Assistant Governor’s Training Manual
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Rotary International is the association of Rotary clubs. Within this association, districts, formed by a group of clubs within a certain geographic area, exist to help individual Rotary clubs advance the Object of Rotary. As an assistant governor, you are a district leader responsible for working with the governor and other district leaders to support the needs of the clubs that have been assigned to you. Both clubs and the district will benefit from your efforts.

You have received this edition of the Assistant Governor’s Training Manual as part of an orientation kit that will help make your year as assistant governor successful and rewarding for you and the clubs with which you will work. The Assistant Governor’s Training Manual provides essential information to help you understand the responsibilities of your position and the many ways in which you can help clubs function effectively.

This manual will help prepare you for your year as assistant governor. Review the entire manual prior to the district team training seminar in order to fully understand and prepare for your responsibilities as a member of the district leadership team. Advance preparation will ensure you achieve the maximum benefit from the district team training seminar.

At the district team training seminar, you, other assistant governors, and district committee members will discuss ways to assist clubs in coordinating key areas of club operations. During the training, this manual will serve as the handout material that will accompany and reinforce the training you will receive. Because of the complementary role the Assistant Governor’s Training Manual plays, it is essential that you bring it with you when you attend the district team training seminar.

After you have completed the training and preparation for your year in office, this manual will remain as an indispensable resource to support you in fulfilling your responsibilities of working with club and district leaders to build effective Rotary clubs.

**Structure of the Manual**

The organization of the Assistant Governor’s Training Manual reflects the recommended curriculum for assistant governors at the district team training seminar. Each chapter relates to a key aspect of an assistant governor’s role in the district and responsibilities related to supporting assigned clubs. Within each chapter you will find individual pages devoted to specific topics. For example, among the information in Chapter 2, “Working with Clubs,” you will find a page regarding the assistant governor’s role during the Official Visit by the district governor.

These topic-specific pages highlight your responsibilities as assistant governor while providing the essential information you need to know to guide clubs. The table of contents references each of the topics covered in the manual.

**Comments?**

If you have questions or comments about this manual, please submit them to

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Chapter 1: Role and Responsibilities

Duties of Assistant Governor

As assistant governor, your primary responsibility is to assist the governor with the administration of designated clubs. By performing this critical function, you support club effectiveness and by extension, district effectiveness. Effective clubs are those that

- sustain and/or grow their membership base;
- implement successful projects that address the needs of their communities and communities in other countries;
- support The Rotary Foundation through both program participation and financial contributions; and
- develop leaders capable of serving in Rotary beyond the club level.

These elements of effectiveness are interrelated and interdependent. For example, a club with a growing membership base can increase the size and scope of its service activities. Conversely, if one element is weak or absent, the club’s capacity to pursue the other elements will also be reduced. As assistant governor, you will provide support to clubs by helping them identify ways to increase their effectiveness in each of the four key areas.

Preparing for the Year Ahead

On 1 July, you will begin working with a group of new club presidents. Your preparations will begin months before the new Rotary year commences as you work with incoming and outgoing district leaders and incoming club leaders. The period before the new year starts is critical, as you will be building a variety of relationships upon which you will rely throughout your term.

Well before the new year begins, you will work with the governor-elect and other district leaders to determine a consensus for what the district wants to achieve and to identify the district committees that will be necessary to reach district goals.

Your advance preparations will continue with attendance at the district team training seminar. During the seminar, you will learn more about your district’s leadership structure, your roles and responsibilities as assistant governor, and your role in the district’s goals and objectives for the coming year. You will also work closely with the governor, other assistant governors, and district committees to determine how you will all collaborate to support clubs.

The district team training seminar is followed closely by the Presidents-elect Training Seminar (PETS). This will be a key opportunity for you to begin to develop a relationship with each club that will facilitate future interaction. Specifically, you will begin to work with the clubs assigned to you to establish goals using the Planning Guide for Effective Rotary Clubs. You will continue to work with club leaders to develop goals and implementation plans at the district assembly.

If you are new to your responsibilities, meet with the outgoing assistant governor to gain an understanding of what you can expect when working with club and district leaders. The current assistant governor can offer a wealth of experience and insight regarding the clubs for which you will be responsible and may have suggestions for working with district leaders.

Your preparations during this time will influence what you are able to accomplish once you take office.
As Assistant Governor — After 1 July
You will reap the benefits of your advanced preparation when you take office in July and continue to develop working relationships with club and district leaders. Your responsibilities will include

1. Attending each club assembly associated with the governor’s official visit;
2. Visiting each club regularly, preferably monthly, with a minimum of one visit each quarter of the Rotary year, and meeting with the club president and club leadership to discuss the business of the club and resources available to them;
3. Assisting club leaders in scheduling and planning for the governor’s official visit;
4. Keeping the governor updated on progress of the clubs and suggesting ways to enhance Rotary development and address problems;
5. Encouraging club follow-through on requests and recommendations of the governor;
6. Monitoring each club’s performance with respect to service projects;
7. Identifying and encouraging the development of future district leaders;
8. Attending and actively promoting attendance at the district conference and other district meetings; and
9. Participating in Rotary Foundation programs, annual and special giving events, and other special assignments as necessary.

The remaining pages of this manual are dedicated to preparing you to fulfill these responsibilities.

Key Relationships

As assistant governor, you are likely to be the district leader who has the most frequent contact with the clubs in your assigned area. You will often be the conduit through which information will flow both to and from the club. Communication will be essential to your success in working with club and district leaders.

Key contacts:
- District leaders
- District governor
- District governor-elect
- District committees
- Other assistant governors

Club leaders:
- Club presidents
- Club secretaries
- Club committee chairpersons

Although your relationship with club and district leaders will be discussed in greater detail in chapters 2 and 3, the following information provides an overview of your key relationships with other district leaders.
Working with the Governor-elect
As outlined in the duties of the assistant governor on page 3, your responsibilities begin before the new Rotary year as you work with other assistant governors, the governor-elect and other district leaders to develop district goals by reviewing district goals and outcomes from past years. The governor-elect may also seek your advice regarding district committee selections. You will continue to forge your relationship with your fellow district leaders and the governor-elect during key training events, including the district team training seminar, the Presidents-elect Training Seminar, and the district assembly.

Working with the Governor
Once the new Rotary year starts, communication with the governor will be of the utmost importance. You support the governor and district by providing service to clubs through increased attention to club administration — essentially functioning as the governor’s administrative eyes, ears, voice, and hands for the clubs to which you have been assigned. During this process, you will keep the governor informed on progress within your assigned clubs and suggest ways to enhance Rotary development. You will accomplish this by

- attending club assemblies that are related to the governor’s official visit;
- working with clubs in your area to schedule and plan for visits of the governor;
- communicating the strengths and weaknesses of the clubs in your area to the governor; and
- updating the governor on club progress and suggesting ways in which issues and concerns can be addressed.

Working with District Committees
As assistant governor, you should collaborate with district committees (both members and chairpersons) in order to serve clubs effectively. The district’s structure for communication should be discussed during the district team training seminar so you, other assistant governors, and district committee members will have a clear understanding of expectations regarding how to communicate with clubs and each other during the year. Once the communications structure has been clearly delineated, work together with district committees to

- provide examples of successful club projects and programs to the governor, club leaders, and other assistant governors;
- build support at the club level for district committee initiatives;
- encourage club leaders to consult directly with relevant district committees when dealing with issues and concerns that are related to a committee’s primary function; and
- ensure that a club’s goals complement, and do not conflict with, district committee goals and objectives.
Chapter 2: Working With Clubs

Goal Setting

Your first interaction with clubs is likely to occur when you begin to work with club leaders to establish goals based on the four elements of an effective club. When establishing goals for membership, service projects, The Rotary Foundation, development of future leaders, and club administration, work with clubs to examine past successes and failures. As an assistant governor, you should act as a “management consultant” for the club by analyzing past trends and current club practices with a view to sharing information about how the club can improve its operations. Work with clubs to ensure that they have

- clearly defined goals;
- widespread participation by members;
- knowledge of club, district and RI resources; and
- clear lines of communication.

Your experience as a past club leader and your training as an assistant governor will help you work with clubs to ensure they establish meaningful goals. Help clubs understand their past performances and present capabilities in order to assess their future potential. You will also need to work with club leaders so they understand the characteristics of an effective goal.

Establishing Achievable Goals

You should work closely with clubs to establish a variety of goals related to membership, service projects, The Rotary Foundation, the development of future leaders, and club administration. Encourage club leaders to consult with other experienced club members who often have years of knowledge regarding the club, its accomplishments, and its limitations to ensure these goals are realistic and reflect club capabilities and interests. Consider using the “Goal-Setting Worksheet” provided on pages 9-10 to guide you in working with clubs to set goals.

Additionally, encourage club leaders to review past club records. These records can provide

- a baseline for establishing future goals;
- data that illustrate membership and attendance trends that can shape club plans and objectives; and
- evaluations of past service projects that indicate ways to improve the planning and implementation of future projects.

Please note: It may be necessary to consult with the district governor, or the current assistant governor, to review club records.

Characteristics of an Effective Goal

Setting goals that are meaningful to the club and its community is a top priority for a club and its leaders. It is important for you to encourage clubs to set goals that are

- **Achievable**. Overly ambitious goals can lead to frustration among club leaders and members.
- **Challenging**. Challenging goals require broad participation and teamwork from club members.
- **Shared**. Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.
- **Measurable**. A measurable goal provides a tangible point upon which club members can focus their efforts.

Using the Planning Guide for Effective Rotary Clubs

The Planning Guide for Effective Rotary Clubs (see Appendix 1) is an essential and practical goal-setting tool that will help you work with club leaders to establish goals related to the four key areas of club effectiveness, as well as general club administration. The Planning Guide also suggests common strategies to pursue their goals.

During PETS, you will work with incoming club presidents to establish provisional goals and develop tentative action steps for attaining them. At the district assembly, these goals and the steps necessary to achieve them will be further refined. A completed copy of the Planning Guide for Effective Rotary Clubs should be submitted to the district (either to the assistant governor or governor, as specified by your dis-
trict) by 1 July. If the Planning Guide is submitted to the governor, be sure to obtain a copy for each club that reports to you. Clubs should also keep their own copy of this important document. You will use the Planning Guide during subsequent club visits to review club progress against established goals and to identify opportunities to tailor your support to each club.

While the Planning Guide for Effective Rotary Clubs may be collected by the district, it ultimately should be seen as a working document that provides a club with signposts to reach its goals. As assistant governor, it is your responsibility to work with club leaders to ensure steady progress is being made toward achievement of the goals envisioned in the Planning Guide.

When working with clubs to establish goals, remind club leaders to consider how the club’s structure relates to the goals they set. Where necessary, suggest changes. Throughout this process, it is important to note that while the Rotary International Board of Directors recommends a particular committee structure, clubs can alter that structure to meet its functional needs. For example, committees that have overlapping responsibilities can be consolidated, or even eliminated. It may also be necessary to add new committees for responsibilities or functions that are not included in the activities of other club leaders or committees. If necessary, clubs can amend their bylaws to more accurately reflect the club’s actual organizational structure.

In addition to ensuring that the club’s structure reflects its goals, club leaders need to mobilize members. Encourage club leaders to take the following steps to achieve each goal:

- Determine the measurable result to be obtained.
- Outline specific actions needed to achieve this goal.
- Establish a time frame for each strategy.
- Determine who is responsible for implementing each step and who can assist that person.
- Promote club-wide participation in achieving the goal.
- Keep members motivated and involved.
- Establish the criteria for measuring your progress and success.
- Consider the resources and tools that can help you to achieve your goal.
- Evaluate the success of your strategy to learn how to better achieve subsequent club goals.

### Amending Club Bylaws

In order for a club to amend its committee structure, it must amend its bylaws. Bylaws may be amended at any regular club meeting.

To amend club bylaws
- a quorum must be present;
- two-thirds of all members present must approve; and
- all members must be notified of the proposed amendment 10 days before the meeting.

The Role of District Training Meetings in Goal Setting

You are expected to attend a variety of district meetings such as PETS, the district assembly, the district leadership seminar, and the district Rotary Foundation seminar. The ultimate goals of these training meetings are to help clubs become more effective and be more essential parts of their communities. At these meetings, club leaders will receive critical training that will provide them with practical skills and knowledge they will need to help them set goals for the year, develop strategies and plans of action to achieve them, and improve their team-building and problem-solving skills. Encourage and promote these meetings among your clubs.
Goal-Setting Worksheet

Assistant governors and club leaders should engage in a close analysis of each functional area of the club. Review the following questions while assessing the club’s present functions and setting goals for the year.

Membership Growth
- What can the club do to successfully recruit new members?
- How can club members be encouraged to recruit new members?
- How are new members oriented to Rotary and the club?
- How does the club identify potential new members?
- How does the club inform new members of the benefits and responsibilities of membership, as well as the opportunities for service that Rotary affords?
- How can the club invite new members to join in a manner that highlights their own personal interests and reasons for joining Rotary?
- How can the club induct new members in a meaningful and dignified way?

Effective Service
- Does the club have a strong tradition of service? If not, what has prevented club involvement in service activities?
- Do the club’s service plans have clearly defined, realistic goals?
- How is the club planning to encourage the widespread participation of club and community members in its service projects?
- Has the club conducted a needs assessment in order to determine the real needs of the community? If not, how does the club plan to determine community needs?
- How does the success or failure of past service projects influence present service project plans?

The Rotary Foundation
- Are club members aware of the variety of Rotary Foundation programs available?
- In what programs does the club currently participate?
- In what programs are club members most interested?
- How can the club widen participation in the programs of The Rotary Foundation?
- How can the club illustrate the link between financial contributions and program results for its members?
- How can the club encourage members to begin contributing or to increase their financial contributions to The Rotary Foundation?
- How can the club properly recognize members who have provided financial support to The Rotary Foundation?

Developing Future Leaders
- What is the club doing to increase the level of member participation in developing and implementing club activities?
- How has the club encouraged communication among club members?
- How does the club encourage maximum attendance at the district assembly?
- How can attendance at the district conference be increased?
- How can the club encourage past presidents to attend the district leadership seminar? How can past presidents serve the club after attending this meeting?

General Administration
- What measures can be taken to improve communication among club leaders?
- Does the club bulletin provide relevant information to club members?
- Are the weekly meetings interesting to club members? What can be done to improve club programs?
- Does the club send reports and dues to RI and the district in an accurate and timely manner? If not, what measures can be taken to ensure compliance?
- What procedures are in place to ensure financial stewardship? What procedures need to be developed?
- How are weekly programs connected to attendance rates?
- What can be done to ensure members are motivated and enthusiastic about attending weekly meetings?
- What successful administrative practices have other clubs developed?
- How can the club better track attendance and member satisfaction?
- How can the club make better use of resources within the district?
- How can the club improve its working relationship with the district governor, assistant governor, and other district leaders?

**Supporting Clubs**

All clubs face challenges throughout the year. To be effective, clubs must be able to recognize these challenges and overcome them through creative solutions. As an essential resource for your clubs, you play an important role in this process. To serve effectively, you must work hard to understand each club and ascertain the most effective ways to support it. Encourage club leaders to recognize and utilize their own internal resources — club members — as much as possible. It is essential for club presidents to work closely with other members and club leaders throughout the year — striving to reach goals and addressing challenges as they arise.

Because you interact with a variety of clubs, you have the benefit of observing a wide range of approaches to common club issues. Share insights or information that would be useful to clubs in meeting goals and overcoming challenges. To support clubs you should

- be available and approachable by club leadership and its members;
- visit clubs regularly;
- maintain a presence in clubs through regular communication via e-mail, telephone and/or mail; and
- provide club leaders with the opportunity to give you feedback regarding the quality of your assistance and support of their club.

**Visiting Clubs**

Periodic visits to your clubs are a key component of your responsibilities. You should visit each club regularly, preferably monthly, and at least quarterly. These regular visits are important because they afford you the opportunity to

- provide clubs with information regarding RI and district resources;
- monitor club progress towards goals and suggest adjustments to the strategies being used to achieve those goals;
- suggest practical solutions to the problems that challenge clubs;
- collect information regarding
  - membership;
  - service projects;
  - participation and support of the programs of The Rotary Foundation;
  - other important club projects and functions;
  - attendance; and
- work with club leaders and the district governor, upon request, to facilitate scheduling of the Official Visit by the district governor.
Your clubs are expected to welcome you, but are not obliged to consider advice you may have. However, it is important to remember that Rotary International is an association of its member clubs. The district, of which you are a part, exists solely to serve clubs. Strive to establish a collaborative relationship with club leaders, listen to their concerns, and be sensitive to local conditions so club leaders will be more receptive to your recommendations.

Sharing Information
The success of any organization is often dependent upon clear networks of communication. This is also true of Rotary. The assistant governor often acts as the liaison between club and district leaders. As the liaison it is essential that you share any information or concerns you may have about a particular club with the district governor, governor-elect, and appropriate district committees. At the end of your term, it is equally important to share critical information with succeeding club and district officers. It is particularly important to share detailed information about clubs with the assistant governor who succeeds you. This will ensure continuity and better management of on-going challenges and will also provide incoming appointees with an orientation to a club’s obstacles and successes.

You also have the opportunity to act as a liaison between Rotary clubs. During the course of your year as assistant governor, you will be maintaining regular contact with clubs that will provide you with a chance to observe how the ideas and programs they have enacted have progressed. Some clubs will have been successful, others less so. You should share successful ideas with other clubs and encourage increased inter-club dialogue to facilitate the sharing of ideas.

Using the Memo of Club Visit

The Memo of Club Visit (refer to Appendix 2) is a tool created for district leaders to assess a club’s effectiveness. It also serves as an annual record of a club’s progress that is sent to the district and Rotary International. The Memo of Club Visit is due to the district governor by 15 May.

Like the Planning Guide for Effective Rotary Clubs, the Memo of Club Visit is largely organized around the four elements of an effective club, helping assistant governors to assess a club’s progress in relation to

- membership growth;
- implementation of successful service projects;
- support of The Rotary Foundation; and
- development of future leaders.

The final Memo of Club Visit submitted should be viewed as an opportunity to assess the club’s progress over the course of the year with a view toward identifying ways the club might improve in the coming year. You may use this form during your visits to the club as a template to assess a club’s progress towards its goals and to identify possible solutions to the challenges it faces. It may also be useful to consult district archives for a club’s Memo of Club Visit and/or other club records from previous years. Please note: prior to the 2000-01 Rotary year, these documents were called the Memo of Official Visit. These records from past years may indicate areas of concern that continue to affect club operations and progress that need to be addressed. At the end of the year, you will need to submit a final version of the Memo of Club Visit. This final version will be submitted to the district and should reflect the observations based on your cumulative visits to the club. While a copy of the Memo of Club Visit must be submitted to the district, be sure to keep a copy of each one you complete for your own records, or to share with your successor.

In addition to providing you and other district leaders with valuable information about a particular club, the Memo of Club Visit will be used by Rotary International to provide the district with information regarding club trends.
Clubs Requiring Special Attention
Most clubs face some challenges that require action by club members in order to be more effective. A smaller number of clubs, however, merit special attention from you and other district leaders. These clubs require immediate responses from club and district leaders in order to become viable. These are generally clubs with the following characteristics:

- low, or stagnant membership;
- consistently low attendance rates;
- a failure to meet the minimum standards established by the Rotary International Board of Directors.

Minimum Standards for Rotary Clubs
Minimum standards are criteria that identify the operating requirements for functioning Rotary clubs. They were developed to ensure all Rotary clubs are vital and growing members of their communities. They were also designed to promote proactive, collaborative efforts between clubs that are struggling, and experienced Rotarians like you, who can provide essential guidance and support. The standards include

- paying per capita dues to RI;
- meeting regularly;
- ensuring that members subscribe to THE ROTARIAN or other approved regional magazine;
- implementing service projects that address the needs of the local community and communities in other countries;
- accepting the visit of the governor, assistant governor, or any officer of Rotary International; and
- maintaining liability insurance appropriate for the geographic region in which the club is located (all clubs), or paying mandatory liability insurance with the semi-annual report (USA only).

Clubs that do not meet minimum standards will be given a variety of options. The first (and perhaps the most desirable) option is to work closely with district leaders to develop a plan that provides the club with the focused guidance and support necessary to meet the minimum standards and become more effective. Clubs that agree to such a plan of remedial action will have their progress closely monitored and will be reevaluated by the governor each year for up to two additional years. In helping to develop such a plan, be sure to have a clear vision of your role and the role of other district leaders, including the district governor and district committees, in working with the club to reach its goals.

The second option given to clubs that do not meet minimum standards is to consolidate with a nearby club. This is only a viable option when, in consultation with the governor, a nearby club is willing to absorb into its membership all the members of the club concerned.

The third option is to voluntarily terminate membership in RI and the fourth option is to seek an exemption from the Rotary International President.

While the first option may seem the most desirable, conditions particular to the club or district may make other options more attractive. You will need to work closely with the club and other district leaders to help make this assessment.

Note
Much of the information used to determine whether a club is meeting minimum standards will be derived from the Memo of Club Visit; other information will come from various Rotary International databases. The mechanism to support and enforce the minimum standards policy will not be fully in place until August 2002. At that time Rotary International will provide governors with a list of clubs within their district that do not meet minimum standards criteria. Consider the minimum standards criteria and work proactively with clubs that you think may not be fulfilling all criteria.
The Official Visit

One of your responsibilities as assistant governor is to help schedule the Official Visit by the governor to the clubs to which you have been assigned. The Official Visit, one of the most important functions of the governor, is also one of the most important occasions for a club during the year.

<table>
<thead>
<tr>
<th>Club Visits versus Official Visits</th>
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<tbody>
<tr>
<td>During club visits, the assistant governor</td>
</tr>
<tr>
<td>- assesses a club’s progress towards its goals;</td>
</tr>
<tr>
<td>- evaluates the effectiveness of a club’s various strategies;</td>
</tr>
<tr>
<td>- suggests practical solutions to the issues challenging the club; and</td>
</tr>
<tr>
<td>- utilizes the Memo of Club Visit.</td>
</tr>
<tr>
<td>During an Official Visit, the governor</td>
</tr>
<tr>
<td>- motivates club members to participate in club and district activities and service projects;</td>
</tr>
<tr>
<td>- focuses attention on the annual RI theme and important Rotary issues;</td>
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<tr>
<td>- pays special attention to weak and struggling clubs; and</td>
</tr>
<tr>
<td>- recognizes outstanding club projects and the work of individual Rotarians.</td>
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</tbody>
</table>

The district governor should pay special attention to weak and struggling clubs — providing them with guidance and working with them (along with other district leaders) to develop solutions that overcome their challenges. You should help prepare the governor by

- supplying an up-to-date profile that details membership statistics, the status of service projects, Rotary Foundation program participation and financial contributions, and attendance rates for each club;
- consulting with the governor regarding the particular circumstances, successes, and challenges of each club; and
- providing the governor with an agenda (developed with the club) for each visit.

In facilitating the governor’s visit to your area, it may be helpful to coordinate any hospitality and/or transportation that may be necessary. If the governor is traveling with a spouse, work with the clubs to make additional provisions as necessary.

Facilitating Official Visits

In helping to schedule the Official Visits you will have to work closely with clubs and the governor. The following are some important factors you should consider when working with club leaders and the district governor to arrange Official Visits:

- The Official Visit should be scheduled for a time when it can have the maximum impact on a club. It may be scheduled to coincide with important club events such as
  - charter nights;
  - induction ceremonies;
  - new-member orientation programs;
  - Rotary Foundation events;
  - citation and award programs; and
  - intercity meetings.
- New clubs and clubs that require “special attention” should be scheduled for a visit early in the Rotary year.
- A schedule should be developed that takes into account geography and travel times based upon clubs’ proximity to each other.

Promoting the Official Visit

The Official Visit provides clubs with ample opportunity to learn about issues facing Rotary and possible solutions to ongoing club challenges. Encourage clubs to promote the Official Visit to ensure the greatest possible participation of club members by

- announcing the upcoming visit at weekly club meetings;
- publishing reminders regarding the visit in the club bulletin;
- asking club members to arrange their schedules so they can be present at the Official Visit; and
- arranging for recognition or awards to be presented by the governor to club members.

Additionally, encourage clubs to consider promoting the Official Visit with the local media.
Setting an Agenda

You should provide any necessary advice regarding setting the agenda for the Official Visit. This agenda should provide the basis for discussion on a variety of topics and challenges that would benefit from the governor’s knowledge and experience. To establish a suitable agenda, encourage club leaders to

- review the club’s progress toward the goals it has set in the Planning Guide for Effective Clubs and be prepared to discuss them during the visit;
- prepare a list of questions, problems, and concerns that can be discussed during the visit; and
- develop presentations on committee plans, activities and accomplishments.
The Planning Guide for Effective Rotary Clubs is a tool to help clubs establish goals for the coming year. The form can be used to help track general club trends in membership and club administration. The Planning Guide for Effective Rotary Clubs is based upon the four elements of an effective club. Effective Rotary clubs are able to:

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

It should be noted that the options listed under each section reflect common ways clubs might choose to pursue goals. It is recognized that there are alternative ways clubs can achieve their goals that may not be listed.

Presidents-elect are encouraged to complete this form in cooperation with their club and submit it to their governor-elect or assistant governor by 1 July.

Please type or print legibly.

ROTARY CLUB OF ________________________________

Name of president: ________________________________

Rotary year of office

Mailing address: __________________________________

Telephone: __________________ Fax: ___________

E-mail: ________________________________________

DEMOGRAPHIC INFORMATION (AS OF 30 JUNE)

Current number of members: _______

Number of members as of 30 June last year: _______

Number of members five years ago: _______

Number of male members: _______

Number of female members: _______

Average age of members: _______

Number of Rotarians who have been members for:

Less than 1 year: ______

1-3 years: ______

3-5 years: ______

5-10 years: ______

10-25 years: ______

More than 25 years: ______

Number of members who have proposed a new member in the previous two years: ______
Our classification survey was updated on (date) and contains (number) classifications, of which (number) are unfilled.

Our club has sponsored a new club within the last 24 months.  

If “Yes,” has your club implemented a plan to provide follow-up orientation for members of the sponsored club?

MEMBERSHIP GROWTH (NEW MEMBERS AND RETENTION OF CURRENT MEMBERS)

Our club has established the following membership goal for the upcoming Rotary year:

   Our club will strive to have (number) members by 30 June (year).

We have identified the following sources of potential members within the community:

How does the club plan on achieving its membership goals? (check all that apply)

☐ Through a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, and fellowship activities.

☐ By appointing a committee of club members who have been trained in effective recruitment techniques.

☐ Through a recruitment plan that focuses on a true representation of the business and professional leadership in the community.

☐ Through a recruitment plan that clearly explains the expectations of membership to potential Rotarians.

☐ Through an orientation program for new members to support their successful assimilation into the club.

☐ Through a brochure that provides general information about Rotary as well as specific information about our club.

☐ By assigning an experienced Rotarian mentor for every new club member.

☐ By recognizing those Rotarians who sponsor new members.

☐ Through a public awareness program targeted at the business and professional community to increase awareness about what Rotary is and what it does.

☐ By participating in the Rotary International Membership Development and Retention award program.

☐ Other (please describe):

What makes this a good club to attract new members?

What negative aspects of this club could pose a barrier to attracting new members?

Points of specific action:
EFFECTIVE SERVICE PROJECTS

Our club has established the following service goals for the upcoming Rotary year:

For our local community:

For communities in other countries (international service):

How does the club plan on achieving its service goals? (check all that apply)

☐ By appointing a committee of club members who have been trained in how to plan and conduct a successful service project.

☐ By reviewing the club’s current and ongoing service projects to determine whether they are relevant, needed, and of interest to club members.

☐ By assessing the club’s fundraising activities to determine if they meet the club’s project funding needs.

☐ By involving each member of the club in some way in the club’s service projects.

☐ By conducting or obtaining a needs assessment of our community or communities in other countries.

☐ By recognizing club members who participate in and provide leadership to the club’s service projects.

☐ By identifying a partner club with which to carry out an international service project.

☐ By participating in:
  ☐ World Community Service ☐ Youth Exchange ☐ Rotary Friendship Exchange
  ☐ Rotary Volunteers ☐ Rotary Recreational and Vocational Fellowships

☐ By using the resources of The Rotary Foundation to support a project identified by the club.

☐ By conducting vocational service activities for local businesses, schools, government agencies, or other organizations.

☐ By conducting projects regarding career development, employer-employee relations, employment training, or vocational recognition.

Other club service project plans (please describe):

Points of specific action:
Our club has established the following Rotary Foundation goals for the upcoming Rotary year:

- Our club will strive to achieve an annual giving goal of US$ ________.
- Our club will participate in Rotary Foundation programs by:

How does the club plan on achieving its Rotary Foundation goals? (check all that apply)

- By appointing a committee of club members who understand and can explain to other club members the programs of The Rotary Foundation and the different ways in which Rotarians can contribute.
- Through club presentations that inform members about what The Rotary Foundation is and what it does.
- By sending a representative to attend the district Rotary Foundation seminar.
- By helping club members understand the relationship between Foundation giving and Foundation programs.
- By using the resources of The Rotary Foundation to support our club’s international projects.
- By recognizing club members’ financial contributions to The Rotary Foundation and their participation in Foundation programs.
- By participating in:
  - Group Study Exchange
  - PolioPlus/PolioPlus Partners
  - Matching Grants
  - Hosting/Sending an Ambassadorial Scholar(s)
- By inviting Foundation program participants and alumni to participate in club programs and activities.
- Other (please describe):

Points of specific action:
DEVELOPING FUTURE ROTARY LEADERS

Our club has established the following goal for developing future Rotary leaders for the upcoming Rotary year:

Our club will identify _______ members as potential future leaders by 30 June _______.

What are your plans for building future Rotary leaders within the club? (check all that apply)

☐ Our club will strongly encourage its committee chairpersons to attend the district assembly.
☐ Our club will strongly encourage interested past presidents to attend the district leadership seminar held in conjunction with the district conference.
☐ Our club will utilize the expertise of our assistant governor.
☐ Our club will arrange for district committees to make presentations to our members.
☐ I will work with our governor and assistant governor to maximize the effectiveness of the Governor’s Official Visit.
☐ Our club will encourage new members to assume positions of leadership through participation in club committees.
☐ Members of our club will visit other clubs to exchange ideas and will share the knowledge they gain with the rest of the club.
☐ Other (please describe):

Points of specific action:

GENERAL ADMINISTRATION

What plans have you made to carry out the administrative tasks required for the effective operation of the club? (check all that apply)

☐ Board meetings have been scheduled on a regular basis.
☐ _______ club assemblies have been scheduled.
☐ Club elections will be held on _______.
☐ Our club will send at least _______ delegates to the district conference.
☐ A club bulletin editor has been appointed and we have discussed what kind of information would be beneficial to club members.
☐ A committee of motivated club members has been appointed to develop interesting and relevant club programs.
☐ A committee of motivated club members has been appointed to plan a variety of fellowship events that will appeal to club members.
☐ Other (please describe):
Points of specific action:

Our club would like assistance from the assistant governor or governor with the following:

☐ Establishing club goals
☐ Orientation of new members
☐ The Rotary Foundation
☐ Other (please describe):

What issues would you like to discuss with your governor or assistant governor during his or her visit to your club:

Club President ___________________________ Rotary Year ___________________________

Assistant Governor ___________________________

Date ___________________________

Date ___________________________
## District Training Meetings

<table>
<thead>
<tr>
<th>Training meeting/Convener</th>
<th>Timeframe</th>
<th>Topics addressed</th>
<th>Audience</th>
<th>Key materials</th>
</tr>
</thead>
</table>
| **District Team Training Seminar**  
Governor-elect | February | - Presentation of the annual theme  
- District administration  
- Role and responsibilities  
- Working with clubs  
- Resources  
- Planning for the year  
- Communication | Assistant governors, district committee chairpersons, and district committee members | For facilitators:  
District Team Training Seminar Leaders’ Guide  
For participants:  
Assistant Governor’s Training Manual,  
District Committee Manual |
| **Presidents-elect Training Seminar (PETS)**  
Governor-elect | March | - Presentation of the annual theme  
- Role and responsibilities of club president  
- Goal setting  
- Selecting and preparing club leaders  
- Club administration  
- Membership recruitment and orientation  
- Effective service projects  
- The Rotary Foundation  
- Resources  
- Planning for the year | Club presidents-elect | For facilitators:  
Presidents-elect Training Seminar Leader’s Guide  
For participants:  
Club President’s Manual |
| **District Assembly**  
Governor-elect | April — May | - Roles and responsibilities  
- Guiding principles — policies and procedures  
- Selecting and training your team  
- Resources  
- Practical application: building a plan  
- Problem solving | Club leaders and committee chairpersons | For facilitators:  
District Assembly Leader’s Guide  
For participants:  
Club Secretary’s Manual,  
Club Committee Manual |
| **District Rotary Foundation Seminar**  
Governor | July — November | - Programs of The Rotary Foundation  
- Setting and achieving Foundation goals  
- Responsibilities of club Foundation committee  
- Use of District Designated Funds (DDF)  
- Other subjects as determined by needs of the district | Club leaders, Rotary Foundation committee members, and other interested Rotarians | For facilitators:  
District Rotary Foundation Seminar Manual (note: includes handouts for participants) |
| **District Leadership Seminar**  
Governor | Immediately prior to or after the district conference | - The District Leadership Plan  
- Leadership and motivational techniques  
- Building an international service project  
- Planning a district meeting  
- Opportunities in the district and beyond | Interested Rotarians who have served as club president, or have served for three or more years in a leadership role in the club | For facilitators:  
District Leadership Seminar Leader’s Guide |
Memo of Club Visit

Assistant Governors: This form should be completed after your final visit to the club and submitted to the district governor by 15 May.

District Governors: Collect the Memos of Club Visit from Assistant Governors (or from your own visits). Once you have received the Memos of Club Visit for each club in the district, they should be submitted via the Club and District Administration Representative at your service center or Rotary International by 1 June. Please remember to keep a copy of these memos for your district records.

Rotary Club of ____________________________ District: ______________
Name of Assistant Governor: ____________________________
Total number of visits made to this club: ______________

Please evaluate the club’s progress during the course of the past year according to the sections indicated below.

**Membership**

Did the club achieve a net growth in membership? [ ] Yes [ ] No
If yes, why? (Please mark all that apply)
- [ ] an effective recruitment plan
- [ ] high degree of member satisfaction resulting in retention
- [ ] other (please explain)

Did the club implement a membership recruitment plan? [ ] Yes [ ] No

Does the club have an orientation program for new members? [ ] Yes [ ] No

Did the club achieve its membership goals for the year? [ ] Yes [ ] No

How many club members attended the district membership development seminar? __________

Comments:

**Service Projects**

Is the club engaged in community service activities? [ ] Yes [ ] No

Is the club engaged in international service activities? [ ] Yes [ ] No

Indicate the type(s) of community and/or international service activities in which the club participated:
(Please mark all that apply)

**Structured Programs**

- [ ] World Community Service
- [ ] Rotary Community Corps
- [ ] Rotary Friendship Exchange
- [ ] Rotary Recreational and Vocational Fellowships
- [ ] Sponsored a Rotaract and/or Interact club
- [ ] Rotary Volunteers
- [ ] Rotary Community Corps
- [ ] World Community Service
- [ ] Rotary Recreational and Vocational Fellowships
- [ ] Sponsored a Rotaract and/or Interact club
- [ ] Rotary Volunteers

**Service Opportunities**

- [ ] Children at Risk
- [ ] Disabled Persons
- [ ] Population Issues
- [ ] Urban Concerns
- [ ] Preserve Planet Earth
- [ ] International Understanding and Goodwill
- [ ] Health Care
- [ ] Literacy and Numeracy
- [ ] Other service activities (please explain)

- [ ] Did the club achieve its service goals for the year? [ ] Yes [ ] No

Comments:
### The Rotary Foundation

Indicate the type(s) of Rotary Foundation programs in which the club participated: (Please mark all that apply)

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Marked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Study Exchange</td>
<td></td>
</tr>
<tr>
<td>Matching Grants</td>
<td></td>
</tr>
<tr>
<td>Helping Grants</td>
<td></td>
</tr>
<tr>
<td>New Opportunities Grants</td>
<td></td>
</tr>
<tr>
<td>Discovery Grants</td>
<td></td>
</tr>
<tr>
<td>3-H Grants</td>
<td></td>
</tr>
<tr>
<td>Grants for Rotary Volunteers</td>
<td></td>
</tr>
<tr>
<td>Hosting/Sending a Group Study Exchange team</td>
<td></td>
</tr>
<tr>
<td>Hosting/Sending a University Teacher</td>
<td></td>
</tr>
<tr>
<td>Hosting/Sending an Ambassadorial Scholar(s)</td>
<td></td>
</tr>
<tr>
<td>Identified a candidate for a Rotary World Peace Scholarship</td>
<td></td>
</tr>
<tr>
<td>PolioPlus/PolioPlus Partners</td>
<td></td>
</tr>
<tr>
<td>Club did not participate in Rotary Foundation activities</td>
<td></td>
</tr>
<tr>
<td>Other (please explain)</td>
<td></td>
</tr>
</tbody>
</table>

Did the club achieve its Rotary Foundation program participation goals for the year?  □ Yes  □ No

Number of new Paul Harris Fellows: ____________

Number of new Benefactors: ____________

What was the club’s Annual Programs Fund giving goal for the year? US$ ____________

Did the club achieve its Annual Programs Fund giving goal for the year?  □ Yes  □ No

Comments:

### Developing Future Leaders

Did the club president-elect attend PETS?  □ Yes  □ No

How many club leaders attended the district assembly? ____________

Which functions were represented by those who attended the district assembly? (Please mark all that apply)

<table>
<thead>
<tr>
<th>Role</th>
<th>Marked</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td></td>
</tr>
<tr>
<td>Secretary</td>
<td></td>
</tr>
<tr>
<td>Treasurer</td>
<td></td>
</tr>
<tr>
<td>Membership-related committees</td>
<td></td>
</tr>
<tr>
<td>Service-related committees</td>
<td></td>
</tr>
<tr>
<td>Foundation-related committees</td>
<td></td>
</tr>
<tr>
<td>Club Administration-related committees</td>
<td></td>
</tr>
<tr>
<td>Public Relations-related committees</td>
<td></td>
</tr>
</tbody>
</table>

How many club members attended the district conference? ____________

How many club members attended the district leadership seminar? ____________

Comments:

### Club Administration

Does the club meet regularly?  □ Yes  □ No

Does the club maintain general liability insurance?  □ Yes  □ No

Does the club have a budget?  □ Yes  □ No

Does the club have a bulletin?  □ Yes  □ No

Does the club have a Web site?  □ Yes  □ No

Does the club publicize its activities within the community?  □ Yes  □ No

If yes, what has the club publicized? (Please mark all that apply)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Marked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service activities</td>
<td></td>
</tr>
<tr>
<td>Guest speakers</td>
<td></td>
</tr>
<tr>
<td>Visit of the DG</td>
<td></td>
</tr>
<tr>
<td>Invitations to attend meetings as a guest</td>
<td></td>
</tr>
<tr>
<td>Visit of GSE team/Scholar/other</td>
<td></td>
</tr>
<tr>
<td>Awards made by the club and/or received by club members</td>
<td></td>
</tr>
<tr>
<td>Other (please explain)</td>
<td></td>
</tr>
</tbody>
</table>

Comments:
How were your visits received by the club?

☐ I was very welcome — The club proactively contacted me in advance to present issues it wished to discuss to make the most of my visits.

☐ I was welcome — The club greeted me warmly and was adequately prepared to discuss its progress during my visits.

☐ My visit was treated as an administrative obligation — The club made minimal preparations and was not interested in “outside” suggestions.

☐ Not welcome — My visits were perceived as a threat to club autonomy.

☐ The club refused to accept my visit.

Comments:

What is your overall rating of the club?

☐ Excellent — The members of this club are informed and engaged in full support of the four elements of an effective club because they are able to:
  • Sustain and/or grow their membership base.
  • Implement successful projects that address the needs of their communities and communities in other countries.
  • Support The Rotary Foundation through both program participation and financial contributions.
  • Develop leaders capable of serving in Rotary beyond the club level.

☐ Good — The members of this club appeared to be informed and engaged; however, the club could increase its effectiveness by focusing on: (Please mark all that apply)
  ☐ member education/orientation
  ☐ increased service activities
  ☐ better integration of membership (fewer cliques)
  ☐ increased fellowship activities
  ☐ more regular change of committee leadership
  ☐ other (please explain)

☐ Adequate — The club functions, but needs significant improvement in the following areas: (Please mark all that apply)
  ☐ member education/orientation
  ☐ increased service activities
  ☐ better integration of membership (fewer cliques)
  ☐ increased fellowship activities
  ☐ more regular change of committee leadership
  ☐ other (please explain)

☐ Poor — This club is need of assistance because: (Please mark all that apply)
  ☐ The members of this club are neither informed nor engaged.
  ☐ Club factions and infighting prevent this club from functioning effectively.
  ☐ The club is stagnating due to lack of new members.
  ☐ The club is not involved (or minimally involved) in service activities.
  ☐ Club leaders have not attended district training meetings and are therefore unable to serve the club effectively.
  ☐ The club regularly fails to meet the basic RI and district administrative requirements (semiannual reports, dues, monthly membership reports) on a timely basis.
  ☐ other (please explain)

Comments:
Additional Suggestions for Improvement
Resources for Clubs

As an assistant governor, one of your roles will be to act as a conduit for information flowing to and from clubs. Clubs will seek your advice and look to you for guidance regarding a wide variety of issues. While you may not necessarily know all the answers, you should know where to find them.

Many types of resources are available to clubs to help them deal with issues and challenges. These resources include

- district-level resources
- club-level resources
- community resources
- Rotary International resources.

District-level Resources

You will be a club’s key resource from the district because you have the most frequent contact with clubs. However, there are several other important resources from the district that can aid the club. These include both human resources and materials such as

- the district governor;
- district committee members and chairpersons;
- the district trainer;
- past district leaders;
- governor’s monthly letter;
- district directory; and
- district Web site.

The District Governor

The district governor, the district’s liaison to the RI president and Board of Directors, is considered an officer of Rotary International. The governor, responsible for overseeing all the clubs in the district, acts as an advisor and motivator to clubs — encouraging them to adopt strategies that will make them more effective. Assistant governors, such as yourself, act as the eyes, ears and hands of the governor — helping to implement district plans and aiding clubs in their efforts to be successful Rotary clubs.

It is extremely important to provide the governor with up-to-date information about the clubs to which you have been assigned. Conversely, the governor should provide you with any information from RI or the district that needs to be communicated to clubs. The district governor, along with other district leaders, should develop a communications protocol for use throughout the district.

Governor’s Monthly Letter

The governor’s monthly letter is sent monthly from the district governor to club presidents and club secretaries. Its purpose is to inform, stimulate and recognize. The governor’s monthly letter is meant to do the following:

Inform club leaders of
- district programs
- Rotary International and Rotary Foundation programs
- the elements of an effective Rotary club
- specific club activities
- the Rotary International theme for the year
- a club’s standing on membership and attendance;

Stimulate club leaders to
- work effectively
- plan ahead
- promote new programs
- cooperate with other clubs in the district;

For additional information regarding the role of the district governor, consult the appendix at the end of this chapter.
Recognize effective contributions by
- committees
- individual Rotarians
- club activities
- specific programs.

As an assistant governor, you may wish to provide the governor with information that you feel should be included in the governor’s monthly letter. For example, you may wish to inform the governor about a club’s successful service project and/or a program that clubs commonly misunderstand.

**District Committees**

District committees, appointed by the district governor, serve specific functions that correspond to district goals and plans, as formulated by the district leadership. District committees often consult relevant RI and Rotary Foundation committees and task forces to facilitate action related to specific programs and activities at the district and club levels.

In working with clubs, district committees are expected to
- work closely with clubs leaders to provide them with specialized knowledge and guidance to implement strategies that fulfill club goals;
- monitor club progress and offer support as appropriate;
- encourage support of district goals;
- educate clubs about available resources; and
- identify and recognize outstanding clubs and individuals.

In addition to carrying out these general responsibilities, district committees have unique roles within the district organization.

While districts around the Rotary world have a wide variety of committees, the RI Board recommends that districts appoint committees that address the following ongoing functions common to all districts:
- Membership Development
- Extension
- Finance
- Public Relations
- District Conference
- The Rotary Foundation
- RI Convention Promotion
- District-level programs that are ongoing in nature (Youth Exchange, Rotaract, RYLA, World Community Service, etc.).

As an assistant governor, you should be familiar with each committee’s specific responsibilities as defined by the RI Board and your district.

**The District Trainer**

Training is a crucial aspect of leadership in Rotary. Training meetings held throughout the year provide Rotarians with the knowledge and skills necessary to conduct their responsibilities effectively. The district trainer is responsible for supporting the governor and governor-elect in training club and district leaders to be successful during their term in office.

Under the direction of the governor or governor-elect (depending upon the meeting), the trainer is responsible, on an annual basis, for developing and conducting training for the
- Presidents-elect Training Seminar (PETS),
- district assembly,
- district team training seminar,
- district leadership seminar,
- Rotaract leadership training, and
- other training events as appropriate.

At both PETS and the district assembly, assistant governors will work with club leaders to formulate club goals and strategies to achieve them. Prior to PETS and the district assembly, consult with the district trainer regarding the PETS and district assembly agendas and the role you will play at those meetings.

**District Directory**

To facilitate communication, districts often compile a district directory that is distributed to club and district leaders. Typically, such a directory lists meeting information for the district’s clubs, as well as contact information for the governor, governor-elect, assistant governors, district committees, club officers and other Rotary leaders.

**District Web Site**

Many districts have Web sites that provide news and information regarding the activities of the district’s clubs and Rotary to Rotarians and members of the community. District Web sites can also be designed to facilitate discussions on issues and challenges facing clubs.
As an assistant governor, you will be working intensively with clubs to help them be as effective as possible. It is important for you to encourage clubs to take advantage of their own members’ and leaders’ knowledge and experience. There are many possible resources available at the club level. These include:

- Club officers and other club members
- Past club leaders
- Spouses and family members of club members.

Many clubs also overlook the Rotarians in neighboring clubs. As an assistant governor, you are in a position to foster ties among your clubs. Encourage

- interclub meetings;
- joint service projects; and
- joint meetings for club presidents in your area to promote cooperation and the sharing of ideas and resources.

The following summaries describe key club leadership positions.

**Club President**

Club presidents are responsible for making their clubs as successful as possible by guiding the club towards goals that are based on the four elements of an effective Rotary club. In this role, club presidents function primarily as leaders and motivators, rather than administrators. The club president must work closely with other club leaders to

- develop a set of realistic, yet challenging goals for the club;
- set strategies to achieve those goals;
- assess the success of those strategies; and
- make any changes necessary to improve the plans and procedures being implemented to achieve club goals.

A club president regularly confers with other club leaders to assess progress and receive input.

**Club Secretary**

The duties of the club secretary are mainly administrative. The secretary

- maintains membership records;
- records attendance at meetings;
- sends out notices of meetings of the club, board, and committees;
- records and preserves minutes of the meetings;
- submits required reports and pays dues to Rotary International;
- reports new members, terminations, and other changes in membership to the general secretary; and
- reports membership and attendance to the district governor.

Do not underestimate the importance of this position. Secretaries are the club’s primary information conduits. It is their job to be aware of all club activities so they are in an excellent position to identify strengths and weaknesses.

**Club Treasurer**

The treasurer’s duties revolve around managing a club’s financial transactions, maintaining financial records, and helping to plan the club’s budget. The duties of the treasurer are prescribed in a club’s by-laws. The treasurer

- has custody of all club funds;
- accounts for all club funds to the club’s board of directors, upon demand, and at the end of the year; and
- performs such duties as pertain to the office.

If the club has no treasurer, the secretary performs these functions.

**Club Committees**

Committees are the engines of a club. Committees plan, promote, and implement activities and projects that sustain the club and provide service to the local community and communities around the world. If a club’s committees do not function effectively, the club will not be able to reach many of its goals. Encourage club presidents to work with other club leaders to make club committees as effective as possible by

- defining the purpose of each committee;
- consolidating, eliminating, expanding, or adding committees as necessary;
• appointing committee members based on their personal interests and talents;
• limiting membership to the actual number of persons required to fulfill the committee’s purpose;
• establishing a concrete assignment for each committee;
• encouraging committees to record meetings, plans, decisions, and results; and
• participating in committee meetings when requested or when the situation requires.

Clubs may wish to organize committees based upon what makes clubs effective. Such functionally-based committees might include:

- Membership Recruitment and Induction
- New Member Orientation and Mentoring
- Service Projects
- Fundraising
- The Rotary Foundation
- Club Public Relations
- Club Administration.

Encourage clubs to develop a structure that reflects their needs and goals.

**Community Resources**

Successful Rotary clubs are active members of their communities. By maintaining close ties to important community institutions and community members, clubs can determine what types of service projects are most appropriate and relevant to actual community needs. Furthermore, close contact with community members can generate interest in Rotary — attracting new members and facilitating cooperative relationships with community organizations and leaders. Often Rotarians, being leading members of their own communities, have access to information about the community. Encourage club leaders to take advantage of this existing knowledge base.

Information that can be instrumental in helping clubs plan projects and activities include the community’s

- economic situation
- geographical setting
- educational strengths and weaknesses
- political conditions
- health care
- demographic status.

To obtain this information, club members need to make contact with other community members. Some important community resources include

- other service organizations and nonprofit groups
- local schools
- government offices
- community vocational programs
- hospitals and other health care providers
- the Chamber of Commerce and other local business groups
- religious organizations.
Rotary International Resources

Rotary International offers a wide array of resources for clubs. Encourage club leaders to familiarize themselves and use the materials and publications that are available. Key resources include:

- Rotary’s Web site at www.rotary.org
- Official Directory
- RI Catalog
- Manual of Procedure
- THE ROTARIAN or regional Rotary magazines

These resources contain information on Rotary policies, procedures, programs and leaders as well as the projects and activities of Rotarians and clubs around the world. Using these materials, you can find answers to many of the inquiries you will receive.

Below is a categorized list of resources with brief descriptions of their content. Please note that the following list is not comprehensive. For a complete list of available resources, consult the RI Catalog (019) and visit Rotary’s Web site.

General Reference

Catalog (019)— A working list of RI publications, audiovisual programs, forms and supplies, updated annually.

Manual of Procedure (035)— Policies and procedures established by legislative action and the RI Board of Directors, issued every 3 years following each meeting of the Council on Legislation. The Manual of Procedure also contains the “Standard Rotary Club Constitution” and “Recommended Rotary Club Bylaws.”

Official Directory (007)— Includes contact information for RI officers, committees, task forces and Secretariat personnel; worldwide listing of districts and governors; alphabetical listing within districts of clubs with names of presidents and secretaries, and meeting times and places.

District Committee Manual (249)— An overview of the responsibilities of district committees.

Club President’s Manual (222)— A component of the Club Officers’ Kit that includes an overview of the responsibilities of the club president, as well as information regarding vital club functions including membership development, service projects, The Rotary Foundation, public relations, and fundraising.

Club Secretary’s Manual (229)— A component of the Club Officers’ Kit that includes an overview of the responsibilities of the club secretary, as well as information regarding the roles of the club treasurer and sergeant-at-arms.

Club Committee Manual (226)— A component of the Club Officers’ Kit that includes an overview of the responsibilities and general guidelines for club committee chairpersons.

News Publications

THE ROTARIAN— The official magazine of RI published monthly. In addition to THE ROTARIAN, 27 regional magazines in 21 languages also serve Rotarians around the world.

Rotary World (050)— An eight-page newspaper published five times yearly for Rotary club, district, and international leaders.

Rotary News Basket (546)— A weekly electronic and printed report of Rotary news and short features.

Membership

This is Rotary (001)— A colorfully illustrated brochure providing a brief overview of Rotary for prospective Rotarians and the public.

What’s Rotary? (419-EN)— A handy, wallet-sized card answering frequently asked questions about the organization and scope of Rotary. It is popular as a handout to non-Rotarians.

How to Propose a New Member (254)— Outline of basic procedures for the selection and election of members.

Membership Development and Retention Manual (417)— Basic procedures for building club membership and suggestions on how to retain members. Note: This publication will be revised in 2001-02 to reflect changes instituted at the 2001 Council on Legislation.
“Strategies for Member Education,” a section contained within the Club President’s Manual (222), details topics such as recruiting new members, new member orientation and membership retention. Also available on Rotary’s Web site.

The ABCs of Rotary (363)—This compilation of short articles about Rotary history, traditions, structure, and programs is useful for orienting new members.

This is Rotary (449) — A comprehensive 12-minute video or DVD that provides an overview of Rotary, its programs and service projects. Ideal viewing for prospective members and new member orientation.

Service Projects

Communities in Action: A Guide to Effective Projects (605A)—A step-by-step guide to planning, conducting and evaluating a service project.

Menu of Service Opportunities (605B)—Packet containing information on RI’s recommended types of service projects for clubs and districts.

World Community Service Handbook: A Guide to Action (742)—Provides information on World Community Service (WCS) and ways in which clubs and districts can become involved in international service projects.

Vocational Service in Your Community (509)—This guidebook presents a brief history of vocational service and examples of successful projects from Rotary clubs around the world.

“Fundraising for Effective Service Projects” is Chapter 4 in the Club Committee Manual (226). This chapter provides information regarding planning, promoting and conducting fundraisers.

The Rotary Foundation

A Guide to Annual Giving (142)—This resource helps club and district leaders plan a successful annual giving program.

Two Needs, Two Ways of Giving (173), Ways of Giving (185)—Brochures that describes various ways of contributing to The Rotary Foundation’s Permanent Fund.

Humanitarian Grants Programs (130)—A booklet containing comprehensive information on all the humanitarian grants programs of The Rotary Foundation.

Public Relations

Effective Public Relations: A Guide for Rotary Clubs (257)—A guide that provides basic tips and tools to help Rotarians promote club activities.

Rotary Public Relations for the 21st Century (269)—A 10-minute video showing the importance of communication in the information age.

Public Service Announcements — Available for print, radio and television. A series of resources are available. For more information, consult the RI Catalog.

Rotary’s Web site

Information on many areas essential to the effective operation of clubs can also be found on Rotary’s Web site, www.rotary.org. The Web site is updated regularly and contains information about a wide range of topics including membership development and retention, resources for conducting community and international service projects, Rotary Foundation programs, training opportunities and resources, and club administration. Many of Rotary’s publications, including program application forms, are available for download. Be sure to take advantage of this resource.
Rotary International Human Resources

Rotary International Committees — The RI Board prescribes the duties and authority of each RI committee. The Board determines the purpose of each committee, members of which are appointed by the RI president.

Task Forces — A task force is a group of Rotarians appointed by the RI president to assist Rotary clubs and districts to carry out specific tasks.

Contact information for committee and task force members can be found in the front section of the Official Directory.

The Secretariat

The Secretariat of Rotary International acts as a clearinghouse for Rotary clubs worldwide; gathering, analyzing, translating, and disseminating Rotary information. It comprises the World Headquarters in Evanston, Illinois, USA, and seven international offices. It serves officers and members of Rotary clubs, the RI Board of Directors, RI committees, and all other RI officers. It also facilitates the work of The Rotary Foundation.

Contact information for the Secretariat staff can be found in the Official Directory and on Rotary’s Web site.

Club and District Administration representatives — These key resources at international offices and World Headquarters can answer many administrative questions and direct other inquiries to appropriate RI staff. A list of international offices and their contact information can be found in the front section of the Official Directory and on Rotary’s Web site.
Job Description/ Role of the District Governor

According the RI Bylaws, the district governor is personally responsible for

1. organizing new clubs;
2. strengthening existing clubs;
3. promoting membership growth by working with district leaders and club presidents to establish realistic membership goals for each club in the district;
4. supporting The Rotary Foundation with respect to program participation and financial contributions;
5. promoting cordial relations between clubs in the district and between the district’s clubs and Rotary International;
6. planning for and presiding at the district conference and assisting incoming governor in planning and preparing for the Presidents-elect Training Seminar and the district assembly;
7. providing for an official visit meeting individually or in multi-club meetings conducted throughout the year to take place at a time that maximizes the governor’s presence for the purpose of
   • focusing attention on important Rotary issues;
   • providing special attention to weak and struggling clubs;
   • motivating Rotarians to participate in service activities; and
   • personally recognizing the outstanding contributions of Rotarians in the district;
8. issuing a monthly letter to each club president and secretary in the district;
9. reporting promptly to Rotary International as may be required by the RI President or Board of Directors.
10. supplying the governor-elect, before the International Assembly, with information on club conditions with recommended actions for strengthening clubs;
11. assuring that district nominations and elections are conducted in accordance with the RI constitution, these bylaws and the established policies of RI;
12. transferring district files to the succeeding district governor; and
13. performing other necessary duties as Rotary International’s district officer.

In all other aspects of the job, governors are permitted and encouraged to delegate responsibility through a district organization.

Additional important functions

• **Schedule** and conduct the Presidents-elect Training Seminar (PETS) and district assembly. After becoming governor, conduct a district Rotary Foundation seminar and the district conference.

• **Appoint** assistant governors and district committees, as needed, and use them effectively throughout the year.

• **Promote** and, if possible, attend the RI Convention.

• **Maintain** and develop a district record book.

• **Prepare** a summary of the membership and attendance reports of the clubs in the district each month and include it in the monthly letter to the clubs.

• **Assist** each club of the district as needed. Give special attention to new, small, or special-needs clubs, and consider making visits to these clubs early.

• **Promote** personal and financial support by the clubs for programs of The Rotary Foundation.

• **Motivate** and assist clubs in membership growth.

• **Develop** a well-rounded public relations program for the district and encourage clubs to do the same.