

Rotary
OMR PETS



Assistant Governor Curriculum Materials



BE THE INSPIRATION

March 9-10, 2018

Session 1: Planning Your Year of Effective Leadership

(55 Minutes)

Learning Objectives

As assistant governor, you are the connection between your clubs and the district. The relationships you build with club leaders make Rotary stronger.

- 1. Appreciate the responsibilities of an Assistant Governor.*
- 2. Identify the key relationships within and between the district and the clubs.*
- 3. Assist clubs with their training.*

1. What are your club-level and district-level responsibilities?

2. How often should you visit your clubs? What should you do when you visit?

3. What forms of communication should you use with clubs? Should this communication differ from club to club? Should it differ based on the particular reason for the communication?

4. Who will you need to work with?

5. What are some potential challenges for your year as Assistant Governor?

6. How will you collaborate with district committees and other assistant governors to support clubs?

7. What is your role in helping clubs and the district governor prepare for the governor's official visit?

8. What is your role in helping clubs to benefit from district training opportunities? What is your role in identifying to the district leadership the special training needs of your clubs?

9. Who is responsible for acknowledging and celebrating your clubs' accomplishments?

10. What is your role in identifying and developing future leaders?

11. Do you have any best practices to share with the group which have helped you to build relationships with your clubs and/or with others involved in district leadership?

12. What resources do you have available to help you have an effective year?

Session 2: Supporting and Strengthening Clubs (55 Minutes)

Learning Objectives

At the end of this session, participants will be able to:

- 1. Understand membership trends in their areas and develop a plan to use membership resources.*
- 2. Understand how increased club flexibility affects the potential for membership growth in their district.*
- 3. Lead clubs to understand and communicate their value to attract new members and engage current ones.*

Membership Strategies

1. What resources do you have to determine the membership trends in your areas of the district? Is membership rising, falling, or steady? What are some reasons for that trend?
2. How do you determine which clubs in your area of the district are strong and which are struggling?
3. How has your district been managing membership leads? Will you commit to participate in following up on any membership lead and shepherding it through the process? How can you encourage your clubs to reach out to potential Rotarians?
4. If a club is strong, what strategies can you suggest to encourage them

to continue growing and improving?

5. What is your role in supporting strong clubs? How can you encourage such clubs to assess their strengths and address any challenges they may have?

6. Think of struggling clubs in your area. What aspects or traditions of these clubs may no longer be relevant?

7. How can you encourage clubs to communicate to specific groups, e.g. women, young professionals, alumni, or recent retirees?

Flexibility

8. What are some examples of the increased flexibility clubs now have? Have clubs in your area been implementing any of the new flexibility options?

9. Are any clubs not implementing the flexibility options that you think could benefit from doing so? How can you help encourage those clubs to adopt these changes?

Goals

10. Why is goal setting so important to your clubs and district?

11. How can you help the clubs in your area to establish goals? How

can you help them to record and track their club goals?

Communicating the Value of Rotary

12. How can you help the clubs in your area to recognize their strengths and values and to communicate them to potential and current members?

13. How can you encourage club leaders in your area to assess how they attract and engage members? What tools can you provide them to help assess their current plan? What resources can you share with them to help develop a long-term plan to strengthen their membership?

14. Do the clubs in your area have the same or different value propositions? How does this value proposition help to attract members? is it important for existing members to know the value of membership and the benefits of membership?

15. How can you assist the clubs in your area in building a public image plan? What resources can you offer them through Brand Center? What other resources can you share with them?

Rotary Education

16. Why is it important to make Rotary education a high priority within the club and the district?

17. How can you help clubs to educate or inform prospective members about Rotary?

18. Why is it important to educate current members? What resources can you offer to help your clubs?

Session 3: Building Our Foundation

(60 Minutes)

Learning Objectives

At the end of this session, participants will be able to:

- 1. Understand the Rotary Foundation funding models.*
- 2. Understand the District Designated Fund and how it can be used.*
- 3. Understand the Six Areas of Focus and the importance of sustainability for Rotary grants.*

1. How would you rate/assess your personal knowledge of the programs and initiatives of the Rotary Foundation?

2. What district committee(s) or leadership is the best resource for helping you to learn more about the Rotary Foundation?

3. What does the money go? What are the three (3) funds that donors can support?

4. What is the District Designated Fund (DDF) and how can districts use it?

5. How can you assist the clubs in your area in finding a partner(s) to help the club maximize the impact of DDF grants? What are the benefits of working with one or more clubs on a project?

6. What happens to unused DDF at the end of each Rotary year?

7. What can you do to promote district and global grant opportunities to the clubs in your area? What resources can you offer? How can you assist with training opportunities?

Areas of Focus

8. What are the Rotary Foundation's 6 Areas of Focus?

9. Why are these areas so important to us as Rotarians?

10. How can you support and encourage clubs to do projects which fit within the 6 areas of focus?

11. Should sustainability also be a goal? Why or why not?

Rotary Foundation Goals

12. Why is goal setting so important to your clubs and district?

13. How can you help the clubs in your area to establish goals? How

can you help them to record and track their club goals?

14. How will you encourage your clubs to achieve their Rotary Foundation goals?

15. How can you recognize contributions by members/by clubs for giving to the Foundation? How can you participate in a recognition ceremony or provide resources to a club to celebrate the achievement of recognition levels?

16. Which district events can you promote to clubs to provide education about the Rotary Foundation or encouragement to give?

Case Studies:

CASE STUDY #1 – “Lost in the past”

The Rotary Club of Buchananville has a very poor record of support to The Rotary Foundation. At \$26, their per capita giving is one of the lowest in the district. While most other clubs in the district have made an effort to encourage their members to give something under the Every Rotarian Every Year (EREY) campaign, this club has only a 37% participation rate. There are a few Paul Harris Fellows (PHF) in the club, but they earned their status years ago. The president explains that he doesn't push PHF because he doesn't believe in “buying one's own recognition.” The club seems to be very much focused on the local community and does a lot to support local humanitarian causes. The president explains that they do not give to The Rotary Foundation because they're not interested in seeing their money go overseas to help people they'll never meet while there are more than enough problems to deal with at home.

Q: As the Assistant Governor responsible for this club, how will you work with the club to change their attitude and increase their support to The Rotary Foundation? Develop a plan of action.

CASE STUDY #2 – “Moneybags”

The Rotary club of Lazy Springs is very proud of the fact that it has built a club foundation of a sizeable amount (> \$100,000). Most of the funds have come from individual Rotarians over many years, although some have come from the club’s fundraising efforts. The club uses the income from the foundation to provide scholarships to deserving high school seniors, as well as donations to a few other local charitable organizations. However, because the club has not gone to the trouble to make the foundation a 501(c)(3) organization, gifts to the foundation are not tax-deductible. Several of the club members have complained about this, but so far nothing has been done. An immediate dilemma is that a local corporation has expressed its willingness to match the sizeable contribution (\$10,000) of a club member (and corporate employee), but a condition of the corporate gift is that it must be tax deductible. Since the club member’s donation is going to The Rotary Foundation to make him and his wife Major Donors, his donation will be tax deductible. However, the corporation desires that its donation be used for local charitable purposes in the community and intends to make its donation to the club foundation, although the donation will not be forthcoming unless it can be made tax deductible.

Q: As the Assistant Governor responsible for this club, how will you advise the club to proceed in this case?

Session 4: Problem Solving

(55 Minutes)

Learning Objectives

At the end of this session, participants will be able to:

- 1. Improve the ability to lead and communicate in group settings.*
- 2. Identify ways we can secure support for our goals and proposals.*

1. What are some of the challenges you have encountered or might expect to encounter as Assistant Governor?
2. Why is it important to get to know the leadership teams of the clubs in your area?
3. How can your actively listening help you to better serve the clubs and the district?
4. As Assistant Governor, what is your responsibility to a club or the district when the club experiences challenges to its leadership, effectiveness, or existence?
5. Why might facilitation skills be beneficial to you?
6. What resources are available to you to help to address potential challenges?

Case Studies to provide some practice in problem identification, problem analysis, creating an action plan. Please summarize your group discussion and any recommendations.

CASE STUDY #1 – “Going, going...”

Over the past two years, the Rotary club of Downsboro, a noontime club of 96 members, has lost 30% of its membership, mostly to resignations, although there have been a few job transfers. During your visits to the club, you have noted that the meetings are somewhat disorganized. The meetings often don't start or end on time, there is no club bulletin, visiting Rotarians and guests are barely mentioned and rarely made welcome, and program speakers are allowed to go on and on, seemingly without any limit. The Sergeant-at-Arms seems very arbitrary and even mean-spirited in imposing fines. The obvious intent is to raise money rather than to have fun and enforce club rules. The meeting place is a restaurant with little separation between the Rotary club and the other patrons of the restaurant, so the atmosphere is noisy and confusing, especially for visitors.

Q: As the Assistant Governor responsible for this club, what can you do to turn this club around and stem the tide of lost members?

CASE STUDY #2 – “Oldies, but goodies”

The membership (about 25) of the Rotary club of Stagburg has remained fairly level for regular membership averages 62 years in age – exactly the average age of Rotarians

worldwide. On visiting the club it appears that there are several cliques in this club, demonstrated by the fact that the same people sit at the same tables every week, and they seem almost to resent an “intruder” penetrating their space. The new members that are inducted into the club don’t seem to know much about Rotary, don’t contribute to the Rotary Foundation, are often not assigned to committees, and don’t get involved in the few service projects that the club does. Further, there is no gender or racial diversity in this club; it consists entirely of white males.

Q: As the Assistant Governor responsible for this club, how can you help the club to revitalize and to educate and retain its new members?

CASE STUDY #3 – “Assessing we will go...”

In preparation for the District Governor’s official visit to the Rotary Club of Chapeau-a-tete, you, the Assistant Governor met with the leadership of the club. You noted a lack of spirit and enthusiasm among the leadership of this club. In reviewing the club’s plans and budget, an imbalance was noted between the funds needed to implement their service projects and expected income. When asked how the club would meet its service financial commitments, the president answered that they would just “pass the hat.” The club does not have a fundraising program. They appear to be a typical “meet’n’eat” kind of Rotary Club. You have observed when visiting that the members arrive for meetings showing little camaraderie or enthusiasm as well. They go to their places at the tables and sit quietly throughout the meeting. When the meeting ends, the members quickly disperse.

Q: As the Assistant Governor responsible for this club, how can you get them excited about Rotary service and help them meet their financial commitments?

CASE STUDY #4 – “Lost in the past”

The Rotary Club of Wonswuz meets in a great restaurant for lunch. The meal is the best you’ve ever had at a Rotary meeting, albeit a bit higher than average in cost. It is an easy drive to a major interstate and is next door to one of the area’s largest employers. The club has been losing members as they retire and/or move. The members take turns serving as president again and do not attend PETS because they have all served multiple terms. The club has dropped from 25 to 8 over the last 5 years and members are discussing disbanding because of the Rotary International dues cost so much. Even so, the club has participated with the local Chamber of Commerce in hosting an after hours wine and cheese event to help bring in new members. You learn that 3 of the attendees even visited the club the following week, but none joined. A Past District Governor, a member of the club, has pulled you aside at your club visit to tell you how Rotary is watering down membership requirements and how this is what is hurting Rotary.

Q: As the Assistant Governor responsible for this club, how will you work with the club to change their attitude and grow their membership? Develop a plan of action.

CASE STUDY #5 – “I Want Money”

The Rotary club of Itsmine has been reborn and cited as a success story in your district. It has grown for a club of 5 to 20 in 2 years and boasts a healthy diverse membership which represents the diversity in the community. The new members have quickly become active in the district and 5 have already attended Rotary Leadership Institute. The club has also been featured in the local newspaper with a multi-page spread, highlighting Rotary and the service it does in Itsmine and around the world. They have even contributed to the Rotary Foundation for the first time in 20 years. With its membership growth, emphasis on public image, and Foundation commitment, you have been wondering what you could do to help them. Now you have received an email from the District Governor that the Rotary International dues and the District dues have not been paid in a year and the charter is in danger. You arrive for your first club visit with this “happy” news and are greeted by the club president who is handing out Rotary t-shirts and caps to everyone including you, but can’t stay for the meeting. When you sit down to eat, you overhear the restaurant manager telling a member the club has not paid the restaurant in 2 months. You ask to speak to the treasurer and learn the president has taken over the checkbook and is handling all money in or out of the club.

Q: As the Assistant Governor responsible for this club, how will you advise the club? Develop an action plan.

CASE STUDY #6 – “There’s a youth program?”

The Rotary club of Kumbayah has an acceptable record of community service. It gives money to several local organizations that support various causes. However, it has been noted by the District Governor that this club, for some reason, does not support the Rotary Youth Leadership Award (RYLA) program by nominating and funding RYLA scholarships, although there are two high schools in the club's area. Further, the club has not in the past supported Rotary's other major youth services program, Rotary Youth Exchange. The District Governor is puzzled at the attitude of the club toward youth services, and has asked the Assistant Governor to look into it and recommend appropriate action.

Q: As the Assistant Governor responsible for this club, how will you gain an understanding of the attitude of this club toward youth services and change their attitude so that they are more supportive of youth services programs? Develop a plan of action.

CASE STUDY #7– “My brother’s keeper”

The city of Dowahdiddy recently suffered the closing of a major and long-time industry, resulting in the loss of several members' jobs. The city as a whole has an unemployment rate of 9.8%. The slumping economy has several others worried about their jobs. The Dowahdiddy Rotary Club, with 37 members could lose as many as 20% of its members as a result. One of those members who has already lost her job is the club's President-elect. The Board of Directors of the club is meeting to deal with the issues that exist in both the city and the club. You, the club's ADG, were asked to sit in and help them find a way to (1) deal with their potential

membership losses, and (2) to help them find a way to help their fellow Dowahdiddyites in these tough times.

Q: As the Assistant Governor responsible for this club, what strategies do you suggest?

CASE STUDY #8 – “Fast-lane Rotary”

The President of the Rotary Club of Diddleysquat, a club of about 75 members, calls you for help solving a problem that exists within his club. It seems that a number of members of his club are rebelling against his attempts to change some of the long-held traditions in the club, and he is unsure what he should do. When he was first installed as his club’s president, he was told by his club that it was “his year as president” and to do whatever he felt like would make it a successful year. He took his club members at their word, and made some changes that have resulted in several resignations and lowered attendance at meetings. He has had the support of his relatively young board of directors. The Rotary Club of Diddleysquat is an old club, both in the age of the club and in the members’ average age. Many of the old-time members remember when being named a Paul Harris Fellow was an honor bestowed on the member by the club for service “above and beyond” and have rejected the now accepted concept that it is a form of recognition for contributions to the Rotary Foundation. These old-time members, all male, and all retired have grumbled and muttered and opposed a number of the new president’s other initiatives like obtaining a matching grant, conducting a Dictionary Project in the local

schools (which would include obtaining a District Simplified Grant to help fund the dictionaries), and volunteering in the local homeless shelter. Thus these projects have failed. Now, with attendance and membership dropping, and few of the old-time members willing to work on any of this new president's projects, the club is in turmoil and has taken sides "for" or "against" the new president's programs.

Q: What do you suggest to the President of the Rotary Club of Diddleysquat?

CASE STUDY #9 – "Gimme liberty, or gimme death!"

You, the new Assistant Governor, have just returned from your first visit to the Rotary Club of Oak Grove. Your assessment of this club, based on their meeting, annual plans, and reputation in your district, is that they are a social club only. They are not interested in supporting any of the district's programs and this club has never given more than a small amount of support to the Rotary Foundation. They do very little in their community other than ring the bell for the Salvation Army each year. They have never had a member hold a district office or even a committee chair, and it's always a chore to convince the President-elect that attendance at PETS is a requirement for holding office. They keep telling the District Governor and previous Assistant Governors that, in Rotary, ALL clubs are autonomous, and that they aren't interested in doing anything that would take them away from their families beyond a weekly meeting. Only a very few of the members of this club ever attend district events, such as assemblies, Foundation seminars, and District Conferences, and even then, you have noticed that

they often slip out early from these meetings. You observed that their meeting was very well planned and that they had a very high level of fellowship and fun at this meeting. However, the District Governor has asked you to help this club be more supportive of her programs and of the Rotary Foundation this year. The Governor's Official Visit will be in four weeks.

Q: What is going to be your strategy? Convince this club president to do what your Governor has asked you to do, while not alienating them – you know that you will have to work with them for the rest of the Rotary year!

Session 5: Building Relationships – Joint Meeting with President-Nominees

(55 Minutes)

Building Relationships – Getting to Know Each Other.

Rotary Club Central

Rotary International Support

What can your Assistant Governor do for you?

What can you do as President-Nominee to prepare for your year as
President?

The responsibilities of an Assistant Governor

The key relationships within and between the district and the clubs

Assist clubs with their training and help clubs achieve their goals

