



# LEAD YOUR DISTRICT

Governor  
2016-17





This is the 2015 edition of Lead Your District: Governor, the reference manual and GETS workbook for district governors serving in the 2016-17 Rotary year. The information in this publication is based on the Constitution and Bylaws of Rotary International, the Rotary Code of Policies, and The Rotary Foundation Code of Policies. Please refer to those documents for exact Rotary policy. Changes to the documents listed above by the Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.

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# LEARNING ABOUT ROTARY JUST BECAME A GROUP ACTIVITY

Click **LEARN** to:

- Take courses
- Track your progress
- Find resources
- Connect with other Rotarians
- Share details about yourself

It's a fun way to learn about Rotary!

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[learn.rotary.org](http://learn.rotary.org)

## INTRODUCTION



Rotary

Congratulations on your position as district governor. You can use this manual to prepare for your responsibilities before attending your governors-elect training seminar and the International Assembly. You'll use it as a workbook at your GETS, so bring it with you.

As a member of Rotary's global network of more than 34,000 Rotary clubs, you have access to a wealth of Rotary services and resources available through Rotary.org. You'll find information, resources, and publications translated into nine languages; club and district data; tools to apply for and manage Rotary grants; and support from staff at Rotary headquarters and international offices. To create an account, go to [www.rotary.org/myrotary](http://www.rotary.org/myrotary).

## COMMENTS

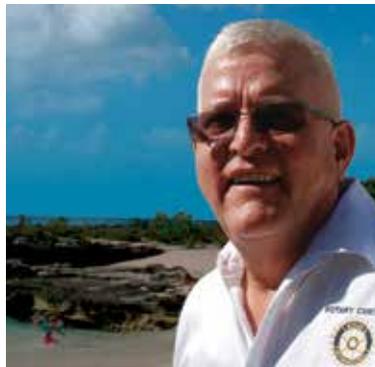
If you have questions or comments about this manual or any of Rotary's training resources, please contact:

Learning and Development

Email: [learn@rotary.org](mailto:learn@rotary.org)

Phone: +1-847-866-3000

# WHAT ARE YOU WAITING FOR? BE A VIBRANT CLUB



## Be a Vibrant Club guide includes:

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



Get your free copy at  
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Rotary 

# STRATEGIC PLANNING

Becoming a district governor can be overwhelming if you don't have a plan for your year. To prepare for your term as the 2016-17 governor, you need to understand your role and responsibilities, set goals, and create a plan for achieving them. Once that work is completed, you will be ready to take action.

Your year as governor will be a memorable one, and you are sure to make your mark on your district. Rotarians in your district will remember you for your impact, the result of good planning. Don't distinguish your term by creating your own theme, but support the presidential theme for the year.

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
In collaboration with past, current, and future district leaders, set district goals for the year that align with your district's and Rotary's strategic plan	Follow the District Governor Code of Ethics
	Work with past, current, and incoming district leaders to follow through on long-term projects and plans

When preparing for your term as governor, check the planning calendar (appendix 14) for important dates.

## RESOURCES

Find more information in the following resources:

- [Strategic Planning Guide](#)
- [www.rotary.org/strategicplan](http://www.rotary.org/strategicplan)
- [Manual of Procedure](#)

## STRATEGIC PLAN

Once you understand your responsibilities, you must set goals and create a strategic plan for achieving them. Get your current governor, immediate past district governor, district governor-nominee (if known), and other district leaders involved to gather support. Follow the existing strategic plan, or develop a multiyear strategic plan if there isn't one in place, to maintain the district's focus from year to year.

[Rotary's strategic plan](#) (appendix 1) can serve as a guide for clubs and districts to follow when creating their own strategic plans.

Use the [District Planning Guide](#) (appendix 2) to assess your district's strengths, weaknesses, opportunities, and risks and set goals for the coming year. Ask your current governor, district committee chairs, assistant governors, and Club and District Support (CDS) representatives for the information needed to complete the guide. You can also download statistical reports about your district from [My Rotary](#) to help you complete it.

## CLUB GOALS

To set good goals, a club president-elect must assess past club accomplishments, member interests, and the club's capacity to achieve goals. Encourage club presidents-elect to enter their annual goals in [Rotary Club Central](#), where they can also see information on their clubs' past performance. For a list of goals clubs can enter in Rotary Club Central, see appendix 3.

As a district leader, you can view a summary of your district's goals and achievements or those of a particular club. If a club is unable to enter goals, any district leader can edit a club's data on its behalf. Club presidents are notified by email when any changes are made to their clubs' data. Remind club secretaries to keep email addresses of club officers current, either in Rotary's member database or through their member integration vendor. Take a course on Rotary Club Central in the [Learning Center](#) to become more familiar with its tools for both districts and clubs.

Work closely with your assistant governors to review each club's goals at the beginning of the Rotary year, as well as their achievements as the year comes to an end. Club goals may be adjusted during the year as needed. Clubs can use the [Strategic Planning Guide](#) to create a long-term plan if they don't already have one. A club strategic plan is helpful for setting annual goals.

## RATE CLUBS IN ROTARY CLUB CENTRAL

The Rate Clubs feature in [Rotary Club Central](#) replaces the Memo of Club Visit. You will use it to keep track of your club visits and report each club's practices, accomplishments, and challenges.

You and your assistant governors can use Rate Clubs to rate and leave comments after each club visit. Assistant governors can view, rate, and leave comments only for the clubs in their club groups.

You can view the ratings and comments for all clubs in the district during your governor-elect year. You can rate clubs and leave comments during your governor year. These ratings and comments will serve as a reference for you, your assistant governors, and your successors. Once all clubs' ratings are final, you should confirm them by 1 June. Final comments and ratings should reflect the state of the club based on all club visits. Clubs do not have access to the ratings or comments.

## MINIMUM STANDARDS

Before visiting a club, review information in Rotary Club Central to determine whether the club needs extra support. To be considered functional, a club should meet these minimum standards:

- Meets regularly
- Implements service projects that address the needs of the local community and communities in other countries
- Accepts the visit of the assistant governor, governor, or any officer of Rotary International
- Pays per capita dues to RI and submits a semiannual report
- Subscribes to a Rotary Magazine Press publication
- Maintains liability insurance (U.S. only)
- Acts in a manner consistent with the RI Constitution and Bylaws and Rotary Code of Policies
- Pays RI membership and district dues without outside assistance
- Provides accurate membership lists to RI in a timely manner\*
- Resolves club disputes amicably
- Maintains cooperative relations with the district
- Cooperates with RI by not initiating or maintaining litigation against Rotary International, The Rotary Foundation, the associate foundations, and the international offices of the Secretariat

Work with your assistant governors to support clubs that are rated nonfunctioning. As your liaisons to club leaders, assistant governors can provide regular guidance to these clubs and inform you of their progress. More information is included in their main resource, [Lead Your District: Assistant Governor](#).

## QUESTIONS TO CONSIDER

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

- What additional responsibilities does the governor of your district have?
- What will be your most challenging responsibility as governor?
- Which goals from the current year will continue into your term?
- How will you measure and track progress toward the goals you have set?
- What are your district's strengths and weaknesses?
- What motivates Rotarians in your district?
- How will you use Rotary Club Central to support club activities in your district?
- What support will clubs need in setting annual and long-term goals?

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\*Work with club secretaries to ensure membership data is kept current.



# STRATEGIC PLAN

## OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

## OUR STRATEGIC GOALS



### Support and strengthen clubs

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels



### Focus and increase humanitarian service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally



### Enhance public image and awareness

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities

JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION [www.rotary.org/strategicplan](http://www.rotary.org/strategicplan)



We are leaders who act responsibly and take action to tackle some of the world's most pressing challenges.



JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION [www.rotary.org/strategicplan](http://www.rotary.org/strategicplan)

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## APPENDIX 2

# DISTRICT PLANNING GUIDE

Review your district's planning guide with your governor and governor-elect and work together to develop or refine it.

This guide helps districts assess where districts are today and establish goals for the coming year. Refer to Rotary Club Central and complete this form during your year as governor-elect to develop goals for your year as governor. Work with your district leadership team to set goals, which should promote your district's strategic plan. Review and revise the goals throughout the year.

District number: \_\_\_\_\_ Rotary year of office: \_\_\_\_\_

Name of governor: \_\_\_\_\_

Name of immediate past governor: \_\_\_\_\_

Name of governor-elect: \_\_\_\_\_

Name of governor-nominee: \_\_\_\_\_

### **STRATEGIC PLANNING**

---

#### **The district today**

Does the district have a strategic plan?  YES  NO

If so, when was it last reviewed, or when was it established? \_\_\_\_\_

Does your district consult with the Rotary coordinator?  YES  NO

#### **Looking ahead**

During my year as governor, the district will focus on the following areas of strategic priorities:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

### **TRAINING**

---

#### **The district today**

Number of Rotarians who attended the most recent:

District team training seminar: \_\_\_\_\_  
Presidents-elect training seminar: \_\_\_\_\_  
District training assembly: \_\_\_\_\_  
District Rotary Foundation seminar: \_\_\_\_\_  
District membership seminar: \_\_\_\_\_  
District leadership seminar: \_\_\_\_\_  
Club leadership development program: \_\_\_\_\_  
Grant management seminar: \_\_\_\_\_

Number of clubs with Rotarians appointed to district-level positions: \_\_\_\_\_

What support does the district provide club trainers? \_\_\_\_\_

During my year as governor, the district will focus on the following areas of training and leadership development:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### **DISTRICT ADMINISTRATION**

---

Does the district have a communication plan?  YES  NO

When does the district's election process start for the following positions:

Governor: \_\_\_\_\_ Council on Legislation representative: \_\_\_\_\_

RI director: \_\_\_\_\_

Which of the following is used in your district's election process?

Nominating committee  Ballot at district conference  Ballot by mail

Do you use Rotary.org?  YES  NO

How is the governor's monthly communication distributed?

Mail  Email  Website  Video

What social media networks does the district use (e.g., Facebook, YouTube, LinkedIn)? \_\_\_\_\_

How often is the district's website updated? \_\_\_\_\_

How often does the district hold social events? \_\_\_\_\_

How does the district involve the families of Rotarians? \_\_\_\_\_

How many clubs received the Presidential Citation last year? \_\_\_\_\_

What awards did the district receive last year? \_\_\_\_\_

What awards does the district present? \_\_\_\_\_

## Looking ahead

During my year as governor, the district will focus on the following areas of district administration:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## FINANCE

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### The district today

How is the district budget prepared? \_\_\_\_\_

When was the budget approved by a majority of district clubs? \_\_\_\_\_

When is the statement of district finances reviewed? \_\_\_\_\_

How is the district financial statement shared with clubs? \_\_\_\_\_

Email     Mail     Spoken report     Website     Other \_\_\_\_\_

Does the district have procedures for protecting district funds?  YES     NO

Did the district file appropriate tax documents with local government this Rotary year?  YES     NO

Is the per capita levy sufficient for district needs?     YES     NO

## Looking ahead

During my year as governor, the district will focus on the following areas in finance:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## DISTRICT CONFERENCE

---

### The district today

How many Rotarians participated? \_\_\_\_\_

How many clubs were represented: \_\_\_\_\_

What were the program's highlights? \_\_\_\_\_

Have participant evaluations been reviewed?     YES     NO

## Looking ahead

During my year as governor, the district will focus on the following areas for the district conference:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## CONVENTION PROMOTION

---

### The district today

Is the Rotary International Convention promoted in your district?  YES  NO

Have materials been shared with clubs to promote the upcoming convention?

YES  NO

About how many Rotarians from your district attended the last convention?

\_\_\_\_\_

Does your district website have a link to convention resources?  YES  
 NO

### Looking ahead

During my year as governor, the district will focus on the following areas of convention promotion:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## PUBLIC RELATIONS

---

### The district today

What district activities are covered by the media, and what type of media coverage do they receive (radio, newspaper, television)? \_\_\_\_\_

Does your district consult with the Rotary public image coordinator?  YES  
 NO

Does your district encourage clubs to use Rotary public relations materials?  YES  NO

Does your district budget for public relations materials?  YES  NO

Did your district apply for public image grants in the past two years?  YES  
 NO

### Looking ahead

During my year as governor, the district will focus on the following areas of public relations:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## **MEMBERSHIP**

---

### **The district today**

Number of members in the district: \_\_\_\_\_

Net membership growth in existing clubs this Rotary year: \_\_\_\_\_

Total number of male members: \_\_\_\_\_ and female members: \_\_\_\_\_

Number of clubs specifically targeting younger members: \_\_\_\_\_

Number of clubs with 25 or fewer members: \_\_\_\_\_

What is your district's strategy for incorporating new ideas and flexibility in order to attract and keep members? \_\_\_\_\_

### **Looking ahead**

During my year as governor, the district will focus on the following areas related to membership:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## **NEW CLUBS (EXTENSION)**

---

### **The district today**

How many clubs have been chartered in your district over the past two years?

\_\_\_\_\_

Which communities has your district identified as potential locations for new Rotary clubs? \_\_\_\_\_

How many years does a sponsor club work with a new club? \_\_\_\_\_

### **Looking ahead**

During my year as governor, the district will focus on the following areas to increase its number of new clubs:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## **THE ROTARY FOUNDATION**

---

### **The district today**

Does your district consult with the regional Rotary Foundation coordinator?

YES       NO

What is your district's grant eligibility status?

Qualified    Qualification pending    Incomplete

How many clubs are currently participating in a district grant? \_\_\_\_\_

Amount of District Designated Fund for global grants: \_\_\_\_\_

What global grants is your district currently participating in?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

What educational, promotional, and fundraising projects did the district hold for PolioPlus last year?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

How many Rotary Peace Fellows did the district nominate last year? \_\_\_\_\_

How many of the district's Rotary Peace Fellow nominees were selected by the Foundation Trustees last year? \_\_\_\_\_

How much did the district contribute to the Annual Fund last year? \_\_\_\_\_  
(Note: This should be the sum as reported in Rotary Club Central.)

Related to the Endowment Fund, how many of the following did the district have last year:

Number of Benefactors: \_\_\_\_\_

Number of Bequest Society members: \_\_\_\_\_

Number of Major Donors: \_\_\_\_\_

### **Looking ahead**

During my year as governor:

Amount of District Designated Funds I would like available for a district grant:

\_\_\_\_\_

Number of clubs I would like to involve in district grants: \_\_\_\_\_

Amount of District Designated Funds I would like available for global grants:

\_\_\_\_\_

The district will concentrate on the following area(s) of focus:

Peace and conflict prevention/resolution

- Maternal and child health
- Disease prevention and treatment
- Basic education and literacy
- Water and sanitation
- Economic and community development

What global grants would you like the district to pursue?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Number of global grants still in progress: \_\_\_\_\_

These are the educational, promotional, and fundraising projects I would like the district to plan for PolioPlus:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Number of Rotary Peace Fellows I would like the district to nominate: \_\_\_\_\_

Annual Fund contribution goal: \_\_\_\_\_

(Note: This should be the sum of club goals as reported in Rotary Club Central.)

Permanent Fund goals:

Number of Benefactors: \_\_\_\_\_

Number of Bequest Society members: \_\_\_\_\_

Number of Major Donors: \_\_\_\_\_

## **DISTRICT PROGRAMS**

---

### **The district today**

Number of Rotary Youth Exchange students:

Hosted: \_\_\_\_\_ Sponsored: \_\_\_\_\_

Number of sponsored Interact clubs: \_\_\_\_\_

Number of Interactors: \_\_\_\_\_

Number of sponsored Rotaract clubs: \_\_\_\_\_

Number of Rotaractors: \_\_\_\_\_

Number of sponsored Rotary Community Corps: \_\_\_\_\_

Number of RCC participants: \_\_\_\_\_

Number of Rotary Youth Leadership Awards (RYLA) participants: \_\_\_\_\_

Number of RYLA activities: \_\_\_\_\_

Number of Rotary Friendship Exchanges: \_\_\_\_\_

Number of service projects coordinated by the district (includes all Avenues of Service): \_\_\_\_\_

Number of Rotarians in the district participating in

Rotarian Action Groups: \_\_\_\_\_

Rotary Fellowships: \_\_\_\_\_

### **Looking ahead**

During my year as governor, the district will focus on the following areas to improve district programs:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**SUMMARY OF GOALS FOR DISTRICT \_\_\_\_\_ ROTARY YEAR \_\_\_\_\_**

---

**Strategic planning goals**

\_\_\_\_\_  
\_\_\_\_\_

**Training goals**

\_\_\_\_\_  
\_\_\_\_\_

**District administration goals**

\_\_\_\_\_  
\_\_\_\_\_

**Finance goals**

\_\_\_\_\_  
\_\_\_\_\_

**District conference goals**

\_\_\_\_\_  
\_\_\_\_\_

**Convention promotion goals**

\_\_\_\_\_  
\_\_\_\_\_

**Public relations goals**

\_\_\_\_\_  
\_\_\_\_\_

**Membership goals**

\_\_\_\_\_  
\_\_\_\_\_

**New club goals**

\_\_\_\_\_  
\_\_\_\_\_

**Rotary Foundation goals**

The district will participate in the following Rotary Foundation grants: \_\_\_\_\_

The district's Annual Fund contribution goal: \_\_\_\_\_

The district's Permanent Fund contribution goal: \_\_\_\_\_

**District program goals**

I would like our district to be involved in the following programs that benefit our local community: \_\_\_\_\_

I would like our district to be involved in the following programs that benefit communities around the world: \_\_\_\_\_

**Other goals**

\_\_\_\_\_  
\_\_\_\_\_

## APPENDIX 3

# ROTARY CLUB CENTRAL GOALS

## YOUR CLUB

### **Membership** (Set % or #)

1. Existing members retained
2. New members retained
3. New members to induct

### **Rotarian Engagement** (Set % or #)

1. Members in club roles
2. Members participating in club service activities
3. Members participating in club social activities
4. Members sponsoring new Rotarians
5. Members in leadership development programs or activities
6. Members in Rotarian Action Groups
7. Members in Rotary Fellowships
8. Members in district roles
9. Members attending district conference
10. Committee chairs attending district training assembly
11. Unique number of members involved

### **Club Communication**

1. Our club has a strategic plan (yes/no)
2. Club assemblies conducted per year (#)
3. Our online presence accurately reflects current activities (yes/no)
4. Number of communications distributed per month (#)

### **Public Relations**

1. Number of times we update our website per month (#)
2. Number of media stories (broadcast and/or print) covering our club's projects per year (#)
3. Number of people in the media we invite to visit a club project or meeting per month (#)
4. We use social media to promote service activities (yes/no)
5. We use RI-produced advertising/public service materials (yes/no)

# SERVICE

## **Service Projects and Activities**

1. Number of service projects and/or activities

## **New Generations Clubs**

1. Number of Rotaract clubs
2. Number of Interact clubs

## **New Generations Participants**

1. Number of inbound Youth Exchange students
2. Number of outbound Youth Exchange students
3. Number of RYLA participants

# FOUNDATION GIVING

## **Annual Fund (USD)**

1. Paul Harris Society
2. Sustaining Members
3. Every Rotarian, Every Year
4. Other Contributions

## **PolioPlus Fund (USD)**

1. PolioPlus Fund

## **Major Gifts and Endowment Fund (#)**

1. Major Gifts
2. Bequest Society
3. Benefactors



# BUILDING YOUR TEAM

Being a successful district governor requires having a strong district leadership team. This team includes assistant governors, district committee chairs, and incoming and past governors. If you share responsibilities with your team, you'll have more time to innovate, develop leaders, and motivate Rotarians to participate in projects, programs, and activities. Use the [District Planning Guide](#) (appendix 2) to work with your leadership team on planning your year.

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Review and update your district's policy, such as the role of past district governors and the coordination of multiyear projects	Ensure that the district leadership team carries out its duties
Appoint assistant governors and district committee chairs and members as needed to fill vacancies	Make sure that district committees support the work of club committees
Work with the governor-nominee and current governor to ensure continuity	
Conduct planning meetings with your district leadership team and ensure they report to you on their activities	

## RESOURCES

Find more information from the following people:

- Past district governors
- [Rotary coordinators](#)
- District governor-elect classmates
- International Assembly training leaders

## APPOINTING TEAM MEMBERS

Selecting individuals to serve on your leadership team is a joint effort. Work with your predecessors and successors to select appropriate people for each open position. Your advisory council of past district governors offers a wealth of history and experience that can be very useful in long-range planning. When making district appointments, consider the following tips:

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

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

## ASSISTANT GOVERNORS

Assistant governors play an important role, because they are the most familiar with the clubs in your district. The number of assistant governors you appoint should be based on factors such as the size, language needs, geography, and balance of strong and weak clubs in your district. Assistant governors should be appointed annually, with no assistant governor serving more than three consecutive years.

To develop leaders in the district, consider past club leaders or other members who have leadership potential for the assistant governor role. For more information about assistant governor responsibilities see [Lead Your District: Assistant Governor](#).

Your district is responsible for determining the amount of financial support provided to assistant governors as they carry out their duties.

## DISTRICT COMMITTEES

District committees support club and district activities related to their areas of expertise and help achieve district goals. The recommended committees are listed and described in appendix 4. You can create additional committees as needed. For more information about district committees and their responsibilities, see [Lead Your District: Committees](#).

## DISTRICT GOVERNOR CONTINUITY

To create greater continuity within the district leadership team, collaborate with your predecessor and successors, especially on activities that last more than a single Rotary year, such as strategic planning, district appointments, district service projects, and managing District Designated Funds and global grants. Your advisory council of past district governors offers a wealth of history and experience that can be very useful in long-range planning.

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

- Assigning the governor-elect specific district committee or organizational responsibilities
- Including the governor-elect in district meetings you convene, such as the district conference
- Informing the governor-elect, before the International Assembly, of the status of clubs and recommending actions for strengthening each club
- Referring the governor-nominee to the governor-nominee course in the [Learning Center](#)
- Discussing the information presented at the International Assembly after the governor-elect returns

## SUPPORTING CLUBS

The district leadership team exists to support the clubs in the district. Your team can help clubs update their practices using the suggestions in [Be a Vibrant Club: Your Club Leadership Plan](#). Helping clubs be the best they can be is the ultimate goal of the district.

## QUESTIONS TO CONSIDER

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

- What should you think about when selecting Rotarians for district positions?
- How will you check in with your team during the year?
- What support will the clubs in your district need in order to be successful?
- How can past district governors support clubs in the district?

## APPENDIX 4

# DISTRICT COMMITTEES

Resources and key messages for each committee are listed in [Lead Your District: Committees](#). Encourage your committees to use Rotary resources for more information.

All district committees are expected to

- Work with the governor, governor-elect, governor-nominee, and assistant governors to plan strategies for achieving goals
- Promote and attend district training meetings and the district conference
- Relay information between Rotary International, the district, and club members
- Work closely with club leaders to provide support and guidance
- Share materials received from the Secretariat, RI committees, and the regional support team with clubs

## ALUMNI

This committee manages ongoing relationships with alumni in the district and assists clubs with alumni relations.

### QUALIFICATIONS

Give preference to:

- Alumni
- Those with professional experience working with alumni

### RESPONSIBILITIES

- Work in conjunction with other district committees, particularly membership, Foundation, and New Generations, to identify alumni and their skills (speaker, project skills, potential to be a member, contributor to Foundation and Rotary programs, etc.) and connect these individuals to clubs and district activities.
- Create awareness of how to work with alumni to maintain their relationship with Rotary.
- Encourage alumni to report their data to RI and work with fellow district chairs to ensure program participants are reported to RI.
- Abide by privacy and youth protection policies and local law.
- Support and coordinate alumni events and associations, where appropriate.

Club officers can access a report of names, program details, and contact information for all former Rotary program participants associated with your district in My Rotary.

## CONVENTION PROMOTION

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

### QUALIFICATIONS

Give preference to those with:

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

### RESPONSIBILITIES

- Attend club and district meetings to promote the convention.
- Serve as a local resource for convention materials and information.
- Communicate with and assist the zone-level RI Convention promotion committee member assigned to your district.
- Contact potential registrants.
- Contribute convention articles and information to district newsletters, publications, and directories.
- Translate important convention information into local languages, if necessary.
- Create or expand a district website with links to convention information at [www.riconvention.org](http://www.riconvention.org).

Many convention promotion committees also:

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

## DISTRICT CONFERENCE

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

### QUALIFICATIONS

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

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

### RESPONSIBILITIES

- Recommend the district conference venue and make all related logistical arrangements.
- Coordinate conference finances to achieve maximum attendance.

- Promote conference attendance, with particular emphasis on new Rotarians, new clubs, and representation from every club.
- Publicize the district conference to external audiences, such as the media, community leaders, and beneficiaries of Rotary’s programs.
- In cooperation with the district trainer, arrange a district leadership seminar to be held in conjunction with the conference.
- Consider including time in the agenda to report on Rotary Foundation activities if no report has been or will be provided at another district meeting.

## DISTRICT PROGRAMS

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

- Interact
- Rotaract\*
- Rotarian Action Groups
- Rotary Community Corps
- Rotary Fellowships
- Rotary Friendship Exchange
- Rotary Youth Exchange
- Rotary Youth Leadership Awards (RYLA)

## QUALIFICATIONS

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

## RESPONSIBILITIES

- Coordinate districtwide efforts related to the program.
- Promote program participation through regular contact with assistant governors and clubs.
- Promote successful programs at district meetings and during club visits by inviting program participants to speak and encouraging clubs to get involved.
- Consult with Rotary coordinators to identify program expertise in your region.
- Assist club program committee chairs in carrying out their responsibilities.
- Encourage clubs to determine whether the program can address local needs.
- Identify potential areas of cooperation between district programs and local non-Rotary service organizations.
- Encourage participants of one program to participate in others offered in the district.

---

*\*Rotary International has a recommended structure for district Rotaract committees, which is outlined in the Rotaract Handbook.*

## EXTENSION

This committee develops and implements plans to organize new Rotary clubs within the district.

### QUALIFICATIONS

Give preference to past district governors, district governors-nominee, and those with:

- Experience as chair of a club committee related to membership development
- Success inviting new members to join Rotary
- Familiarity with implementing membership programs
- Success developing new clubs

### RESPONSIBILITIES

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

### TRAINING REQUIREMENT

The chair and as many committee members as possible should attend a training meeting conducted by the Rotary coordinator.

## FINANCE

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

### QUALIFICATIONS

Give preference to those with:

- Previous service as club treasurer
- Accounting or finance as a component of their profession

### RESPONSIBILITIES

- In cooperation with the governor, create a district budget to be submitted to clubs at least four weeks before the presidents-elect training seminar (PETS) or the district training assembly and approved at a meeting of incoming club presidents.
- Review and recommend the amount of per capita levy. Any per capita levy must be approved by at least three-fourths of the incoming club presidents at PETS or the district training assembly or by a majority of the electors present and voting at a district conference.
- Ensure that proper income and expense records are kept.
- Prepare an annual financial report to present at the district training assembly.

- Ensure that a member of the committee (preferably the treasurer) and the district governor are the authorized signatories for district bank accounts. Both signatures are required for any withdrawal.
- Consider working with the district Rotary Foundation committee chair to disburse grant funds and ensure that proper records of grant activity are maintained for reporting purposes.

## MEMBERSHIP DEVELOPMENT

This committee identifies, markets, and implements membership development strategies that are appropriate for the district and will result in membership growth.

### QUALIFICATIONS

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

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

### RESPONSIBILITIES

- Plan, market, and conduct a district membership development seminar in consultation with the governor-elect and district trainer.
- Assist clubs' member recruitment efforts, paying special attention to small and struggling clubs.
- Encourage clubs to strive to represent the demographic composition of the community's professionals.
- Ensure that clubs are aware of the membership tools available from Rotary International and that membership information is reported promptly to Rotary International.
- Work and communicate regularly with the district governor and club leaders to ensure that the district achieves its membership goals.
- Coordinate districtwide membership development activities.
- Encourage clubs to participate in Rotary or presidential membership development and recognition programs.
- Work with the district extension and public relations committees to plan activities that will aid membership development efforts.
- Assist club membership committee chairs in carrying out their responsibilities.
- Visit clubs to speak about innovation, flexibility, diversity, and ways to engage members.
- Work with the Rotary coordinator to plan membership activities in the district.
- Ensure that each club committee has a copy of *Strengthening Your Membership: Creating Your Membership Development Plan* (formerly known as *Membership Development Resource Guide*) and is aware of resources on [Rotary.org](http://Rotary.org).

### TRAINING REQUIREMENT

The chair and as many committee members as possible should attend a regional seminar conducted by the Rotary coordinator.

## NEW GENERATIONS (YOUTH SERVICE)

This committee develops, implements, and supports activities in the district and coordinates with other committees to engage youth and young leaders. The district governor may determine the best structure for the committee and its relationships with other district committees.

### RESPONSIBILITIES

- Coordinate with the district Interact, Rotaract, RYLA, Youth Exchange, Community Service, International Service, and Vocational Service committees to share expertise across the district, lead cross-promotion between programs, promote service opportunities, and coordinate efforts between district committees.
- Emphasize service in each of Rotary's programs for young leaders (Interact, Rotaract, RYLA, and Youth Exchange).
- Encourage and facilitate relationships with other organizations to expand opportunities for young people.
- Encourage and facilitate young people's transition from one program or activity to another, and offer progressively increasing responsibility as they acquire leadership skills.
- Engage with former New Generations program participants to maintain their contact with Rotary.
- Promote Youth Service Month (May).

## NOMINATING

This committee nominates the most qualified Rotarian who is available to serve as governor. For more information, contact your Club and District Support representative.

### RESPONSIBILITIES

- Conduct a selection process in a dignified, responsible manner in accord with the principles of Rotary.
- Seek out and nominate the most qualified person.
- Interview all candidates for governor, whether they are suggested by clubs or by the nominating committee itself. Each interview of governor-nominee candidates should satisfy the minimum requirements specified in the Rotary Code of Policies, Governor-Nominee Selection, section 19.030.
- Ensure that no member, alternate member, or candidate for membership on the nominating committee is eligible to be nominated for any office for which the committee nominates candidates.

## PUBLIC RELATIONS

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

## QUALIFICATIONS

Give preference to those with either:

- Experience in club public relations activities (preferably as chair)
- Media, journalism, public relations, communications, advertising, or marketing skills as part of their profession

## RESPONSIBILITIES

- Maintain contact with the district governor and key committee chairs to stay informed about district projects and activities that can be promoted — particularly those that are of interest to the public.
- Promote Rotary to external audiences, such as the media, community leaders, potential partner organizations, program beneficiaries, and the general public.
- Contact the media with newsworthy stories of district projects and events, and share district and club stories on social media.
- Share Rotary public relations materials with clubs and encourage them to make public outreach a priority, using both traditional and social media.
- Seek opportunities to speak with individual clubs about developing content on their websites that appeals to the general public.
- Promote Rotary initiatives, such as PolioPlus, grant successes, alumni activities, and awards, to districts and the Rotary community.

## TRAINING REQUIREMENT

Committee members should attend public relations workshops held in conjunction with Rotary training meetings whenever possible, as well as the regional seminar held by the Rotary public image coordinator.

## ROTARY FOUNDATION

This committee assists the governor in educating, motivating, and inspiring Rotarians to participate in Foundation programs and fundraising activities. It serves as a liaison between the Foundation and club members. The district governor is an ex officio member of the committee and has voting privileges. The committee chair should serve as an ex officio member of all subcommittees to stay informed of their progress and directly support them as needed.

The members of the district Rotary Foundation committee serve as chairs of four subcommittees:

- Fundraising — Coordinates the district's fundraising goals for the Annual Fund, PolioPlus Fund, and the Endowment Fund, soliciting gifts and educating Rotarians about their gift options
- Grants — Oversees the qualification of clubs, assists clubs in applying for Rotary grants, reports irregularities in grant-related activities, and promotes Rotary grants
- PolioPlus — Supports Rotary's commitment to polio eradication and encourages participation in PolioPlus activities
- Stewardship — Responsible for ensuring the careful management of Rotary grant funds and educating Rotarians on proper and effective grant management

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

- Annual Fund subcommittee
- Endowment/major gifts subcommittee
- Rotary Peace Fellowships subcommittee
- Scholarships subcommittee
- Vocational training team subcommittee

## QUALIFICATION

Give preference to past district governors, past assistant governors, effective past district subcommittee members, significant financial contributors, and club-level Rotarians with professional or technical experience in a related field.

## RESPONSIBILITIES OF THE CHAIR

- Assist the district governor in presenting a district Rotary Foundation seminar for club presidents, presidents-elect, club Foundation committees, and other Rotarians.
- Help the district training committee conduct Foundation sessions each year at the presidents-elect training seminar and district training assembly.
- Encourage clubs to offer at least two programs on the Foundation annually, paying special attention to November, which is Rotary Foundation Month.
- Promote high levels of financial support for Foundation programs by encouraging regular contributions to the Annual Fund, PolioPlus Fund, and Endowment Fund.
- Coordinate all district Foundation fundraising and program participation.
- Encourage clubs to find current Foundation information at Rotary.org.
- Work with the district governor and governor-elect to decide how to use the District Designated Fund.
- Help the governor-elect gather input from club-level Rotarians before establishing district Foundation goals for the upcoming year.
- Manage the DDF distribution process and work with the district governor to authorize the use of the fund for program, grant, and fundraising purposes.
- Ensure that satisfactory final reports on district-sponsored programs and activities are submitted to The Rotary Foundation on time.
- Serve as an ex officio member of all subcommittees, maintain contact with them to stay informed of their progress, and directly support them as needed.
- Help the governor select qualified recipients for Foundation awards.
- Qualify the district and its clubs to use Rotary grants.
- Ensure that all clubs interested in participating in Rotary grants are able to qualify.
- Help organize grant management seminars to qualify clubs.
- Confirm that clubs applying for global grants are qualified.

## TRAINING REQUIREMENT

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

## TRAINING

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

### QUALIFICATION

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

### RESPONSIBILITIES

- Work with the governor-elect, who has final approval on the program, speakers, training leaders, evaluations, and logistics for the presidents-elect training seminar (PETS), district training assembly, and district team training seminar, which includes assistant governor training. A district participating in a multidistrict PETS should have a training committee member selected by the governor-elect to develop and conduct training at the seminar.
- Work with the governor, who has final approval on the program, speakers, training leaders, evaluations, and logistics for the district leadership seminar, club-level and Rotaract leadership training, and other training and leadership development programs, as appropriate.
- Consult on training issues for the district Rotary Foundation seminar and district membership seminar. (These seminars are the primary responsibility of other district committees.)
- Support club trainers as needed.
- Work with the district governor and the district Rotary Foundation committee chair to plan, organize, and promote the district Rotary Foundation seminar and work with the district governor-elect to promote the grant management seminar.



# ROTARY CLUB CENTRAL PLAN TOGETHER TRACK PROGRESS ACHIEVE GOALS



It's a one-stop shop.



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**Rotary**



# MANAGING VOLUNTEERS

Managing a district is no small task and is not possible without a team of volunteers who are willing and motivated to help. As district governor, you will need to demonstrate leadership qualities that inspire your district leadership team to contribute their time and energy.

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Start forming your team and begin teambuilding	Work with your team effectively to maximize your impact during your term
	Motivate your team and resolve any conflicts that arise
	Recognize outstanding efforts of Rotarians in your district through awards and other forms of public recognition

## RESOURCES

- [www.rotary.org/awards](http://www.rotary.org/awards)
- Past district governors
- District governor-elect classmates

## DELEGATION

During your year as district governor, much of your time will be devoted to club visits, attending training events, and other meetings. Your district leadership team is there to support you and help you achieve your district goals. The team includes your assistant governors, district committee chairs, and incoming and past governors. To have a successful year, it will be necessary to delegate tasks to your team members and communicate with them regularly. Each committee chair will take appropriate tasks back to their committees to complete. Check in with them often on their progress and advise them as necessary.

## MOTIVATION

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

If you don't know everyone on your district leadership team, make an effort to get to know them. This could be done with an informal gathering or by meeting individually with those you don't know as well. People vary in what motivates them, so once you get to know your team members better, you will better be able to motivate them.

## AWARDS

One way to demonstrate your appreciation for Rotarians' commitment is to recognize them with an award. Awards motivate Rotarians and thank them for their service. In addition to honors given by Rotary International and The Rotary Foundation, your district may have several of its own awards. Descriptions and nomination forms for each award are available at [www.rotary.org/awards](http://www.rotary.org/awards).

## QUESTIONS TO CONSIDER

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

- How will you delegate responsibilities so that goals are met and no one is overtasked?
- How will you motivate your team and other Rotarian volunteers?



## GETS WORKSHEET

# MANAGING CONFLICT

In your groups, discuss your assigned case study and answer the questions that follow.

### Scenario 1: Underperforming committee chair

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

How will you address the situation? How can you work with the chair to build a successful working environment?

How will you respond to the committee members' concerns?

## Scenario 2: Clubs not working with district

Over the past few years, a few of your clubs have developed a negative attitude toward the district, and they avoid working with it whenever possible. They also won't set goals in Rotary Club Central. You would like them work with the assistant governor to ensure they are receiving resources and support from the district to be a strong club.

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

How can you help them understand the benefit of using Rotary Club Central to set and track their goals?

What approach can you take with the presidents to make them feel confident about working with the district?

### Scenario 3: Overburdened district governor

You felt prepared for this position before taking office, but now that you are a quarter of the way into the year, you are feeling overwhelmed by all the work involved in developing goals, preparing for club visits, overseeing district funds, and fulfilling other responsibilities.

What steps can you take to manage your work load?

What tasks or responsibilities can you delegate to your team?

#### Scenario 4: Uncooperative team members

You have an innovative idea that you would like to try in your district. Some of your team members don't agree, but you feel strongly about it and need their support in order to carry it out.

Do you still move forward with your idea? Why or why not?

If so, how do you get support from your team to try your new idea?

What will you do if can't get their support?

### Scenario 5: Disorganized assistant governor

Maria has been an assistant governor for one year. A few previous club presidents had some difficulties with her, which you were not aware of when becoming governor. Halfway through the year, you realize that the past club presidents were right: Maria is not organized, and the current presidents haven't been able to reach her. She also forgot to schedule some of your governor's visits and rate some of your clubs in Rotary Club Central.

What do you do? Would you keep her in the position or replace her?

If you decide to keep her, how can you work with her to stay organized and on task?

If you decide to replace her, how would you find someone new?

### Scenario 6: Disagreement between team members

Your public relations, membership, and Foundation committees are trying to work together to arrange and promote a district fundraising event that is open to the public. The chairs of the committees don't agree on the venue or the approach to publicity. They want this to be a collaborative effort, because it's a good opportunity to attract new members and raise money for the Foundation. They are at an impasse, and one of the chairs has come to you to for direction but hasn't told the others.

How would you address this situation?

How can you help the committee chairs to work together on this event to make it successful and to prevent this from happening in the future?



# STRENGTHEN YOUR MEMBERSHIP

You joined Rotary because you wanted to make a difference. Together, with more than a million members in 34,000 clubs worldwide, our global community’s impact has never been greater. Our ability to provide service in communities around the world depends on strong, active, and engaged members.

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

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Appoint chairs and members to the district membership development and extension committees	Work with your director and district leaders to communicate your regional membership plan goals to club presidents and help them implement strategies to achieve these goals at the club level
Become familiar with your regional membership plan’s goals and strategies to increase membership	Organize new clubs, including satellite clubs and e-clubs, to meet the needs of a wide range of prospective members in your community
Work with assistant governors to help ensure clubs have set membership goals in <i>Rotary Club Central</i> and have a plan to achieve those goals	Promote club membership growth and development through membership diversity in classification and profession, age, gender, ethnicity, etc.
	Work with club secretaries in the district
	Encourage clubs to embrace change and foster an innovative and flexible culture
	Strengthen existing clubs by encouraging them to be actively engaged in Rotary programs and service and to maintain their relevance within the community
	Recognize and support club and member achievements
	Work with the membership development committee to organize a district membership seminar

## RESOURCES

Find more information through the following resources and people:

- [Regional membership plans](#)
- [Organizing New Clubs: A Guide for District Governors](#)
- [Strengthening Your Membership: Creating Your Membership Development Plan](#) (formerly known as Membership Development Resource Guide)
- [Membership Assessment Tools](#) (formerly known as Club Assessment Tools)
- [New Member Orientation: A How-to Guide for Clubs](#)
- [Connect for Good](#)
- [Be a Vibrant Club: Your Club Leadership Plan](#)
- [Your Rotary coordinator](#)

## SERVICE, IMAGE, AND MEMBERSHIP

Rotary research shows that the number one reason people join Rotary is to have a positive effect on their community. It is important that Rotary clubs are active in service, that this service truly improves the quality of life of its beneficiaries, and that the impact is visible to improve community awareness of Rotary. Promote club service projects on your district website, in your monthly communications, and at club visits. Encourage clubs to promote their service projects in their communities and to use social media to get the word out.

Remember that clubs that have engaged members are more likely to keep them. You can engage members by:

- Asking them to serve on committees
- Giving them active roles at meetings
- Asking them to participate in service projects
- Having them mentor new members

At the district membership seminar, members can share best practices for creating strong, vibrant, and innovative clubs with involved members. Work with your membership development and district training committees to plan this seminar, as well as stand-alone events or sessions for new members at your district training assembly or conference.

When you have clubs with engaged members who are fulfilling their desire to improve their communities and connect with others, they will stay in the club and will reflect a positive image. Engaged members have fun, and this also attracts new members.

# DISTRICT MEMBERSHIP DEVELOPMENT COMMITTEE

Your membership development committee exists to help clubs attract and engage members by helping them set realistic goals, connecting them with available resources, and implementing strategies that are appropriate for the district.

Be sure to enter your district appointments in My Rotary so that the committee can receive membership development resources from Rotary International. For more information on this committee, see Appendix 4: District Committees.

## REGIONAL MEMBERSHIP PLANS

Regional membership plans recognize that needs vary from region to region and address our membership challenge on a local level. The initiative empowers Rotarians around the world to develop membership strategies that work best in their region. Work with your membership committee to identify tactics for attracting new members, engaging your current members to improve member retention, and increasing the diversity of your membership.

## QUESTIONS TO CONSIDER

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

- What opportunities exist for organizing new clubs in your district?
- How can you help increase membership in the clubs in your district?
- What strategies for engaging existing members will you promote to clubs?
- What can you do to promote membership diversity as a key component of membership growth?
- How can you encourage clubs to continually assess and monitor themselves to remain relevant and viable to their members and their communities?



# CREATING A VALUE PROPOSITION

As overall membership declines, it's important to consider various approaches to attracting and engaging members. Target segments have differing needs and want to customize their Rotary experience. As governor, encourage your clubs to develop a value proposition for each group they want to target.

A value proposition is a promise of value to be delivered. It's the primary reason a prospective member should join your club. Consider the following when developing your value proposition:

- What service or product is your club offering?
- What is the benefit of using it?
- Who is your target customer for this?
- What makes your product unique and different?

Use the following formula to write a value proposition to use on your website, posters, fliers, etc.

- **Headline.** Use one short sentence to convey the benefit you're offering. You can mention the product and/or the customer.
- **Subheadline or a paragraph of two to three sentences.** A specific explanation of what you do or offer, for whom, and why it is useful.
- **Three bullet points.** List the key benefits or features.
- **Visual.** Images communicate much faster than words. Show the product or an image that reinforces your main message.

## ACTIVITY

**Step 1: With your group, review your assigned target segment.**

Target group 1: Young professionals

Target group 2: Rotary alumni

Target group 3: Women

Target group 4: Rotaractors

Target group 5: A local or regional ethnic group that is underrepresented in your clubs, or recent retirees

Use the questions below to develop a value proposition

1. Ask yourself: "Why should my ideal prospect join Rotary (or my club)?"
2. Refine your value proposition until you can articulate it in a single credible sentence.
3. If you had to use just 10 words to explain why people should join your club, what would you say?

**Step 2: Write your value proposition:**

Target segment: \_\_\_\_\_

**GETS WORKSHEET**

# DEVELOPING YOUR DISTRICT MEMBERSHIP PLAN

Use this worksheet to develop membership goals and strategies that can be implemented in your district and clubs.

Step 1: Review your regional membership plan

Step 2: With your group, choose a goal from the regional membership plan or another goal you would like to implement in your districts

Step 3: Discuss district-level strategies for achieving your goal

GOAL: \_\_\_\_\_

Steps for achieving this goal	Implement by (date)	Budget	Who will do this?

GOAL: \_\_\_\_\_

Steps for achieving this goal	Implement by (date)	Budget	Who will do this?

**GOAL:** \_\_\_\_\_

Steps for achieving this goal	Implement by (date)	Budget	Who will do this?

GOAL: \_\_\_\_\_

Steps for achieving this goal	Implement by (date)	Budget	Who will do this?

**GOAL:** \_\_\_\_\_

Steps for achieving this goal	Implement by (date)	Budget	Who will do this?



# SERVICE AND WORKING WITH YOUNG LEADERS

Effective service projects help clubs maintain their members' enthusiasm for Rotary and encourage them to initiate new service efforts. Meaningful involvement with young leaders through support of Rotary's youth programs will secure a vibrant future for your district.

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Appoint chairs and members to service-related district committees	Ensure that district programs are conducted appropriately, in compliance with Rotary policies and local laws, and that no personal financial profit is made from the district's activities
Work with assistant governors to see that clubs have set service goals in <a href="#">Rotary Club Central</a>	Work with the governor-elect and governor-nominee to reach a consensus on service projects that last more than one year and with past district governors on projects that continue into your year
	Partner with your counterparts in other countries on service projects
	Receive and evaluate requests to contact Rotary clubs in your district for cooperation on any activity or project from clubs, multidistrict groups, Rotarian Action Groups, or others

## RESOURCES

Find more information in the following resources:

- [Communities in Action: A Guide to Effective Projects](#)
- [Community Assessment Tools](#)
- [Abuse and Harassment Prevention Training Manual and Leaders' Guide](#)
- [Learning Center](#)

## DEVELOPING SERVICE PROJECTS

All Rotarians are responsible for participating in service projects that improve the quality of life in their community and communities around the world. When considering service projects and activities, keep in mind Rotary’s areas of focus and programs (see appendix 5). Conduct a needs assessment to determine what will benefit the community. For more information on needs assessments, see [Community Assessment Tools](#). Talking to members of the community who will benefit from the project before developing a project plan will increase the difference that the project makes in the community.

A priority of Rotary’s strategic plan is to focus and increase humanitarian service. As district governor, encourage sustainable service focused on youth programs and the areas of focus, and create projects locally and internationally.

## ONLINE TOOLS

To enhance your service this year, consider using these online Rotary tools:

- [Rotary Ideas](#) — Find an international partner for a global grant, promote hands-on volunteer opportunities, or encourage clubs to crowdsource funding from their community.
- [Rotary Club Central](#) — Plan your year of service projects and see what service goals clubs in your district have set. When you visit them, you can check on their progress.
- [Rotary Showcase](#) — Promote successful projects on Rotary Showcase and share your service projects within and beyond the Rotary family. You can add your clubs’ service projects and explore the projects Rotarians are undertaking worldwide. Best of all, you can connect directly to Facebook and promote your district’s projects.
- Discussion Groups — Find or start a discussion group on service projects, youth programs, or other Rotary topics.

See appendix 13 for information on all of Rotary’s online tools.



## WORKING WITH YOUTH

When Rotary clubs and districts work with youth, they make an investment in the future of their communities and of Rotary itself — but this investment succeeds only if the activities are administered responsibly. Our Statement of Conduct for Working With Youth outlines this philosophy:

Rotary International strives to create and maintain a safe environment for all youth who participate in Rotary activities. To the best of their ability, Rotarians, Rotarians' spouses and partners, and other volunteers must safeguard the children and young people with whom they come into contact and protect them from physical, sexual, or emotional abuse.

As district governor, take extra care to create a safe and inclusive environment that engages young people in Rotary. During the presidents-elect training seminar, ensure clubs understand their responsibility to report and follow through on any youth safety concerns.

The Rotary Youth Exchange program requires participating districts to obtain certification, which involves establishing additional policies and procedures for protecting youth. As governor, you ensure that certification requirements are met and maintained before the district plans any student exchanges.

Other club and district programs and activities that involve minors traveling outside their local communities require careful planning and specific communications with parents or guardians.

Additional resources and information for responsibly working with youth can be found in the Rotary Code of Policies section 2.110 and the [Abuse and Harassment Prevention Training Manual and Leaders' Guide](#). See appendix 6 for more information on managing risk for youth programs.

## QUESTIONS TO CONSIDER

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

- How will you motivate Rotarians to participate in service projects?
- Which service projects in your district will attract the most publicity and local interest?
- What factors have made projects in your district successful?
- How will you ensure that your district is providing a safe environment for youth who participate in Rotary activities?

## APPENDIX 5

# ROTARY PROGRAMS AND ACTIVITIES

Rotary programs and your responsibilities for each are explained below. Resources for each program are also listed and available at [Rotary.org](http://Rotary.org) depending on the activities in your district, appoint district committees for the following programs.

## COMMUNITY SERVICE

Community service includes the projects and activities that clubs undertake to respond to the needs of local communities. Rotary clubs should determine top priorities for service projects by assessing their own communities' needs and assets, then developing a response that addresses them.

### RESOURCES

- Communities in Action/Community Assessment Tools – Kit contains two publications:
  - [Communities in Action: A Guide to Effective Projects](#) offers step-by-step instructions for developing, carrying out, and evaluating a service project, including how to conduct a community needs assessment and work with other organizations.
  - [Community Assessment Tools](#) describes tools for identifying effective service projects.
- [Rotary's Areas of Focus](#) – Booklet that introduces Rotary's six areas of focus, with examples of service projects for each area.
- Rotary Service newsletter – Bimonthly newsletter that provides information and ideas for Rotarians to use in planning service projects. Subscribe at [www.rotary.org/newsletters](http://www.rotary.org/newsletters).

## ROTARY COMMUNITY CORPS

The Rotary Community Corps program promotes self-reliance among community groups and encourages participants to identify and address community needs. A Rotary Community Corps is a group of adult, non-Rotarian volunteers sponsored by a Rotary club, which provides guidance for community and vocational projects.

### YOUR RESPONSIBILITIES

- Approve the organization of all Rotary Community Corps.
- Encourage the formation of Rotary Community Corps in underrepresented areas.
- Establish relationships between Rotary Community Corps and their sponsor Rotary clubs.
- Suggest that Rotary clubs appoint a Rotary Community Corps committee.

### RESOURCES

- [Rotary Community Corps Handbook](#) – Basic steps for organizing an RCC, including tips for identifying potential leaders, new case studies, and program ideas.
- [Rotary Community Corps Brochure](#) – An overview of the program, including case studies and instructions for organizing a Rotary Community Corps.

- [Rotary Community Corps: Changing Lives, Shaping the Future](#) — Brochure for prospective Rotary Community Corps members. Available to clubs as a recruiting piece to hand out their communities.

## INTERACT

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

### YOUR RESPONSIBILITIES

- Approve the organization of all Interact clubs.
- Send your monthly communications to Interact clubs, highlighting opportunities for Interactors to participate in Rotary projects and activities.
- Establish strong relationships between Interact clubs and their sponsor Rotary clubs.
- Work with Interactors to develop a districtwide service project for all Interact clubs.
- Endorse the Statement of Conduct for Working With Youth and ensure that appropriate risk management measures are in place to protect all program participants.
- Promote Rotary Youth Exchange and RYLA among current Interactors, and raise awareness of Rotaract among those who are outgrowing Interact.
- If your district has two or more Interact clubs, encourage them to elect a district Interact representative to work with the district Interact committee.

### RESOURCE

- [Interact Handbook](#) — Complete guide for organizing and administering an effective Interact club, written for both sponsoring Rotary clubs and Interact club leaders.

## NEW GENERATIONS SERVICE EXCHANGE

New Generations Service Exchange allows young adults up to age 30 the opportunity to discover their strengths while using their skills to help others. These exchanges may be designed for individuals or groups, may be reciprocal or one-way exchanges, and can last up to six months. Coordinated by district New Generations (Youth Service) committee chairs, exchanges are supported by district resources and through connections with community, international, and vocational service chairs and Rotary Foundation subcommittee chairs. All exchanges must have a strong vocational or humanitarian service component.

### YOUR RESPONSIBILITY

- Encourage connections and coordination among district committees to design and plan customized exchanges for young professionals.

### RESOURCE

- [New Generations Service Exchange](#) — Information flier with tips and suggestions for developing successful exchanges.

## ROTARACT

Rotaract is a Rotary-sponsored service organization for young adults ages 18-30, designed to promote personal development by building leadership and professional skills through service. Rotaract clubs must have a Rotary club sponsor.

### YOUR RESPONSIBILITIES

- Approve the organization of all Rotaract clubs. Encourage the formation of both university-based and community-based Rotaract clubs.
- Send your monthly communications to Rotaract clubs, highlighting opportunities for Rotaractors to participate in Rotary projects and activities.
- Establish strong relationships between Rotaract clubs and their sponsor Rotary clubs. Involve Rotaractors in the life of the district. They should meet regularly with sponsor Rotary clubs, attend district events, and work with Rotarians on service projects.
- Increase the capacity of Rotaract clubs to provide service.
- Welcome former Rotaractors to Rotary club activities and events.
- Ensure that the Rotaract leadership training seminar is conducted during the district training assembly, if appropriate.
- If your district has two or more Rotaract clubs, encourage them to elect a district Rotaract representative as co-chair of the district Rotaract committee. Appoint both Rotaractors and Rotarians to serve on this committee.
- Pay for the attendance of district Rotaract representatives at district, multidistrict, or international training meetings. Defray all or part of the costs associated with the district Rotaract representative-elect's attendance at the annual Rotaract Preconvention Meeting.
- Promote the Rotaract Preconvention Meeting and the Rotary convention to all Rotaractors.

### RESOURCES

- [Guide for District Rotaract Representatives](#) – Manual for district Rotaract representatives and others involved with Rotaract at the district level. Provides an overview of responsibilities and suggestions for successful Rotaract clubs.
- [Rotaract Handbook](#) – Guide to organizing and developing a Rotaract club and conducting service projects and professional development projects. Also describes district Rotaract structure and multidistrict activities. Contains administrative forms and constitutional documents.

## ROTARY YOUTH EXCHANGE

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

- Long-term exchange – Students ages 15-19 live with more than one host family and attend school in the host country for an academic year.
- Short-term exchange – Students ages 15-19 visit the host country for several days or weeks. This exchange does not include an academic program and often takes place when schools are not in session.

## YOUR RESPONSIBILITIES

- Endorse the Statement of Conduct for Working With Youth, and make certain that appropriate risk management measures are in place to protect all program participants.
- Have your district's Youth Exchange program obtain certification or maintain its certification.
- Make sure the district Youth Exchange program is being conducted within RI guidelines.
- Seek legal advice about liability issues before undertaking Youth Exchange activities.

## RESOURCES

- [Youth Exchange: A Guide for Exchange Students](#) — Guide for exchange students and their parents.
- [Youth Exchange: A Guide for Host Families](#) — Information on the responsibilities of serving as a host family.
- List of district Youth Exchange chairs and multidistrict officers (available from [programs@rotary.org](mailto:programs@rotary.org)) — Resource for coordinating exchanges with other districts and multidistrict groups.
- [Youth Exchange Handbook](#) — Comprehensive information for Rotarians organizing a district Youth Exchange program. Includes guidelines for sending and hosting Youth Exchange students.
- Youth Exchange certification materials (available from [programs@rotary.org](mailto:programs@rotary.org)) — Application, support documentation, and youth protection requirements.

## ROTARY YOUTH LEADERSHIP AWARDS (RYLA)

Rotary Youth Leadership Awards provide young people an opportunity to develop their leadership skills. Young men and women selected by their local Rotary clubs are invited to participate in leadership training meetings organized, funded, and implemented by Rotarians. These events can happen at the club, district, or multidistrict level.

## YOUR RESPONSIBILITIES

- Endorse the Statement of Conduct for Working With Youth and make certain that appropriate risk management measures are in place to protect all program participants.
- Use RYLA as a tool to develop the leadership skills of Interactors, Rotaractors, and other young people with leadership potential, with a special focus on economically and socially disadvantaged youth.
- Promote Interact and Youth Exchange participation among younger RYLA participants.
- Encourage young professionals who participate in RYLA to start or join a Rotaract club or Rotary club or to participate in New Generations Service Exchange.
- Ask RYLA organizers to exchange ideas with other districts through social media, planning workshops, and visits to other RYLA events.
- Promote leadership of youth by youth by empowering young people, including Rotaractors and past RYLA participants, to design RYLA programming.

## RESOURCE

- [Rotary Youth Leadership Awards Handbook](#) — Step-by-step guide to organizing a RYLA event.

## INTERNATIONAL SERVICE

International service promotes and fosters international understanding and goodwill through both fellowship and service.

### YOUR RESPONSIBILITY

- Support clubs in their efforts to partner with clubs in other countries for fellowship and service.

## RESOURCES

- Rotary grants — Available grants will vary depending on the type of project.
- Rotary Service newsletter — Bimonthly newsletter that provides information and ideas for Rotarians to use in planning service projects. Subscribe at [www.rotary.org/newsletters](http://www.rotary.org/newsletters).

## ROTARIAN ACTION GROUPS

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

### YOUR RESPONSIBILITIES

- Facilitate collaboration between clubs and Rotarian Action Groups on projects and activities.
- Report on Rotarian Action Group activities for the year at the district conference.

## RESOURCE

- [Rotarian Action Groups Officer Directory](#) — List of Rotarian Action Groups including officers' contact information.

## ROTARY FELLOWSHIPS

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

## YOUR RESPONSIBILITIES

- Report on Rotary Fellowships activities for the year at the district conference.
- Promote Rotary Fellowships Month (June).

## RESOURCES

- Rotary Fellowships Handbook — Guidelines and suggestions for starting, operating, and promoting a Rotary Fellowship.
- Rotary Fellowships Officer Directory — List of each Rotary Fellowship, including officers' contact information.

## ROTARY FRIENDSHIP EXCHANGE

Rotary Friendship Exchange gives Rotarians and their families an opportunity to stay in the homes of Rotary members in other countries. These reciprocal visits advance international understanding through personal contact across national boundaries. This program also fosters partnerships between districts that lead to fellowship and service visits.

## RESOURCES

- Rotary Friendship Exchange District Chair Directory — Resource for coordinating exchanges with other districts.
- Rotary Friendship Exchange Matching Board — Quarterly list of districts seeking partners for an exchange.

## VOCATIONAL SERVICE

Vocational service encourages Rotarians to model high ethical standards and apply their business knowledge and skills to benefit others.

## YOUR RESPONSIBILITY

- Promote Vocational Service Month (January).

## RESOURCES

- An Introduction to Vocational Service — Provides information, resources, and project ideas related to vocational service.
- Rotary Code of Conduct — A set of ethical guidelines for Rotarians.
- Vocational Service newsletter — Quarterly newsletter that provides information and ideas for Rotarians to use in planning vocational service activities. Subscribe at [www.rotary.org/newsletters](http://www.rotary.org/newsletters).

## APPENDIX 6

# RISK MANAGEMENT FOR YOUTH PROGRAMS

It's important to be aware of the risks involved in youth activities, such as injury, illness, and abuse, so that participants may make good choices in dealing with these risks. Although awareness alone cannot prevent incidents, it can reduce their number and effects. Your district should consider developing a risk management program for working with youth that includes the following steps:

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

While these steps are required for Youth Exchange district certification, they are also recommended for districts that participate in Interact, RYLA, or any other youth activity.

Clubs and districts are urged to contact their insurance brokers or agents to determine whether their insurance policies provide adequate coverage for their youth programs. Insurance becomes a complex issue when multiple districts or clubs sponsor a program, because each organization may have different coverage.

All participants, including youth and organizers, are urged to verify that their health and life insurance will provide adequate coverage while they participate in the program. Many health insurance policies provide only limited coverage outside a certain area, so this precaution is especially important when traveling or living away from home. In these cases, participants must obtain a travel medical and accident insurance policy that provides the following types of coverage:

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

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



## GETS WORKSHEET

# STRATEGIES FOR ENGAGING YOUNG LEADERS

As governor, your role is to support service and professional development that connect youth and young adults with Rotarians and strengthen the family of Rotary. Strengthening these connections will keep young leaders engaged with Rotary as volunteers, ambassadors, and prospective members.

Use this worksheet to develop strategies for keeping current and former program participants engaged with Rotary. If you wish, add other groups of participants that clubs in your district might work with.

Rotaract	District-level engagement strategies	Club-level engagement strategies
Current	<ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol>	<ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol>
Alumni	<ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol>	<ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol>

<b>Interact</b>	<b>District-level engagement strategies</b>	<b>Club-level engagement strategies</b>
Current	1. 2. 3.	1. 2. 3.
Alumni	1. 2. 3.	1. 2. 3.

<b>Youth Exchange</b>	<b>District-level engagement strategies</b>	<b>Club-level engagement strategies</b>
Current	1. 2. 3.	1. 2. 3.
Alumni	1. 2. 3.	1. 2. 3.

<b>RYLA</b>	<b>District-level engagement strategies</b>	<b>Club-level engagement strategies</b>
Current	1. 2. 3.	1. 2. 3.
Alumni	1. 2. 3.	1. 2. 3.

<b>Other</b>	<b>District-level engagement strategies</b>	<b>Club-level engagement strategies</b>
Current	1. 2. 3.	1. 2. 3.
Alumni	1. 2. 3.	1. 2. 3.



# DEVELOPING LEADERS

Rotary club and district leaders change annually, and new Rotary leaders are continually needed. While serving as governor-elect and governor, you are responsible for overseeing the training events that develop incoming and future Rotary leaders.

For detailed information on the district trainer’s and the training committee’s responsibilities, refer to [Lead Your District: Training](#) and online resources at [www.rotary.org/trainers](http://www.rotary.org/trainers). Appendix 7 lists and summarizes Rotary training events.

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Appoint members, including the district trainer, to the district training committee	Convene continuing education meetings, including <ul style="list-style-type: none"> <li>• District Rotary Foundation seminar</li> <li>• District leadership seminar</li> </ul>
Convene incoming officer trainings, including: <ul style="list-style-type: none"> <li>• District team training seminar</li> <li>• Presidents-elect training seminar (PETS)</li> <li>• District training assembly</li> <li>• District membership seminar</li> <li>• Grant management seminar</li> </ul>	Help the governor-elect with the meetings he or she convenes
Approve a substitute attendee for PETS if the president-elect cannot attend	
Ensure that each Rotary club has a training plan, and promote the role of a club trainer	

## RESOURCES

Find more information in the following resources

- [Lead Your District: Training](#)
- [www.rotary.org/trainers](http://www.rotary.org/trainers)
- [Learning Center](#)

## DISTRICT TRAINING COMMITTEE

Your district’s training committee, chaired by the district trainer, will assist you with the Rotary training meetings you are responsible for as governor-elect and as governor. Under your supervision, this committee plans and conducts the trainings, including logistics and program content. As the convener, you have final authority over the program, venue, speakers, training leaders, and other meeting elements. For more information on the district training committee, see *Lead Your District: Training*.

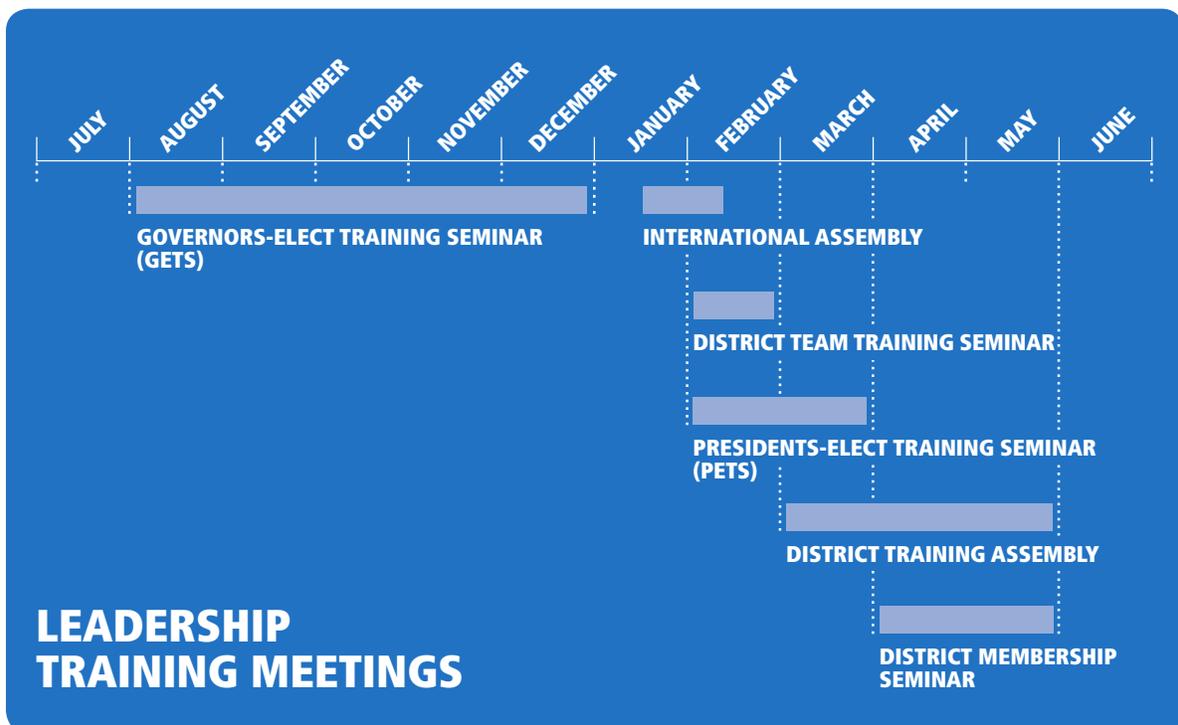
## ROTARY TRAINING MEETINGS

Since Rotary clubs and districts change leadership annually, training is critical to maintain continuity and the success of Rotary. Every year, there is a series of consecutive training meetings for district and club leaders. Each meeting has a recommended but flexible time frame and curriculum, allowing for modifications based on the needs of the district and participants.

Rotary International provides many resources to support the training meetings for club and district leaders, including leaders guides for every RI Board-recommended meeting (see appendix 7). The guides can be found on [www.rotary.org/trainers](http://www.rotary.org/trainers).

Courses for trainers are available in the Learning Center on Rotary.org. Encourage your district trainer and committee to take the courses by signing in to My Rotary and clicking on Learning and Reference | Learning Center.

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

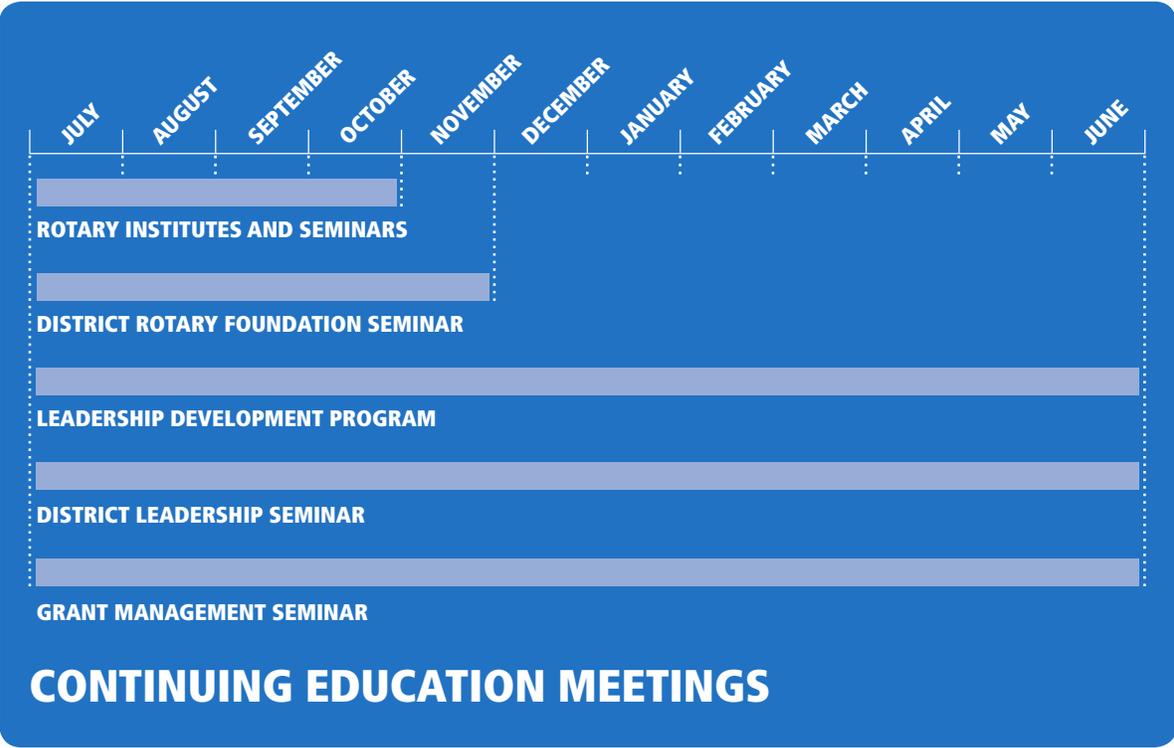


# TRAINING MEETINGS FOR INCOMING OFFICERS

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

# CONTINUING EDUCATION MEETINGS

As governor, you convene meetings for Rotarians to further their Rotary education. Holding training meetings during the year keeps members informed on current trends in the organization, develops leadership skills, and provides networking opportunities. For these continuing education meetings, you and your district training committee have discretion on the time frame and other details, such as who convenes and organizes each meeting. The governor and governor-elect should work together to determine what works best for the district. For more information on each of these meetings, see [Lead Your District: Training](#), or the leader’s guides for each of these events.



## CLUB TRAINING

Clubs are encouraged to have a club trainer to:

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

For more information about the role of the club trainer, sign in to My Rotary and clicking on Learning and Reference | Learning Center.

## QUESTIONS TO CONSIDER

Consider these questions in preparation for your GETS:

- What learning opportunities does your district offer in addition to Rotary-recommended events?
- What makes training seminars successful in your district?
- How will you motivate Rotarians to attend training meetings?
- How will you support the development of future district governors?

## APPENDIX 7

# ROTARY TRAINING EVENTS

### District Training Events Convened by the Governor-elect

Training Events/ Time of Year	Purpose	Organizer	Materials
<b>District team training seminar</b> February	Assistant governors and district committee leaders learn their new roles and responsibilities and work on district goals and the district leadership plan.	District training committee	<b>For leaders:</b> District Team Training Seminar Leader's Guide  <b>For participants:</b> Lead Your District manuals for assistant governors and committees
<b>Presidents-elect training seminar (PETS)</b> February or March	Club presidents-elect learn their new responsibilities and work with assistant governors to set their goals.	District training committee	<b>For leaders:</b> Presidents-elect Training Seminar Leader's Guide  <b>For participants:</b> Lead Your Club: President training manual
<b>District training assembly</b> March-May (after PETS)	Club presidents-elect build on PETS training to gain leadership skills, while other incoming club leaders learn their new responsibilities. Club leadership teams refine their goals for the year.	District training committee	<b>For leaders:</b> District Assembly Leader's Guide  <b>For participants:</b> Club Officers Kit manuals for: President Secretary Treasurer Committees
<b>District membership seminar</b> April or May (after district training assembly)	Club presidents, club membership committee chairs, interested Rotarians, and district leaders learn how to sustain and increase membership.	District membership committee	<b>For leaders:</b> District Membership Seminar Leader's Guide  <b>For participants:</b> Determined by the district
<b>Grant management seminar</b> Determined by the district	Club presidents-elect (or club-designated appointees) learn how to manage Rotary grants. Clubs applying for global grants must attend.	District Rotary Foundation committee chair, grants subcommittee chair, district training committee	<b>For leaders:</b> Grant Management Seminar Leader's Guide  <b>For participants:</b> Manage Your Global Grant manual

## District Training Events Convened by the Governor

Training Events/ Time of Year	Purpose	Organizer	Materials
<b>District Rotary Foundation seminar</b> July-November	Club Rotary Foundation committee chairs and interested Rotarians learn about the Foundation and Rotary grants.	District Rotary Foundation committee, district training committee, regional Rotary Foundation coordinator	<b>For leaders:</b> District Rotary Foundation Seminar Leader's Guide  <b>For participants:</b> Determined by the district
<b>Leadership development program</b> Determined by the club	Club members gain leadership skills that apply both to their professional lives and their leadership roles in Rotary.	Club trainer, president, assistant governor, district training committee	<b>For leaders:</b> Leadership Development: Your Guide to Starting a Program  <b>For participants:</b> Materials developed by the club or district
<b>District leadership seminar</b> Immediately before or after the district conference	Current or past club presidents and other club leaders who have served three or more years learn about leadership opportunities in Rotary.	District training committee	<b>For leaders:</b> District Leadership Seminar Guide  <b>For participants:</b> Determined by the district
<b>District conference</b> Any time except at the same time as the district training assembly, during the Rotary institute, the International Assembly, or the Rotary convention	Rotarians hear inspirational addresses and discuss matters of importance to clubs and Rotary International.	District training committee	<b>For leaders:</b> District Conference Manual
<b>Rotaract district leadership training meeting</b> Any time after club open elections and before 30 June	Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and the general public learn about Rotaract.	District Rotaract representative	<b>For leaders:</b> Guide for District Rotaract Leaders



## GETS WORKSHEET

# MANAGING TRAINING SEMINARS

As governor-elect and governor, you are responsible for planning incoming training and continuing education meetings for your district. Various aspects of planning these meetings are addressed below. With a partner, discuss at least one question from each topic to start thinking about how you can effectively manage these events.

### Training committee and district trainer

Do you have a district trainer or a training committee? How is your district training committee structured? Is each member assigned to handle a different aspect of the meeting; are members assigned specific meetings to work on?

How will you work with your district trainer to prepare for training meetings? Will you delegate most of the training meeting arrangement to your district trainer? Which aspects of meeting planning will you handle?

### Flexibility in training

Does your district currently combine training meetings? How can you schedule your trainings to be more flexible?

### Flexibility in training (continued)

If applicable, describe how you use technology to train in your district.

### PETS and district training assembly

Are you and your district trainers familiar with the PETS Leader's Guide?

Which of the following topics are included in your PETS curriculum?

- Planning for your year
- Running meetings
- Leading Rotarians
- Engaging your members
- Running your club
- Rotary grants
- Fundraising
- Service projects
- Partnerships
- Working with youth and young professionals
- Social media
- Promoting your project
- Telling your Rotary story
- Public image

What other sessions or topics will you include in your PETS?

### **PETS and district training assembly (continued)**

Will your PETS and district training assembly breakout sessions include a variety of formats, such as idea exchanges, panels, workshops and speedmeets?

How is your district training assembly conducted for club leaders? Is it combined with other trainings? The District Assembly Leader's Guide helps to train incoming club leaders in their roles.

### **Promotion**

What has inspired you to attend training seminars? Think about past training seminars you've attended: What made them successful? What would you do differently?

What strategies will you use to promote attendance at training meetings in your district?

### Club-level trainers

Do you have club-level trainers in your district? If not, who provides training?

What does a club trainer do?

What kind of training do your clubs offer?

How can you encourage your clubs to appoint trainers? Who on your team would work with the trainers to train and support them?



**INTRODUCING**  
**THE NEW MEMBER SPONSOR**  
**RECOGNITION PROGRAM**

**BE RECOGNIZED FOR**  
**STRENGTHENING**  
**ROTARY'S**  
**MEMBERSHIP**

This exciting new initiative acknowledges Rotary members who sponsor new members admitted on or after 1 July 2013. Sponsors are eligible to receive a specially designed membership pin and colored pin backer designating their achievements from Rotary as well as a place in the Membership Recognition Gallery coming soon to Rotary.org.



**JOIN LEADERS:** [www.rotary.org/myrotary](http://www.rotary.org/myrotary)

# PLANNING YOUR DISTRICT CONFERENCE

One of your most memorable experiences as district governor will be your district conference. Start preparing for this special occasion early in your year as district governor-elect to make it successful for you and the Rotarians in your district.

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Select the date and venue for your district conference	Convene your district conference and oversee the event
Appoint the district conference committee chair and members	Appoint an aide to the RI president's representative, as well as a conference secretary to record the proceedings
Visit other district conferences to get ideas	Promote the conference during club visits and on the district website
Submit the date, location, and other district conference details by 1 February on Rotary.org	Ensure that hospitality and courtesy appropriate to the RI president are given to the RI president's representative and his or her spouse (see the <b>Manual of Procedure</b> for Rotary protocol)
	Make sure that a written report of the conference proceedings is sent to clubs within 30 days of the event
	Submit the <u>president's representative report</u> to <a href="mailto:presidential.services@rotary.org">presidential.services@rotary.org</a>

## RESOURCES

- [District Conference Manual](#)
- [Manual of Procedure](#)

## DISTRICT CONFERENCE

District conferences are held each year to inspire and motivate Rotarians. Celebrate the achievements of the past Rotary year and build confidence to achieve the goals for the upcoming year. The district conference should be designed to appeal to all Rotarians in the district.

Hold your conference at a time and place agreed upon by you and a majority of club presidents. The event dates and location can be decided as early as your term as governor-nominee, with either the current club presidents or those who will be president during your term. Avoid scheduling your conference during the Rotary institute, Rotary convention, and holidays; the dates for these and other RI meetings are available at [Rotary.org](http://Rotary.org) or from your CDS representative. Consider holding your conference with another district. For more information about planning and promoting your district conference, refer to the [District Conference Manual](#).

## QUESTIONS TO CONSIDER

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

- What features of your district conference will interest Rotarians and their families?
- How will you ensure that your district conference is widely promoted?
- What will you do to make sure that your district conference is a celebratory event, in addition to training and Rotary business?



**GETS WORKSHEET**

# IDEAS FOR YOUR DISTRICT CONFERENCE

Use this worksheet to collect district conference ideas from your fellow governors-elect.

Promoting the conference

Working with the RI president's representative

Involving youth at your conference

Finding and using sponsorships

Recognizing achievements of Rotarians in the district

Holding service projects at the conference

# CONNECTING WITH CLUBS

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

## RESPONSIBILITIES

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

## RESOURCES

- Official Directory
- [Manual of Procedure](#)

## DISTRICT LEADERSHIP TEAM COMMUNICATION

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

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

## DISTRICT WEBSITE

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

- A district events calendar listing upcoming district meetings and club visits
- A message for clubs (which can be your monthly communication)
- Notes on how clubs in your district have been successful attracting new members
- Profiles of club service projects
- Links to club websites
- Updates on district goals
- Contact information for district leaders

Encourage clubs to have their own websites to promote Rotary, advertise club and district events and activities, and share Rotary resources and news via RSS feeds. Clubs should also be encouraged to have an outward-facing website or Facebook page that is directed to the public.

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

## SOCIAL MEDIA

Communicating with Rotarians in your district through social media can facilitate networking and collaboration among Rotarians for individual or club projects and activities. Visit Rotary's official social networking pages ([Facebook](#), [LinkedIn](#), [Flickr](#), and [YouTube](#)) to share Rotary images, videos, and stories with Rotarians and your community.

## GOVERNOR'S MONTHLY COMMUNICATION

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

- Inform members about important Rotary updates
- List upcoming district deadlines
- Highlight specific club activities, such as new clubs admitted and names of new Rotarians
- Motivate club leaders to use Rotary Club Central to list their goals and celebrate their accomplishments

- Motivate clubs to pursue club goals, plan for upcoming events and observances, and promote district initiatives
- Recognize the service of committees, Rotarians, and club and district programs
- Recognize the financial contributions of Rotarians and community organizations
- Recommend helpful Rotary resources

## QUESTIONS TO CONSIDER

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

- Which aspects of your district's current communication policy are working well, and which need to be improved?
- How will you communicate with clubs regularly?
- What kinds of social media does your district use?
- How will you make sure club members' needs are heard and addressed?



## GETS WORKSHEET

# INTERNAL COMMUNICATION CHECKLIST AND GUIDELINES

### Part 1: Communicating updates from RI to your district

Think about how information is usually shared in your district and use the guide below to refine your internal communication plan. Although Rotary typically sends information regarding new initiatives and changes to both club and district leaders as appropriate, as governor, you are responsible for ensuring that these changes are implemented. For this activity, work with your partner to determine how you will communicate updates based on your assigned scenario and the questions that follow. Use the flip chart paper provided to diagram your responses.

#### Scenario 1

You receive a notice in October 2016 that there is a change to the club invoicing process that goes into effect in July 2017.

#### Scenario 2

A club has shared an excellent project on Rotary Showcase.

#### Scenario 3

You see a great news story about Rotary's polio efforts on the Rotary website.

Who will you tell first?

How quickly will the message be transmitted to your clubs? What criteria will you use to determine the priority of the message?

How will you communicate?

- In person
- By phone
- By email
- By newsletter
- Other \_\_\_\_\_

How do you determine which team member communicates which information?

Who will tell the clubs?

## **Part 2: Communication among clubs, district, and zone**

What type of information do you want to receive from clubs?

How do you want this information communicated to you?

Under what circumstances will a district committee work directly with a club?

How will information from RCs, RRFs, RPICs, and E/MGAs be communicated to clubs?

Under what circumstances will a regional coordinator or adviser work directly with a club?

### Part 3: Checklist

Each time you plan a communication, consider what information you will communicate to clubs, how you plan to send the information, how often, and the reason you're sending it.

Consider what your first communication to your clubs after 1 July will be.

What type of information will you include?

- Introduction
- Goals for the year
- Other \_\_\_\_\_
- Other \_\_\_\_\_

What is the best format?

- Newsletter
- Blog
- Video message
- Other \_\_\_\_\_

What is the method of transmission?

- Email
- Facebook
- District website
- Mail
- Other \_\_\_\_\_

What is the appropriate frequency?

- Daily
- Weekly
- Monthly
- Quarterly
- Once
- As needed

# MAXIMIZING YOUR CLUB VISITS

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

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Consider scheduling your club visits and getting clubs' confirmation of the scheduled dates	Visit every club in your district

## RESOURCES

- [Your CDS representative](#)
- [Club Finder](#)
- [Rotary Club Central](#)
- [Be a Vibrant Club: Your Club Leadership Plan](#)

## CLUB VISITS

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

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

- Emphasize that district leaders are there to help them.
- Motivate club members to participate in service projects and encourage clubs to let the community know about their projects and activities.
- Encourage them to try new things to rejuvenate their clubs and attract new members. (Refer them to [Be a Vibrant Club: Your Club Leadership Plan](#).)
- Highlight important Rotary issues.
- Recognize outstanding club projects and individual Rotarian contributions.

Be sure to meet with the president and other club leaders, including committee chairs. Attend a club meeting or assembly and take the opportunity to talk to members about club activities, issues, and how the district can support

their efforts. This open communication will lead to a productive relationship throughout the year.

## LOGISTICS

Work with the assistant governor assigned to the club to determine the best time for your visit. Ask assistant governors to identify clubs that will require an early visit, including those that are new, have low membership, or are not meeting minimum standards (listed on page 1.3). Given their role as club advisers, assistant governors should be able to discuss a club's strengths, weaknesses, and needs with you, providing insight and potential ways to bring about improvement.

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

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

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

## QUESTIONS TO CONSIDER

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

- How will you make sure club members' concerns are heard and addressed?
- What innovative ideas do you have for your club visits?
- What will you do to prepare for your club visits?





# BRING ROTARY'S STORY TO LIFE

548-EN—(214)

Applying a consistent Rotary look and voice in all of our communications is vital to strengthening our image and enhancing our reputation. Visit Rotary's online **brand center**, where you can find new resources and templates to help you deliver a clear and compelling story to the public.

Sign in to **My Rotary** to get:

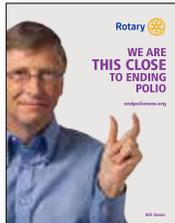
**Logos**



**Images**



**Ads**



**Videos**



**Customizable brochures and fliers**



**Examples and guidelines for telling Rotary's story effectively**



**TAKE ACTION:** [www.rotary.org/brandcenter](http://www.rotary.org/brandcenter)

# PROMOTING ROTARY'S PUBLIC IMAGE

Promoting a positive public image is important because it informs communities around the world that Rotary is a credible organization that meets real needs. In addition, a positive image of Rotary makes members proud and motivates them to be active participants in their clubs and districts.

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Appoint members and a chair to the district public relations committee	Serve as a spokesperson for your district and Rotary
Budget for the district's public relations needs	Encourage clubs to have a public relations plan
Ensure that clubs have appropriate public relations training	Ensure that the district's website and social networking sites are updated regularly
Work with assistant governors to ensure that clubs set public image goals in Rotary Club Central	Promote service projects effectively and encourage clubs to share their projects' impact through Rotary Showcase and Rotary Club Central

## RESOURCES

- Your Rotary public image coordinator (RPIC)
- [Brand Center](#)
- [Voice and Visual Identity Guidelines](#)
- [Effective Public Relations: A Guide for Rotary Clubs](#)
- [Lead Your Club: Public Relations Committee](#)
- [Media Crisis Handbook](#)
- [endpolio.org](http://endpolio.org)

## RAISING AWARENESS OF ROTARY

There are many ways to make the community more aware of Rotary, including:

- Sponsoring special events (for example, marathons, recycling efforts, or fundraisers for a Rotary project or program)
- Creating exhibits and displays that can be featured in museums, historical societies, city halls, or libraries
- Advertising in newspapers, magazines, billboards, buses, airports, or train stations
- Establishing communication with the public relations staff of other organizations that your clubs and district are involved with
- Encouraging Rotarians to wear their Rotary lapel pins and talk about the organization with colleagues, family, and friends
- Having Rotarians post information on a club or district website or social media sites, or refer members of their community to [Rotary.org](https://www.rotary.org)
- Ordering promotional materials and publications at [shop.rotary.org](https://shop.rotary.org)

## DISTRICT PUBLIC RELATIONS COMMITTEE

Your public relations committee exists to raise awareness of Rotary by promoting it in local media and providing public relations advice to clubs. Seek out club members who are media, journalism, public relations, communications, advertising, or marketing professionals, and appoint them to your committee.

Be sure to enter your district appointments on [Rotary.org](https://www.rotary.org) so that the committee can receive public relations resources from Rotary International. For more information on this committee, see Appendix 4: District Committees.

## STRENGTHENING THE ROTARY BRAND

The Rotary brand is strengthened by members living it. The way you talk about Rotary can affect the public's perception of it. Keep this in mind when visiting clubs and encourage them to live according to the values that Rotary promotes.

The Rotary logo identifies Rotary clubs and their members in every part of the world. Rotary International owns trademarks and service marks (referred to as Rotary Marks) for the benefit of Rotarians worldwide. You can see a list in chapter 14 of the Manual of Procedure.

RI depends on you, as governor, to work with the clubs in your district to ensure they understand how to use the Rotary Marks.

When you reproduce the Rotary Marks, follow the guidelines approved by the RI Board of Directors in the Rotary Code of Policies, which allow Rotary clubs, districts, or other Rotary Entities\* to use the Rotary Marks. The marks may not be altered, modified, or obstructed in any way or reproduced other than in their complete form.

Rotary's [Brand Center](#) offers resources for Rotary clubs and districts to customize their logos, as well as templates for stationery, event fliers, PowerPoint presentations, and more that make it easy to apply Rotary's brand. You'll also find guidelines for writing about Rotary and using the Rotary Marks. Take the course on Strengthening Rotary's Brand in the [Learning Center](#). If you have questions about licensing, contact RI's Licensing Section at [rilicensingservices@rotary.org](mailto:rilicensingservices@rotary.org).

## QUESTIONS TO CONSIDER

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

- How do you explain what Rotary is?
- What innovative ideas do you have to promote Rotary?
- Who in your community can you partner with to enhance Rotary's public image?
- What district projects, activities, or special events would interest the public?

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*\*Rotary Entities include Rotary International, The Rotary Foundation, Rotary clubs or groups of clubs, Rotary districts or groups of districts, Rotary Fellowships, Rotarian Action Groups, and administrative territorial units of Rotary International. Individual RI programs are not considered Rotary Entities.*

## APPENDIX 8

# KEY POINTS FOR TALKING ABOUT ROTARY

Use these messages when talking about Rotary to media professionals and in your public relations materials and speeches.

### **Rotary brings together a global network of volunteer leaders dedicated to tackling the world's most pressing humanitarian challenges.**

- Rotary harnesses the strength of 1.2 million professional and community leaders from nearly every country to help families in need.
- From stocking local food pantries to providing clean water and improving maternal health, Rotary clubs join forces to carry out sustainable projects with real impact at home and abroad.
- Rotary provides a platform for successful men and women of all ethnicities, faiths, and cultures to make the world a better place through volunteer service.

### **Rotary's top goal is to eradicate polio worldwide.**

- Rotary and its partners are close to eliminating polio, having achieved a 99 percent reduction in cases since 1988. Polio would follow smallpox to become only the second human disease in history to be eradicated.
- Rotary's chief roles are fundraising, advocacy, and mobilizing volunteers.
- Rotary members have contributed more than \$1.2 billion and countless volunteer hours to protect more than 2.5 billion children in 122 countries from polio.
- Rotary is working to raise an additional \$35 million per year through 2018 for polio eradication, to be matched 2 to 1 by the Bill & Melinda Gates Foundation.

### **Rotary maximizes its impact through innovative partnerships.**

- Rotary's goal-oriented, business-model approach emphasizes the need for community involvement, measurable goals, and maximum impact and sustainability.
- Rotary leverages resources through partnerships with other top-tier humanitarian organizations to effectively combat disease and illiteracy, improve maternal and child health, improve access to clean water, and reduce poverty and conflict worldwide.

### **Rotary builds peace and international understanding through education and humanitarian service and by connecting young leaders.**

- More than 600 graduates of the Rotary Peace Center master's degree program are in key decision-making positions in governments, corporations, and organizations around the world.
- Rotary's humanitarian projects help prevent the underlying causes of conflict, such as poverty, illiteracy, and lack of clean water.
- Rotary Youth Exchange fosters international goodwill by enabling 8,500 high school students to live and study abroad each year in 100 countries.
- Rotary's two service organizations for young leaders — Interact and Rotaract — promote volunteer service, leadership, and professional development.



**GETS WORKSHEET**

# UNDERSTANDING YOUR AUDIENCE

An essential part of communications planning is to understand your most important audiences and their needs. For this activity, first identify **one** audience and its perceptions of Rotary or of your club. Then decide the perception you want the audience to have, determine its needs, and choose a call to action. This will help you create targeted messages to use in your communications plan. If you have time, repeat this exercise for your other audiences, or you can do it later with your district team.

Audience (internal or external)	Current perception	Desired perception	Audience needs	Desired actions

**GETS WORKSHEET**

# CREATING A COMMUNICATIONS PLAN

Use the following template to create a communications plan for your district.

Communications goal	Strategies
Communications goal	Strategies
Communications goal	Strategies

Tactic/Tool	Audience	Content/Message	Timing	Responsibility	Measurement

# ROTARY GIVING AND GRANTS

Rotary grants enable Rotarians to carry out service that improves health, supports education, and alleviates poverty. Rotary districts coordinate club participation in Rotary grants and programs as well as financial contributions to the Foundation. As governor, you will motivate Rotarians to support our Foundation and understand the possibilities it offers.

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

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
In consultation with the district governor and governor-nominee, if known, fill open positions on the district Rotary Foundation committee and its subcommittees	Attend the regional Rotary Foundation seminar, often held in conjunction with the Rotary institute
Encourage clubs in your district to set Foundation goals and enter them in Rotary Club Central	Hold a district Rotary Foundation seminar for all interested Rotarians
Determine whether to hold the grant management seminar during your governor-elect year or your governor year and begin planning it	Work with the district Rotary Foundation committee chair to plan and evaluate all Foundation activities
Serve on your district's Rotary Peace Fellowships selection committee and endorse applications for the candidates selected by your district for the coming year	Share information about the Foundation throughout the district
Complete the qualification process for your district	Serve on the Rotary Peace Fellowships selection committee and as an ex officio voting member of the district Rotary Foundation committee
Discuss the use of the District Designated Fund with the district Rotary Foundation committee and the district governor	Work with the district Rotary Foundation committee chair to plan, coordinate, and evaluate all Foundation activities

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
	With the district Rotary Foundation committee chair, authorize the use of the District Designated Fund for grants, programs, and donations
	Encourage every Rotarian in your district to contribute to the Foundation every year
	Recognize clubs and Rotarians that support the Foundation
	Promote proper stewardship of Foundation funds
	Report to the district on all Rotary grant activity that has taken place in the past year to ensure transparency and stewardship of funds
	Involve inbound, outbound, and returning Rotary Peace Fellows in district and regional events, including your district conference

## RESOURCES

- [Lead Your District: Rotary Foundation Committee](#)
- [Manage Your Global Grant](#)
- [www.rotary.org/awards](http://www.rotary.org/awards)
- [www.rotary.org/grants](http://www.rotary.org/grants)
- [The Rotary Foundation Reference Guide](#)
- Your regional Rotary Foundation coordinator (RRFC)
- [endpolionow.org](http://endpolionow.org)
- Courses on Rotary grants in the [Learning Center](#)
- [Rotary Peace Centers Program Guide for Rotarians](#)
- [Rotary grants staff](#)
- [www.rotary.org/give](http://www.rotary.org/give)

## DISTRICT ROTARY FOUNDATION COMMITTEE

The district Rotary Foundation committee serves as the liaison between the Foundation and Rotarians in the district. By assisting with your district Rotary Foundation seminar and other tasks, the committee will educate Rotarians about the Foundation and motivate them to participate.

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

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

## SUBCOMMITTEES

To reduce the committee's responsibilities, create subcommittees to complete the various tasks that need to be done. Be sure to include the following four subcommittees:

- Fundraising
- Grants
- PolioPlus
- Stewardship

The chairs of each subcommittee should be members of your district Rotary Foundation committee. Additional subcommittees can be created as needed.

See descriptions of the subcommittee structure in Appendix 11: Foundation Committee Responsibilities. Detailed information about this committee can be found in [Lead Your District: Rotary Foundation Committee](#).

## FOUNDATION TRAINING

Information on The Rotary Foundation is included in sessions for the presidents-elect training seminar, district training assembly, district Rotary Foundation seminar, and grant management seminar. Your regional Rotary Foundation coordinator and your district Rotary Foundation committee will help you with these events. For details, see session 6.

## GRANT MANAGEMENT SEMINAR

Every year, the district holds a grant management seminar to teach club members how to qualify their clubs to receive global grant funds and develop the skills needed to manage and oversee grant funds. In order to be qualified, each club interested in global grants is required to send at least one representative to the seminar.

The training can be given in conjunction with other district meetings, such as the presidents-elect training seminar, district training assembly, district conference, or district Rotary Foundation seminar; as a separate meeting; or as a series of webinars. Find more information in the [Grant Management Seminar Leaders' Guide](#) for trainers and [Manage Your Global Grant](#) for participants.

Note: District grant funds are eligible for use to cover the costs associated with the grant management seminar.

# RAISING FUNDS FOR THE ROTARY FOUNDATION

Raising funds for The Rotary Foundation is important for all Rotarians. Without financial resources, the activities through which Rotarians do good in the world would not be possible. Contributions sent to the Foundation can be directed to the PolioPlus Fund, Annual Fund, or Endowment Fund.

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

## CLUB CONTRIBUTION GOALS

The clubs in your district should set their PolioPlus Fund, Annual Fund, and Endowment Fund goals for the coming year during your presidents-elect training seminar. Encourage all presidents-elect to set their Foundation giving goals in Rotary Club Central by 1 May. Setting these goals online enables The Rotary Foundation to set the worldwide Annual Fund goal in time to announce it at the Rotary convention. During your year as governor, support clubs' efforts to achieve their fundraising goals.

## ANNUAL FUND

The Annual Fund is the primary source of support for Foundation activities. The money is spent every year to carry out Rotarians' international and local service opportunities. As governor, you are asked to promote contributions to the Foundation through the Every Rotarian, Every Year initiative, which encourages every Rotarian to participate in a Foundation project and donate to the Annual Fund every year. Contributions can be directed to SHARE, the World Fund, or one of the Foundation's six areas of focus. Note: Contributions directed to areas of focus are not included in the district's SHARE calculation and do not add to the District Designated Fund.

## ENDOWMENT FUND

The Endowment Fund ensures a strong future for The Rotary Foundation by providing a continuous stream of income to meet the increasing demand for Foundation programs. Contributions are invested and a portion, as determined annually, is made available for spending. Donations to the Endowment Fund often take the form of outright gifts, such as endowed funds, bequests, or life-income agreements. Contact your endowment/major gifts adviser to support you in pursuing these types of gifts.

## POLIOPLUS FUND

The PolioPlus Fund supports the immunization activities of Rotary and the other major partners of the Global Polio Eradication Initiative — the World Health Organization, UNICEF, U.S. Centers for Disease Control and Prevention, and the Bill & Melinda Gates Foundation — by keeping Rotarians informed of progress,

promoting accurate media coverage, volunteering in National Immunization Days, and providing needed resources in polio-endemic or at-risk regions.

Through 2018, every \$1 Rotary commits to direct support for polio immunization will be matched 2-to-1 (up to \$35 million per year) by the Bill & Melinda Gates Foundation. If fully realized, the campaign will result in \$525 million for polio eradication. Encourage continued support of the PolioPlus Fund, emphasizing that contributions of any amount will make a big impact.

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

## ROTARY GRANTS

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

District grants fund small-scale, short-term activities that address needs in your community and communities abroad. Global grants support large international activities with sustainable, measureable outcomes in Rotary's areas of focus.

For more information about these grants, see [Manage Your Global Grant](#).

## ROTARY PEACE CENTERS

The Rotary Peace Centers provide Rotary Peace Fellowships to individuals pursuing a master's degree or a professional development certificate in international relations, peace, conflict resolution, peace and conflict studies, and related subjects. Peace fellowships are funded separately from district and global grants, and there's no cost to the district.

Applications must be submitted to the district by 31 May. Your selection committee must interview all applicants and submit endorsed applications to The Rotary Foundation by 1 July for world-competitive selection. For information on selecting qualified applicants, see the [Rotary Peace Centers Program Guide for Rotarians](#).

## FOUNDATION FUNDING

Since 1947, generous Rotarians and friends of Rotary have funded over \$3 billion in programs that have had a lasting impact for people around the world. These contributions have been directed to areas such as the Annual Fund, Endowment Fund, PolioPlus Fund, and specific global grants.

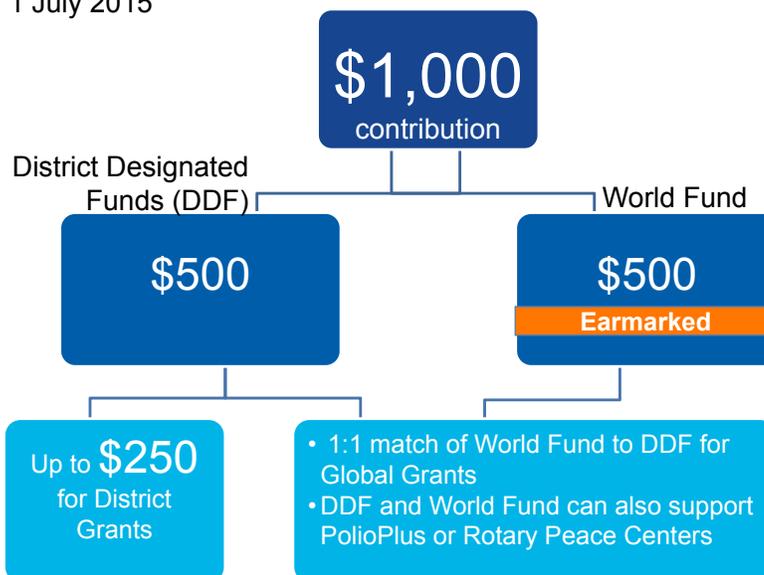
The Rotary Foundation's SHARE system transforms contributions into grants and programs. Its three-year funding cycle gives districts time to plan and select projects and enables the Foundation to use the investment earnings to pay for operating expenses, including fundraising and general administration.

Here's how it works:

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

## SHARE SYSTEM

Effective 1 July 2015



- Note this does not include DDF generated by Endowment Fund-SHARE spendable earnings.
- Unused DDF will roll forward.
- 5% of the contribution is earmarked to cover operating expenses if investment earnings are insufficient.

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

Beginning 1 July 2015, 5 percent of Annual Fund contributions will be earmarked for operating expenses or for building the Foundation's operating reserve. These funds will be used only when net investment returns are not sufficient to cover operating expenses; DDF is not affected. Learn more about this [funding model](#).

## AWARDS

It is important to honor Rotarians who support the mission of The Rotary Foundation. Receiving recognition for individual or club contributions often motivates Rotarians to provide more service to their community and communities in other countries. For more information on awards and your responsibilities for each, see [www.rotary.org/awards](http://www.rotary.org/awards).

## QUESTIONS TO CONSIDER

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

- How will your district structure the district Rotary Foundation committee?
- In what year will you conduct the grant management seminar?
- How will your district focus and increase humanitarian service?
- What are the priorities of clubs in your district when it comes to spending DDF?
- How does your district determine the optimum use of its DDF?
- How will you motivate every Rotarian to give every year?
- How will your district take full advantage of Rotary grants?
- How can your district practice good stewardship for the grants it receives?

## APPENDIX 9

# DISTRICT GRANT SAMPLE SPENDING PLANS

The following are examples of district grant spending plans.

District 3400 (2011-12 District Grant Spending Plan)			
Sponsor	Project Description	Activity Type	Budget Amount
Bandung Selatan	Provide clean water for community in Bandung area, Indonesia	Water: Supply/ Access	100
Bali Sanur	Provide clean water for the community in Singaraja area, Bali, Indonesia	Water: Supply/ Access	100
Surabaya-Darmo	Provide clean water in community in Surabaya area, Indonesia	Water: Supply/ Access	100
Semarang Sentral	Provide computer sets for elementary schools in Semarang, Indonesia	Education: General	2400
Jakarta Sentral	Provide computer sets for elementary schools in Jakarta area, Indonesia	Education: General	4335
Bandung Kota Kembang	Provide education for children who suffer from earthquake in Bandung area, Indonesia	Education: General	1355
Bali Taman	Provide microcredit for group of women and milk for malnourished children in Karang Asem Regency, Bali, Indonesia	Community Development: General	6000
Bali Kuta	Provide spectacles for high school students in Bali area	Health: Disease	3231
Surabaya Kaliasin	Provide HIV and AIDS prevention for community in Surabaya, Indonesia	Health: General	3818
Yogyakarta Tamansari	Provide computer sets for elementary schools in Yogyakarta, Indonesia	Education: General	981
Bandar Lampung	Provide medical equipment for community in Medan, providing computer sets for elementary schools in Batam, providing medical services in Bandar Lampung, Indonesia	Health: Medical Equipment	2000
Purwokerto Satria	Provide training on sales management for community in Purwokerto, Indonesia	Community Development: General	600
<b>TOTAL</b>			<b>25,020</b>

<b>District 5020 (2011-12 District Grant Spending Plan)</b>			
<b>Sponsor</b>	<b>Project Description</b>	<b>Activity Type</b>	<b>Budget Amount</b>
Longview- Early Edition	Books, equipment and supplies, and training of teachers to establish literacy center, community library, and computer laboratory in Namungoona community of Uganda	Education: Literacy	9500
Sooke	Build and install safety equipment for residents with dementia, such as railings, raised planters, benches on walkways at community senior center	Health: General	2500
Gig Harbor	CPR training, and defibrillator equipment and training, for high school students, faculty, and administrators in Santiago, Chile	Health: General	10000
Gig Harbor	Develop fresh water, gravity-flow systems in villages of Los Flores, Tzycoach, Los Encuentros, Nueve Puntos and Iliom, Guatemala	Water: Supply/ Access	19000
5020	District-sponsored vocational training team of multiple professional backgrounds to District 3770 and transportation of a similar vocational training team from District 3770 to our district	Travel: Training/Study Team	25000
Oak Bay, Victoria	Fund a program to train orphans on sustainable building techniques so they will be qualified to perform construction or improvements to basic housing in western Rwanda when they are done with school	Education: Vocational Training	2500
5020	Install solar power panels in schools in the villages of Socso and Sonay, Peru, and Kayapa, Philippines	Education: General	5000
5020	International scholarship issued by district to fund two scholars previously selected as Rotary Ambassadorial Scholars	Education: Scholarships	50000
Silverdale	Provide a van to improve the safety of transportation of elementary students in a remote area of the Dominican Republic (District 4060)	Education: General	10000
Bainbridge Island	Purchase and transport of supplies and equipment to teach women basic business skills in rural Ethiopia	Community Development: General	2500
Victoria	Purchase books and supplies and provide teacher training to implement a literacy program to improve reading skills in both English and Swahili for elementary children in multiple schools in western Kenya	Education: Literacy	2500
West Shore (Victoria)	Purchase books for Beecher Bay First Nations Reserve (Canada) library reading program	Education: Literacy	2500
Tacoma South	Purchase dining sets for NW Furniture Bank, which provides furniture for destitute families displaced from homes as the result of fire or other catastrophic event	Community Development: General	2500

<b>District 5020 (2011-12 District Grant Spending Plan)</b>			
<b>Sponsor</b>	<b>Project Description</b>	<b>Activity Type</b>	<b>Budget Amount</b>
Tacoma	Purchase Jaws of Life for Mazatlan, Mexico, Search and Rescue	Health: Medical Equipment	2500
Lantzville	Purchase literacy training materials for low-income community school	Education: Literacy	1250
Hawks Prairie-Lacey	Purchase of playground equipment and educational toys for community-based preschool for low-income families. Equipment will improve educational experience and increase safety	Education: General	2500
Gig Harbor Mid-Day	Purchase school supplies for Peninsula FISH Food Bank and Family Service Center for children of impoverished families	Education: General	2500
Tumwater	Purchase two AED defibrillators for local high schools	Health: Medical Equipment	2500
5020	Reserve to cover cost of administering grant	Administration (Max 3%)	5636
Clover Park	Scholarships for low-income children to youth theater program to improve teamwork, responsibilities, personal growth, and personal interactions	Education: General	2500
5020	To match club contributions for international community development projects. Projects will be similar to international projects shown elsewhere on spending plan	Community Development: General	6253
5020	To match club funds for small local community development projects. Each club grant will be US\$2,500 or less. Similar to small club projects previously listed in spending plan	Community Development: General	14250
Nanaimo Daybreak	To provide materials to support a community educational program focused on teaching teenagers the risks associated with drinking and driving. Materials to be purchased include make-up kits to portray injured victims; banners. Provide transportation to hospitals for remote underfunded schools	Education: General	2000
Oak Bay, Victoria	Upgrading facilities (water supply, perimeter fence for safety, safe play area) at Luis Pasteur School in Nayarit, Mexico	Education: General	2500
<b>TOTAL</b>			<b>187,889</b>

## APPENDIX 10

# DISTRICT AND GLOBAL GRANTS

The following chart is provided as a resource for a discussion about district grants.

	District Grants	Global Grants
<b>Funding</b>	District applies for a block grant (up to 50% of DDF) and distributes smaller amounts to clubs for projects.	Clubs and districts apply for a minimum World Fund award of \$15,000 for a total project budget of at least \$30,000.
	No World Fund match	World Fund match of 1:1 for DDF and 0.5:1 for cash
	Awarded to district by the Foundation. Distributed to clubs by district.	Awarded by the Foundation
<b>Partner</b>	No partner required; can be local or international; district must be qualified.	International partner and host partner; both must be qualified.
<b>Scope or Vision</b>	Related to the Foundation's mission	Aligned with an area of focus: <ul style="list-style-type: none"> <li>• Peace and conflict prevention/ resolution</li> <li>• Disease prevention and treatment</li> <li>• Water and sanitation</li> <li>• Maternal and child health</li> <li>• Basic education and literacy</li> <li>• Economic and community development</li> </ul>
	Short-term, one-time, smaller in scope	Long-term, sustainable, measurable
<b>Activity Type</b>	Educational, vocational, or humanitarian	Educational, vocational, or humanitarian
<b>Planning</b>	Shorter planning process	Longer planning process
<b>Involvement</b>	Active Rotarian participation	Active Rotarian participation

## APPENDIX 11

# FOUNDATION COMMITTEE RESPONSIBILITIES

Review the responsibilities of each subcommittee and discuss the questions on the following pages as a group.

### District Rotary Foundation Committee

ROLE	RESPONSIBILITIES
Chair	<ul style="list-style-type: none"><li>• Report all Foundation activities to the district governor.</li><li>• Provide one of two authorizing signatures for use of District Designated Fund.</li><li>• Confirm that club sponsors of global grant applications are qualified.</li><li>• Oversee the district's qualification process.</li><li>• Serve as liaison to RI district committees.</li><li>• Provide support to club Foundation committees.</li><li>• Ensure that grant activities are reported at a district meeting to which all club members are invited.</li></ul>
PolioPlus subcommittee	<ul style="list-style-type: none"><li>• Encourage donations.</li><li>• Organize district PolioPlus activities.</li><li>• Ensure recognition of exemplary polio eradication activities.</li><li>• Present on PolioPlus.</li><li>• Coordinate with PolioPlus committees and governmental agencies.</li></ul>
Grants subcommittee	<ul style="list-style-type: none"><li>• Serve as a resource on Rotary grants.</li><li>• Educate clubs on the terms and conditions of grant awards.</li><li>• Work with the district Rotary Foundation committee chair to disburse grant funds and ensure proper reporting.</li><li>• Enforce the district's policy for distributing grant funds.</li><li>• Promote and encourage participation in the Rotary Peace Centers program.</li><li>• Conduct orientation for Rotary Peace Fellows, scholars, and vocational training teams.</li></ul>

ROLE	RESPONSIBILITIES
Fundraising subcommittee	<ul style="list-style-type: none"> <li>• Assist clubs in setting and achieving fundraising goals.</li> <li>• Organize club and district fundraising activities.</li> <li>• Motivate, promote, and advise clubs on Foundation fundraising initiatives.</li> <li>• Coordinate donor appreciation events within the district.</li> </ul>
Stewardship subcommittee	<ul style="list-style-type: none"> <li>• Oversee the qualification of clubs.</li> <li>• Ensure stewardship practices are implemented as outlined in the district MOU.</li> <li>• Report misuse or irregularities in grant-related activities to The Rotary Foundation and conduct local investigations.</li> <li>• Approve the annual financial assessment and ensure it is distributed to clubs.</li> <li>• Monitor and evaluate the implementation of proper grant management.</li> <li>• Ensure that grants are conducted in a manner that avoids conflicts of interest.</li> </ul>
Optional reported subcommittees	<p>Possible subcommittees include:</p> <ul style="list-style-type: none"> <li>• Annual Fund subcommittee</li> <li>• Endowment/major gifts subcommittee</li> <li>• Rotary Peace Fellowships subcommittee</li> <li>• Scholarships subcommittee</li> <li>• Vocational training team subcommittee</li> </ul>

**Discuss the following questions with your group:**

How is your district committee structure working?

**Discuss the following questions with your group:**

What optional subcommittees were appointed?

Do you think changes to the structure are needed?

How do you plan to evaluate the structure going forward?



## GETS WORKSHEET

# DISTRICT QUALIFICATION PROCESS

Review the checklist of items outlined in the memorandum of understanding (MOU). The steps listed below should already be completed. Discuss how well each step went and how you would strengthen the existing district policy.

MOU Steps	How is the process working? How would you strengthen the district policies?
Assign specific roles and responsibilities to district officers	
Offer grant management seminars to clubs that wish to qualify	
Establish a financial management plan	
Plan your annual financial assessment process; include dates and who will conduct it	
Open a separate bank account specifically for Foundation grant funds	
Plan how you'll report on the use of DDF to clubs	
Establish a document retention system	
Create a system for receiving, reporting, and investigating misuse of grant funds	

## GETS WORKSHEET

# MANAGING DDF

Review the following scenario and answer the questions below.

**Scenario:** Your district's Foundation committee chair has received several requests for district grants. More money has been requested than is available.

1. When and how are clubs in your district notified that DDF is available and they may submit grant proposals?

2. How does your district determine who receives grant funding?

3. How will you handle complaints from clubs that are denied DDF or do not receive enough for their projects?

4. How does your district ask clubs about their interests before setting a DDF policy?

5. Does your district have an internal deadline by which clubs must apply for district and global grants?

## GETS WORKSHEET

# DEVELOPING A FUNDRAISING PLAN

As governor, you are responsible for motivating Rotarians and non-Rotarians in your district to give to The Rotary Foundation. Contributions can be directed to the PolioPlus Fund, the Annual Fund, or the Endowment Fund. Select a fund for which you would like to develop a fundraising plan that will help you meet your contribution goals. Discuss the other funds if there is time.

What are your district's contribution goals for the PolioPlus Fund, the Annual Fund, or the Endowment Fund? (Choose one.)

- PolioPlus Fund: \_\_\_\_\_
- Annual Fund: \_\_\_\_\_
- Endowment Fund: \_\_\_\_\_

How do you plan to raise money to meet this goal, through individual donations or events or activities? List events or activities you plan to hold and how much you expect each to earn. Also note how much you think you can gather through donations.

Events/Activities	Estimated Contributions

Who are some potential donors in your district?

Potential Donors	Estimated Contributions

What are some ways you or others in your district might cultivate donors? Discuss how you would recognize, approach, and track the following types of donors using the resources available to you in the district and zone.

Individual Rotarian	
Individual non-Rotarian	
Other Rotary clubs	
Businesses	
Foundations	
Rotary alumni (former Rotaract, RYLA, Youth Exchange, and Interact participants; grant and scholarship recipients; award recipients; vocational training/Group Study Exchange teams; etc.)	
Other	



# YOUR SUPPORT FROM ROTARY TO RUN YOUR DISTRICT

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

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

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Submit the following <ul style="list-style-type: none"> <li>• District committee appointments</li> <li>• Rotary International and Rotary Foundation Expense Statement for International Assembly</li> </ul>	Submit the following required forms <ul style="list-style-type: none"> <li>• Governor-nominee Form</li> <li>• District Governor’s Report</li> <li>• District Governor Expense Statement</li> </ul>
Consider appointing a district secretary	Oversee all district funds
In cooperation with the governor, create a district budget to be submitted to clubs at least four weeks before the presidents-elect training seminar or the district training assembly and approved at a meeting of incoming club presidents	Provide an annual statement of all district finances within three months of leaving office
	Supervise all district nominations and elections

## RESOURCES

- [Your CDS representative](#)
- [Lead Your District: Committees](#)
- [Manual of Procedure](#)
- [Appendix 13: Rotary’s Online Tools](#)

## FINANCIAL MANAGEMENT

As district governor, you have fiscal responsibilities, such as managing the district's finances, monitoring the funds of clubs, practicing good stewardship, and ensuring that the district complies with all applicable local laws, including tax and nonprofit laws. Find more information about district finances in the finance committee section of [Lead Your District: Committees](#). For general information about club and district finances, see the Manual of Procedure.

Districts may establish a fund for financing district-sponsored projects and the administration and development of Rotary in the district. Such a district fund is established by resolution of the district conference. Ensure that:

- Decisions about the fund, including the district levy, are voted on at the district training assembly, presidents-elect training seminar, or district conference
- The fund is not controlled by one person
- An annual statement and report of income and expenditures for the fund is presented to all clubs

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

Select one member of the district finance committee to act as treasurer and keep proper records of income and expenditures for each of your district's funds. You and the treasurer will supervise the funds, which should be held in a bank account in the district's name. For more information on this committee, see appendix 4.

Send your annual report of district finances to each club within three months of leaving office. This annual statement and the report of district finances should also be reviewed by a qualified accountant, and presented, discussed, and formally adopted at the next district event. The district finance report should include:

- Sources of the district's funds (from RI, The Rotary Foundation, district, or clubs)
- Funds received by or on behalf of the district from fundraising activities
- Grants received from The Rotary Foundation or Rotary Foundation funds designated for use by the district
- Financial transactions of district committees
- Financial transactions of the governor on behalf of the district
- Expenditures of district funds
- Funds received by the governor from RI

If your district raises funds for a specific purpose, such as a multidistrict Rotary Youth Exchange, a budget should be prepared and submitted to the governor and the finance committee for approval. This budget should be included in the statement that the finance committee submits to the district training assembly or conference. It is essential to maintain separate bank accounts for specific funds and to designate the chair of the appropriate committee as one of the signatories.

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

Use Appendix 12: Financial and Risk Management Best Practices Checklist to ensure you're managing district finances appropriately.

## TAXES

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

## FUNDRAISING

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

- Report money earned through fundraising to your local government.
- When promoting fundraising initiatives, be precise about where the funds will go, whether it's to a local club, the district's own foundation, The Rotary Foundation, or some other entity.
- If a fundraiser qualifies as a tax-deductible event, issue receipts to donors as needed.
- Submit all contributions to The Rotary Foundation separately from payments to Rotary International.

Rotary Foundation grants are made possible through voluntary contributions from Rotarians and friends of Rotary. Find more information and tips about fundraising in [The Rotary Foundation Reference Guide](#).

## RISK MANAGEMENT

Risk management is the process of planning, organizing, leading, and controlling activities to minimize the adverse effects of accidental losses on the organization. You are in a position to minimize risk and safeguard Rotarians, program participants, and district assets. Limit liability by answering three basic questions when planning activities and events:

- What can go wrong?
- If something goes wrong, how will I or the district respond?
- How will losses be paid for?

If there's a significant possibility that something can go wrong, reduce risk by:

- Not conducting the activity or event
- Modifying the activity or event to lessen the risk
- Preparing a plan to address any potential problems
- Finding another organization that will agree to participate and share the risk

RI strongly recommends using written contracts. A contract should clearly define the roles and responsibilities of each party and can include provisions that limit risk. Before signing any contract, involve local legal counsel and thoroughly read and understand what you are agreeing to. Retain legal documents for several years in case a claim is made.

Districts and clubs are urged to seek professional legal and insurance advice regarding liability protection. They can protect themselves by incorporating themselves or their activities or by purchasing liability insurance. See the [Manual of Procedure](#) for additional information.

Use Appendix 12: Financial and Risk Management Best Practices Checklist to ensure that you're managing district risk appropriately.

## DISTRICT INCORPORATION

Districts may seek the RI Board's approval to incorporate as long as they have the support of at least two-thirds of their clubs. For more information about incorporation, refer to the [Manual of Procedure](#).

If you are considering incorporating your district, contact your [CDS representative](#).

## INSURANCE COVERAGE PROVIDED BY ROTARY

During your term as district governor, you will be covered by the RI general liability and directors and officers liability insurance policies, but only while acting within the course and scope of RI.

Because you will not be serving in this role at all times, your district is urged to secure liability insurance. The cost of additional insurance is not reimbursable as part of your district governor's allocation from RI. To obtain insurance, contact a local insurance professional.

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

### *COVERAGE FOR U.S. DISTRICTS*

Districts in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged for by RI and paid for by all active U.S. clubs through the July invoice.

## COVERAGE AT THE INTERNATIONAL ASSEMBLY

You and your spouse/partner will be covered by travel insurance during the International Assembly and while traveling to and from it. Your International Assembly registration packet will include more information about the travel insurance coverage provided by RI.

## DISTRICT NOMINATIONS AND ELECTIONS

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

## GUIDELINES FOR DISTRICT ELECTIONS

Rotarians and election candidates shall:

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

### **Governor-nominee**

The process for selecting the governor-nominee in your district must be completed between 36 and 24 months before the day this Rotarian will take office as district governor. As governor, you should remind all candidates for governor-nominee that, if selected, they must attend the governors-elect training seminar and the International Assembly; the nomination should not be accepted by anyone who cannot attend these two meetings.

Election timetables recommended by the RI Board for selecting the governor-nominee are provided by your Club and District Support representative.

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

### **Member of the Nominating Committee for RI Director**

Every four years, a zone nominates a member of one of its clubs to serve a two-year term on the RI Board of Directors. Any club in the district can nominate one of its own members.

Each zone's nominating committee consists of a past district governor from each district in the zone. Your district should select a nominating committee

member at the district conference, choosing from all the nominations submitted by clubs the Rotary year before the nominating committee meets. In certain circumstances, a ballot-by-mail can be conducted to select this Rotarian. Depending on when your zone nominates a director, your district may not need to choose a nominating committee member during your year as governor.

## COUNCIL ON LEGISLATION REPRESENTATIVE

Your district should elect a representative and an alternate to the Council on Legislation two years before the Council meets. A district can select its representative through a nominating committee procedure, through an election at the district conference, or through ballot-by-mail. No Rotarian can attend more than three Councils as a voting representative. Contact your CDS representative for approval if you are conducting a ballot-by-mail to choose your Council representative.

### **Ballot-by-mail**

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

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

1. Follow the instructions on the ballot provided by the RI office serving your district.
2. Mail one ballot to each club in your district with instructions to return it to you by a specified deadline. Any club with a membership of more than 25 is entitled to one more vote for each additional 25 members or major fraction thereof. For example, clubs with 39 members get two votes, as do clubs with 57 members.
3. Appoint a three-member balloting committee to validate and count the ballots at an announced time and date.
4. Each candidate or a representative of each candidate should be present during the opening and counting of the ballots.
5. To ensure that the ballots have been completed properly, the committee should validate the ballots before counting begins.
6. The candidate who receives the highest number of votes is nominated, and the candidate who receives the second-highest number of votes is the alternate, except in the case of governor-nominee.

## COUNCIL ON LEGISLATION

The Council on Legislation, Rotary's legislative body, meets every three years and will next meet in 2016. A club or a district conference may propose legislation, but any legislation submitted by a club must be voted on at the district conference or district resolutions meeting and endorsed by the district. If there is not enough

time to vote in person on a proposed item of legislation at the district conference, as governor you can obtain the endorsement of the clubs in your district through a ballot-by-mail.

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

In the Rotary year in which the Council meets, the district governor is provided with copies of all duly proposed legislation. After the Council, all clubs will receive a Report of Action, which lists all enactments and resolutions adopted by the Council. If you are governor during this year, you and your clubs should review the adopted legislation and implement it starting the following Rotary year. Adopted enactments change the Constitution and Bylaws of Rotary International and the Standard Rotary Club Constitution. These enactments become effective on 1 July following the Council. Find more information about the policies and procedures of the Council at [Rotary.org](http://Rotary.org).

## COUNCIL ON LEGISLATION TIMELINE

	Deadlines	
	2016 Council	2019 Council
Representatives and alternates are selected	Rotary year 2013-14	Rotary year 2016-17
Representatives and alternates are reported to RI	30 June 2014	30 June 2017
Proposed legislation is due to Rotary International	31 December 2014	31 December 2017
Proposed legislation is published	30 September 2015	30 September 2018
Council on Legislation meets	April 2016	April 2019
Report of Action is distributed	June 2016	June 2019

## QUESTIONS TO CONSIDER

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

- What would you like to ask your CDS representative?
- Who will assist you with your administrative responsibilities?
- How can you streamline your administrative responsibilities?
- How will you ensure sound financial management of the district?

## APPENDIX 12

# FINANCIAL AND RISK MANAGEMENT BEST PRACTICES CHECKLIST

Review the items on this checklist to safeguard transparent and professional financial practices at the club and district levels. Share all pertinent information about local laws and regulations with clubs in the district. Select and involve qualified professionals to implement financial and risk management best practices appropriately.

## FINANCIAL MANAGEMENT

- Register the club or district with the government, if required.
- Submit club or district tax documentation annually, if required by the local or national tax code.
- Set up club or district bank accounts appropriately, and assign two signatories to each account.
- Establish procedures for handling club or district funds.
- Develop a budget and follow it.
- Review the per capita levy to ensure that it meets district needs.
- Make sure that the club or district has a procedure for sending contributions to The Rotary Foundation and that each club has a procedure for sending dues to Rotary International in a timely way. You may be asked by RI staff to help with dues collection in your area to keep clubs in good standing.
- Make sure that the club or district has a procedure for naming future officers and that officers' contact information (including email addresses) are registered with Rotary.
- Be aware of local laws regarding donated funds and payment of dues, and make sure those laws are being followed.
- Have the yearly financial report reviewed by a qualified accountant who is not involved with the regular management of club or district funds.
- Ensure that the club or district has an effective way to learn about financial best practices and that these practices are passed on to incoming officers every year.

## RISK MANAGEMENT

- Limit liability by anticipating what can go wrong, what the response will be, and how losses will be paid for.
- Use written and signed contracts when appropriate, involve local legal counsel when working with written contracts, and retain documentation appropriately.
- Ensure that clubs and the district have liability insurance for their activities and operations that is adequate for the region; contact a local insurance professional for assistance. (Clubs and districts in the United States and its territories and possessions are provided with general liability and directors and officers/employment practices liability insurance through a program arranged by RI and paid for by U.S. Rotarians.)

## APPENDIX 13

# ROTARY'S ONLINE TOOLS

Tool	What is it?	Who adds/updates content?	Who is the information for?	Need help?
<u>Rotary.org</u>	Rotary.org is the public face of Rotary, designed to inform the general public.	RI staff	General public	<a href="mailto:website@rotary.org">website@rotary.org</a>
<u>My Rotary</u>	My Rotary ( <a href="http://rotary.org/myrotary">rotary.org/myrotary</a> ) has more detailed information for Rotarians and the family of Rotary. Users don't need to sign in to access some of the content. But with a My Rotary account, you can view and access information tailored to your Rotary role.	RI staff	Rotary members and family of Rotary	
<u>Community</u>	Community members can manage and personalize their My Rotary profiles, participate in public or private discussion groups, and connect and message each other directly, without exposing personal email.	Rotarians and Rotaractors	Rotarians and Rotaractors	<a href="mailto:social@rotary.org">social@rotary.org</a>
<u>Rotary Ideas</u>	Rotary Ideas allows clubs to seek four types of resources for their service projects: partners, volunteers, material contributions, or direct financial contributions through PayPal. Project listings can be posted on club or district websites.	Rotary club leaders and Rotaract club presidents	Rotary clubs seeking projects and general public	<a href="mailto:social@rotary.org">social@rotary.org</a>
<u>Rotary Showcase</u>	Rotary Showcase allows Rotarians and Rotaractors to share successful project stories, photos, and video; identify partners; and report the project's contribution to Rotary's global impact. Data can be synchronized with Rotary Club Central.	Rotarians and Rotaractors	General public and Rotary members and family of Rotary	<a href="mailto:social@rotary.org">social@rotary.org</a>
<u>Rotary Club Central</u>	Rotary Club Central allows club leaders to enter and update membership, service, and Foundation giving goals, which district leaders can view and edit. Leaders have access for the years before, during, and after their term. All Rotarians can view their club's goals. Service projects can be imported from grants and Rotary Showcase.	Club and district leaders	All Rotarians	<a href="mailto:cds@rotary.org">cds@rotary.org</a>
<u>Events</u>	Register for the Rotary Convention.	RI staff	Rotarians and Rotaractors	<a href="mailto:website@rotary.org">website@rotary.org</a>

Tool	What is it?	Who adds/ updates content?	Who is the information for?	Need help?
<a href="#">Brand Center</a>	Customize and download materials that use the new Rotary voice and visual identity guidelines.	RI staff	Rotarians	<a href="mailto:graphics@rotary.org">graphics@rotary.org</a>
<a href="#">Grant application tool</a>	The grant application tool is for district qualification and applying for district and global grants.	Rotarians applying for grants	RI staff: regional grants officers	<a href="mailto:grants@rotary.org">grants@rotary.org</a>
<a href="#">Learning Center</a>	The Learning Center provides e-learning materials to help Rotarians learn new skills, prepare for leadership roles, and use Rotary tools to accomplish their goals.	RI staff	Rotary members and family of Rotary	<a href="mailto:learn@rotary.org">learn@rotary.org</a>



**GETS WORKSHEET**

# FINANCIAL MANAGEMENT

Use the space below to record ideas you would consider implementing in your district.

The role of each member of the finance committee and how they work with the governor

Developing the district budget

Managing multiple funds

Monitoring club funds

Preparing financial reports and distribution

Systems for documenting, maintaining, and submitting district expenses

Tax and filing requirements

District incorporation

Managing money from fundraising activities

Risk management and insurance coverage

## GETS WORKSHEET

# EXPLORING ROTARY'S ONLINE TOOLS

## MY ROTARY

### Description

Rotary.org is designed in large part to inform the public about Rotary. My Rotary, a part of Rotary.org that is accessible only to those who register, offers more detailed information for Rotarians and the family of Rotary. Users can see much of the content without signing in, but those who do sign in will have a more customized experience, including access to resources based on their roles and participation in the online community.

Register for an account to get access to My Rotary, and then sign in. You will be taken directly to your homepage, a personal dashboard with information relevant to you, including highlighted stories, your messages, important announcements, your club snapshot, and a link to your discussion groups. From there you can also navigate to your profile to add personal information and a photo.

Need help? Write [website@rotary.org](mailto:website@rotary.org).

### Location

[www.rotary.org/myrotary](http://www.rotary.org/myrotary)

### Key Actions for Today's Session

- Find a featured link
- Add your personal contact information in My Profile

### Explore more

- Add professional details to your profile
- Add skills and interests to your profile
- Set your privacy settings
- Add a profile picture

### Notes

## BRAND CENTER

### **Description**

Use this page to strengthen Rotary's image by delivering a clear and compelling message that conveys what we do and how people can engage with us. Customize and download materials that reflect Rotary's voice and visual identity guidelines.

Need help with colors and fonts? Write [graphics@rotary.org](mailto:graphics@rotary.org).

### **Location**

- My Rotary > Manage > Brand Center

### **Key Actions for Today's Session**

- Download the Ideas Book
- Make a club logo

### **Explore more**

- Download the Voice and Visual Identity Guidelines
- Email the Quick Start for Club Websites to a club president-elect

### **Notes**

## ROTARY IDEAS

### **Description**

This platform allows clubs to seek four types of resources for their service projects: partners, volunteers, material contributions, and direct online financial contributions via PayPal. Rotarians are also encouraged to post their Rotary Ideas project listings on club or district websites.

Need help? Write [social@rotary.org](mailto:social@rotary.org).

### **Location**

My Rotary > Take Action > Rotary Ideas

### **Key Action for Today's Session**

- Find a featured project and view its profile

### **Explore more**

- Search for projects by keyword “water”
- Use a detailed search to look for projects by category

### **Notes**

## ROTARY SHOWCASE

### **Description**

Rotarians and Rotaractors can post photos and videos of successful projects, identify partners, and report the project's contribution to Rotary's Global Impact all on Rotary Showcase. It's the easiest way to share your project with both the Rotary world and the public. Showcase data can also be synchronized with Rotary Club Central to update a club's progress on its service goals.

Need help? Write [social@rotary.org](mailto:social@rotary.org).

### **Location**

- My Rotary > Take Action > Rotary Showcase

### **Key Actions for Today's Session**

- Search for projects about disease prevention
- Search for projects in your own club or district

### **Explore more**

- Share a project on Facebook
- Post a new project for your club or district

### **Notes**

## LEARNING CENTER

### **Description**

The Learning Center is where you can access training information by role or by topic. Rotarians can easily register for and take courses at their own pace, on topics of their own choosing. Various materials are available for download within each course.

Need help? Write [learn@rotary.org](mailto:learn@rotary.org).

### **Location**

My Rotary > Learning and Reference > Learning Center

### **Key Actions for Today's Session**

- Search for a course about Rotary Club Central
- Register for a course on social media

### **Explore more**

- Register for a course on membership
- Download course materials from the Rotary Club Central course

### **Notes**

## COMMUNITY/DISCUSSION GROUPS

### **Description**

Connect with other Rotary members by joining an online discussion group or starting a new one. Find others who share your interests and activities, connect with project partners, and tap into the diversity of global perspectives that is Rotary.

Need help? Write [social@rotary.org](mailto:social@rotary.org).

### **Location**

- My Rotary > Exchange Ideas > Discussion Groups

### **Key Actions for Today's Session**

- Search for groups whose focus is membership
- Join an open Discussion Group

### **Explore more**

- Join the open Discussion Group named Membership Best Practices
- Choose Start A Group to see what data is needed in order to start a group of your own

### **Notes**



# PREPARING FOR THE INTERNATIONAL ASSEMBLY

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

## RESPONSIBILITIES

### AS DISTRICT GOVERNOR-ELECT

Attend all scheduled sessions at the International Assembly

### AS DISTRICT GOVERNOR

## RESOURCES

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

These resources supplement the materials provided in this manual. You will not need to bring your manual with you to the assembly.

## GETTING READY FOR THE ASSEMBLY

The International Assembly is a weeklong meeting held annually in San Diego, California, USA (check the Rotary calendar for dates). Plan to wear professional clothing according to your culture's custom, and formal wear for some evenings. Spouses of governors-elect are invited to attend but are required to participate in the program.

Simultaneous interpretation of general sessions is provided in eight languages: English, Italian, French, Japanese, Korean, Mandarin, Portuguese, and Spanish.

You will receive a registration email in August or September that will include program highlights, travel information, and logistical details. All travel is arranged through the Rotary International Travel Service (RITS). Please wait to

make travel arrangements until you receive your registration packet. Your travel, hotel, and food expenses are paid by Rotary. To report other appropriate expenses as outlined in the registration packet, download the expense statement (on Rotary.org under Manage | Travel & Expenses).

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

## THE INTERNATIONAL ASSEMBLY EXPERIENCE

At the International Assembly, you will attend general sessions and small group sessions as well as social events. The general sessions include inspirational speeches by the RI president-elect, The Rotary Foundation trustee chair-elect, and Rotary's general secretary.

The small group sessions provide an opportunity to go over your plans for the upcoming year and discover new ideas and strategies from other participants. Although the International Assembly program varies from year to year, common topics include The Rotary Foundation, public image, membership, and leadership.

You will also meet with your Club and District Support representative, who will be your primary contact during your years as governor-elect and governor. This meeting will include an overview of your Rotary funding and information on Rotary resources.

Besides attending training sessions, you and your spouse will be able to meet with other participants at social events, such as the president-elect's meals, festival night, optional host hospitality events, and banquets. You are also encouraged to visit booths during your free time, where you can talk with Rotary International staff, learn about the upcoming Rotary convention, or buy theme materials and other Rotary items.

View a [video](#) about what to expect at the International Assembly.

## SPOUSES PROGRAM

Your spouse is encouraged to attend the International Assembly to prepare for the upcoming year. Spouses attend general sessions and combined small group sessions with the governors-elect. They also have their own program, which may include panel presentations, networking activities, or roundtable discussions. Registration information for your spouse will be included in your registration materials. As long as your spouse is a registered participant, Rotary will cover the cost of his or her travel, hotel, and food. Spouse attendance at the assembly is not mandatory; however, if your spouse chooses to attend, full participation in the spouse program is required.

## QUESTIONS TO CONSIDER

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

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



# YOUR REGIONAL SUPPORT TEAM

Your region has a team of experts to support you during your term as governor. These leaders and their assistants can provide advice and assistance to you when you need them.

## RESPONSIBILITIES

AS DISTRICT GOVERNOR-ELECT	AS DISTRICT GOVERNOR
Get to know your regional support team	Work with your RC on ways to boost club membership and keep members engaged
	Get ideas from your RRFC about strategies for giving, grants, and participation in The Rotary Foundation
	Consult your RPIC to increase public awareness of Rotary in your region
	Work with your E/MGA to develop a major gifts strategy and to identify major giving opportunities in your district

## RESOURCES

- [Regional Coordinator and Adviser Directory](#)
- [Coordinators and advisers page on Rotary.org](#)

## ROTARY COORDINATOR

Your Rotary coordinator offers support and expertise to build strong, dynamic, and effective clubs and districts. RCs can help you:

- Identify regional challenges to developing strong and dynamic districts and clubs
- Develop and implement a strategic plan to address your regional challenges
- Emphasize member engagement by encouraging Rotarians to participate in Rotary International programs and service activities

## ROTARY PUBLIC IMAGE COORDINATOR

Your Rotary public image coordinator has expertise in the fields of public relations or media outreach. By combining their business backgrounds with their Rotary experience, RPICs help you:

- Share Rotary’s successes with the community and media, local civic and government leaders, nongovernmental organizations, and similar entities
- Encourage stronger club-level public relations efforts
- Promote Rotary’s visual identity resources

## REGIONAL ROTARY FOUNDATION COORDINATOR

Your regional Rotary Foundation coordinator is a key resource on all Foundation-related topics. RRFs can provide guidance and expertise on grants, grants management, and fundraising and help you:

- Encourage Rotarians in your region to continue supporting PolioPlus
- Establish Rotary Foundation goals

## ENDOWMENT/MAJOR GIFTS ADVISER

Your endowment/major gifts adviser can help you and other district leaders educate Rotarians, alumni, and friends of Rotary on opportunities to give major gifts to The Rotary Foundation. Your E/MGA will work with your RRF to:

- Identify, cultivate, and solicit major gifts
- Ensure that donors who make major gifts are appropriately thanked and appreciated
- Train district leaders in major giving and suggest ways districts can establish structures to cultivate local major givers
- Suggest ways to develop cultivation events for existing and prospective Foundation supporters

## QUESTIONS TO CONSIDER

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

- Do you know your regional support team members? How can you get to know them?
- How can you work with your regional support team during your year as governor?

## APPENDIX 14

# PLANNING CALENDAR

Use this calendar to plan your years as district governor-elect and district governor. Deadlines and observances are listed on the left, and reminders are on the right.

## ROTARY YEAR 2015-16

JULY		
30	Submit appointment for district Rotary Foundation committee chair, if appointing this year	<p>RI sends Rotary training and membership materials</p> <p>The Rotary Foundation (TRF) emails world reporting percentages for grant reporting to districts</p> <p>Have new district officers authorize district qualification for Rotary grants</p> <p>Lead by example and make your personal gift to the Annual Fund</p> <p>Around mid-July, RI emails July dues invoices to all officers (email addresses must be current), or mails them to incoming secretaries</p>
AUGUST Membership Month		
		<p>Prepare to attend your GETS in conjunction with the Rotary institute for your zone</p> <p>TRF notifies districts that District Designated Funds unspent from the previous year are available</p> <p>If clubs don't receive their dues invoice, refer them to <a href="mailto:riclubfinance@rotary.org">riclubfinance@rotary.org</a></p> <p>RI sends 1 July club membership numbers and July month-end totals</p> <p>RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater</p>
SEPTEMBER Basic Education and Literacy Month		
30	Receive copy of proposed legislation for Council on Legislation	Forward the Club Officers' Kit to club presidents-elect before PETS
30	Rotaract club membership rosters due	<p>Review and discuss proposed legislation</p> <p>RI sends 60-day reminder letters to clubs with past dues balances of \$250 or greater</p>

**OCTOBER Economic and Community Development Month**

24	World Polio Day	<p>TRF emails world reporting percentages for grant reporting to districts</p> <p>TRF notifies districts that any spendable earnings available from the Endowment Fund have been added to their DDF balance</p> <p>RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater</p>
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**NOVEMBER Rotary Foundation Month**

		<p>RI sends RI Convention District Commitment form</p> <p>TRF notifies districts of the following year's DDF amount and the maximum award available for the district grant</p> <p>RI may terminate clubs that have owed \$250 or more for 120 days or longer</p>
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**DECEMBER Disease Prevention and Treatment Month**

13	Submit RI Convention District Commitment form with district convention attendance goal to <a href="mailto:impromo@rotary.org">impromo@rotary.org</a>	First deadline for RI Convention; register at <a href="http://riconvention.org">riconvention.org</a>
31	Submit your district's committee appointments on <a href="http://Rotary.org">Rotary.org</a>	Remind clubs to elect presidents-nominee
31	Last day to make Rotary Foundation contributions that will be credited to 2015	

**JANUARY Vocational Service Month**

		<p>Attend International Assembly (confirm dates on Rotary calendar)</p> <p>RI sends additional theme materials for distribution at your PETS</p> <p>TRF emails world reporting percentages for grant reporting to districts</p> <p>Ask clubs to review historical achievements in Rotary Club Central and begin to think of goals for next year</p> <p>Around mid-January, RI emails January dues invoices to all officers (email addresses must be current), or mails them to incoming secretaries</p>
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### FEBRUARY Peace and Conflict Prevention/Resolution Month

1	Submit date and details of your district conference on Rotary.org	Conduct district team training seminar Conduct PETS (February or March)
23	Rotary's anniversary/World Understanding and Peace Day	Begin conducting grant management seminars for 2015-16 club leaders If clubs don't receive their dues invoices, refer them to riclubfinance@rotary.org RI sends first installment of the estimated governor's allocation Submit Statements of Support and Opposition for proposed legislation to Rotary RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater

### MARCH Water and Sanitation Month

10	Last day for clubs to submit their incoming club officer information for inclusion in the Official Directory	Conduct district assembly (March, April, or May) Submit RI and TRF Expense Report from the International Assembly to meetings.finance@rotary.org (download from the District Governor's Exchange)
31	Remind Rotaract clubs to report their membership rosters through My Rotary	Second registration deadline for RI Convention; after this deadline, admission to preconvention events and luncheons can be purchased only on-site RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater

### APRIL Maternal and Child Health Month

		Conduct district membership seminar TRF emails world reporting percentages for grant reporting to districts Council on Legislation meets; confirm dates on Rotary calendar RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater
--	--	--

MAY Youth Services Month		
15	Remind club presidents-elect to set their annual goals in Rotary Club Central	TRF notifies districts to check the amount of unused District Designated Funds to date for the year
15	Last day to complete payment requirements for 2015-16 district grant	Email information about the Interactor elected as your district Interact representative and the Rotaractor elected as your district Rotaract representative to <a href="mailto:data@rotary.org">data@rotary.org</a>  RI may terminate clubs that have owed \$250 or more for 120 days or longer

JUNE Rotary Fellowships Month		
1	Remind club presidents-elect to set their annual goals in Rotary Club Central	Attend the RI Convention, tentatively scheduled for 28 May-1 June in Seoul; confirm dates at <a href="http://riconvention.org">riconvention.org</a>
30	Submit nominations for the 2016-17 TRF Distinguished Service Award to <a href="mailto:riawards@rotary.org">riawards@rotary.org</a>	Remind Rotaract and Interact clubs, and their sponsor Rotary clubs, to report incoming club presidents and advisers through Rotary.org

## ROTARY YEAR 2016-17

JULY		
1	Rotary Peace Fellowship applications due to The Rotary Foundation	Select members of the nominating committee for governor  RI emails information about your role in receiving online membership inquiries  The Rotary Foundation (TRF) emails world reporting percentages for grant reporting to districts  Ensure clubs set annual goals in Rotary Club Central  Around mid-July, RI emails July dues invoices to all officers (email addresses must be current), or mails them to incoming secretaries  Lead by example and make your personal gift to the Annual Fund

AUGUST Membership Month		
		TRF notifies districts that District Designated Funds unspent from the previous year are available  If clubs don't receive their dues invoices, refer them to <a href="mailto:riclubfinance@rotary.org">riclubfinance@rotary.org</a>  RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater

**SEPTEMBER Basic Education and Literacy Month**

1	Submit nominations for Service Above Self Award to <a href="mailto:riawards@rotary.org">riawards@rotary.org</a>	RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater
30	Remind Rotaract clubs to report their membership rosters	

**OCTOBER Economic and Community Development Month**

24	World Polio Day	<p>Continue the process of nominating a governor</p> <p>TRF sends Every Rotarian Every Year, 100% Rotary Foundation Sustaining Member, and Top Three per capita club banners from previous year</p> <p>TRF emails world reporting percentages for grant reporting to districts</p> <p>TRF notifies districts that any spendable earnings available from the Endowment Fund have been added to their DDF balance</p> <p>RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater</p>
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**NOVEMBER Rotary Foundation Month**

1	Submit nominations for the Service Award for a Polio-Free World to <a href="mailto:polioplus@rotary.org">polioplus@rotary.org</a>	<p>Observe World Interact Week (3-9 November), including Interact anniversary (5 November)</p> <p>Conduct district Rotary Foundation seminar (may be held earlier)</p> <p>Remind clubs to update membership data on <a href="http://Rotary.org">Rotary.org</a> (or their member integration vendor)</p> <p>TRF notifies districts of the following year's DDF amount and the maximum award available for the district grant</p> <p>RI may terminate clubs that have owed \$250 or more for 120 days or longer</p>
1	Submit nominations for the RI Vocational Service Leadership Award to <a href="mailto:riawards@rotary.org">riawards@rotary.org</a>	

**DECEMBER Disease Prevention and Treatment Month**

1	Complete the governor-nominee selection form on <a href="http://Rotary.org">Rotary.org</a>	First registration deadline for RI Convention; register at <a href="http://riconvention.org">riconvention.org</a>
31	Deadline for clubs to hold their annual meeting for election of club officers	
31	Last day to make Rotary Foundation contributions that will be credited to 2016	

JANUARY Vocational Service Month		
31	U.S. only: Submit interim expense statements with receipts to your CDS representative	<p>Remind clubs to update Official Directory information on Rotary.org</p> <p>TRF emails world reporting percentages for grant reporting to districts</p> <p>RI may terminate clubs that have owed \$250 or more for 180 days or longer</p> <p>Around mid-January, RI emails January dues invoices to all officers (email addresses must be current), or mails them to incoming secretaries</p>
FEBRUARY Peace and Conflict Prevention/Resolution Month		
23	Rotary's anniversary/World Understanding and Peace Day	<p>If clubs don't receive their January dues invoices, refer them to <a href="mailto:riclubfinance@rotary.org">riclubfinance@rotary.org</a></p> <p>RI sends 30-day reminder letters to clubs with past due balances of \$250 or greater</p>
MARCH Water and Sanitation Month		
1	Submit nominations for the Rotarian Spouse/ Partner Service Award to <a href="mailto:riawards@rotary.org">riawards@rotary.org</a>	Observe World Rotaract Week (9-15 March), including Rotaract anniversary (13 March)
10	Last day for clubs to submit their incoming club officer information for inclusion in the Official Directory through Rotary.org	<p>Clubs receive RI Convention credentials</p> <p>Conduct district assembly (March, April, or May)</p>
15	Submit nominations for Significant Achievement Award to <a href="mailto:riawards@rotary.org">riawards@rotary.org</a> (nominate one Rotary club)	Second registration deadline for RI Convention; after this deadline admission to pre-convention events and luncheons can be purchased only onsite
31	Remind Rotaract clubs to report their membership rosters through My Rotary	RI sends 60-day reminder letters to clubs with past due balances of \$250 or greater
APRIL Maternal and Child Health Month		
		<p>CDS representative emails online survey link to the Governor's Report to RI</p> <p>TRF emails world reporting percentages for grant reporting to districts</p> <p>RI sends 90-day reminder letters to clubs with past due balances of \$250 or greater</p>

MAY Youth Services Month		
15	Complete the Governor's Report to RI (see April email for link)	TRF notifies districts to check the amount of unused District Designated Funds to date for the year  Remind clubs to update membership data on Rotary.org (or through member integration vendor)
15	Last day to complete payment requirements for 2016-17 district grant	

JUNE Rotary Fellowships Month		
1	Confirm club ratings and visits in Rotary Club Central	RI may terminate clubs that have owed \$250 or more for 120 days or longer
30	Submit TRF contributions to be credited to current fiscal year	Attend the RI Convention, tentatively scheduled for 10-14 June in Atlanta, Georgia, USA; confirm dates on reconvention.org  Remind Rotaract and Interact clubs, and their sponsor Rotary clubs, to report incoming club presidents and advisers through Rotary.org
30	Final district governor expense reports are due to your CDS representative	
30	Deadline to submit one nomination for the TRF Citation for Meritorious Service to riawards@rotary.org (may be submitted any time during 2016-17)	
30	Submit nominations for the 2017-18 TRF Distinguished Service Award to riawards@rotary.org	

ENGLISH



**TURN  
YOUR VISION  
INTO  
REALITY**



**TAKE ACTION:** [rotary.org/grants](https://rotary.org/grants)

**ROTARY CLUB CENTRAL  
PLAN TOGETHER  
TRACK PROGRESS  
ACHIEVE GOALS**

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