind secretaries to complete their semiannual reports and dues payments.
- Promote Rotary Fellowships activities.
- Thank district Rotarians for their contributions toward the success of Rotary in the district this year.

Appendix 15

Summary of Session 3: Communication

Resources

<i>Publication</i>	<i>Publication Number</i>
<i>District Conference Manual</i>	800-EN
<i>Effective Public Relations: A Guide for Rotary Clubs</i>	257-EN
<i>Public Relations: Make It Work for You</i>	269-EN

Additional Resources

Club and District Support representative
RI Public Relations Division staff

Communication Ideas to Implement

1.
2.
3.
4.
5.

SESSION 4

Developing District Leaders

(60 minutes)

Learning Objectives

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

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

Materials

Slides

22-26

Appendixes in

District Governor's Training Manual

17. Leadership Development Training Cycle
18. Summary

Handout

Case Studies: Promoting Training Seminars

Session Outline

Introduction	5 minutes
Managing Training Seminars	25 minutes
Promoting Training Seminars	25 minutes
Review	5 minutes

INTRODUCTION

(5 MINUTES) _____ TO _____

 SHOW SLIDE 22

Introduction

 SHOW SLIDE 23

Learning Objectives

 REFER TO APPENDIX 18

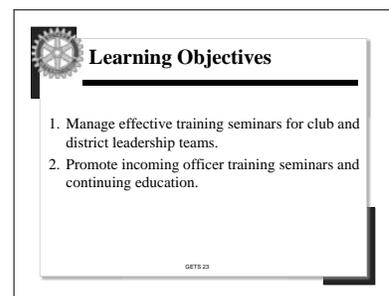
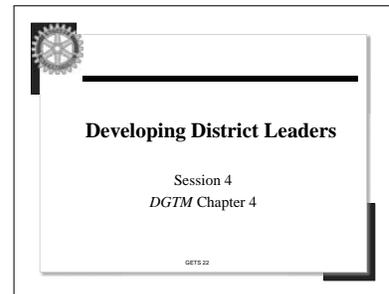
Summary

Training leader's note

— *Encourage participants to use the summary sheet to write down ideas for managing and promoting training seminars in their districts.*

Key points

- Because of the annual turnover of leadership, training is critical to ensuring continuity.
- The development of effective club and district leaders is crucial to the success of each district.
- One of the governor-elect's responsibilities is to train others at the district level.
- Chapter 4 of the *District Governor's Training Manual* lists the training meetings convened by the governor-elect and governor.



 SHOW SLIDE 24
RI Training Seminars

 *Key point*

- The following training seminars are recommended by the RI Board:
 - District team training seminar
 - Presidents-elect training seminar
 - District assembly
 - District leadership seminar
 - District membership seminar
 - District Rotary Foundation seminar



MANAGING TRAINING SEMINARS

(25 MINUTES) _____ TO _____

How many of you have already appointed your district trainer?

For those with new district trainers, how will you help prepare them for their role?

How would you describe the working relationship between the governor-elect and the district trainer?

🗨️ *Key points*

- The governor-elect provides guidance, supervision, and overall direction, and the district trainer implements the program.
- RI sends training materials for all RI Board-recommended leadership development meetings to governors-elect for distribution to the district trainers.

How many of you have training committees in your district?

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

Sample responses

- *Acts as committee chair*
- *Manages training efforts*
- *Conducts training sessions for committee members*

Training leader's notes

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

What will you do to prepare for your district training seminars?

Sample responses

- Set the date.
 - Read materials from RI.
 - Work with the district trainer and other district leaders to coordinate meeting logistics.
-

Training leader's notes

- Ask a volunteer to record the responses to the question below on a flip chart.
 - Encourage participants to write down strategies they will incorporate into their training.
-

Think about past training seminars you've attended. What made them successful?

🗨️ *Key point*

- Governors-elect should incorporate these strategies when possible while planning training meetings.

 REFER TO APPENDIX 17

Leadership Development Training Cycle

Key point

- At its November 2006 meeting, the Board determined that the training cycle should be flexible, so districts are encouraged to combine events or hold them sequentially at their discretion.

How will you modify the recommended training cycle to meet your district's needs?

PROMOTING TRAINING SEMINARS

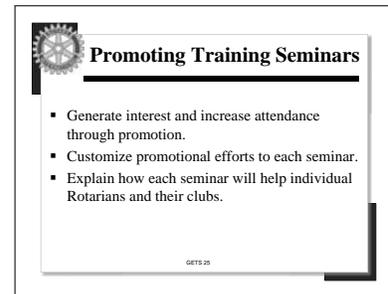
(25 MINUTES) _____ TO _____

 SHOW SLIDE 25

Promoting Training Seminars

Key points

- Once training seminars have been planned, governors-elect should generate interest and increase attendance through promotion.
- Governors-elect can help in these efforts by explaining how the seminars will help individual Rotarians and their clubs.
- Promotional efforts should be tailored to each seminar.



What has inspired you to attend seminars in the past?

How will you promote training seminars?

Sample responses

- *Governor's monthly letter*
- *Governor's club visits*
- *District Web site*
- *Video of past meeting highlights*
- *Personal invitations*

REFER TO HANDOUT

Case Studies: Promoting Training Seminars

Training leader's notes

- *Distribute the case studies to participants. If one of the scenarios is not appropriate to your zone's culture, please remove it from the list.*
 - *Divide participants into groups of no more than five people and assign a scenario to each group.*
 - *Ask each group to discuss the questions from its assigned scenario. Allow five minutes for discussion.*
 - *Ask each group to share its responses.*
-

REVIEW

(5 MINUTES) _____ TO _____

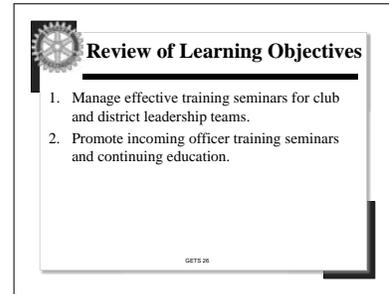
 **SHOW SLIDE 26**

Review of Learning Objectives

Training leader's notes

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

Adjourn



The slide is titled "Review of Learning Objectives" and features a gear icon in the top left corner. It contains two numbered list items: "1. Manage effective training seminars for club and district leadership teams." and "2. Promote incoming officer training seminars and continuing education." The slide number "GETS 26" is visible in the bottom right corner.

Case Studies: Promoting Training Seminars

An important part of your position as governor is to convene and promote training seminars so Rotarians will understand the benefits of attending. The scenarios below address the obstacles you may encounter when promoting a training seminar. Please answer the questions that follow as if you were the governor convening the district team training seminar.

Scenario 1

Two assistant governors have indicated that they don't have time to go to seminars and have declined your invitation to the district team training seminar.

How can you promote the seminar so the assistant governors will attend?

Scenario 2

The membership development committee chair is serving for a third year and feels that additional training is unnecessary given his experience.

How can you convince the committee chair to attend?

Given his experience, how can you involve the committee chair in the seminar?

Scenario 3

The incoming district public relations committee chair has previously held a district leadership position, and he doesn't wish to attend another training seminar.

How can you promote the seminar so the committee chair will attend?

Given his experience, how can you involve the committee chair in the seminar?

Appendix 17

Leadership Development Training Cycle

Incoming Officer Training

Meeting/ Timing	Topics	Convener/ Participants	Materials
Governors-elect Training Seminar (GETS) August — December in conjunction with Rotary zone institutes	<ul style="list-style-type: none"> • Role and responsibilities • Developing and managing a functional district organization • Sustaining and growing Rotary's membership base • Developing effective leaders • The Rotary Foundation • Administration requirements of RI • International Assembly preview 	Convener: RI director or immediate past director Participants: Governors-elect	For trainers: <i>Governors-elect Training Seminar Leaders' Guide</i> For participants: <i>District Governor's Training Manual</i>
International Assembly Before 15 February	<ul style="list-style-type: none"> • Sustaining and growing Rotary's membership base • Successful service projects • The Rotary Foundation • Administration requirements of RI • Annual RI theme and presidential message 	Convener: RI president and president-elect Participants: Governors-elect	For trainers: <i>International Assembly Leaders' Guide</i> For participants: <i>International Assembly Governor-elect Workbook</i> <i>District Governor's Training Manual</i>
District Team Training Seminar February	<ul style="list-style-type: none"> • Presentation of the annual theme • District administration • Role and responsibilities • Working with clubs • Resources • Planning for the year • Communication 	Convener: Governor-elect Participants: Assistant governors, district committee chairs, and district committee members	For trainers: <i>District Team Training Seminar Leaders' Guide (247-EN)</i> For participants: <i>Assistant Governor's Training Manual (244-EN)</i> <i>District Committee Manual (249-EN)</i>
Presidents-elect Training Seminar (PETS) March	<ul style="list-style-type: none"> • Presentation of the annual theme • Role and responsibilities • Goal setting • Selecting and preparing club leaders • Club administration • Membership recruitment and orientation • Successful service projects • The Rotary Foundation • Resources • Planning for the year 	Convener: Governor-elect Participants: Club presidents-elect	For trainers: <i>Presidents-elect Training Seminar Leaders' Guide (243-EN)</i> For participants: <i>Club President's Manual (222-EN)</i>
District Assembly April or May (preferably following PETS)	<ul style="list-style-type: none"> • Roles and responsibilities • Guiding principles: policies and procedures • Selecting and training your team • Resources • Practical application: building a plan • Problem solving 	Convener: Governor-elect Participants: Club leaders and committee chairs	For trainers: <i>District Assembly Leaders' Guide (828-EN)</i> For participants: <i>Club Secretary's Manual (229-EN)</i> , includes a section for the club treasurer <i>Club Committee Manual (226-EN)</i>

Continuing Education

Meeting/ Timing	Topics	Convener/ Participants	Materials
Regional Rotary Foundation Seminar (zone level) September — December (usually as adjunct meeting to Rotary zone institutes)	<ul style="list-style-type: none"> • Foundation programs • Foundation goal setting • District organization: The Rotary Foundation committee • Conducting district Foundation seminars • Fundamental elements of fund development 	Convener: Trustee of The Rotary Foundation Participants: Governors, district Rotary Foundation chairs, and interested Rotarians	For trainers: <i>Regional Rotary Foundation Coordinator's Resource Manual</i> For participants: <i>District Rotary Foundation Seminar Manual (438-EN)</i>
Membership Development Seminar (zone level) July — December	<ul style="list-style-type: none"> • Membership development • Emphases of current RI president's membership development program • Resources • Membership development strategies appropriate to zones/ geographic areas 	Convener: Regional RI membership coordinator Participants: Past, current, and incoming governors, current and incoming district membership development and extension chairs, current and incoming district leaders	For trainers: <i>Regional RI Membership Coordinator Manual</i>
District Leadership Seminar Immediately before or after the district conference	<ul style="list-style-type: none"> • Leadership and motivational techniques • Leadership opportunities • District meetings • Building an international service project • RI and Rotary Foundation programs (elective sessions) 	Convener: Governor Participants: Rotarians who have served as club president or in a club leadership role for three or more years	For trainers: <i>District Leadership Seminar Leaders' Guide (248-EN)</i>
District Membership Seminar August or September	<ul style="list-style-type: none"> • Overview of the importance of membership • Retention • Recruitment • Organizing new clubs • Role and responsibilities • Resources 	Convener: Governor Participants: Club and district leaders whose duties relate to membership, assistant governors, and all interested Rotarians	For trainers: <i>District Membership Seminar Leaders' Guide (242-EN)</i>
District Rotary Foundation Seminar July — November	<ul style="list-style-type: none"> • Programs of The Rotary Foundation • Setting and achieving Foundation goals • Responsibilities of club Foundation committee • Use of District Designated Fund • Others as determined by needs of the district 	Convener: Governor Participants: Club leaders, Rotary Foundation committee members, and other interested Rotarians	For trainers: <i>District Rotary Foundation Seminar Manual (438-EN)</i>

Appendix 18

Summary of Session 4: Developing District Leaders

Resources

<i>Publication</i>	<i>Publication Number</i>
<i>District Assembly Leaders' Guide</i>	828-EN
<i>District Leadership Seminar Leaders' Guide</i>	248-EN
<i>District Membership Seminar Leaders' Guide</i>	242-EN
<i>District Team Training Seminar Leaders' Guide</i>	247-EN
<i>District Training Manual</i>	246-EN
<i>Presidents-elect Training Seminar Leaders' Guide</i>	243-EN

Additional Resources

- Planning Guide for Effective Rotary Clubs*
- District trainer and training committee
- Rotary Training Talk*
- Training section of the RI Web site
- RI Leadership and Education Training Division staff
- Current or past RI training leaders for your region

Leadership Training Ideas to Implement

1.
2.
3.
4.
5.

SESSION 5

Membership Development

(90 minutes)

Learning Objectives

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

1. Develop strategies for sustaining and increasing membership within the district
2. Utilize the resources available from the district, zone, and RI

Materials

Slides

27-52

Appendixes in

District Governor's Training Manual

20. Retention and Recruitment Strategies
21. Public Relations Strategies
22. Summary

Session Outline

Introduction	15 minutes
Membership Trends	10 minutes
Recruitment	15 minutes
Retention	15 minutes
Utilizing Your Membership Resources	25 minutes
Review	10 minutes

Training leader's notes

- *It is recommended that the RRIMC conduct this session.*
 - *This session requires customization of the PowerPoint slides with contact information and regional issues.*
-

INTRODUCTION

(15 MINUTES) _____ TO _____

 **SHOW SLIDE 27**

Introduction

 **SHOW SLIDE 28**

Learning Objectives

 **REFER TO APPENDIX 22**

Summary

Training leader's notes

- *This session combines the presentation on membership development with facilitated discussion.*
- *The key points follow the PowerPoint slides.*
- *Introduce yourself as the regional Rotary International membership coordinator (RRIMC) for participants' districts.*
- *Encourage participants to use the summary sheet to write down questions or comments for the RRIMC to address, as well as ideas they hear throughout the session to incorporate into their district plans.*

 **Key point**

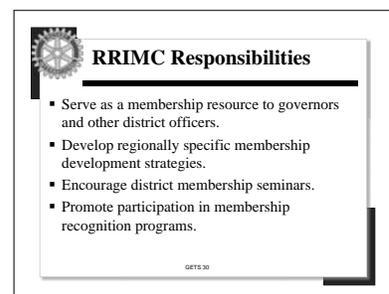
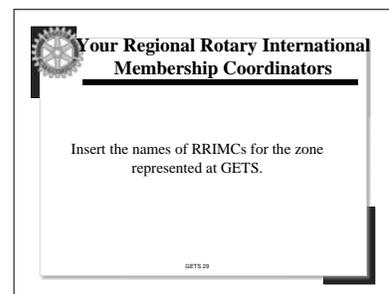
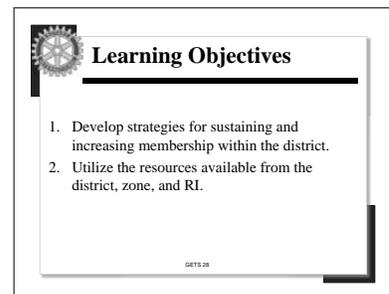
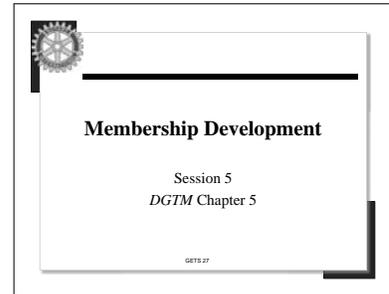
- The regional Rotary International membership coordinator (RRIMC) is an important resource for districts.

 **SHOW SLIDE 29**

Your Regional Rotary International Membership Coordinators

 **SHOW SLIDE 30**

RRIMC Responsibilities



SHOW SLIDE 31
How RRIMCs Can Help

How RRIMCs Can Help

RRIMCs are available to

- Answer membership development and retention questions
- Help develop the district membership seminar
- Speak at membership functions
- Assist small clubs or weak clubs

GETS 31

SHOW SLIDE 32
Zone Membership Team

Zone Membership Team

- List all RRIMCs for the zone represented at GETS.
- List all of the zone coordinators zones represented at GETS.

GETS 32

Who has appointed their district membership committee?

SHOW SLIDE 33
District Membership Committee

District Membership Committee

- Appointees:
 - Rotarians who have demonstrated interest and success in membership development or club extension
 - Preferences to past governors & governors-nominee
- Membership and chair continuity

GETS 33

Key points

- It is important for governors-elect to ensure continuity when appointing their membership committee.
- Terms of two to three years are recommended.

What will your membership responsibilities be?

Sample responses

- *Speaking to clubs about membership retention*
- *Reminding Rotarians to invite people to join*
- *Encouraging club diversity and public awareness*
- *Recognizing clubs for their achievements in membership development*

SHOW SLIDE 34
Elements of Membership Development

Elements of Membership Development

Retention: maintaining membership

Organizing New Clubs

Recruitment: gaining membership

Membership Development & Growth

GETS 34

Key point

- Membership development includes recruiting new club members, retaining current club members, and organizing new clubs.

MEMBERSHIP TRENDS

(10 MINUTES) _____ TO _____

Training leader's note

- *Insert global membership numbers as of 30 June 2007 (available from the RI Web site and RRIMC secure site) into slide 35.*

SHOW SLIDE 35

Global Membership

Key point

- In some regions, the number of new clubs is increasing, but the number of club members is declining.

REFER TO APPENDIX 22

Summary

Training leader's note

- *Encourage all participants to use the summary sheet to record ideas while discussing the following three questions.*



How does this information compare with the membership trends in your district?

What are some specific membership challenges facing clubs in your area?

How could you help clubs address these challenges?

Training leader's notes

- Insert zone membership numbers as of 30 June 2007 into slide 36.
 - Start figures are mailed out in October. If your GETS is held before October, use the start figures provided at the RRIMC training in Evanston.
 - Membership reports are placed on the RRIMC secure site and are also available through Member Access.
-

 **SHOW SLIDE 36**

Regional/Zone Membership

Training leader's notes

- Insert regional data statistics and membership graphs as of 30 June 2007 into slide 37.
 - The number of members, Rotary clubs, charter clubs, and charter members in all Rotary clubs should be represented.
-

 **SHOW SLIDE 37**

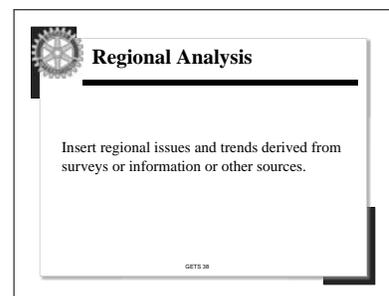
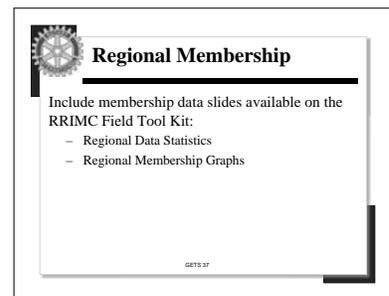
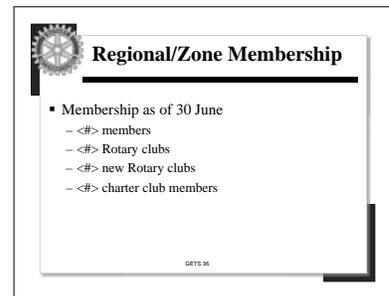
Regional Membership

Training leader's note

- Insert specific regional issues and trends derived from surveys or other sources into slide 38.
-

 **SHOW SLIDE 38**

Regional Analysis



RECRUITMENT

(15 MINUTES) _____ TO _____

Training leader's note

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

What specific recruiting challenges do Rotary clubs face in your district?



REFER TO APPENDIX 20

Retention and Recruitment Strategies

Training leader's notes

- Pair participants with the person sitting next to them.
 - Allow two to three minutes to discuss possible solutions to the challenges listed on the flip chart.
 - Encourage them to use appendix 20 to record possible solutions.
 - Ask each pair to share one strategy.
-

When recruiting, how will you ensure that clubs reflect the business and professional population of the community?

How will you ensure that clubs reflect their community in terms of gender, age, and ethnicity?

How can you encourage clubs to recruit alumni of Rotary International and The Rotary Foundation?

RETENTION

(15 MINUTES) _____ TO _____

What are the clubs in your district doing to retain members?*Sample responses*

- *Immediately involving new members in club activities and committees*
- *Being conscious of competing demands on Rotarians' time*
- *Encouraging family participation at more Rotary events, such as the district conference*
- *Developing activities and service projects that meet community needs and the interests of club members*
- *Training and orienting new members*

🗨️ Key points

- Rotarians who are involved and committed to their clubs are less likely to leave Rotary.
- The Club Leadership Plan offers effective ways to involve members.

How can you use the Club Leadership Plan to help retain members? REFER TO APPENDIX 20

Retention and Recruitment Strategies

 SHOW SLIDE 39

Club Leadership Plan Best Practices



**Club Leadership Plan
Best Practices**

1. Develop long-range goals that address the elements of an effective club.
2. Conduct club assemblies that involve members in the planning process and keep them informed of Rotary activities.
3. Provide for continuity in leadership, including the concept of succession planning, to ensure development of future leaders.
4. Ensure that every member is active in a club project or function.

GR15.39

Training leader's notes

- *Divide the governors-elect into groups of no more than five people and ask them to discuss how the Club Leadership Plan Best Practices listed on slide 39 can help retain members.*
 - *Allow five minutes for discussion.*
 - *Encourage them to use the retention strategy column in appendix 20 to list the practices they would like to implement.*
 - *Ask various groups to report on one best practice.*
-

Key points

- Another way to help retain members is to encourage clubs to use the following retention assessment tools:
 - Demographic Survey Template
 - *Planning Guide for Effective Rotary Clubs*
- The Demographic Survey Template is a tool to help clubs review their membership data.
- The *Planning Guide for Effective Rotary Clubs* helps club presidents-elect establish goals and determine strategies to achieve them as well as track general club trends in membership and club administration.

How can you encourage clubs to use retention assessment tools?

Sample responses

- *Highlight the tools in the monthly newsletter.*
- *Encourage the district membership committee or assistant governor to work with clubs.*

UTILIZING YOUR MEMBERSHIP RESOURCES

(25 MINUTES) _____ TO _____

Key points

- Clubs can use several publications to propose and orient new members.
- Membership Development publications can be ordered from the *RI Catalog* or on the RI Web site, and most can be downloaded for free at www.rotary.org.

SHOW SLIDE 40

Membership Development Publications

SHOW SLIDE 41

Rotary Basics

SHOW SLIDE 42

New Member Bulletin

Key points

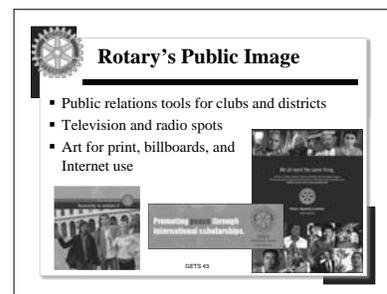
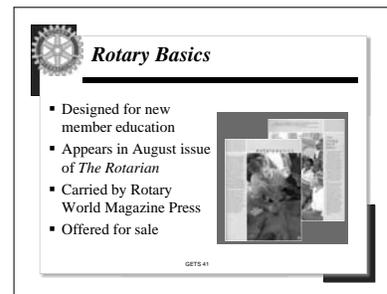
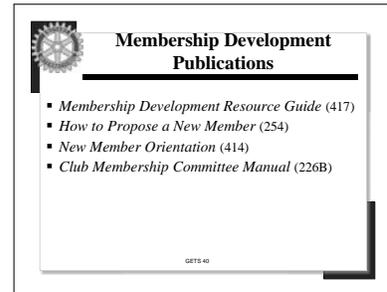
- In addition to membership development publications, RI has other resources for clubs and districts.
- RI membership resources can be used to help clubs promote a positive public image in the community.

SHOW SLIDE 43

Rotary's Public Image

Key points

- Rotary's public image has a significant impact on recruiting and retaining club members.
- Prospective club members are attracted to worthwhile, active organizations that make a difference in their communities.



What public relations strategies can you use to increase membership in your district?

🗨️ Key point

- District public relations and membership committees should work closely together.

📄 REFER TO APPENDIX 21 Public Relations Strategies

Training leader's note

— Encourage participants to write down public relations strategies.

🗨️ SHOW SLIDE 44 Communications Resources

🗨️ Key points

- Communications resources include *The Rotarian* and Rotary World Magazine Press.
- *The Rotarian* reports on Rotary news and subjects related to the interests and involvement of club members.
- Each Rotary World Magazine Press publication has a local editorial perspective and includes required articles and photographs from *The Rotarian* that appeal to international interests.

🗨️ SHOW SLIDE 45 RVM: The Rotarian Video Magazine

Communications Resources

The Rotarian magazine

- Relates the Rotary experience in a meaningful way
- Explores the experiences of grassroots Rotarians

Rotary World Magazine Press

- 30 magazines in 22 languages
- Combined circulation of 715,000 in 133 countries

GETS 44

RVM: The Rotarian Video Magazine

- Documentary-style videos feature compelling stories of Rotarians in action
- Showcase Rotary's work to prospective and current club members

GETS 45

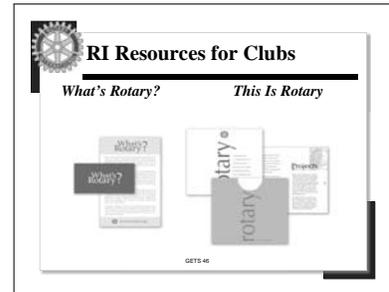
Key points

- RVM offers documentary-style videos that feature compelling stories of Rotarians in action.
- It showcases Rotary’s work to prospective and current club members.

SHOW SLIDE 46
RI Resources for Clubs

Key points

- *What’s Rotary?* is a wallet-size card answering frequently asked questions for non-Rotarians about the organization and scope of Rotary.
- *This Is Rotary* is an illustrated brochure providing a brief overview of Rotary for prospective Rotarians and the public.
- These items are sent to each club president-elect before the presidents-elect training seminar.



SHOW SLIDE 47
Membership Development Online

Key point

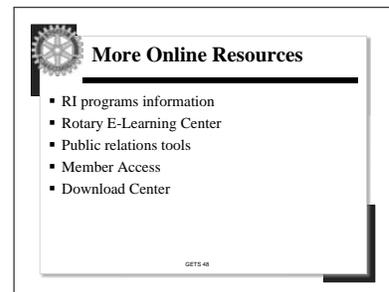
- The Membership Development page of the RI Web site provides resources for governors, district membership committees, and clubs.



SHOW SLIDE 48
More Online Resources

Key point

- The RI Web site has other membership-related resources.



 SHOW SLIDE 49

Club Membership Recognition

 *Key points*

- RI also provides resources to recognize club efforts in membership growth and development.
- The purpose of the recognition programs is to encourage clubs to create long-term strategies and to develop creative solutions and approaches.



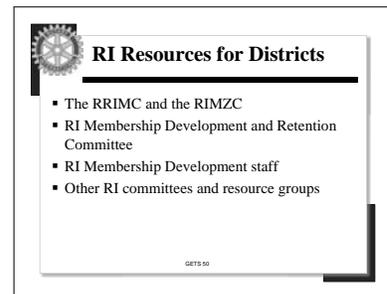
How have you used membership recognition programs?

 SHOW SLIDE 50

RI Resources for Districts

 *Key point*

- Districts can consult with RRIMCs, RI membership zone coordinators, the RI Membership Development and Retention Committee, RI Membership Development staff, and other RI committees and resource groups.



REVIEW

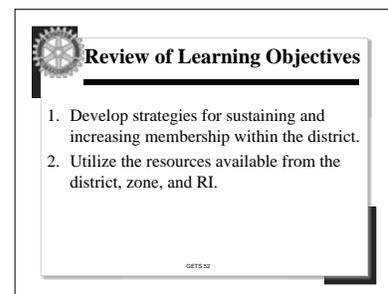
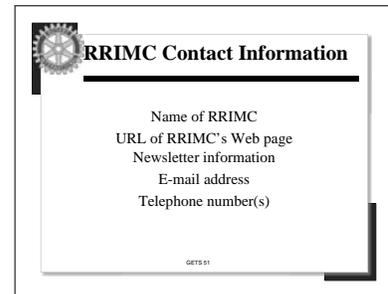
(10 MINUTES) _____ TO _____

Training leader's note— *Insert RRIMC contact information into slide 51.* **SHOW SLIDE 51****RRIMC Contact Information** **Key points**

- RRIMCs are available to support the membership development initiatives of governors.
- Governors are encouraged to contact their RRIMC for membership assistance.

 **SHOW SLIDE 52****Review of Learning Objectives***Training leader's notes*

- *Encourage participants to review the list of membership-related RI publications in the District Governor's Training Manual.*
- *Answer participants' questions.*
- *Review the learning objectives to ensure that all topics were covered sufficiently.*
- *Thank participants.*

Adjourn

Appendix 20

Membership: Retention and Recruitment Strategies

Retention Strategies

1.

2.

3.

4.

5.

Recruitment Strategies

1.

2.

3.

4.

5.

Appendix 21

Membership: Public Relations Strategies

Membership-related Public Relations Strategies

1.
2.
3.
4.
5.

Strategies to Implement

1.
2.
3.
4.
5.

Appendix 22

Summary of Session 5: Membership

Resources

<i>Publication</i>	<i>Publication Number</i>
<i>District Membership Seminar Leaders' Guide</i>	242-EN
<i>How to Propose a New Member</i>	254-EN
<i>New Member Orientation</i>	414-EN
<i>Membership Development Resource Guide</i>	417-EN
<i>Membership Development Booklet</i>	916-EN
<i>RI Membership Development and Extension Award</i>	901-EN

Additional Resources

District membership committee chair
Regional Rotary International membership coordinators (RRIMCs)
Rotary International membership zone coordinators (RIMZCs)
Assistant governors
Club and District Support representative

Questions for RRIMC

1.
2.
3.
4.

Answers

1.
2.
3.
4.

RRIMC Ideas to Incorporate into District Plan

1.
2.
3.
4.

SESSION 6A

Rotary Foundation Fund Development and *SHARE*

(90 minutes)

Learning Objectives

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

1. Understand their Foundation resources
2. Understand their fund development and *SHARE* responsibilities
3. Develop their district and zone teams to fulfill fundraising duties and goals

Materials

Slides

53-74

Appendix in

District Governor's Training Manual

26. Summary

Session Outline

Introduction	10 minutes
Your Foundation Resources	10 minutes
Understanding <i>SHARE</i>	20 minutes
Fundraising	15 minutes
Developing Your Team to Meet Fundraising Goals	25 minutes
Review	10 minutes

Training leader's notes

- *It is recommended that the RRFC conduct this session.*
 - *This session requires customization of the PowerPoint slides with contact information and regional issues.*
-

INTRODUCTION

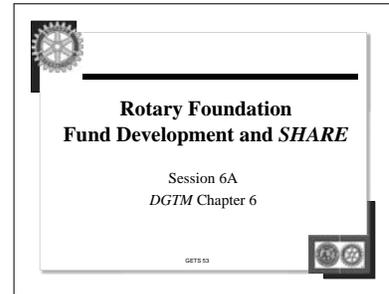
(10 MINUTES) _____ TO _____

 **SHOW SLIDE 53**

Introduction

Training leader's notes

- *This session combines the presentation on Fund Development and SHARE with facilitated discussion.*
- *The key points follow the PowerPoint slides.*
- *Introduce yourself as the regional Rotary Foundation coordinator (RRFC) for participants' districts.*



 **SHOW SLIDE 54**

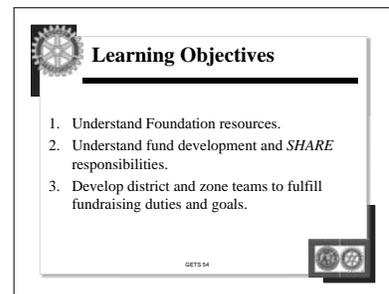
Learning Objectives

 **REFER TO APPENDIX 26**

Summary

Training leader's note

- *Encourage participants to use the summary sheet to write down questions or comments for the RRFC to address, as well as ideas they hear throughout the session to incorporate into their district plans.*



 **Key point**

- The next two 90-minute sessions focus on The Rotary Foundation.

YOUR FOUNDATION RESOURCES

(10 MINUTES) _____ TO _____

Key point

- The Rotary Foundation can be complex, so governors-elect should review what resources are available to them.

SHOW SLIDE 55

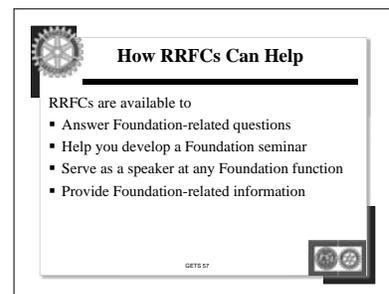
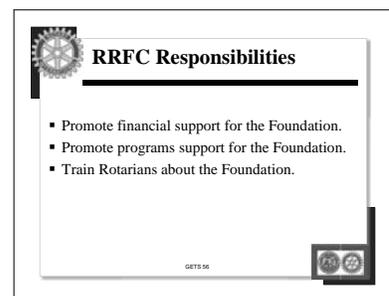
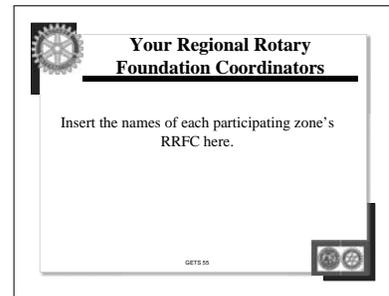
Your Regional Rotary Foundation Coordinators

SHOW SLIDE 56

RRFC Responsibilities

SHOW SLIDE 57

How RRFCs Can Help



Training leader's notes

- Ask a volunteer to record the responses to the question below on a flip chart.
- Save the list for an activity at the end of the session.

What other resources can help you with your Foundation responsibilities?

Sample responses

- District Rotary Foundation chair and subchairs
- Foundation staff
- The RI Web site
- Assistant governors

 SHOW SLIDE 58

Your Zone Team

 Key points

- Annual Programs Fund strategic advisers work with the RRFC to help reach annual giving goals through Every Rotarian, Every Year.
- Major Gifts advisers help identify club members who are capable of giving a substantial gift to The Rotary Foundation.
- Rotary Foundation alumni coordinators help districts connect with Foundation alumni, including former Ambassadorial Scholars, Group Study Exchange team members and leaders, and recipients of Rotary Grants for University Teachers, Volunteer Service Grants (formerly Individual Grants), and Carl P. Miller Discovery Grants (a retired program).



Your Zone Team

- Regional Rotary Foundation Coordinator (RRFC)
- Annual Programs Fund strategic advisers
- Major Gifts advisers
- Rotary Foundation alumni coordinator (RFAC)

[FILL IN APPROPRIATE NAMES]

GET 58



UNDERSTANDING *SHARE*

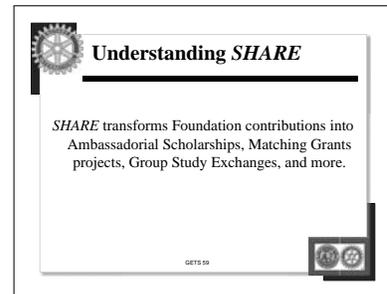
(20 MINUTES) _____ TO _____

 SHOW SLIDE 59

Understanding *SHARE*

 Key point

- *SHARE* is a unique funding system that gives Rotary districts control over how their contributions are spent.



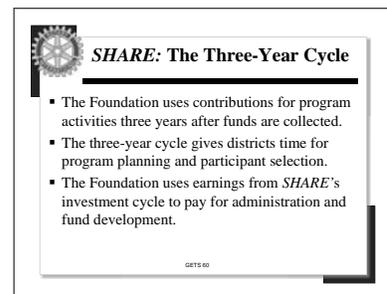
Would someone please describe *SHARE* to the group?

 SHOW SLIDE 60

SHARE: The Three-Year Cycle

 Key points

- The Foundation uses contributions for program activities three years after funds are collected.
- The three-year cycle gives districts time for program planning and participant selection.
- The Foundation uses earnings from *SHARE*'s investment cycle to pay for administration and fund development

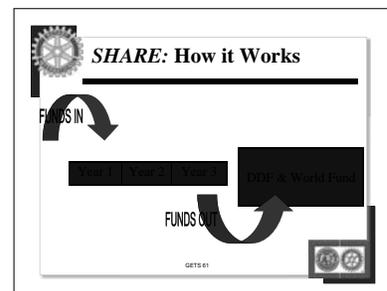


 SHOW SLIDE 61

SHARE: How it works

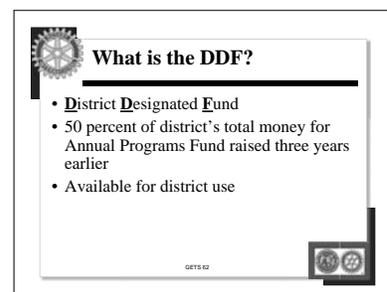
 Key points

- Funds raised in 2006-07 are used in 2009-10.
- Funds raised in 2008-09 are used in 2011-12.



 SHOW SLIDE 62

What is the DDF?



🗨️ Key point

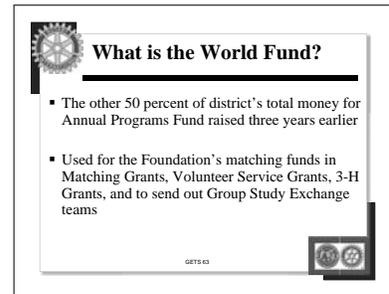
- The District Designated Fund amounts to 50 percent of the money the district raised three years earlier for the Annual Programs Fund and is available for district use.

🗨️ SHOW SLIDE 63

What is the World Fund?

🗨️ Key points

- The World Fund accounts for the other 50 percent of the district's total Annual Programs Funds raised three years earlier.
- It's used for the Foundation's matching funds in Matching Grants, Volunteer Service Grants, 3-H Grants, and to send out Group Study Exchange teams.

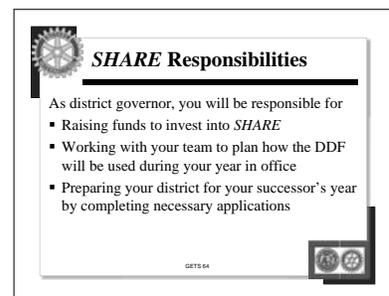


🗨️ SHOW SLIDE 64

SHARE Responsibilities

🗨️ Key point

- District governors are responsible for raising funds to invest into *SHARE*, working with their team to plan how DDF money will be used during their year in office, and preparing their district for their successor's year by completing the necessary applications.



What are some of your other *SHARE* responsibilities?

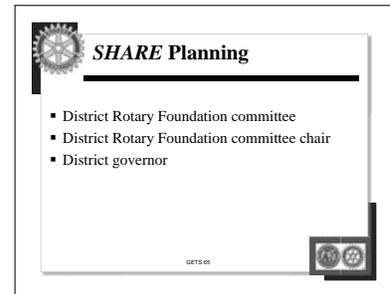
Sample responses

- *Working with the district Rotary Foundation committee*
- *Appointing a district Rotary Foundation committee chair, if necessary, or working closely with the current chair*
- *Ensuring that all available money in the District Designated Fund is allocated during your year as governor*

 SHOW SLIDE 65
SHARE Planning

 Key points

- The district Foundation committee, which decides how best to use the DDF, is key to the success of *SHARE*.
- The district Rotary Foundation committee chair is responsible for signing off on *SHARE* DDF use on behalf of the entire committee.
- The district governor is integral to the decision-making process and is an ex officio member of the district Rotary Foundation committee.



How does your district involve clubs in the allocation of the DDF?

How will you work with your district's Foundation committee?

FUNDRAISING

(15 MINUTES) _____ TO _____

Key points

- The first step of the *SHARE* system is raising funds.
- Governors are responsible for raising funds that will be used by their district in future years.

What are your fundraising responsibilities?

Sample responses

- *Work with clubs to set fundraising goals.*
- *Work with the district Rotary Foundation committee to plan the use of the District Designated Fund.*
- *Promote Every Rotarian, Every Year at club visits.*
- *Promote stewardship of Rotary Foundation funds.*
- *Express appreciation for contributions made by clubs and individuals.*

SHOW SLIDE 66

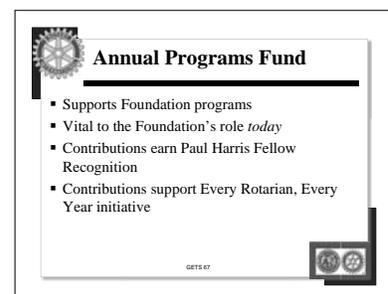
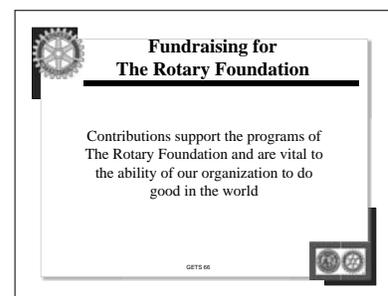
Fundraising for The Rotary Foundation

Key points

- A core responsibility of the governor is to raise money for The Rotary Foundation.
- Contributions support educational and humanitarian programs.
- Clubs and districts can support The Rotary Foundation through the Annual Programs Fund and the Permanent Fund.

SHOW SLIDE 67

Annual Programs Fund



Key points

- The Annual Programs Fund supports Foundation programs such as Matching Grants, District Simplified Grants, Health, Hunger and Humanity Grants, Ambassadorial Scholarships, Group Study Exchanges, and Rotary Centers for International Studies in peace and conflict resolution.
- Contributors to the Annual Programs Fund are eligible for Paul Harris Fellow Recognition.
- Every Rotarian, Every Year (EREY) is a commitment to making the world a better place.
- The goal of EREY is for every Rotarian to contribute at least US\$100 to the Annual Programs Fund every year.

What are clubs in your district doing to support Every Rotarian, Every Year?

How many of you have clubs in your district that do not contribute to The Rotary Foundation?

How will you encourage these clubs to start giving?

Key point

- Clubs and districts can also support the Foundation through the Permanent Fund.

 SHOW SLIDE 68
Permanent Fund



Permanent Fund

- Contributions support long-term sustainability of the Foundation.
- It supports Foundation programs.
- Contributors include Benefactors and Bequest Society members.
- It's key to the Foundation's role in the future.



🗝️ *Key points*

- Whereas contributions to the Annual Programs Fund provide the necessary funding to operate Foundation programs today, gifts to the Permanent Fund ensure that the Foundation addresses the world's greatest needs for generations to come.
- Gifts to the Permanent Fund are held in perpetuity as part of an endowment.
- These gifts are professionally invested, and only a portion of Permanent Fund earnings are spent each year on programs.
- The Permanent Fund can be supported by Rotarians through bequests and life income agreements.

DEVELOPING YOUR TEAM TO MEET FUNDRAISING GOALS

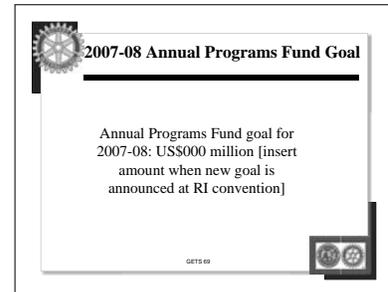
(25 MINUTES) _____ TO _____

SHOW SLIDE 69

2007-08 Annual Programs Fund Goal

Key points

- The overall goal for 2007-08 is to reach [insert amount when goal is announced]
- Individual Rotary clubs are asked to set their own goals in support of the worldwide goal.
- Once clubs have set their Foundation goals, they become a promise to the Trustees.
- Governors are responsible for encouraging and helping clubs to achieve their goals.
- In addition to supporting club goals, governors need to set goals for their district.
- Goal setting is key to promoting clubs' sense of ownership and measuring progress toward The Rotary Foundation's overall fundraising goals.

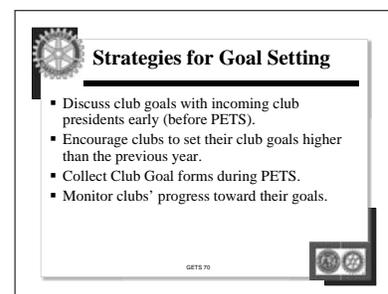


SHOW SLIDE 70

Strategies for Goal Setting

Key point

- District governors, along with their district leadership team, should work with clubs throughout the year on goal setting and achievement.



How will you monitor clubs' progress toward goals?

What else can you do to reach your Rotary Foundation annual giving goal?

Sample responses

- Study clubs' past giving.
- Ask every member to participate.
- Ask major donors to match small donations.

Key point

- Now that Foundation resources and funds have been discussed, it's important to explore specifically how governors will accomplish fundraising goals.

SHOW SLIDE 71

Working with Your Team

Training leader's notes

- Divide participants into groups of no more than five people, and assign one of the questions on the slide to each group.
- Ask each group to assign one person to present the group's ideas.
- Allow each group 10 minutes to discuss its question.
- Ask groups to refer to the Foundation resources listed on the flip chart earlier in the session.
- Ask each group to spend about two minutes presenting its ideas to the rest of the participants.



Working with Your Team

- Who will you work with to set and achieve Foundation goals for your district?
- Who will you work with to increase contributions to the Annual Programs Fund?
- Who will you work with to identify Rotarians capable of donating major gifts to the Permanent fund?
- Who will you work with to monitor your district's progress toward goals?



Who will you work with to set and achieve Foundation goals for your district?

Who will you work with to increase contributions to the Annual Programs Fund?

Who will you work with to increase contributions to the Permanent Fund?

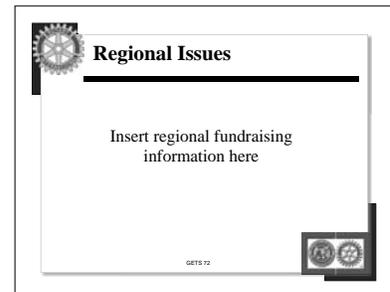
Who will you work with to monitor your district's progress toward goals?

Training leader's note

— *Insert regional fundraising information or concerns in slide 72.*

 **SHOW SLIDE 72**

Regional Issues



REVIEW

(10 MINUTES) _____ TO _____

 SHOW SLIDE 73

Resources

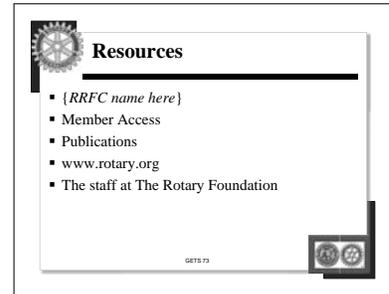
 SHOW SLIDE 74

Review of Learning Objectives

Training leader's notes

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

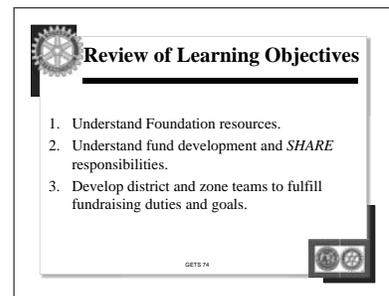
Adjourn



Resources

- {RRFC name here}
- Member Access
- Publications
- www.rotary.org
- The staff at The Rotary Foundation

GETS 73



Review of Learning Objectives

1. Understand Foundation resources.
2. Understand fund development and *SHARE* responsibilities.
3. Develop district and zone teams to fulfill fundraising duties and goals.

GETS 74

Appendix 26

Summary of Session 6A: Fund Development and *SHARE*

Resources

<i>Publication</i>	<i>Publication Number</i>
<i>The Rotary Foundation Quick Reference Guide</i>	219-EN
<i>Two Needs, Two Ways of Giving</i>	173-EN
<i>TRF Global Contribution Form</i>	123-EN
<i>Every Rotarian, Every Year Brochure</i>	957-EN
<i>Securing the Future — Your Bequest to The Rotary Foundation</i>	183-EN

Additional Resources

Trustees of The Rotary Foundation
Regional Rotary Foundation coordinator (RRFC)
Major Gifts advisers
Annual Programs Fund strategic advisers
District Rotary Foundation committee chair
RI Web site
Rotary Foundation Fund Development Division staff

Questions for RRFC

1.
2.
3.

Answers

1.
2.
3.

RRFC Ideas to Incorporate into District Plan

1.
2.
3.

SESSION 6B

Rotary Foundation Programs

(90 minutes)

Learning Objectives

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

1. Understand the programs of The Rotary Foundation
2. Work with their district and zone teams to fulfill Foundation program duties

Materials

Slides

75-105

Appendixes in

District Governor's Training Manual

24. Rotary Foundation Programs
25. Summary

Session Outline

Introduction	10 minutes
Educational Programs	20 minutes
Humanitarian Grants Program	15 minutes
PolioPlus	10 minutes
Working with Your Foundation Team	30 minutes
Review	5 minutes

Training leader's notes

- *It is recommended that the RRFC conduct this session.*
 - *This session requires customization of PowerPoint slides with contact information and regional issues.*
-

INTRODUCTION

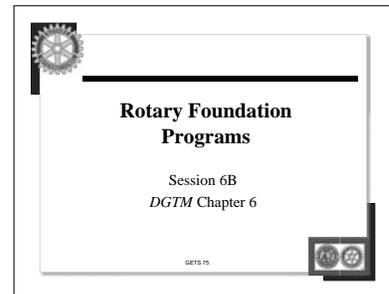
(10 MINUTES) _____ TO _____

SHOW SLIDE 75

Introduction

Training leader's notes

- This session combines the presentation on The Rotary Foundation Programs with facilitated discussion.
- The key points follow the slides on the accompanying PowerPoint presentation.
- Introduce yourself as the regional Rotary Foundation coordinator for participants' districts.



SHOW SLIDE 76

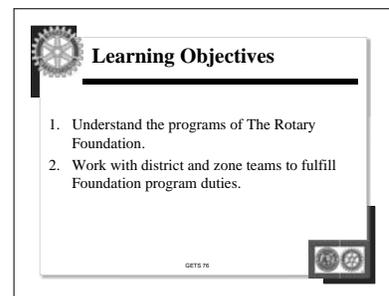
Learning Objectives

REFER TO APPENDIX 25

Summary

Training leader's notes

- Encourage participants to use the summary sheet to write down questions or comments for the RRFC to address, as well as ideas they hear throughout the session to incorporate into their district plans.
- Explain to participants that the session will provide basic information on Rotary Foundation programs, with an activity at the end that will allow them to explore their program responsibilities in detail.



Key points

- The Rotary Foundation has many programs in which districts can participate.
- It is the governor's responsibility to support these programs.

SHOW SLIDE 77
Mission Statement

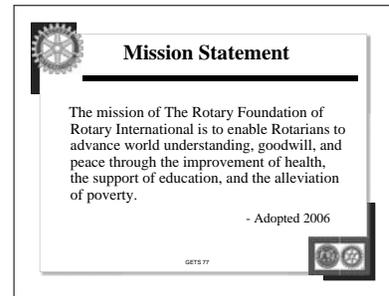
SHOW SLIDE 78
Motto

What do the mission statement and motto mean to you?

SHOW SLIDE 79
Foundation Programs

Key point

- The Educational, Humanitarian Grants, and PolioPlus programs support the mission of The Rotary Foundation and are equally important to the Foundation's success.



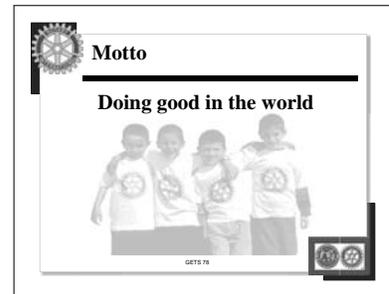
Mission Statement

The mission of The Rotary Foundation of Rotary International is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

- Adopted 2006

GETS 77

This slide features the Rotary logo in the top left corner and a small inset of the logo in the bottom right corner. The text is centered on a white background with a thin black border.

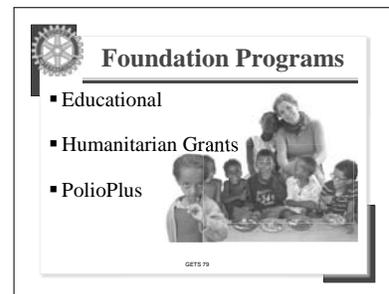


Motto

Doing good in the world

GETS 78

This slide features the Rotary logo in the top left corner and a small inset of the logo in the bottom right corner. Below the motto, there is a photograph of four children wearing white t-shirts with the Rotary logo. The text is centered on a white background with a thin black border.



Foundation Programs

- Educational
- Humanitarian Grants
- PolioPlus

GETS 79

This slide features the Rotary logo in the top left corner and a small inset of the logo in the bottom right corner. Below the list, there is a photograph of a woman and several children sitting around a table. The text is centered on a white background with a thin black border.

EDUCATIONAL PROGRAMS

(20 MINUTES) _____ TO _____

 SHOW SLIDE 80

Educational Programs

What experience do you have in working with some of these programs?

 SHOW SLIDE 81

Ambassadorial Scholarships

 Key points

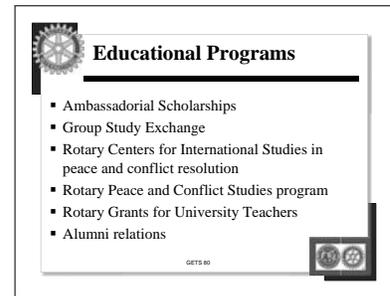
- Ambassadorial Scholarships are designed for students to study abroad and serve as ambassadors of goodwill.
- There are three types of scholarships available: academic-year, multiyear, and cultural.

 SHOW SLIDE 82

Scholarships Fund Pool for Low-Income Countries

 Key points

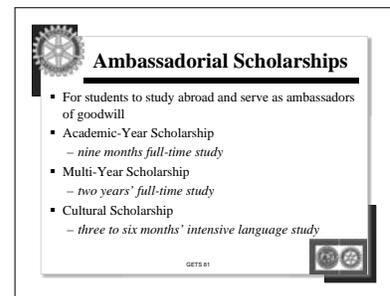
- The Scholarships Fund Pool for Low-Income Countries allows districts to provide study opportunities to scholars from low-income districts.
- Increasing the educational opportunities for scholars from low-income countries is a challenge because many low-income districts are unable to allocate sufficient funds to sponsor scholars.
- Scholars from low-income countries compete on a worldwide level for academic-year or cultural scholarships.
- Scholarships are funded by DDF donations.
- The number of scholarships issued each year depends on the amount of DDF donations.



Educational Programs

- Ambassadorial Scholarships
- Group Study Exchange
- Rotary Centers for International Studies in peace and conflict resolution
- Rotary Peace and Conflict Studies program
- Rotary Grants for University Teachers
- Alumni relations

GETS 80



Ambassadorial Scholarships

- For students to study abroad and serve as ambassadors of goodwill
- Academic-Year Scholarship
 - nine months full-time study
- Multi-Year Scholarship
 - two years' full-time study
- Cultural Scholarship
 - three to six months' intensive language study

GETS 81



Scholarships Fund Pool for Low-Income Countries

Ambassadorial Scholarships awarded to students from low-income countries each year

GETS 82

 SHOW SLIDE 83

Recent Changes in Ambassadorial Scholarships

 Key points

- As of 2008-09, the Foundation will no longer credit funds back to districts for scholars who travel for less than the *SHARE* District Designated Fund amount.
- This change will save the Foundation considerable time and effort in accounting for the use of the DDF.
- Flat grants will be awarded for academic-year, multi-year, and three- or six-month cultural scholarships.

 SHOW SLIDE 84

Group Study Exchange

 Key point

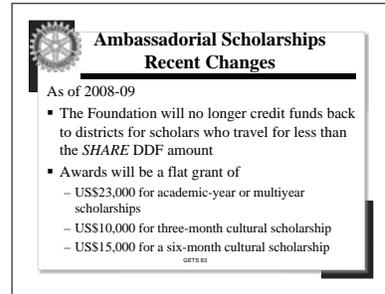
- To improve the quality and planning of the host itinerary, Group Study Exchange teams will not be allowed to travel until the host district has submitted its complete itinerary and the team has approved the content.

 SHOW SLIDE 85

Rotary World Peace Fellowships

 Key points

- The Rotary World Peace Fellowship is a two-year master's degree program in fields related to peace and conflict resolution.
- Through the Rotary Centers for International Studies in peace and conflict resolution, it promotes advanced knowledge and world understanding among potential leaders.
- It also promotes greater tolerance and cooperation among peoples.

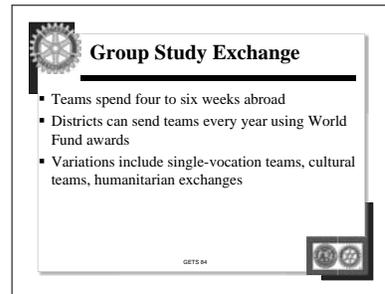


Ambassadorial Scholarships
Recent Changes

As of 2008-09

- The Foundation will no longer credit funds back to districts for scholars who travel for less than the *SHARE* DDF amount
- Awards will be a flat grant of
 - US\$23,000 for academic-year or multiyear scholarships
 - US\$10,000 for three-month cultural scholarship
 - US\$15,000 for a six-month cultural scholarship

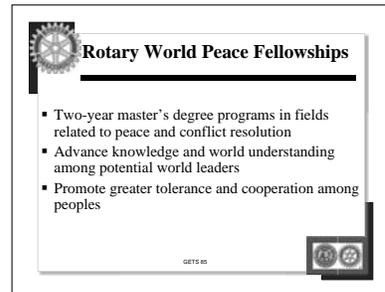
GETS 83



Group Study Exchange

- Teams spend four to six weeks abroad
- Districts can send teams every year using World Fund awards
- Variations include single-vocation teams, cultural teams, humanitarian exchanges

GETS 84



Rotary World Peace Fellowships

- Two-year master's degree programs in fields related to peace and conflict resolution
- Advance knowledge and world understanding among potential world leaders
- Promote greater tolerance and cooperation among peoples

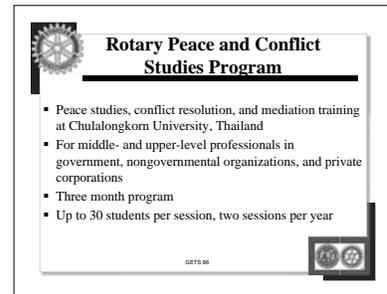
GETS 85

 SHOW SLIDE 86

Rotary Peace and Conflict Studies Program

 Key points

- The program started in July 2006 and is located at Chulalongkorn University in Bangkok, Thailand.
- It is a concentrated three-month program aimed at middle- to upper-level professionals in government, nongovernmental organizations, and private corporations.
- Up to 30 students are accepted to each session, and two sessions are held each year.



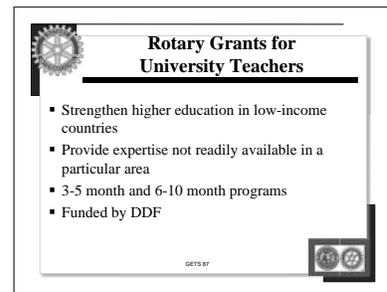
How many of your districts have sent participants to this program?

 SHOW SLIDE 87

Rotary Grants for University Teachers

 Key points

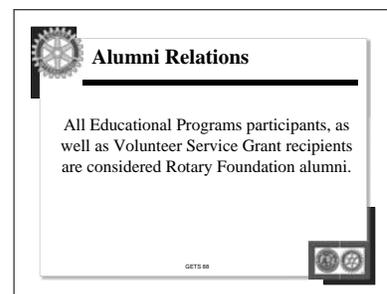
- Rotary Grants for University Teachers are designed to strengthen higher education in low-income countries.
- Two types of grants are available: 3 to 5 months and 6 to 10 months.
- The grants are funded by the DDF.



How can you promote these grants in your district?

 SHOW SLIDE 88

Alumni Relations



Why are alumni important to The Rotary Foundation?

Key points

- Alumni can be an important element in membership development, program promotion, and fundraising for The Rotary Foundation.
- They can also be inspirational speakers for the Foundation.
- Governors should make sure districts have an active alumni subcommittee working to keep former program participants connected to Rotary.

How can you help your district's alumni connect with Rotary?

What questions do you have about Educational Programs?

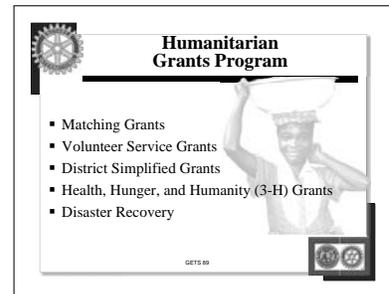
HUMANITARIAN GRANTS PROGRAM

(15 MINUTES) _____ TO _____

Key point

- The Rotary Foundation also offers the Humanitarian Grants Program.

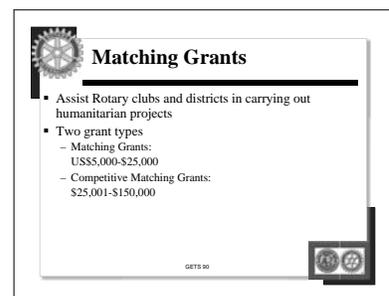
SHOW SLIDE 89 Humanitarian Grants Program



SHOW SLIDE 90 Matching Grants

Key points

- Matching Grants assist Rotary clubs and districts in carrying out humanitarian projects.
- Two grant types are available: Matching Grants, which range from US\$5,000 to \$25,000, and competitive Matching Grants, which range from \$25,001 to \$150,000.



SHOW SLIDE 91 Guidelines for Matching Grants

Key points

- Projects must involve active Rotarian participation.
- Grants must address humanitarian needs.
- All grants must adhere to the terms and conditions of Matching Grants.
- Progress reports are due every 12 months.



SHOW SLIDE 92 Volunteer Service Grants



Key points

- Volunteer Service Grants support travel to plan projects and provide direct service.
- Grants are available to qualified Rotarians and spouses of Rotarians.
- Flat grants of US\$3,000 are available to individuals, and flat grants of \$6,000 are available to teams of up to five members.
- Applications should be received three months before departure and be approved two months before departure.
- Reports are due within two months of project completion.

SHOW SLIDE 93

Volunteer Service Grant Eligibility

Key point

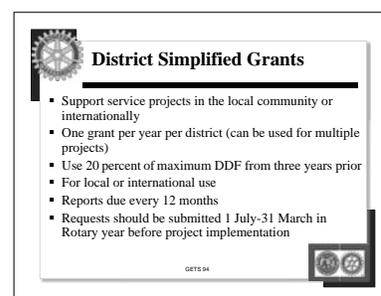
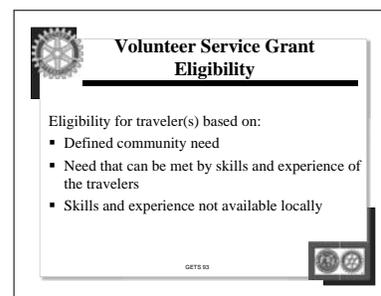
- Volunteer Service Grant applicants must be able to
 - Define a community need
 - Demonstrate a need that can be met by skills and experience of the travelers
 - Provide skills and experience not available locally

SHOW SLIDE 94

District Simplified Grants

Key points

- District Simplified Grants support service projects in the local community or internationally.
- One grant per year per district is awarded and can be used for multiple projects.
- Grants use a maximum of 20 percent of the DDF from three years prior.
- Requests should be submitted 1 July-31 March in the Rotary year before project implementation.



 SHOW SLIDE 95

District Simplified Grants Criteria

 Key points

- For grants of over \$25,000, payments are made in installments based on a spending plan.
- Districts must provide progress reports delineating the expenditures before additional installments are issued.
- A maximum of two paid open District Simplified Grants are allowed at any time.
- Before receiving funds for a second open grant, districts must spend 50 percent of the first open grant.

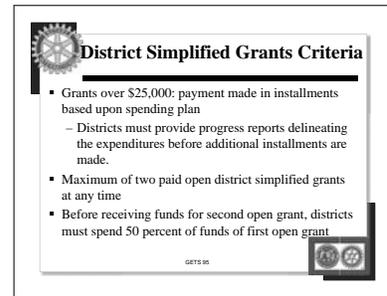
 SHOW SLIDE 96

3-H Grants

 Key points

- Health, Hunger and Humanity (3-H) Grants fund large international long-term, self-help, and grassroots development projects.
- Projects must be self-sustaining after funds are spent.
- Sponsors must have successfully worked together on a Matching Grant within five years of submitting their 3-H application to be eligible for consideration.
- Sponsors must contribute a minimum of 10 percent toward the award.
- They require more Foundation oversight because they are larger and more complex than Matching Grants.

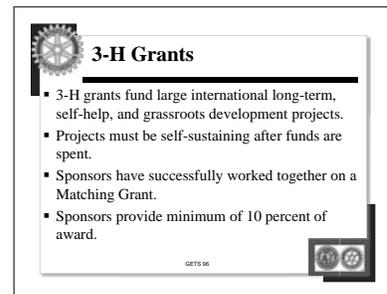
How can you encourage successful participation in the Humanitarian Grants Program?



District Simplified Grants Criteria

- Grants over \$25,000; payment made in installments based upon spending plan
 - Districts must provide progress reports delineating the expenditures before additional installments are made.
- Maximum of two paid open district simplified grants at any time
- Before receiving funds for second open grant, districts must spend 50 percent of funds of first open grant

GETS 95



3-H Grants

- 3-H grants fund large international long-term, self-help, and grassroots development projects.
- Projects must be self-sustaining after funds are spent.
- Sponsors have successfully worked together on a Matching Grant.
- Sponsors provide minimum of 10 percent of award.

GETS 96

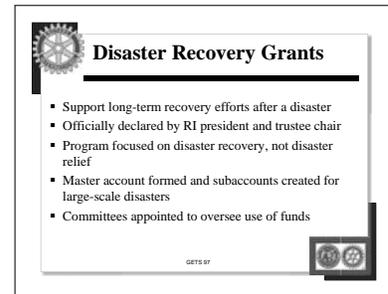
 SHOW SLIDE 97

Disaster Recovery

 Key points

- The Humanitarian Grants Program also provides grants for disaster recovery.
- Disaster Recovery Grants support long-term recovery efforts following a large-scale disaster.
- The program is focused on disaster recovery, not disaster relief.
- A master account is formed, and subaccounts are created for specific disasters.
- Committees are appointed to oversee the use of funds.

How will you ensure the proper stewardship of Foundation funds in your district?



POLIOPLUS

(10 MINUTES) _____ TO _____

SHOW SLIDE 98

PolioPlus

Key points

- PolioPlus is the corporate program of Rotary.
- It began with a 3-H project to immunize all the children in the Philippines in the early 1980s, which led Rotary to engage in a worldwide effort to eradicate polio everywhere.
- In over 200 countries and geographical areas, 20 million volunteers have immunized two billion children.

SHOW SLIDE 99

Global Polio Eradication Initiative

Key point

- Rotary works with international partners to eradicate polio.

Training leader's note

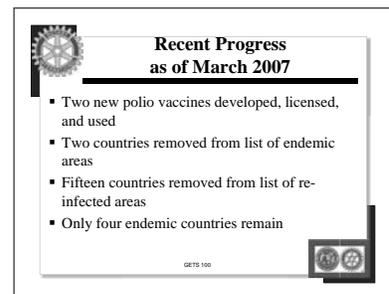
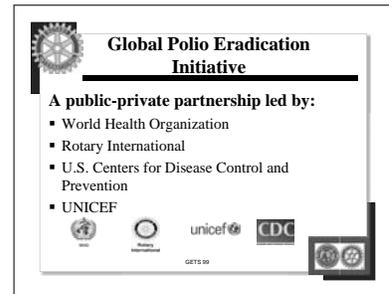
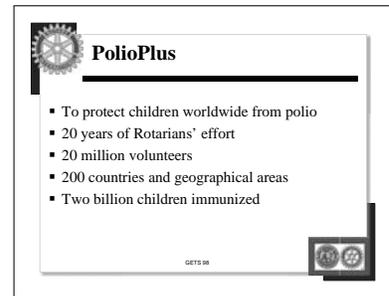
— *Please check the most recent progress on www.rotary.org for the information on slide 100.*

SHOW SLIDE 100

Recent Progress (as of March 2007)

Key points

- Two new polio vaccines were developed and used to help control polio cases imported from Nigeria.
- Egypt and Niger were removed from the list of polio-endemic countries.



SHOW SLIDE 101**Polio Endemic Countries in 2007****Key point**

- The wild poliovirus is endemic in only four countries: Afghanistan, India, Nigeria, and Pakistan.

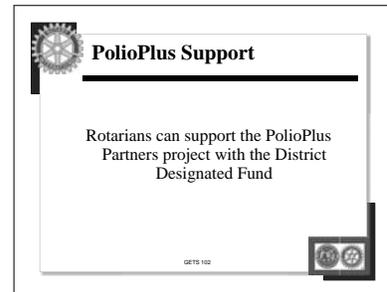
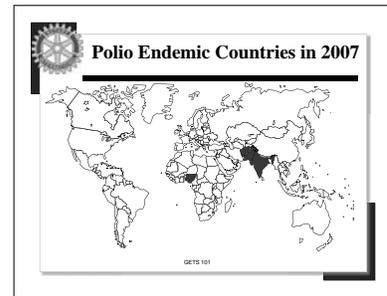
SHOW SLIDE 102**PolioPlus Support***Training leader's notes*

- *Remind participants that there are crucial needs to be met through PolioPlus Partners.*
- *Encourage participants to work with their district Rotary Foundation coordinators to donate unused portions of the DDF to PolioPlus Partners.*

How can you encourage your clubs to continue to support the goal of polio eradication?

Sample responses

- *Publicly highlight the role of Rotary International.*
- *Participate in National Immunization Days.*
- *Participate in PolioPlus Partners.*
- *Publicize eradication efforts.*

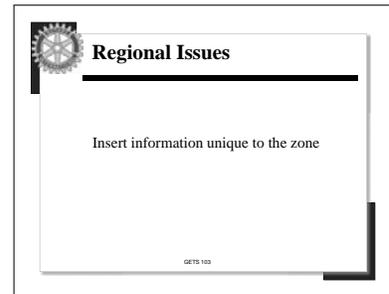


Training leader's note

— *Insert regional information about Foundation programs in slide 103.*

 **SHOW SLIDE 103**

Regional Issues



WORKING WITH YOUR FOUNDATION TEAM

(30 MINUTES) _____ TO _____

Key points

- One of the governor's main responsibilities is to support Foundation programs through participation and financial contributions.
- Governors should work with the zone and district Foundation teams to fulfill their Foundation program duties.



REFER TO APPENDIX 24

Rotary Foundation Programs

Training leader's notes

- *Divide participants into groups of no more than five people.*
 - *Ask them to refer to appendix 24 in the District Governor's Training Manual.*
 - *Assign each group one of the following three categories: Educational Programs, Humanitarian Grants Program, PolioPlus.*
 - *Ask group members to review the governor-elect's and governor's responsibilities and to determine how they can work with their district and zone teams to help support these programs.*
 - *Ask participants to use a notepad to take notes.*
 - *Allow 15 minutes for discussion.*
 - *Ask a representative from each group to share participants' responses.*
-

REVIEW

(5 MINUTES) _____ TO _____

 SHOW SLIDE 104

Resources

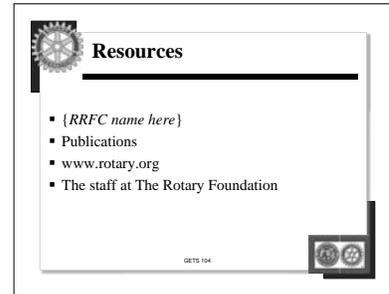
 SHOW SLIDE 105

Review Learning Objectives

Training leader's notes

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

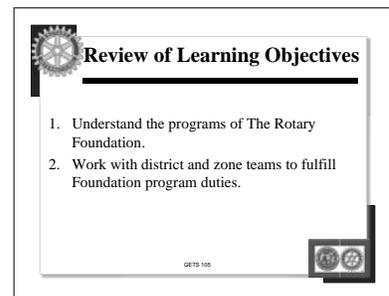
Adjourn



Resources

- {RRFC name here}
- Publications
- www.rotary.org
- The staff at The Rotary Foundation

GETS 104

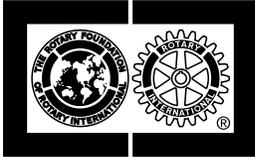


Review of Learning Objectives

1. Understand the programs of The Rotary Foundation.
2. Work with district and zone teams to fulfill Foundation program duties.

GETS 105

Appendix 24



Rotary Foundation Programs

The Rotary Foundation's programs and your responsibilities for each are explained below. Available resources for each program are also listed.

Humanitarian Grants Program

As governor, you are responsible for all Rotary Foundation grant activity in your district. This responsibility includes:

- Visiting current grant-funded projects
- Helping identify, solve, or prevent misuse of Foundation funds or program problems
- Visiting past project sites to assess project outcomes

District Simplified Grants — Grants that allow Rotary districts to support short-term, humanitarian projects that benefit the community. Districts can request up to 20 percent of their District Designated Fund (DDF) for a grant to support local or international projects.

Volunteer Service Grants (formerly Individual Grants) — Travel subsidy for individuals or small groups (two to five people) for qualified international humanitarian service in Rotary countries for up to 60 days. Funding is provided to plan future humanitarian projects or provide direct service to a benefiting community.

Matching Grants — Match to contributions raised by Rotary clubs and districts for international service projects involving Rotary clubs or districts in two or more countries. Frequently, these are World Community Service (WCS) projects.

Health, Hunger and Humanity (3-H) Grants — Award to fund long-term, self-help, and grassroots development projects that are too large for one club or district to implement on their own. Projects must be self-sustaining after the 3-H Grant funds have been spent. All projects must involve Rotary clubs and districts in at least two different countries with a significant number of Rotarians actively participating in the project.

Blane Community Immunization Grants (USA only) — Matched award of up to \$1,000 to Rotary clubs in the United States to help improve immunization levels in their communities.

Resources

- *The Guide to Matching Grants (144-EN)* — Comprehensive guidelines for applying for and carrying out humanitarian grant projects.
- District grants subcommittee — Responsible for assisting with and reviewing all humanitarian grant activity for clubs and the district.

Educational Programs

As governor-elect, you have the following Educational Programs responsibilities:

- Serving on the Group Study Exchange and the Rotary World Peace Fellow selection committees
- Endorsing applications for the candidates selected by your district for the following year
- Appointing host counselors for Ambassadorial Scholars assigned to study in your district the following year

As governor, you have the following responsibilities:

- Serving on the Group Study Exchange and the Rotary World Peace Fellow selection committees
- Involving inbound, outbound, and returning Ambassadorial Scholars and Rotary World Peace Fellows in district and regional events, including your district conference program

Ambassadorial Scholarships — Program to further international understanding and friendly relations among people of different countries that sponsors several types of scholarships for undergraduate and graduate students as well as qualified professionals pursuing vocational studies. The Scholarships Fund Pool for Low-Income Countries helps scholars from developing countries.

Resources

- *Program Guide for Rotarians* (012-EN) — Guide to help Rotary club members promote the program, select qualified applicants, familiarize grant recipients with the program, host scholars, and develop and maintain contact with alumni.
- District scholarships subcommittee — Responsible for promoting club and district participation in and reviewing applications for Ambassadorial Scholarships and Rotary Grants for University Teachers.

Group Study Exchange (GSE) — Program that provides cultural and vocational exchange opportunities for young professionals, ages 25-40, in the beginning of their professional lives.

Resources

- *Program Guide for Rotarians* (165-EN) — Complete guide to setting up a GSE team.
- District Group Study Exchange subcommittee — Responsible for promoting club and district participation in the Group Study Exchange (GSE) program, preparing the outbound GSE team for their exchange, and planning and implementing the itinerary for the visiting GSE team.

Rotary Centers for International Studies in peace and conflict resolution — Program that selects Rotary World Peace Fellows to study at one of seven Rotary Centers worldwide to pursue master’s-level degree programs in conflict resolution, peace studies, and international relations.

Resources

- *Program Guide for Rotarians* (085-EN) — Guide to help promote, select qualified applicants, orient grant recipients, host participants, and develop and maintain contact with alumni.
- District Rotary World Peace Fellowships subcommittee — Responsible for promoting club and district participation in and reviewing applications for Rotary Centers for International Studies in peace and conflict resolution.

Rotary Grants for University Teachers — Funding higher education faculty to travel abroad to teach at colleges and universities in developing countries.

Resources

- *Program Guide for Rotarians* (012-EN) — Guide to help promote, select qualified applicants, orient grant recipients, host participants, and develop and maintain contact with alumni.
- District scholarships subcommittee — Responsible for promoting club and district participation in and reviewing applications for Ambassadorial Scholarships and Rotary Grants for University Teachers.

PolioPlus

As governor, you are responsible for supporting involvement in eradication efforts until final certification of eradication is reached.

PolioPlus Partners — Program that enables Rotary clubs, districts, and individual Rotarians to assist in reaching Rotary’s goal of a polio-free world. It supports the immunization activities of Rotary and the other major partners of the Global Polio Eradication Initiative — the World Health Organization, UNICEF, and the U.S. Centers for Disease Control and Prevention — by keeping Rotarians informed of progress, promoting accurate media coverage, volunteering in National Immunization Days, and providing needed resources in regions with, or at risk for, polio.

Resources

- *PolioPlus Partners Brochure* (344-EN) — Information on projects in polio eradication priority countries that clubs and districts can support to make a direct impact on polio eradication.
- District PolioPlus subcommittee — Responsible for supporting Rotary’s commitment to polio eradication and encouraging all Rotarians to participate in PolioPlus activities.

Appendix 25

Summary of Session 6B: Rotary Foundation Programs

Resources

<i>Publication</i>	<i>Publication Number</i>
<i>The Rotary Foundation Quick Reference Guide</i>	219-EN
<i>The Guide to Matching Grants</i>	144-EN
<i>Group Study Exchange Brochure</i>	160-EN
<i>Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers</i>	012-EN
<i>Rotary World Peace Fellowships Leaflet</i>	084-EN
<i>PolioPlus Brochure</i>	323-EN

Additional Resources

Trustees of The Rotary Foundation
Regional Rotary Foundation coordinator (RRFC)
District Rotary Foundation committee chair
RI Web site
Rotary Foundation programs staff

Questions for RRFC

1.
2.
3.
4.

Answers

1.
2.
3.
4.

RRFC Ideas to Incorporate into District Plan

1.
2.
3.
4.

SESSION 7

Service Projects

(60 minutes)

Learning Objectives

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

1. Encourage clubs to use their resources for implementing active service projects in their district
2. Motivate clubs to expand and diversify their service projects

Materials

Slides

106-112

Appendixes in

District Governor's Training Manual

30. Avenues of Service Motivational Strategies
31. Summary

Session Outline

Introduction	10 minutes
Resources for Successful Service Projects	10 minutes
Improving Service in Your District	20 minutes
Action Items	15 minutes
Review	5 minutes

INTRODUCTION

(10 MINUTES) _____ TO _____

 SHOW SLIDE 106

Introduction

 SHOW SLIDE 107

Learning Objectives

 REFER TO APPENDIX 31

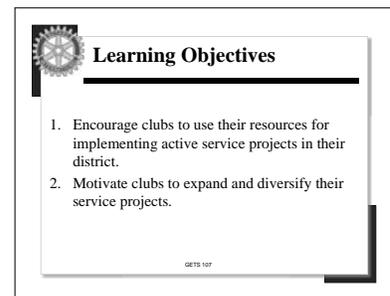
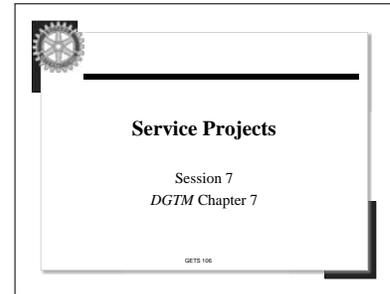
Summary

Training leader's note

— *Encourage participants to use the summary sheet to write down ideas for partnering with other governors-elect at the International Assembly.*

Key points

- The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise.
- Effective community service projects enhance public image and attract new club members.
- Involvement in service projects helps retain club members and inspires giving to club and district projects and The Rotary Foundation.
- It is the responsibility of governors to motivate clubs to conduct meaningful projects and to implement active service projects in their district.



Training leader's note

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

How is your district involved in service projects?

RESOURCES FOR SUCCESSFUL SERVICE PROJECTS

(10 MINUTES) _____ TO _____

SHOW SLIDE 108

Service Project Survey Results

Key point

- Over the last 10 years, Rotary clubs have conducted about 1.8 million projects, worked about 253 million volunteer hours, and spent between US\$5.7 and \$10 billion on service projects.

REFER TO APPENDIX 31

Summary

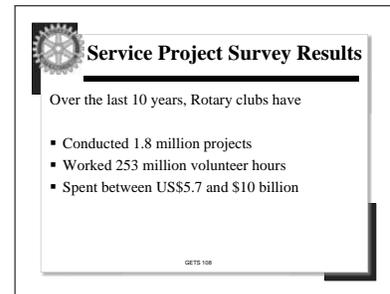
Training leader's notes

- Ask a volunteer to record participants' responses to the following question on a flip chart.
- Encourage all participants to use the summary sheet to record these ideas.

Think of a service project that went well in your district. What made it a success?

Sample responses

- A genuine need was met.
- Very specific goals and objectives were developed.
- It was heavily promoted.
- Participants' contributions were recognized.
- The recipients continued to benefit after the project ended.



Service Project Survey Results

Over the last 10 years, Rotary clubs have

- Conducted 1.8 million projects
- Worked 253 million volunteer hours
- Spent between US\$5.7 and \$10 billion

GETS 108

What resources are available to help you motivate clubs to focus on active service projects in your district?

Sample responses

- District programs committee
- Specialized service projects committee
- Zone coordinators for presidential resource groups
- District Simplified Grants
- RI Significant Achievement Award

What resources are available to clubs to conduct projects?

Sample responses

- World Community Service Projects Exchange
- Global Networking Groups
- Rotary Foundation grants
- RI Web site

How can your assistant governors work with clubs to implement projects?

Sample responses

- Encourage them to conduct a needs assessment.
- Work with the service projects committee.
- Connect clubs to district and RI resources.
- Set service goals with each club.
- Focus on long-term projects that extend beyond one Rotary year.

IMPROVING SERVICE IN YOUR DISTRICT

(20 MINUTES) _____ TO _____

How can you encourage more projects at the district level?

Sample responses

- *Appoint a committee to identify projects in which a number of clubs and a majority of Rotarians can participate.*
- *Challenge Rotarians in your district to focus on large-scale projects.*

How can you encourage clubs to conduct multiyear projects?

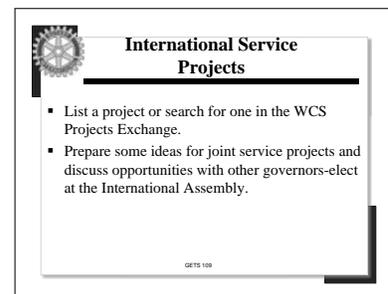
SHOW SLIDE 109

International Service Projects

How can you encourage clubs in your district to work with clubs in other countries to conduct service projects?

Sample responses

- *Promote participation in the World Community Service (WCS) Projects Exchange and ask clubs to list a project that needs support.*
- *Ask clubs to search the Projects Exchange Database by topic or geographic area to find a project.*
- *Work with the district Rotary Volunteers chair to identify Rotarians or groups of Rotarians in the district interested in serving abroad as volunteers.*
- *Prepare some ideas for joint service projects and discuss opportunities with other governors-elect at the International Assembly.*



How can you challenge clubs to expand their service activities?

 REFER TO APPENDIX 30

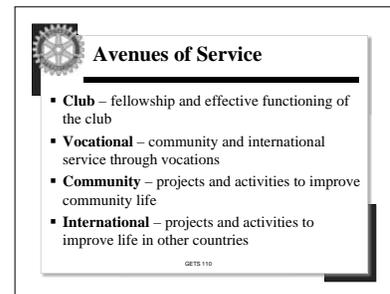
Avenues of Service Motivational Strategies

 SHOW SLIDE 110

Avenues of Service

Training leader's notes

- *Pair participants with the person sitting next them.*
 - *Ask each pair to consider the Avenues of Service and how their clubs can expand their service activities in these areas.*
 - *Note that the exercise should not include club service, and ask the group to focus on community, international, and vocational service.*
 - *Encourage participants to consider projects that include multiple Avenues of Service or ones that clubs in the district tend to exclude.*
 - *Ask each pair to share and discuss their responses with the rest of the group.*
-



ACTION ITEMS

(15 MINUTES) _____ TO _____

🗨️ Key point

- Now that ideas for expanding service projects have been discussed, it is important to set goals and action plans for accomplishing them.

 REFER TO APPENDIX 31

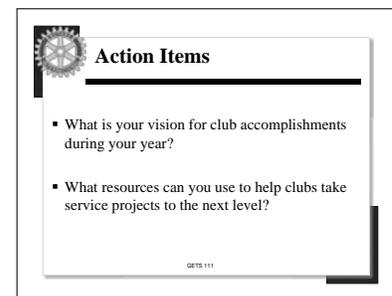
Summary

 SHOW SLIDE 111

Action Items

Training leader's note

- Referring to the questions below, ask participants to record the actions they would like to take to promote service in their district on the summary sheet.
-



What would you like clubs to accomplish during your year?

What resources can you use to help clubs take service projects to the next level?

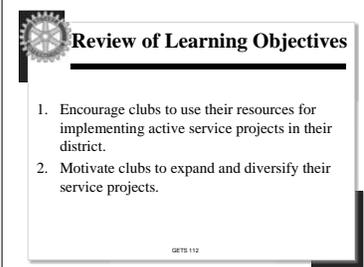
REVIEW

(5 MINUTES) _____ TO _____

 **SHOW SLIDE 112****Review of Learning Objectives**

Training leader's notes

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

Adjourn

 **Review of Learning Objectives**

1. Encourage clubs to use their resources for implementing active service projects in their district.
2. Motivate clubs to expand and diversify their service projects.

GETS 112

Appendix 30

Service Projects: Avenues of Service Motivational Strategies

Club Service

1.
2.
3.
4.

Vocational Service

1.
2.
3.
4.

Community Service

1.
2.
3.
4.

International Service

1.
2.
3.
4.

Appendix 31

Summary of Session 7: Service Projects

Resources

<i>Publication</i>	<i>Publication Number</i>
<i>Effective Public Relations: A Guide for Rotary Clubs</i>	257-EN
<i>Communities in Action: A Guide to Effective Projects/ A Menu of Service Opportunities</i>	605-EN
<i>Community Assessment Tool (Web only)</i>	605C-EN

Additional Resources

District programs committee chairs
Assistant governors
Club and District Support representative
RI programs committees
RI programs task forces
RI Programs staff at World Headquarters

Ideas for Joint Service Projects

DGEs at IA

1.	1.
2.	2.
3.	3.
4.	4.

Action Items

1.
2.
3.
4.

SESSION 8

Your Support from Rotary International

(60 minutes)

Learning Objectives

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

1. Understand their administrative responsibilities
2. Identify the resources available through the Secretariat, including various reports

Materials

Appendix in

District Governor's Training Manual

37. Summary

Training leader's notes

- *This session should be facilitated by an RI staff member, as noted in the following Board decision:*

A member of the RI staff should conduct the session on Administration Requirements of RI (The Role of the Secretariat) in conjunction with the GETS training leader. (June 2004 Mtg., Bd. Dec. 270)

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

Appendix 37

Summary of Session 8: Your Support from Rotary International

Resources

Club and District Support representative
District governor

Questions for My Club and District Administration Representative

1.
2.
3.
4.
5.

Action Items

1.
2.
3.
4.
5.

SESSION 9

International Assembly Preview

(40 minutes)

Learning Objectives

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

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

Materials

Slides

113-124

Appendix in

District Governor's Training Manual

39. Summary

Session Outline

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

INTRODUCTION

(5 MINUTES) _____ TO _____

 **SHOW SLIDE 113**

Introduction

 **SHOW SLIDE 114**

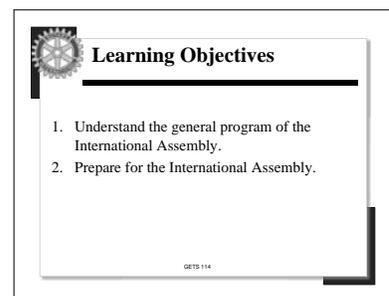
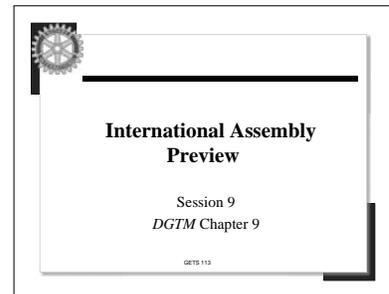
Learning Objectives

 **REFER TO APPENDIX 39**

Summary

Training leader's notes

- Consider conducting this session as a panel discussion. The panel should include the Club and District Support representative, with each panelist covering a different topic.
 - Encourage participants to use the summary sheet to write down ideas during this session and list action items in preparation for the International Assembly.
 - Refer participants to chapter 9 of the District Governor's Training Manual for an overview of the meeting.
-



INTERNATIONAL ASSEMBLY PROGRAM

(20 MINUTES) _____ TO _____

Key point

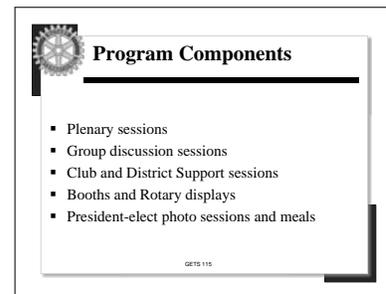
- At the International Assembly, governors-elect learn the RI theme for the coming year, the president-elect's choice of emphases, membership and Foundation goals, and other important information they'll need to incorporate into their plan for the year.

SHOW SLIDE 115

Program Components

Key point

- The International Assembly is made up of the following components:
 - **Plenary sessions.** Training featuring keynote speakers and short presentations highlighted by audiovisuals.
 - **Group discussion sessions.** Discussion based on plenary session topics with about 20 other governors-elect facilitated by a training leader.
 - **Club and District Support sessions.** Small-group meetings conducted by RI staff addressing regional concerns and administrative responsibilities and resources available through RI.
 - **Booths and Rotary displays.** Resources including RI and Foundation staff, convention information, and licensed merchandise.
 - **President-elect photo sessions and meals.** Governors-elect are requested to attend special meals and photo sessions with the president-elect.



 **SHOW SLIDE 116**
Special Events

 **Key points**

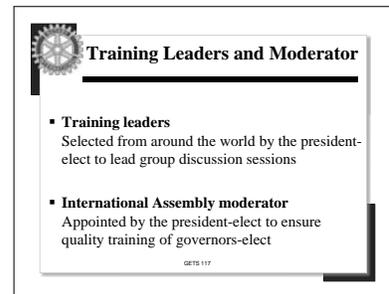
- The following events are also typically part of the International Assembly:
 - International Festival Talent Night
 - International Fellowship Dinner and Dance
 - Group Study Exchange meeting point
- The dress code for the assembly is the business attire of participants' cultures.
- Simultaneous interpretation will be provided for participants in the plenary hall in French, Italian, Japanese, Korean, Portuguese, and Spanish.



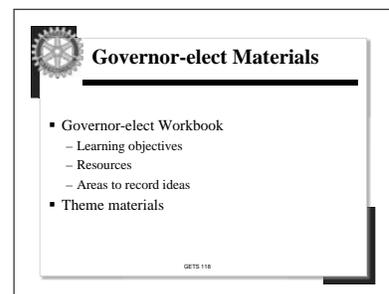
 **SHOW SLIDE 117**
Training Leaders and Moderator

 **Key points**

- About 40 Rotarians from around the world have been selected by the president-elect to serve as training leaders.
- They are trained to facilitate the group discussion sessions.
- The president-elect also appoints an International Assembly moderator to oversee the training of the training leaders and ensure quality training of governors-elect.



 **SHOW SLIDE 118**
Materials



Key point

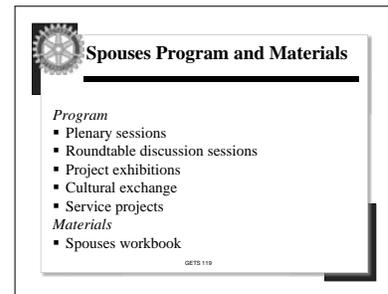
- Governors-elect will receive the following materials on the first day of training:
 - **Governor-elect workbook.** Collection of learning objectives, resources, and areas in which participants may record ideas and action items for their districts.
 - **Theme materials.** Package for each governor-elect containing sample copies of theme materials.

SHOW SLIDE 119

Spouses Program and Materials

Key points

- A special training program has also been designed for the spouses of International Assembly participants.
- Spouses' attendance at the assembly is not mandatory, but full participation in all spouses program activities is required for those who do attend.
- The spouses program for the International Assembly typically includes:
 - Plenary sessions
 - Roundtable discussion sessions
 - Project exhibitions
 - Cultural exchange
 - Service projects
- The materials for the International Assembly include a spouses workbook, a collection of learning objectives, resource materials, and areas in which participants may record ideas and action items.



PREPARING FOR THE INTERNATIONAL ASSEMBLY

(10 MINUTES) _____ TO _____

Key point

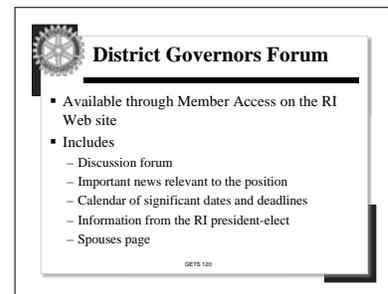
- Specific program information for district governors-elect and their spouses is included in the International Assembly registration book mailed in September.

SHOW SLIDE 120

District Governors Forum

Key points

- Updated information on the International Assembly for governors-elect and spouses can be found on the District Governors Forum.
- The District Governors Forum is available through Member Access on the RI Web site and includes a discussion forum, important news relevant to the position, a calendar of significant dates and deadlines, a spouses page, and information from the RI president-elect.

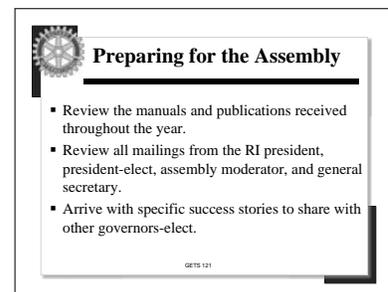


SHOW SLIDE 121

Preparing for the Assembly

Key point

- In addition to the District Governors Forum, governors-elect can prepare for the International Assembly through
 - Manuals and publications received throughout the year
 - Mailings from the RI president, president-elect, assembly moderator, and general secretary
 - Specific success stories they've gathered to share with other governors-elect

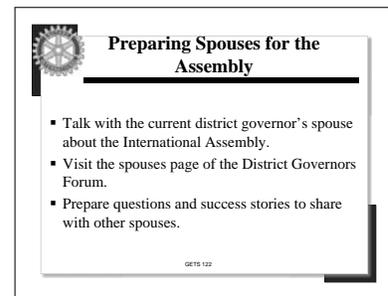


 SHOW SLIDE 122

Preparing Spouses for the Assembly

 *Key point*

- Governors-elect can help their spouses prepare for the International Assembly by encouraging them to
 - Talk to the current district governor's spouse about the International Assembly.
 - Visit the spouses page of the District Governors Forum, which includes copies of letters, assembly program highlights, and Rotary E-Learning Center modules.
 - Prepare questions and success stories to share with other spouses.



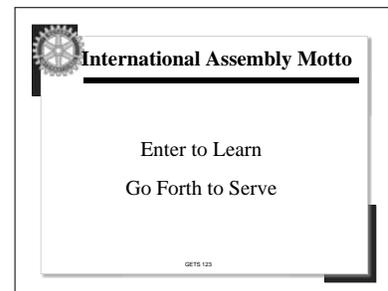
What are some other questions you have about the assembly?

 SHOW SLIDE 123

International Assembly Motto

 *Key point*

- The official motto of the International Assembly is “Enter to learn; go forth to serve,” which sets a clear expectation for the governors-elect.



REVIEW

(5 MINUTES) _____ TO _____

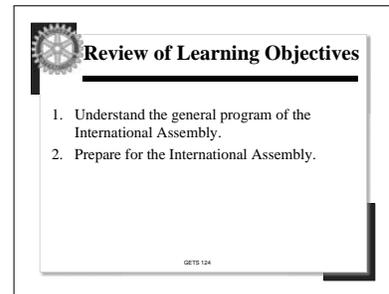
 **SHOW SLIDE 124**

Review of Learning Objectives

Training leader's notes

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

Adjourn



Appendix 39

Summary of Session 9: International Assembly Preview

Resources

Club and District Support representative
District governor

Goal for International Assembly

--

How I Will Achieve This Goal

--

Ideas for My District

1.
2.
3.
4.

Districts to Contact

1.
2.
3.
4.

Action Items

1.
2.
3.
4.

Evaluations and Closing Plenary Session

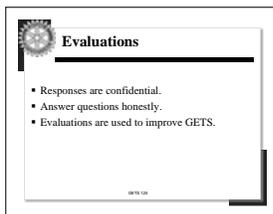
The closing plenary session of the governors-elect training seminar should summarize the seminar's learning objectives and discussions and motivate governors-elect to build on what they've learned. This session is also an opportunity for governors-elect to complete evaluations of the training.

MATERIALS

Slides 125-127

HANDOUT

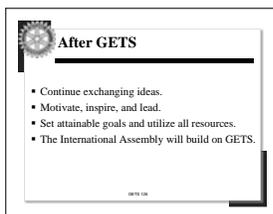
Governors-elect Training Seminar Evaluation



SHOW SLIDE 125

Evaluations (15 minutes)

- Distribute evaluations to the governors-elect.
- Explain that their responses are confidential.
- Ask them to complete their evaluations honestly.
- Explain that their responses will be used to help improve the training program for future governors-elect.
- Collect evaluations before governors-elect leave the training.



SHOW SLIDE 126

Summary of Accomplishments and Future Action (10 minutes)

- Highlight significant areas of discussion and key points.
- Discuss what governors-elect have learned and how this knowledge will help them during their year in office by
 - Encouraging them to continue exchanging ideas with one another prior to and throughout their year in office
 - Reminding them that they are to motivate, inspire, and lead their district teams and clubs

- Reminding them of the importance of setting attainable goals and utilizing all available resources
- Emphasizing that the International Assembly will build on what they have learned at GETS and allow them to finalize plans for their year



SHOW SLIDE 127

Recognition (5 minutes)

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



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