

NAME \_\_\_\_\_

DISTRICT \_\_\_\_\_



# GOVERNOR-ELECT WORKBOOK

2020 INTERNATIONAL ASSEMBLY

SAN DIEGO, CALIFORNIA, USA | 19-25 JANUARY 2020



January 2020

Dear 2020-21 district governor:

Welcome to the 2020 International Assembly! As you embark on this week of training, remember that our work is to prepare you to serve as district governor. This week is also about building relationships that may lead to project partnerships or exchanges. This is a truly international experience — the participants in your breakout sessions will often be from all over the world, and speakers from our general session stage will speak in a variety of languages. Take advantage of every opportunity offered to you, whether in a breakout session, at lunch, or at an evening event, to get to know your fellow governors, explore new ideas, and be inspired by those who have served before you. Introduce yourself to the Rotaractors in your sessions and learn about their club experience — how they raise funds, plan projects, and engage members. Ask questions in your sessions and remember that the training leader might not have all the answers but will help you find them.

This workbook is your most important resource for the training sessions. Please take it to every session and use it to write notes, ideas, or contact information for your fellow governors-elect and for Rotaractors. During sessions and informal networking, you should write all the new ideas you hear, including innovative ways to motivate the Rotarians in your district. Take 15 minutes at the end of each day to reflect on your sessions and to continue developing your goals and key messages for each session. In your final session, you should be ready to share your plans for the year ahead!

After you have completed this week of training, the workbook will continue to be a resource for you, filled with the great ideas and strategies that you want to apply in your district during your year as governor.

A few additional tips for success this week:

- Download the Rotary Events app for program information, maps, and networking.
- In sessions, only use your mobile phones and other electronic devices for learning purposes. Fully participate in the sessions and leave personal business, including checking email or text messages, for breaks or after training hours.
- Speak slowly and clearly to help everyone understand you. Remember that many participants are using their second or third language in these sessions.

We wish you success this week and during the exciting year ahead.

Sincerely,



Holger Knaack  
2020-21 President  
Rotary International



Jennifer E. Jones  
Moderator  
2020 International Assembly



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## Appendixes

1. Rotary's Strategic Priorities and Objectives
2. Electronic Resources

**Download an interactive PDF of this workbook at:**  
**[rotary.org/international-assembly](https://rotary.org/international-assembly)**

Write the names and district numbers of Rotarian and Rotaractor classmates in each session with whom you want to connect after the event. You can cross-reference them with the 2020-21 Leadership Directory for contact information.

# LEADING WITH VISION

TRAINING LEADER: \_\_\_\_\_

## LEARNING OBJECTIVES

At the end of the session, you will be able to:

1. Use the 2020-21 presidential theme to inspire clubs to adopt Rotary's vision.
2. Plan how to use goal setting to strengthen clubs.
3. Leverage the district structure to successfully balance work, life, and Rotary.

## RESOURCES

Rotary Club Central

Programs and member services staff in the Rotary Resource Center at the assembly

### 2020-21 PRESIDENTIAL THEME BAG AND GIFTS

The theme bag contains materials to help you emphasize and promote the presidential theme for 2020-21. Please review the following list to make sure you have all the items. If you're missing an item, visit the Assembly Office for a replacement after the session.

Theme tie

Theme scarf

Theme pins

Theme banner

Theme luggage tag

Theme district governor pocket patch

*Note that only those companies, Rotary entities, or individuals licensed or otherwise given permission by RI are authorized to reproduce the Rotary emblem and other Rotary Marks on goods for sale. Official licensees of RI are authorized to produce and sell ties and scarves that incorporate the theme logo only if the designs are not similar to those of the official theme tie or scarf. Any companies or Rotary entities that produce and sell ties and scarves that are similar in design to the official theme tie and scarf are acting without RI's authorization.*

# ROTARY'S PAST AND FUTURE

.....

We'll discuss responding to resistance in the session called "Leading Change."

## ROTARY'S VISION STATEMENT

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



## ROTARY'S CORE VALUES

- Service
- Fellowship
- Diversity
- Integrity
- Leadership

How does this year's presidential theme communicate our core values?

How are our core values evident in Rotary today?

AT AN EVENT EARLY IN YOUR GOVERNOR YEAR, A ROTARIAN TELLS YOU,

*"This new vision statement and strategic priorities take Rotary in the wrong direction! I don't like it. What happened to our core values?"*

How might you respond?



## GOAL SETTING HELPS GROW ROTARY

Rotary Club Central helps clubs set and track goals. You can monitor each club's progress and provide support throughout the year.

Rotary's priorities will direct our work over the next five years. How do we get started?

How does goal setting help us achieve Rotary's strategic priorities and objectives?

### WHAT YOU NEED TO KNOW ABOUT THE 2020-21 ROTARY CITATION

#### ACHIEVING THE ROTARY CITATION IS EASY!

1. Go to Rotary Club Central.
2. Review the 25 available goals.
3. Select 13 goals (or 52% of the available goals).
4. Achieve those goals.
5. Report those goals in Rotary Club Central.
6. Celebrate!

#### SOME POINTS TO REMEMBER ABOUT THE ROTARY CITATION:

- The Rotary Citation is electronic only and located in Rotary Club Central.
- Clubs will have the entire Rotary year (from 1 July 2020 to 30 June 2021) to achieve Rotary Citation goals.
- To achieve the citation, clubs must be active and in good standing (that is, be current on dues payments) for the whole Rotary year.
- District governors will be able to use My Rotary to see clubs' progress toward the goals.
- The goals of the Rotary Citations for Rotaract and Interact clubs are fully aligned with the goals of Rotary clubs, yet they are tailored to young leaders' experiences. The Rotaract and Interact citations will be a PDF, and nominations for the citation will be completed online by their sponsor club's president.

## FINDING BALANCE

How often will you meet with your district leadership team to discuss how you'll share tasks and measure the progress on those tasks?

What tasks and projects can committee chairs manage?

How can you use Rotary Club Central to help you in your role?

What new ideas do you have for leveraging assistant governors to manage your workload more effectively?

Use the space below to write your ideas for balancing work, life, and Rotary:

# ENGAGING YOUNG LEADERS

TRAINING LEADER: \_\_\_\_\_

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Describe the value of engaging young leaders in Rotary.
2. Identify strategies to communicate across generations.
3. Promote the value of a more inclusive organization.

## RESOURCES

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Engaging Younger Professionals Toolkit

Rotaract Handbook

Interact Guide for Rotary Club Sponsors and Advisers

Programs for young leaders, promotional cards

Programs for young leaders, promotional posters

Young Leaders in Action newsletter

## EMERGING LEADERS

YOUR DISTRICT SUPPORT PROGRAMS AND ACTIVITIES FOR YOUNG LEADERS			
PROGRAM/ACTIVITY	DOES NOT PARTICIPATE	LOW PARTICIPATION	HIGH PARTICIPATION
Interact (ages 12-18)			
Rotaract (ages 18-30)			
Rotary Youth Exchange (ages 15-19)			
Rotary Youth Leadership Awards (RYLA) (ages 14-30)			
New Generations Service Exchange (ages 18-30)			
Opportunities for young leaders to volunteer on projects			
Rotary Community Corps			
Scholarships			
Alumni associations			

What is the goal of engaging young leaders in Rotary?

How can Rotarians collaborate with young leaders to achieve their shared goals?

What role can young leaders play in supporting the priorities of Rotary's strategic plan?

# COMMUNICATING ACROSS GENERATIONS

## TRADITIONALISTS (BORN PRIOR TO 1946)

will typically arrive early and expect a paper agenda.

## BABY BOOMERS (BORN BETWEEN 1946 AND 1964)

will expect a PowerPoint presentation and are willing to put in any extra hours required if the meeting runs long.

## GEN X (BORN BETWEEN 1965 AND 1976)

[participants] will prefer to watch a video and expect the meeting to end by 5 p.m. to honor work-life balance boundaries.

## MILLENNIALS (BORN BETWEEN 1977 AND 1997)

will want the meeting to have a strong purpose, and will use collaborative digital tools to share meeting information and expect others to do the same.

## GENERATION Z (BORN AFTER 1997)

[participants may] want to call in from a remote location, no matter what the time, because they view the workplace as an anytime-anywhere proposition.

## SOURCES

Pew Research (<https://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/>)

Post Bulletin ([https://www.postbulletin.com/news/business/women-at-work-today-s-workplace-spans-generations/article\\_d27dc42a-cb7f-5c7b-9a86-bcce227e52ec.html](https://www.postbulletin.com/news/business/women-at-work-today-s-workplace-spans-generations/article_d27dc42a-cb7f-5c7b-9a86-bcce227e52ec.html))

Forbes.com (<https://www.forbes.com/sites/centurylink/2016/11/18/are-you-promoting-collaboration-in-an-intergenerational-workforce/#6641c2907ef2>)

# WHAT ROTARACTORS WANT

Download the Engaging Younger Professionals Toolkit to help you rethink your approach to membership. Topics covered include characteristics of your audience, your club's culture, and ideas for outreach and engagement.

## TOP REASONS WHY ROTARACTORS JOIN:

- To participate in service projects in local community, 20%
- For personal growth and development, 12%
- To meet people and build strong personal relationships, 11%
- To network and build professional relationships, 11%
- For leadership development, 11%

## TOP ACTIVITIES ROTARACT MEMBERS ARE LIKELY TO ATTEND:

- Community service, 90%
- Events with representatives from other Rotaract clubs, 81%
- Club meetings, 78%

## STUDY POPULATION:

5,797 responses

Geographic breakdown (number shows percent of total respondents):

- |                            |                                |
|----------------------------|--------------------------------|
| – South America (25%)      | – North America (14%)          |
| – South Asia (20%)         | – East Asia/South Pacific (7%) |
| – Africa (18%)             | – No Response (1%)             |
| – Europe/Middle East (15%) |                                |

*Respondent club breakdown:*  
85% community-based clubs  
15% university-based clubs

## ROTARACTORS (AGES 18-30) MAY BE MILLENNIALS OR MEMBERS OF GENERATION Z What do we know about those groups?

Millennials are:  
Tech savvy  
Concerned about work-life balance  
Team-oriented  
Socially conscious

Gen Z members are:  
Digital natives  
Accepting of diversity  
Entrepreneurial  
Financially conscious

<https://www.forbes.com>  
<https://casbs.stanford.edu>

How can you help improve intergenerational collaboration in your district?

How can intergenerational collaboration strengthen your district?

## A MORE INCLUSIVE ROTARY

### ROTARY'S DIVERSITY, EQUITY, AND INCLUSION STATEMENT

As a global network that strives to build a world where people unite and take action to create lasting change, Rotary values diversity and celebrates the contributions of people of all backgrounds, regardless of their age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, and gender identity.



Rotary will cultivate a diverse, equitable, and inclusive culture in which people from underrepresented groups have greater opportunities to participate as members and leaders.

Why is it important to be an inclusive organization?

What steps can you take in the coming year to engage young leaders and attract young professionals?



# INNOVATING NEW CLUB MODELS

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Describe the opportunities clubs have to adapt to the needs of current and potential members.
2. Recognize the value of all available club models.
3. Imagine and form new clubs to support the needs of your community.
4. Appreciate how to serve a variety of people with different needs.

## RESOURCES

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

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

Rotary Club Models chart

Guide to Passport Clubs

Guide to Corporate Membership

Club innovation audio stories on SoundCloud

## NOTES

# DOING GOOD IN THE WORLD

TRAINING LEADER: \_\_\_\_\_

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Describe the elements of successful projects.
2. Use the district resource network for better projects.
3. Understand the role of the governor in projects and global grants.

## RESOURCES

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Community Assessment Tools

A Guide to Global Grants

Rotary Ideas

District community service, international service, and Rotary Foundation committees

Rotarian Action Groups

Rotary Community Corps

Regional Rotary Foundation coordinators

## FROM LOCAL TO GLOBAL

Briefly describe a recent project that a club in your district did in your community and check the appropriate box for each question that follows.

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You can reach non-Rotarian donors by creating an online crowdsourcing campaign on Rotary Ideas.

Describe the project:

<input type="checkbox"/> YES <input type="checkbox"/> NO	Did the club complete a community assessment?
<input type="checkbox"/> YES <input type="checkbox"/> NO	Were any aspects of the project sustainable?
<input type="checkbox"/> YES <input type="checkbox"/> NO	Was there a plan for monitoring, evaluation, and measurement after the project's completion?

## SUSTAINABILITY

For Rotary, sustainability means providing long-term solutions to community problems that community members themselves can support after the grant funding ends.



### Start with the community

Identify a need and develop a solution that builds on community strengths and aligns with local values and culture.



### Encourage local ownership

Identify key community members who can help pioneer lasting improvements.



### Provide training

A project's success depends on people.



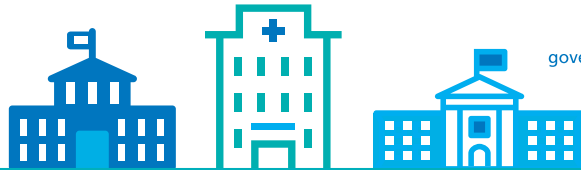
### Buy local

Purchase equipment and technology from local sources.



### Find local funding

Get local funding through governments, hospitals, companies, and other organizations.



### Measure your success

Develop clear and measurable project outcomes and determine how you will collect your data.



What role do community assessments play in sustainability?

How do you increase the quality, impact, and sustainability of projects?

# DISTRICT INTERNATIONAL SERVICE CHAIR

## MOTIVATES

clubs to get involved in international service

## MAINTAINS

the district resource network, a database of local mentors who can provide guidance and technical expertise

## HELPS

clubs find international partners

## SUPPORTS

district Foundation committees and clubs with resources for projects and global grants

## COLLABORATES

with district leaders to recruit local mentors with experience to join the district resource network

## PROMOTES

Rotary publications, online tools, and strategies for planning effective projects and grants



## DISTRICT RESOURCE NETWORK

Available on your district's website or through your district international service chair.

Mentors with expertise in project planning, Rotary's areas of focus, and Rotary grants, including: ROTARIANS · ROTARACTORS · ROTARY PROGRAM ALUMNI · COMMUNITY MEMBERS · PROFESSIONALS FROM PARTNERING ORGANIZATIONS



## PUBLICATIONS

Available on My Rotary

COMMUNITY ASSESSMENT TOOLS · GUIDE TO GLOBAL GRANTS







































## ONLINE TOOLS

Available on My Rotary

ROTARY SHOWCASE · ROTARY IDEAS · DISCUSSION GROUPS · CLUB SERVICE PROJECTS COMMITTEE BASICS

How can the district international service chair (DISC) increase the impact of projects in your district?

## AREAS OF FOCUS

<b>PROMOTING PEACE</b>      	<b>FIGHTING DISEASE</b>      	<b>PROVIDING CLEAN WATER</b>      
<b>SAVING MOTHERS AND CHILDREN</b>      	<b>SUPPORTING EDUCATION</b>      	<b>GROWING LOCAL ECONOMIES</b>      

### Environmental Projects

Most areas of focus now include projects designed to protect the environment. Visit My Rotary to read through the Areas of Focus Policy Statements; projects with an environmental focus are marked with a green leaf symbol. The Environmental Sustainability Rotary Action Group can also help.

How do the areas of focus increase our global impact?

## GLOBAL GRANTS

- Address an important need identified by the community that will benefit
- Have a minimum project budget of \$30,000
- Involve the active participation of Rotarians
- Are initiated and led by a host club or district in partnership with an international club or district
- Align with the goals of one or more of the areas of focus
- Include the active participation of the community that will benefit
- Strengthen a community's capacity to address their own needs
- Use local sources of funding and materials
- Provide long-term benefits to the community after the Rotary club or district has concluded its work
- Have measurable results

Although you might not complete a global grant application yourself, you should understand the application process and be able to offer help to anyone in your district who is applying for a global grant. Review A Guide to Global Grants to become familiar with the process.

## THE GOVERNOR'S ROLE IN GLOBAL GRANTS

- When appropriate, appoint the district Rotary Foundation chair (DRFC) and the district international service chair (DISC). Both serve three-year terms.

Work with the DRFC to:

- Hold a grant management seminar
- Ensure that clubs that are applying for a global grant are qualified
- Connect clubs with the DRFC
- Promote global grants

Contact your district international service chair for help connecting with the district resource network to find local subject matter and project experts.

How can you help the district Rotary Foundation chair (DRFC) and the district international service chair (DISC) to work together to support clubs and their projects?

Rotarians can post their completed projects on Rotary Showcase to record the volunteer support and engagement that they received for their projects.

Why do we want to measure the impact of our projects?

# INCREASING OUR FOUNDATION'S IMPACT

TRAINING LEADER: \_\_\_\_\_

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Assess your clubs' involvement in polio eradication efforts.
2. Describe how our ability to raise and distribute funds increases our impact.
3. Use the power of storytelling to increase our Foundation's impact.

## RESOURCES

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[endpolio.org](http://endpolio.org)

End Polio Now coordinators

End Polio Now newsletter

The Rotary Foundation Reference Guide

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

Rotary.org, Rotary Showcase, and Rotary Ideas

Giving & Grants newsletter

Regional leaders

District Rotary Foundation committee



## OUR ROLE IN POLIO ERADICATION

Visit [endpolio.org](http://endpolio.org) for up-to-date information on the state of polio eradication in the world and to sign up for the End Polio Now newsletter.

### DO CLUBS IN YOUR DISTRICT:

- |  |  |
|--|--|
| <input type="checkbox"/> YES <input type="checkbox"/> NO | Understand Rotary's history and impact toward eradicating polio worldwide?   |
| <input type="checkbox"/> YES <input type="checkbox"/> NO | Consistently promote and raise funds for the PolioPlus Fund?   |
| <input type="checkbox"/> YES <input type="checkbox"/> NO | Rank polio eradication as our organization's first priority?   |
| <input type="checkbox"/> YES <input type="checkbox"/> NO | Plan projects and events to promote awareness among non-Rotarians of our polio eradication efforts?                              |
| <input type="checkbox"/> YES <input type="checkbox"/> NO | Celebrate World Polio Day?   |
| <input type="checkbox"/> YES <input type="checkbox"/> NO | Know about the Bill & Melinda Gates Foundation's 2-to-1 matching grant lasting through 2023?                                     |
| <input type="checkbox"/> YES <input type="checkbox"/> NO | Know that the Trustees of The Rotary Foundation have requested clubs make at least a \$1,500 contribution to the PolioPlus Fund? |

### DOES YOUR DISTRICT:

- |  |  |
|--|--|
| <input type="checkbox"/> YES <input type="checkbox"/> NO | Earmark District Designated Funds for PolioPlus? |
|--|--|

#### Did you know that:

- The Rotary Foundation Trustees have asked each district to contribute 20 percent of their DDF to the PolioPlus Fund?
- The Rotary Foundation matches DDF allocations to the PolioPlus Fund from the World Fund?

What is your role in ensuring that each club in your district is knowledgeable about End Polio Now and supports and promotes these efforts?

How can you help keep the momentum going in your district as we near our goal of a polio-free world?

## YOUR POLIO MESSAGE CALENDAR

EVENT/OPPORTUNITY	TIME	WHAT I CAN DO TO RAISE AWARENESS AND FUNDS FOR POLIO ERADICATION
International Assembly	January	<ul style="list-style-type: none"> <li>• Learn about the state of polio.</li> <li>• Meet 2020-21 governors from around the world and share ideas for World Polio Day.</li> <li>•</li> </ul>
District team training seminar		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>
PETS	February/March	<ul style="list-style-type: none"> <li>• Encourage each club president to lead by example and donate to the PolioPlus Fund.</li> <li>•</li> <li>•</li> </ul>
District training assembly		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>
District team training seminar		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>
Speaking opportunity at a community event		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>
World Immunization Week	Last week of April	<ul style="list-style-type: none"> <li>• Hold an event to share the importance of polio eradication.</li> <li>•</li> <li>•</li> </ul>
District conference		<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>

EVENT/OPPORTUNITY	TIME	WHAT I CAN DO TO RAISE AWARENESS AND FUNDS FOR POLIO ERADICATION
World Polio Day interview with local media	September/October	<ul style="list-style-type: none"> <li>Have clubs register their World Polio Day events at <a href="http://endpolio.org">endpolio.org</a>.</li> <li>Our World Polio Day event will be: _____</li> </ul>
World Polio Day	24 October	<ul style="list-style-type: none"> <li></li> <li></li> <li></li> </ul>
Innovative event idea:		<ul style="list-style-type: none"> <li></li> <li></li> <li></li> </ul>
Innovative event idea:		<ul style="list-style-type: none"> <li></li> <li></li> <li></li> </ul>
Innovative event idea:		<ul style="list-style-type: none"> <li></li> <li></li> <li></li> </ul>



## VIRTUAL REALITY

Visit the VR Zone during the assembly to experience one of Rotary's three films:

- "I Dream of an Empty Ward" tells the inspiring story of Alokita, one of the last children in India to be paralyzed by polio.
- "Two Drops of Patience" follows a Rotaractor and a group of local Rotarians in Uganda as they travel to a remote region to immunize children with the polio vaccine.
- "One Small Act" takes us on the journey of a child whose world has been torn apart by conflict.

Showing Rotary's virtual reality films at club and district events can show members the great work that is being done with their donations — and inspire them to stay involved.

[ROTARY.ORG/EN/VIRTUAL-REALITY](http://ROTARY.ORG/EN/VIRTUAL-REALITY)

## FUNDING OUR SERVICE

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Your regional Rotary Foundation coordinator and endowment/major gifts adviser are important resources for supporting and promoting our Foundation.

How can we use storytelling to engage donors and raise funds for our Foundation?

### CONNECTING A DONOR'S PASSION WITH AN OPPORTUNITY TO GIVE

Making a gift is an opportunity for a donor to support a cause that is important to them. You can help them by connecting a donor's passion to a specific cause or opportunity to give, such as the areas of focus, scholarships and peace fellowships, outright gifts (which let them see their gifts used immediately), or bequests (which let their gifts serve as their legacy).

Consider each of the prospective donors described in the chart and select which of the giving opportunities listed below might be a good match for their interests or passion. What story might you tell to connect the donor with the work of The Rotary Foundation?

### OPPORTUNITIES TO GIVE:

- PolioPlus Fund (supports a polio-free world)
- Annual Fund (supports Rotary's current work)
- Endowment (supports Rotary's future)
- World Fund gifts (spent where the need is the greatest)
- Gifts for a specific cause (area of focus)
- Disaster Response Fund
- Gifts to an approved global grant
- Gifts to Rotary Peace Centers

PROSPECTIVE DONOR	OPPORTUNITY TO GIVE	STORY
A colleague from your office who recently learned about the challenges facing vaccinators in Pakistan	PolioPlus	Along with our partners, we have helped immunize more than 2.5 billion children against polio in 122 countries. We have reduced polio cases by 99.9 percent worldwide and we won't stop until we end the disease for good. You can join us.
The grandparent of an Interactor		
A teacher who recently traveled to a rural community that struggles with high levels of illiteracy		
A PDG who recently returned from a Rotary Friendship Exchange, where she visited a global grant project		
The director of a local nonprofit whose refugee parents were forced to flee their home because of war		
An architect who has been actively involved in rebuilding a flood-devastated community		

## TAKING ACTION

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District officers can monitor their district's DDF availability and activity by viewing the SHARE Contribution Detail Report and Available DDF by District Report in My Rotary.

What kind of impact can we make by spending DDF?

### DISTRICT DESIGNATED FUNDS

Your district can use its DDF to pay for Foundation, club, and district projects of your club's or district's choice. Districts may use up to half of their new DDF to fund district grants. The remaining DDF may be used for [global grants](#) or can be donated to the PolioPlus Fund, the Rotary Peace Centers, or another district.

How can you support clubs in setting and achieving Foundation-related goals in Rotary Club Central?

# UNDERSTANDING YOUR ROLE AND FINANCIAL RESPONSIBILITIES

CLUB AND DISTRICT SUPPORT (CDS) STAFF MEMBER: \_\_\_\_\_

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Understand the Rotary funding and district financial statement reporting policy.
2. Address common questions and issues you will face as governor.

## RESOURCES

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Club and District Support (CDS) staff

Lead Your District: Governor

Manual of Procedure

Rotary Code of Policies

My Rotary

## ROTARY FUNDING

Rotary funding is intended to partially offset the expenses you'll incur while you prepare for and carry out your duties as governor. Use the space below to take notes on how to report your expenses and write down the Rotary funding due dates:



## DISTRICT FINANCIAL STATEMENT

The Rotary International Bylaws require all district governors to prepare an annual statement and report of district finances and give it to the clubs in their district to review and approve it after their year as governor has ended. The approved report must also be submitted to Rotary International at [districtfinancialstatement@rotary.org](mailto:districtfinancialstatement@rotary.org). Use the space below to take notes on the process for preparing the annual statement and the due dates for that statement:

## DISTRICT GOVERNOR'S ROLE AND RESPONSIBILITIES

A list of practical questions will be distributed for discussion. Use the space below to take notes:

In the space below, write one thing that you will focus on during your year as district governor.  
How can you use what you learned during this session to achieve your goal?

# CREATING A POSITIVE AND SAFE CULTURE

## LEARNING OBJECTIVES

At the end of the session, you will be able to:

1. Identify your conflict management style and its strengths and challenges.
2. Prepare for situations that will require conflict management in your year as governor.

### SCENARIO 1: RESISTANCE TO A NEW CLUB

“Hello governor, this is Ruth, the president of the Rotary Club of Eliot Sunrise. I’m calling because I’ve just heard about the new club forming in our community. They are marketing themselves as a cause-based club. Apparently, they’re focusing only on water and sanitation projects. Is that even allowed? We care about water and sanitation, too, and this just makes us look bad. We don’t want to compete for members in our own backyard. Morale is already low, and this new club could cause a drop in membership, which would be the end of our club.”

How do you respond? (Circle one.)

1. Tell Ruth that you’ll talk to the president of the new club to discourage it from recruiting new members from the community.
2. Tell Ruth that you can’t stop the new club from forming, but you’ll work with her club to find strategies to improve morale in her club and help it grow.
3. Arrange a phone call between Ruth and the president of the new club to discuss how they can work together.
4. Tell Ruth that there’s nothing you can do and that supporting new clubs is important.
5. Tell Ruth that you’re busy at the moment but that your assistant governor will be in touch.

#### RESOURCES:

- Your Rotary coordinator
- Your regional membership officer
- Lead Your District: Governor

#### NOTES

## SCENARIO 2: MEMBER DISPUTE WITHIN A CLUB

### Part 1

“Hello governor, this is Drew, the president of the Rotary Club of Longville. I’m calling for some advice. One of our members, Tom, came to me yesterday and told me that he had had a disagreement with Jerry, another member of our club, on Facebook. Tom feels that Jerry was aggressive and disrespectful, and he’s nervous about attending future club events with Jerry present. What do I do?”

How do you respond? (Circle one.)

1. Tell Drew you will support him in whatever he chooses to do.
2. Tell Drew that he has to address the issue directly, but let him determine which way is best.
3. Tell Drew that the two of you can address it together and offer to attend a club meeting.
4. Tell Drew he has to address it by telling Jerry that if he doesn’t stop he’ll be removed from the club.
5. Tell Drew that club conflicts are a club matter and that you will not get involved.

### Part 2

“Hi governor, this is Drew again. I approached Jerry like we talked about to address the issue. He said he understood, and everything seemed resolved. Tom called again to let me know that Jerry has been messaging him over Facebook, attacking him for reporting the issue, and telling him he’s ‘being too sensitive.’ Tom sent me screenshots that show Jerry making negative comments about Tom’s race and religion. I really feel that this is harassment.”

What would you do?

### RESOURCES:

- Club and District Support representative
- Rotary’s harassment policy (Rotary Code of Policies section 26.120.)
- Preventing and Addressing Harassment online course

### NOTES

# CONFLICT MANAGEMENT STYLES

Conflict is a natural part of life, and conflict management is one of the responsibilities of a district governor, so it's an important skill to have. According to the model developed by Kenneth W. Thomas and Ralph H. Kilmann, there are five conflict management styles. Everyone will use all five styles at different times, but each person uses one or two most often. Each style has strengths and weaknesses — there is no one right approach to resolving all conflicts.

These styles, their strengths and weaknesses, and some guidance about when to use them and when to avoid them are listed below.

## 1. ACCOMMODATING

This style is not assertive and focuses on cooperation. You neglect your own concerns to satisfy the needs of others.

STRENGTHS:	CHALLENGES:
<ul style="list-style-type: none"><li>• Prioritizes a positive relationship and goodwill between groups</li><li>• Builds credit for future issues that are more important to you</li></ul>	<ul style="list-style-type: none"><li>• Can be perceived as giving in or not caring about an issue</li><li>• Can allow resentment to build if you feel your concerns aren't addressed</li></ul>
USE THIS STYLE WHEN:	AVOID THIS STYLE WHEN:
<ul style="list-style-type: none"><li>• The issue is less important than maintaining a positive relationship.</li><li>• One group is less powerful and doesn't see a way to get what they want.</li></ul>	<ul style="list-style-type: none"><li>• Both groups have strong feelings about getting a specific outcome.</li><li>• One group's needs will go unmet, and that will have a significant negative impact</li></ul>

## 2. COMPROMISING

This style is moderate in both assertiveness and cooperativeness. The objective is to find an acceptable solution that partially satisfies everyone involved.

STRENGTHS:	CHALLENGES:
<ul style="list-style-type: none"><li>• Allows everyone to evaluate and understand the others' needs and opinions</li><li>• Gives everyone ownership of the final outcome</li></ul>	<ul style="list-style-type: none"><li>• Both groups risk sacrificing things they really care about.</li><li>• Can create a power imbalance between groups that were equal.</li></ul>
USE THIS STYLE WHEN:	AVOID THIS STYLE WHEN:
<ul style="list-style-type: none"><li>• You're willing to trade some of your needs to get the other group to do the same.</li><li>• Both people or groups are equally powerful or responsible and want to preserve the relationship.</li></ul>	<ul style="list-style-type: none"><li>• One group will be affected much more by the decision.</li><li>• One group has more power or responsibility than the other, and so feels like they must give up more.</li></ul>

### 3. COLLABORATING

This style is both assertive and cooperative. The groups in conflict attempt to work together to find a solution that satisfies everyone's concerns.

STRENGTHS:	CHALLENGES:
<ul style="list-style-type: none"><li>• Encourages positive relationship building through imaginative thinking</li><li>• Builds a strong commitment to the outcome from everyone involved</li></ul>	<ul style="list-style-type: none"><li>• It is often difficult to find a solution that satisfies everyone's needs.</li><li>• It requires people with different perspectives to agree or find a new way of thinking.</li></ul>
USE THIS STYLE WHEN:	AVOID THIS STYLE WHEN:
<ul style="list-style-type: none"><li>• Everyone has equal power and mutual respect for one another's role in the issue.</li><li>• Everyone involved needs to win to proceed successfully.</li></ul>	<ul style="list-style-type: none"><li>• The outcome might conflict with any group's needs or wants.</li><li>• One group has significantly more power or will be more greatly affected by the outcome.</li></ul>

### 4. COMPETING

This style is assertive and uncooperative. One group prioritizes its own concerns over others'. The group may use its position of power to get its way.

STRENGTHS:	CHALLENGES:
<ul style="list-style-type: none"><li>• Creates a strong and final outcome that serves the needs of one group completely</li><li>• Inspires quick decision making and action</li></ul>	<ul style="list-style-type: none"><li>• Often perceived as too controlling or uncaring</li><li>• Discourages people from building positive, collaborative relationships</li></ul>
USE THIS STYLE WHEN:	AVOID THIS STYLE WHEN:
<ul style="list-style-type: none"><li>• A decision must be made quickly and clearly.</li><li>• The issue is so important that one group is unwilling or unable to compromise in any way.</li></ul>	<ul style="list-style-type: none"><li>• The collaborative nature of the relationship will be deeply damaged.</li><li>• Being perceived as a "team player" is important to the group deciding on the outcome.</li></ul>

## 5. AVOIDING

This style is both unassertive and uncooperative. The group pursues neither their own concerns nor those of others. They simply don't deal with the conflict.

STRENGTHS:	CHALLENGES:
<ul style="list-style-type: none"><li>• Can reduce tension in a relationship</li><li>• Can put off making the conflict more intense until a better resolution exists</li></ul>	<ul style="list-style-type: none"><li>• Can be perceived as "passive-aggressive" or not interested</li><li>• Can delay the resolution of an ongoing issue</li></ul>
USE THIS STYLE WHEN:	AVOID THIS STYLE WHEN:
<ul style="list-style-type: none"><li>• There is something new or more information coming that will change the circumstances of the conflict.</li><li>• The issue is not very important, or it is clear to all the people involved that delaying an outcome will not have very harmful consequences.</li></ul>	<ul style="list-style-type: none"><li>• Ignoring the needs or issues of the other group involved will damage the relationship beyond repair.</li></ul>

My natural conflict management styles are:

The conflict management style or styles I hope to use most as governor are:

NOTES

### SCENARIO 3: YOUTH PROTECTION INCIDENT

“Thanks governor, we’re really looking forward to your visit. Oh, while we’re on the phone, I just wanted to tell you about an incident with one of our longtime members a few weeks ago. Fred offered to drive Karolina, a Youth Exchange student, home from our meeting. When she got home, she told her host family that Fred spent the car ride complimenting her physical appearance and asking intrusive questions about her dating life. When she got out of the car, he asked if they could ‘hang out’ again. He also sent her a friend request on Facebook the next day. Anyway, we know that this student just misunderstood Fred, and we’ve explained to her that he’s just friendly with everyone. He was very upset by the suggestion that he had been improper, so I just wanted you to be aware in case it comes up during your visit.”

What would you do?

#### ROTARY’S STATEMENT OF CONDUCT FOR WORKING WITH YOUTH (ROTARY CODE OF POLICIES SECTION 2.120.1.)

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 they come into contact with and protect them from physical, sexual, and emotional abuse. (November 2006 Meeting, Board Decision 72)

What did the governor do correctly in responding to the club president?

#### RESOURCES:

- Rotary’s Youth Protection staff ([youthprotection@rotary.org](mailto:youthprotection@rotary.org))
- Your district youth protection officer
- Rotary’s youth protection policies (Rotary Code of Policies section 2.120.)
- Online course: Protecting Youth Program Participants
- Rotary’s Youth Protection Guide

#### NOTES



# GROWING ROTARY

TRAINING LEADER: \_\_\_\_\_

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Identify opportunities to start new clubs.
2. Implement strategies for attracting and engaging members.
3. Understand how flexibility can strengthen Rotary's membership.

## RESOURCES

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Rotary Club Central

Membership resources on [rotary.org/membership](https://rotary.org/membership) and online membership courses at [rotary.org/learn](https://rotary.org/learn):

- State of Rotary's Membership presentation (updated every six months)
- Engaging Younger Professionals Toolkit
- Managing Membership Leads presentation
- Starting a Rotary Club
- [rotary.org/flexibility](https://rotary.org/flexibility)
- Club Membership Committee Checklist
- How to Start a Rotaract Club

## OUR MEMBERSHIP

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Make sure that your club and district membership committees include several members who represent the diversity of your membership and that all committee members collaborate on efforts and share responsibility for success.

Why do people join Rotary and Rotaract?

Why do members leave Rotary and Rotaract?

## YOUR CLUB EXPERIENCE

Are you happy with your club experience? What ideas do you have for improving your club experience?

How could Rotary grow if club presidents asked each of their members those two questions?

## CLUB MODELS

The criteria for club membership are simple. A member needs to be an adult — and for Rotaract clubs, an adult age 18-30 — who demonstrates good character, integrity, and leadership; has a good reputation within their business or profession and community; and is willing to serve in the community and have an impact elsewhere in the world. All clubs share similar values and a passion for service, but no two clubs are the same because each community has its own unique needs.

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Learn more about new club models and how clubs can embrace flexibility to meet the needs of members at [rotary.org/flexibility](https://rotary.org/flexibility).

CLUB MODEL	DESCRIPTION	APPEALS TO
Traditional Rotary club	Professionals and aspiring leaders who meet regularly for service, connections, and personal growth	People looking for connections, service opportunities, and tradition
Rotaract club	A club of members ages 18-30 that is sponsored by a Rotary club and often works with that club on projects	Younger people who want to serve their communities, develop leadership and professional skills, and have fun through service
Satellite club	A Rotary club sponsored by a traditional club but with its own meetings, projects, bylaws, and board	Those who want a club experience or meeting format or time that's different from what's offered by other clubs in the area
E-club	A Rotary club that meets primarily online	People who travel frequently, whose schedules make it difficult to meet in person, or who prefer an online experience

CLUB MODEL	DESCRIPTION	APPEALS TO
Passport club	A Rotary club that allows members to attend other Rotary clubs' meetings as long as they attend a specified number of meetings in their own club each year	People who travel frequently or those who enjoy trying a variety of club experiences and meeting lots of new people
Corporate club	A club whose members (or most of them) work for the same employer	Employees of an organization who want to come together to do good in their community
Cause-based club	A club whose members are passionate about a particular cause and focus their service efforts in that area	People who want to connect with others while addressing a particular set of problems
Alumni-based club	A club whose members (or most of them) are former Rotary program participants	People who have participated in Rotary outside of a club

All club models meet at least twice each month. With the exception of Rotaract clubs, all active members pay \$68.00 in annual dues, are counted in Rotary International's database, and have voting privileges in their clubs.

How can developing new ways to experience Rotary help us meet our strategic goals?

## STARTING NEW CLUBS

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Governors-elect, use Rotary's new online membership leads pages to assign interested prospects or relocating members to your clubs.

When is the right time to start a new club?

Should Rotaract clubs start new Rotary clubs? What are the benefits?

What resistance to starting new clubs might you get from existing clubs that view new clubs as competitors?

How will you respond to that resistance?

### **Who can start a new club?**

- Anyone — a Rotaractor, a Rotarian, or a nonmember — can start a club, as long as they work with a member of an existing Rotary club who can serve as the new club's adviser.
- A new Rotary club or Rotaract club needs a sponsor club and the support of the district governor. Rotary clubs need at least 20 members, and satellite Rotary clubs need at least eight members. Rotaract clubs do not have a minimum number of members.

## KEEPING OUR CLUBS RELEVANT

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The district membership chair, assistant governors, and Rotary coordinators can support club and district membership initiatives.

Who are potential members in your district? Are those potential members different for Rotary and Rotaract?

What are some ways to raise the likelihood that a new member will stay in their club?

How can changing the frequency and format of the club meeting, and not focusing on strict attendance requirements, engage current members?

What steps can be taken to further strengthen the partnership between Rotary and Rotaract?

## WHAT ROTARY OFFERS PROSPECTIVE MEMBERS

Each one of our Rotary clubs offers a unique experience while staying true to the vision and mission of our organization. Consider some of the opportunities that Rotary clubs offer their members and reflect on the clubs in your district.

- **FRIENDSHIP** Club meetings, projects, and social activities are fun and filled with fellowship, humor, and entertainment. Our members are friendly, welcoming, and engaging.
- **LEADERSHIP AND PROFESSIONAL DEVELOPMENT** Members learn how to be leaders in a volunteer organization. If you can be an effective Rotary leader, you will be a better business leader.
- **PERSONAL GROWTH** Our members develop broad social skills. Membership in Rotary makes our members better individuals, community leaders, internationalists, and humanitarians.
- **GLOBAL ACCESS** Our global presence offers our members an exclusive opportunity to create relationships in both the local and world communities and allows our members to be better global citizens.
- **COMMUNITY CONNECTIONS** Membership in a club makes a person a better community citizen who is more connected with community leaders and the needs of the community.
- **ETHICAL PRINCIPLES** One of Rotary's core principles is to maintain high ethical standards. Rotarians and Rotaractors are expected to be ethical in business and personal relationships.
- **OPPORTUNITIES FOR THE FAMILY** A member's involvement in Rotary brings their family into a community's support network. They form lifelong relationships and friendships that can support a family for years.
- **PUBLIC SPEAKING SKILLS** Participating in a club helps our members develop both confidence and skills in public communication and gives them the opportunity to use them.
- **ADDITIONAL OPPORTUNITIES OFFERED IN YOUR DISTRICT**

Does your district have clubs that offer each of these opportunities? Which of these is not represented in your district?

How can clubs let prospective members know that these opportunities are available?

Who is the best person to match prospective members to the right clubs?

If you were to develop three new clubs in your district, what would they offer prospective members that clubs in your district don't offer now?

What types of club models would be most effective for these new clubs?

How would you support the growth of those clubs in the first three years?



# PROMOTING ROTARY

TRAINING LEADER: \_\_\_\_\_

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Inspire districts and clubs to use Rotary's resources to increase public awareness of Rotary and its work.
2. Communicate to clubs the importance of presenting a consistent brand identity to the world.
3. Serve as a Rotary brand ambassador by leading by example.

## RESOURCES

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People of Action campaign materials and campaign guidelines

Brand Center on My Rotary

Tell Rotary's Story: Voice and Visual Identity Guidelines

Quick Start Guide for Club Social Media Pages

Rotary Public Relations Guide

Quarterly Brand News email (on the Brand Center)

Rotary public image coordinator

## ROTARY'S PUBLIC IMAGE

Why does public image matter? Why is it important to promote Rotary and its work?

What will you say to clubs to help them understand the importance of increasing public awareness of Rotary?

**One objective of Rotary's strategic plan is to "build awareness of our impact and brand."**

What does "impact" mean?

What does "brand" mean?

How does an emphasis on increasing the public awareness of Rotary support Rotary's strategic plan?

## WE ARE PEOPLE OF ACTION



[Rotary.org](https://Rotary.org)

Why did we develop materials and resources to help Rotarians promote themselves as People of Action?

How can you show clubs the value of using People of Action resources?

**Club public relations committees can bring People of Action to life by:**

- Planning local campaigns
- Targeting the People of Action ads to their particular community
- Using social media to tell People of Action stories
- Keeping the club website current
- Posting Rotary's People of Action video and ads on club websites
- Updating the club's online presence (website, social media) to include Rotarians in action

## CASE STUDY 1

Over the past several years, project participation in your clubs has been declining. The members in each club are still active, but the community involvement is not as strong as it used to be, and those projects used to be the main way your clubs would attract new members. At an upcoming event, you'll speak to club presidents about what resources they have to increase awareness of their clubs and projects.

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Remind clubs to regularly check the Brand Center ([rotary.org/brandcenter](http://rotary.org/brandcenter)) to access the People of Action campaign assets and new public image resources.

What advice will you give Rotaract or Rotary club presidents about ways to increase awareness of their clubs and projects?

How can you use your social media presence to communicate that Rotary is an inclusive organization? How could you be inadvertently communicating that Rotary is not diverse or inclusive?

How can you communicate to club members the importance of a social media presence that promotes Rotary as an open and welcoming organization?

**Encourage clubs to share their People of Action stories with Rotary at [pr@rotary.org](mailto:pr@rotary.org)**

## CASE STUDY 2

A local doctor volunteers at a community 5K that raises money for charity. The event is called the Annual Run Toward Polio Eradication, sponsored by the Anytown Breakfast Club. The doctor has a great experience at the event, and she feels good about the time spent supporting a worthwhile cause. A year later, she is asked to join Rotary. She declines because she's never heard of it.

What could have been done to avoid this outcome?

## USING ROTARY'S BRAND MARKS

When used alone, the word “Rotary” or the Rotary emblem typically refers to the entire organization, Rotary International. All club, district, multidistrict, and other Rotary-affiliated activities, projects, and organizations must include identifiers of the club, district, multidistrict group, or other Rotary affiliations when using the Rotary emblem or other Rotary marks.

Be sure that when using the Rotary logo, the club or district qualifier is always included. Create your logo in the Brand Center.

### ROTARY'S MASTERBRAND SIGNATURE (OFFICIAL LOGO)



### ROTARY'S MARK OF EXCELLENCE (WHEEL)



### CORRECT CLUB LOGO EXAMPLE CREATED IN BRAND CENTER



### CORRECT DISTRICT LOGO EXAMPLE CREATED IN BRAND CENTER



How often is the Rotary logo used correctly in your district? (Circle the percentage below.)

10%    20%    30%    40%    50%    60%    70%    80%    90%    100%

### As governors, you are public image role models!

Work with your district team to review and update all your district's internal and external materials for proper usage of the Rotary logo.

### CASE STUDY 3

You've signed up to receive the electronic newsletters from every Rotary or Rotaract club in your district to keep up-to-date with their activities. Most of them use a similarly branded template with the correct logo. But four clubs have websites that use old logos, and one doesn't contain a logo at all.

What are your next steps for helping them get up-to-date?

How can you help the clubs in your district stay current with our visual identity?

How can inconsistency in our visual identity hurt Rotary?

How will you communicate to clubs the value of a consistent brand and visual identity?

## CASE STUDY 4

A club in your district has invited you to speak at its 19th annual picnic, and you notice that the logos on the signs and T-shirts are all in the old brand style and use unapproved marks. When you bring it up, the club president tells you that community recognizes this logo since they've been using the same one for 19 years, and the club doesn't plan to change their logo or branding now.

How can you communicate the importance of a consistent brand to a club that might be resistant?

Do you anticipate any resistance from clubs about updating Rotary's visual identity or following Rotary's guidelines? How will you handle this?

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Participants will discuss responding to resistance to change in the session called "Leading Change."



# LEADING CHANGE

TRAINING LEADER: \_\_\_\_\_

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Act as a change leader in personal, professional, and Rotary experiences.
2. Use Rotary's model to successfully plan for change.

## RESOURCES

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Regional leaders (Rotary coordinators, regional Rotary Foundation coordinators, Rotary public image coordinators, endowment/major gifts advisers)

Assistant governors

## CHANGE READINESS

### HOW DO YOU RESPOND TO CHANGE?

Mark the spot in the scale below that best describes how you respond to change.

I do not adopt change easily.

If I'm motivated, I adopt new ideas.

Change is exciting!



## LEADING CHANGE

Have you ever been charged with implementing a new system, method, or technology at work? Have you led the introduction of a new initiative in your Rotary or Rotaract club? Have you helped a friend or family member go through a challenging life change?

What happened? How did people react? How well was the change adopted?

# PLANNING FOR CHANGE: ROTARY'S CHANGE MODEL

Managing change in your district can be complicated. Six key elements of change planning can promote acceptance of change.

VISION	COLLABORATIVE COMMITMENT	SKILLS	REWARDS	RESOURCES	ACTION PLAN
<p>Describe why the change is necessary and how things will work after it's implemented.</p> <p>Consider:</p> <ul style="list-style-type: none"> <li>• What will be different when the change is complete?</li> <li>• Will people do new things to make it work?</li> </ul>	<p>Ask people at all levels of the organization for input.</p> <p>Consider:</p> <ul style="list-style-type: none"> <li>• How can I help people feel committed to the vision?</li> <li>• How can team members contribute their skills, talents, and knowledge?</li> </ul>	<p>Determine what skills are needed to implement and sustain the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> <li>• Do people in key positions have those skills?</li> <li>• If not, how can they learn those skills?</li> <li>• What support or training can we offer?</li> </ul>	<p>Promote the benefits of embracing the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> <li>• How to answer those who ask, "What's in it for me?"</li> <li>• What incentives can we offer?</li> <li>• What activities can we plan to encourage people?</li> </ul>	<p>Develop tools and resources to support the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> <li>• What tools will help team members the most?</li> <li>• How will we make these resources available?</li> <li>• Who will be available to support and encourage people?</li> </ul>	<p>Separate the change into small, manageable steps.</p> <p>Consider:</p> <ul style="list-style-type: none"> <li>• What steps will we take to implement the change?</li> <li>• How will we talk about the change with members, employees, and customers?</li> <li>• How can we make implementing and adopting the change as easy as possible?</li> </ul>
<p>What to do:</p> <ul style="list-style-type: none"> <li>• Collaborate on a vision statement.</li> <li>• Engage other leaders and members in group meetings.</li> <li>• Communicate in different ways to reach many audiences.</li> </ul>	<p>What to do:</p> <ul style="list-style-type: none"> <li>• Create teams to collect data and help refine the vision and action plan.</li> <li>• Invite team members to contribute their ideas and expertise.</li> </ul>	<p>What to do:</p> <ul style="list-style-type: none"> <li>• Determine what skills people need and if they are missing any.</li> <li>• Provide training and share the best practices, with examples and lessons you learned.</li> <li>• Offer workshops to give team members practical experience.</li> </ul>	<p>What to do:</p> <ul style="list-style-type: none"> <li>• Hold contests that encourage participation.</li> <li>• Recognize those who are adapting to the change.</li> <li>• Plan activities and events that build the team.</li> </ul>	<p>What to do:</p> <ul style="list-style-type: none"> <li>• Write an FAQ that people can consult.</li> <li>• Create how-to guides for new processes.</li> <li>• Have experts or coaches provide guidance.</li> </ul>	<p>What to do:</p> <ul style="list-style-type: none"> <li>• Make a formal plan.</li> <li>• Create a list of all of the steps.</li> <li>• Agree on what will constitute success.</li> <li>• Gather and share success stories.</li> </ul>

## THE ROTARY CLUB OF ELIOT SUNRISE PREPARES FOR CHANGE

Review each part of the scenario and match it to the corresponding change planning element.

The president of the Rotary Club of Eliot Sunrise plans to meet less frequently. The club now meets every week on Wednesdays for breakfast. She would like to change the attendance requirements from weekly to twice a month. The club has had low attendance, and she thinks the added flexibility would benefit members who travel often or who have young children. She believes this change will satisfy current members and attract new members.

CHANGE ELEMENT: \_\_\_\_\_

President Judy first meets with Marcela, the club membership chair, and Tom, the president-elect. They both agree that this change would be positive. At the next club meeting, Judy asks members what they think. Several members disagree with the change, believing Rotary clubs should meet weekly. Others suggest the club go further: They recommend adding an online meeting option for people who can't attend breakfast meetings in person, or a monthly service project to replace one of the meetings. The club members all agree to think about this idea and discuss it at the next meeting.

CHANGE ELEMENT: \_\_\_\_\_

Marcela has been the membership chair for two years. In considering this change, she compiles data from the past two Rotary Club Health Checks and a recent member satisfaction survey. She talks to other clubs in the district about their flexible meeting frequency. She visits a few Rotaract clubs in the district and asks how meeting flexibility affects their member engagement. She reads materials about membership and flexibility on My Rotary and plans to give her club all of this information at an upcoming meeting.

CHANGE ELEMENT: \_\_\_\_\_

Judy, Tom, and Marcela develop a plan for making the change. They consider questions and objections that club members may have and create an FAQ about the change. They share the FAQ with their members and make changes to it in order to address some concerns and feedback. They host a webinar for any club members who want to ask questions and encourage people to call them with concerns. They consider implementing awards for perfect attendance to engage those who might be resistant to the change. They develop a list of all the ways the club will grow stronger with more flexible attendance requirements, highlighting growth in membership and more service projects.

CHANGE ELEMENT: \_\_\_\_\_  
&  
CHANGE ELEMENT: \_\_\_\_\_

Judy and Tom decide it would be best to adopt the new requirements on 1 July, when Tom takes office. In the next three months, Tom, Judy, and Marcela invite supporters of the new requirements and some members who do not like the new requirements to join a planning group for the rollout. They consider the repercussions of losing one or two members who disagree with the change. They develop a calendar of events and meetings in the new Rotary year and begin to promote the upcoming change. When Tom takes office, they plan to update the club bylaws to reflect the change.

CHANGE ELEMENT: \_\_\_\_\_

## IDENTIFYING GAPS IN THE CHANGE PLAN

When each part of the change plan is present, the result is a more successful change. When a part is missing, there is a predictable negative consequence. Consider what the result would be for each of these missing parts:



A clear vision isn't communicated for the change plan.



Team members are not included in the planning or implementation of the change.



Individuals do not have the right skills to adopt the change.



Rewards are not provided for those who adopt the change.



Resources (people, information, or materials) are not provided or are hard to reach.



Each step of the change isn't supported with a clear action plan

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Leaving out any element of the change plan makes the process of changing more difficult, and eliminating more than one may eliminate your chance of success.

**Think back to the examples of change that you shared with the group before this exercise.**

Were any of the six key parts — vision, collaborative commitment, skills, rewards, resources, or an action plan — missing?

If a key part was missing, what would you do differently in the future?

## CASE STUDIES

Review these case studies and choose one that you think might be challenging for club members to adopt in the coming year.

### 1. ROTARY EMBRACES FLEXIBILITY

Rotary's requirements for club meetings and attendance requirements have evolved. Individual Rotary clubs can now (1) determine the best day and time for their meetings, (2) change or cancel a meeting if the need arises, (3) count service projects or social events as meetings, (4) choose whether to gather in person, meet online, alternate between online and in-person meetings, or even use both formats at the same time, and (5) amend their bylaws to either relax or tighten attendance requirements and policies about terminating members for poor attendance.

How will you support clubs in choosing and implementing these changes?

### 2. PROTECTING ROTARY'S BRAND

In order to expand our reach, we need to build awareness of our impact and brand. Since we launched our new brand and visual identity in 2013, many clubs and districts have successfully adopted our new Rotary marks and messaging, but many have not. Protecting Rotary's brand and brand marks will help strengthen and grow our brand locally and globally. Consistent messaging and branding can help people better understand who Rotary is and what we do, which builds engagement, member participation, and support.

How can you help clubs and their members in your region embrace and use Rotary's updated brand identity?

### 3. ROTARY'S VISION AND NEW ACTION PLAN

Rotary adopted a new vision statement: *Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.* As people of action, we understand that fulfilling that vision requires a plan. This is Rotary's plan for the next five years: to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.

How will you support clubs in adopting the vision statement and our new strategic plan, known as the Action Plan?

#### 4. STARTING A NEW CLUB

In your community, most Rotary clubs follow traditional meeting and attendance practices. Your city has become a center for growing technology companies, and many younger professionals and their families have moved there but are not joining Rotary. Although there are several Rotaractors in your area who are aging out of Rotaract, they are not joining Rotary either because they cannot find clubs that accommodate their professional and family obligations. You learn that a few Rotarians are considering leaving their clubs to start a new club that is more flexible. You think this is a great idea, but you also know that some Rotary clubs see new clubs as competition.

How can you work with the Rotary clubs in the area to maintain good relationships while starting a new club?

Write which case study you chose, and why adopting this change is valuable to your clubs and district in the coming year.

CASE STUDY	
Reason this change is valuable to members	



Consider the change plan you would use to implement this change. Complete this chart by outlining each element needed to form a change plan.

### VISION

What does the new change look like?

### COLLABORATIVE COMMITMENT

How will you help people at all levels feel committed to the vision?

### SKILLS

What skills are needed to implement and sustain the change?

### REWARDS

What are the benefits to clubs and individuals?

### RESOURCES

What will be offered (e.g., information, tools) to ensure the change is supported?

### ACTION PLAN

What will you do to make sure all key areas are in place and acted on?

## RESPONDING TO RESISTANCE

Reflecting on the change plan you developed in the last exercise, consider some reasons clubs and their members might be resistant to that change. Below, identify each of those reasons, how you might recognize signs of resistance, and what steps you can take to help people embrace the change.

Reasons clubs or their members might be resistant to change:

What might this resistance look like? What tactics or actions show a resistance to change?

What steps can you take to reduce resistance and help people embrace change?

# PLANNING FOR ACTION

TRAINING LEADER: \_\_\_\_\_

## LEARNING OBJECTIVES

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At the end of the session, you will be able to:

1. Develop an action plan to implement in your district.
2. Communicate key messages to clubs.
3. Promote Rotary's new strategic plan as a tool to achieve our vision.

## RESOURCES

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Lead Your District: Governor

International Assembly District Governor-elect Workbook

## SUMMARIZE THE WEEK

The most important things I learned this week are:

Something I learned from a Rotaract participant:

How I plan to work with Rotaract clubs and Rotaractors as governor:

Advice for the district governor-nominee:

## KEY MESSAGES FOR 2020-21

At the end of each session, select one of the learning objectives and write a goal that relates to that learning objective:

### SAMPLE SESSION:

#### LEADING WITH VISION

##### Learning Objectives:

1. Use the 2020-21 presidential theme to inspire clubs to adopt Rotary's vision.
2. Plan how to use goal setting to strengthen clubs.
3. Leverage the district structure to successfully balance work, life, and Rotary.

##### Learning objective reframed as a goal:

*At least 50 percent of the clubs in my district will achieve 51% or more of their goals by the end of the year.*

##### Key message:

*Setting and reaching your goals in Rotary Club Central helps all our clubs grow stronger and, as a result, helps our organization grow stronger.*

##### Which strategic priority or priorities that goal most relates to:

- |  |  |
|--|--|
| <input type="checkbox"/> Increase Our Impact | <input checked="" type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt             |

##### Strategic key message:

*When Rotarians work together to reach a goal, they become more engaged in service, networking, and fundraising. When our members are engaged, our clubs and our organization grow stronger.*

##### Potential opportunity to deliver this message:

.....

Regional leaders such as Rotary coordinators, Rotary public image coordinators, and regional Rotary Foundation coordinators, are trained to help you plan strategically and set and achieve goals! Think about how you can use these great resources in the year ahead.

#### NOTES

Throughout the week, you'll be encouraged to take 15 minutes a day to reflect on the goals and key messages you drafted at the end each session.

During the final session on Friday, Planning for Action, you'll talk about these goals, key messages, and next steps.

## LEADING WITH VISION

### Learning Objectives:

1. Use the 2020-21 presidential theme to inspire clubs to adopt Rotary's vision.
2. Plan how to use goal setting to strengthen clubs.
3. Leverage the district structure to successfully balance work, life, and Rotary.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

### Audience:

### NOTES

## ENGAGING YOUNG LEADERS

### Learning Objectives:

1. Describe the value of engaging young leaders in Rotary.
2. Identify strategies to communicate across generations.
3. Promote the value of a more inclusive organization.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

### Audience:

### NOTES

## INNOVATING NEW CLUB MODELS

### Learning Objectives:

1. Describe the opportunities clubs have to adapt to the needs of current and potential members.
2. Recognize the value of all available club models.
3. Imagine and form new clubs to support the needs of your community.
4. Appreciate how to serve a variety of people with different needs.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

Audience:

NOTES



## DOING GOOD IN THE WORLD

### Learning Objectives:

1. Describe the elements of successful projects.
2. Use the district resource network for better projects.
3. Understand the role of the governor in projects and global grants.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

### Audience:

### NOTES

## INCREASING OUR FOUNDATION'S IMPACT

### Learning Objectives:

1. Assess your clubs' involvement in polio eradication efforts.
2. Describe how our ability to raise and distribute funds increases our impact.
3. Use the power of storytelling to increase our Foundation's impact.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

### Audience:

NOTES

## UNDERSTANDING YOUR ROLE AND FINANCIAL RESPONSIBILITIES

### Learning Objectives:

1. Understand the Rotary funding and district financial statement reporting policy.
2. Address common questions and issues you will face as governor.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

### Audience:

NOTES

## CREATING A POSITIVE AND SAFE CULTURE

### Learning Objectives:

1. Identify your conflict management style and its strengths and challenges.
2. Prepare for situations that will require conflict management in your year as governor.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

### Audience:

NOTES

## GROWING ROTARY

### Learning Objectives:

1. Identify opportunities to start new clubs.
2. Implement strategies for attracting and engaging members.
3. Understand how flexibility can strengthen Rotary's membership.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

### Audience:

### NOTES

## PROMOTING ROTARY

### Learning Objectives:

1. Inspire districts and clubs to use Rotary's resources to increase public awareness of Rotary and its work.
2. Communicate to clubs the importance of presenting a consistent brand identity to the world.
3. Serve as a Rotary brand ambassador by leading by example.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

Audience:

NOTES

## LEADING CHANGE

### Learning Objectives:

1. Act as a change leader in personal, professional, and Rotary experiences.
2. Use Rotary's model to successfully plan for change.

### Learning objective reframed as a goal:

### Key message:

### Which strategic priority or priorities that goal most relates to:

- |  |   |
|--|---|
| <input type="checkbox"/> Increase Our Impact | <input type="checkbox"/> Enhance Participant Engagement |
| <input type="checkbox"/> Expand Our Reach    | <input type="checkbox"/> Increase Our Ability to Adapt  |

### Strategic key message:

### Potential opportunity to deliver this message:

### Audience:

### NOTES

# REGIONAL REVIEW SESSION

NOTES





# ROTARY'S VISION STATEMENT

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

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

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

## ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

### INCREASE OUR IMPACT

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

### EXPAND OUR REACH

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

### ENHANCE PARTICIPANT ENGAGEMENT

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

### INCREASE OUR ABILITY TO ADAPT

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

## APPENDIX 2

### GENERAL REFERENCE

[Strategic Planning Guide](#)

[Strategic plan resources on My Rotary](#)

[Strategic plan presentation](#)

[Strategic plan flyer](#)

[Rotary Citation](#)

[Rotary Club Central Resources e-learning course](#)

[Diversity, Equity, and Inclusion Statement Preventing and Addressing Harassment e-learning course](#)

### THEME AND PRESIDENT

[2020-21 Theme Logos](#)

[2020-21 Presidential Theme](#)

### MEMBERSHIP

Membership resources on [rotary.org/membership](https://rotary.org/membership) and online membership courses at [rotary.org/learn](https://rotary.org/learn).

#### For Rotary leaders:

- [State of Membership presentation as of July and as of January](#)
- [Club Planning Assistant](#)
- [Rotary Club Health Check](#)
- [Be a Vibrant Club](#)
- [Membership Assessment Tools](#)
- [Strengthening Your Membership: Creating Your Membership Plan](#)
- [Engaging Younger Professionals](#) digital toolkit
- [Managing Membership Leads training presentation](#)
- [How to Manage Membership Leads \(for districts\)](#)
- [Rotary Club Models](#)
- [Starting a Rotary Club](#)
- [Guide to Passport Clubs](#)
- [Guide to Satellite Clubs](#)

- [Flexible options for clubs](#)
- [Guide to Corporate Membership](#)
- [Introducing New Members to Rotary: An Orientation Guide](#)
- [Club Membership Committee Checklist](#)
- [Connect for Good](#)
- [Understanding Membership Reports: Getting Started](#)

#### For prospective and new members:

- [Rotary Basics online course](#)
- [Impact Begins With You](#) (prospective member brochure), available on [shop.rotary.org](https://shop.rotary.org) until April 2020
- [Connect for Good](#)
- [New Member Welcome Kit](#), available on [shop.rotary.org](https://shop.rotary.org) until April 2020

### POLIOPLUS

[Endpolio.org](https://endpolio.org)

[PolioPlus Resource Center](#) (Language versions available on EPN language pages)

[PolioPlus Video Resources](#)

- English: <https://vimeopro.com/rotary/polioplus-video-resources>
- Japanese: <https://vimeopro.com/rotary/polioplus-videos-japanese>
- Korean: <https://vimeopro.com/rotary/polioplus-videos-korean>
- German: <https://vimeopro.com/rotary/polioplus-video-ressourcen>
- French: <https://vimeopro.com/rotary/videos-polioplus>
- Italian: <https://vimeopro.com/rotary/risorse-video-polioplus>
- Portuguese: <https://vimeopro.com/rotary/videos-sobre-o-polio-plus>

## THE ROTARY FOUNDATION (TRF)

[The Rotary Foundation Reference Guide](#)

[The Rotary Foundation Basics](#)

[Every Rotarian, Every Year club presentation](#)

[rotary.org/grants](https://rotary.org/grants)

[rotary.org/legacy](https://rotary.org/legacy)

[Paul Harris Society page](#)

[Giving & Grants newsletter](#)

[A Guide to Global Grants](#)

[District Foundation committees](#)

[Endowment/Major Gifts Advisers](#)

[Regional Rotary Foundation coordinators](#)

[Rotary Peace Centers Program Guide for Rotarians](#)

[Rotary Peace Centers – Endorsing Candidates](#)

[Institute for Economics and Peace \(A Rotary partner\)](#)

## PROGRAMS FOR YOUNG LEADERS

[Rotaract Handbook](#)

[Frequently asked questions about 2019](#)

[Council on Legislation changes to Rotaract](#)

[Interact Guide for Rotary Club Sponsors and Advisers](#)

[How to Update Rotaract and Interact Club Information](#)

[Young Leaders in Action newsletter](#)

[Rotary Youth Exchange Handbook](#)

[Protecting Youth Program Participants \(online course\)](#)

[Rotary Youth Protection Guide](#)

## ROTARY INTERNATIONAL CONVENTION

[2020 Rotary International Convention in Honolulu, Hawaii, USA](#)

- [Register](#)

- [Accommodations](#)

- [Convention promotion](#)

- [Visa info](#)

[2020 Rotaract Preconvention](#), in Honolulu, Hawaii, USA

[2021 Rotary International Convention in Taipei, Taiwan](#)

- Registration, accommodations, convention promotion, and visa info will be available at [riconvention.org/en](https://riconvention.org/en) starting 6 June 2020.

- [Taiwan Visa Information](#)

## ROTARY SERVICE AND ENGAGEMENT

### Humanitarian Service

[Rotary Service and Engagement overview](#)

[District community service committee](#)

[District international service committee](#)

[Frequently Asked Questions](#)

[InterCountry Committees](#)

[Project Fairs](#)

[Project Lifecycle Resources](#)

- [My Rotary Discussion Groups](#)

- [Downloadable Guide: How to join a discussion group](#)

- [Rotary Ideas](#)

- [Downloadable Guide: How to start a project on Rotary Ideas](#)

- [Rotary Showcase](#)

- [Downloadable Guide: Rotary Showcase](#)

[Rotarian Action Groups](#)

[Rotary Community Corps](#)

[Rotary's Areas of Focus guide](#)

[Community Assessment Tools](#)

[Rotary Service blog](#)

[Rotary Service newsletter](#)

[Vocational Service in Action](#)

### **Fellowship**

- [Rotary Fellowships](#)
- [Rotary Friendship Exchanges](#)

### **ROTARY PARTNERSHIPS**

[Habitat for Humanity International](#)

[Institute for Economics and Peace](#)

[Mediators Beyond Borders International](#)

[Peace Corps](#)

[ShelterBox](#)

[United States Agency for International Development](#)

### **ROTARY'S PUBLIC IMAGE**

[Brand Center on My Rotary](#)

[Rotary public image coordinators](#)

**Log in to My Rotary to download the following resources:**

[People of Action campaign materials and campaign guidelines](#)

[Rotary's Messaging Guide](#)

[Tell Rotary's Story: Voice and Visual Identity Guidelines](#)

[Quick Start Guide for Club Social Media Pages](#)

[Rotary Public Relations Guide](#)





