

# GOVERNORS-NOMINEE TRAINING SEMINAR LEADER'S GUIDE



## GETTING STARTED

The Governors-nominee Training Seminar Leader's Guide is an editable guide for organizers and trainers convening in-person training for district governors-nominee (DGNs). DGN training is optional but has become an increasingly popular adjunct to Rotary institutes. It can be a full-day seminar or incorporated into the zone's training program.

## PURPOSE OF THE SEMINAR

The seminar helps DGNs learn about their district in preparation for their years as governor-elect and governor. This guide contains outlines for sessions about the following topics, which are related to material in the Rotary Code of Policies:

- District governor-nominee responsibilities
- Getting to know your district
- Membership
- Financial management
- Communication
- District conference
- Creating a calendar

Governor-nominee training can be conducted in person or, if in-person training is not feasible, as a series of webinars on the above topics. To learn more about running a webinar, take the How to Run a Webinar: For Organizers online course in the professional development section of the [Learning Center](#) at Rotary.org.

## PARTICIPANT MATERIALS

Before the seminar, send participants the Governor-nominee Workbook, which you can download from the [Learning Center](#) at Rotary.org. Click on **Your Role**, then **District Governor**. Send the workbook electronically or print copies to distribute before the training begins; either way, participants should have the workbook with them. And trainers should have a copy as a reference.

## TRAINER RESOURCES

Consider reviewing the materials below before the training begins. You can download them from Rotary's website or order them at [shop.rotary.org](http://shop.rotary.org):

- [2013 Manual of Procedure: A Rotary Policy Reference Guide](#)
- [Official Directory](#)
- [Rotary Code of Policies](#)

- [District Conference Manual](#)
- Governor-nominee Workbook

For information about The Rotary Foundation, refer to the [District Rotary Foundation Seminar Leader's Guide](#).

You should consider working with trainers for the governors-elect training seminar (GETS) to ensure that the programs build on each other and are not redundant. Let governors-nominee know what will be covered at GETS:

- Role and responsibilities
- District organization
- Membership development
- Developing effective leaders
- Public image
- The Rotary Foundation
- Rotary International administration requirements
- International Assembly preview

## **Getting started**

After reviewing this guide, training seminar organizers should determine who their trainers will be for the various sessions. Then they should provide trainers with the session guides and slides, allowing them sufficient time for planning.

## **Evaluations**

This guide includes sample evaluations for participants and trainers. We encourage both groups to complete these after the seminar.

## **How to contact us**

Send questions or comments about this guide, or any of Rotary's training resources, to [learn@rotary.org](mailto:learn@rotary.org).

# SESSION 1: DISTRICT GOVERNOR-NOMINEE RESPONSIBILITIES



Governors-nominee should become familiar with their responsibilities and work with the governor-elect and governor to prepare for their year as governor.

## LEARNING OBJECTIVE

- Become familiar with governor-nominee responsibilities.

## SPEAKING POINT

- Your responsibilities as governor-nominee, outlined on worksheet 2, are to:
  - Work with past, current, and incoming district leaders to support effective clubs
  - Analyze the district's strengths and weaknesses using materials provided by the immediate past governor, governor, and governor-elect
  - Learn how your district is structured, and get to know the clubs in your district and how they are organized
  - Attend district meetings when invited by the district governor or governor-elect
  - Participate in district committees or other activities, as suggested by the district governor or governor-elect
  - Select a site for the district conference to be held during your year as governor, with the agreement of the majority of either current club presidents or of those who will serve as club presidents during your year as governor
  - Attend leadership skills training, if available
  - Attend district governor-nominee training, if offered, or complete the online course for district governors-elect in the Learning Center at [Rotary.org](http://Rotary.org)

## DISCUSSION QUESTIONS

- What additional responsibilities does your district assign the governor-nominee?
- What responsibilities do you consider most important?
- What responsibilities do you believe will be the most challenging?
- What responsibilities are you unfamiliar with?
- How can you learn more about these responsibilities?

## SUGGESTED ACTIVITIES

**Individual work:** Refer participants to worksheet 2: Responsibility Planning in the workbook. Ask them to share their ideas for next steps.

**Group work:** Have participants form small groups and assign one of the following resources to each group: Official Directory, Manual of Procedure, and Rotary Code of Policies. Ask the group with the relevant resource to search for the following:

- District conference voting procedures in the Manual of Procedure
- Club officer information in the Official Directory
- District Leadership Plan in the Rotary Code of Policies

## **ACTION ITEM**

Ask participants to write on their notes worksheet one idea from this session that they will take back to their district. If time allows, have some of them share what they've written with the group.

# SESSION 2: GETTING TO KNOW YOUR DISTRICT



Governors-nominee should become familiar with their district's committees. They should work closely with their governor and governor-elect for the sake of continuity in district leadership. Continuity is particularly important for strategic planning, district appointments, multiyear district service projects, and Rotary Foundation activities.

## LEARNING OBJECTIVES

- Become familiar with district committees and most clubs in the district.
- Have a strategy for identifying struggling clubs and successful clubs in the district.
- Understand the importance of continuity in leadership.

## SPEAKING POINTS

- The District Leadership Plan outlines the suggested structure for district teams. It includes:
  - Assistant governors
  - Standard committees
  - Systems for continuity in leadership
- The District Leadership Plan enables the district to support clubs and function effectively.
- Become familiar with your district's committees and think about how they can help you run your district. (*Refer to worksheet 5: District Committees.*)
- Identify which district appointments you will make as governor-elect.
- Once you understand how your district functions, you should try to become familiar with each club in the district.
- The District Planning Guide is useful for setting long-term and annual goals. (*Refer to worksheet 6: District Planning Guide.*)
- Review your district planning guide and strategic plan with your governor and governor-elect and work together to develop or refine them.
- Talk to your governor and governor-elect about club ratings in Rotary Club Central; identify clubs that are doing well and those that are struggling.
- Urge clubs to rejuvenate their practices, incorporating suggestions from *Be a Vibrant Club: Your Club Leadership Plan* (*refer to worksheet 7: Club Best Practices*). Club leaders should:
  - Decide where their club wants to be in three to five years.
  - Set annual goals and enter them into Rotary Club Central.
  - Hold club assemblies regularly to keep members engaged and informed.

- Communicate openly in your club.
- Prepare members for future roles in order to maintain a smooth leadership transition.
- Adapt their club's bylaws to support the way the club works.
- Develop strong relationships within your club.
- Make sure that all members are involved in activities that genuinely interest them.
- Coach new and current members in leadership skills.
- Create committees that are practical for the club.
- The governor and governor-elect probably will give you opportunities to observe and participate in various meetings.
- Take worksheet 8: District Event Observation Form with you when you attend district events.

## DISCUSSION QUESTIONS

- How many of you have served on district committees?
- What committees does your district have? What are their primary responsibilities? What do they achieve?
- What should you consider when selecting candidates for district appointments?
- Which district activities would you like to become more familiar with?
- How can your clubs benefit from the best practices presented in Be a Vibrant Club?
- Where do you see opportunities for growth of both new and existing clubs in your district?
- How will you ensure continuity for multiyear service projects?
- How much does your district give annually to The Rotary Foundation?
- Does your district have a strategic plan? How are you working with your governor and governor-elect to create a plan that encourages continuity?

## SUGGESTED ACTIVITIES

### **Individual work:**

- Ask participants to review worksheet 6: District Planning Guide. Encourage them to consider how they can use it to assess their district's strengths and weaknesses, so they can start thinking about their goals for the district.
- Ask participants to review worksheet 7: Club Best Practices and jot down their ideas for helping clubs implement the best practices.

### **Group work:**

- Have participants complete worksheet 5: District Committees on their own. Suggest that, during a break, they share ideas with other DGNs about organizing their district functions.
- Remind participants that, as governor-elect and governor, they will be responsible for convening district events and training seminars. Have

them work in groups or pairs to develop a list of things to watch for in district meetings. Encourage them to use worksheet 8: District Event Observation Form when attending district events.

### **ACTION ITEM**

Ask participants to write on the notes worksheet one idea from this session that they will take back to their districts. If time permits, have some of them share what they've written with the group.

# SESSION 3: MEMBERSHIP



If we have more members, we can achieve more as an organization. That's why membership is a top priority for Rotary International, second only to polio eradication. It is important that it also be a priority at the district and club levels. Governors-nominee should become familiar with their district's membership trends, and work with other district leaders on a long range plan for membership development.

## LEARNING OBJECTIVES

- Learn the district's membership trends.
- Become familiar with the district's regional membership plans.

## SPEAKING POINTS

- As governor-nominee, you should talk to your governor-elect and district governor to learn about membership trends.
- The top three reports you should become familiar with are:
  - Clubs in My District
  - Club Growth
  - Member Viability and Growth
- Meet with your membership committee to learn more about your district's strategy to attract new members, strengthen clubs, and engage current members and leaders.
- Discuss membership strategies with your district's past governor, governor, and governor-elect, as continuity is important to long-term success.

## DISCUSSION QUESTIONS

- What membership trends do you see in your district's records in Rotary Club Central?
- What membership concerns have you heard in your district?
- How can you help implement the regional membership plan in your district?
- How do you plan to work with your district governor and governor-elect to establish a succession plan that supports your district's membership goals?
- What would you like to accomplish for your district's membership in your years as governor-elect and governor?
- How can you build on the work of previous governors?

## SUGGESTED ACTIVITIES

**Group work:** Discuss your region's membership plan with participants. Then divide them into groups and have them use worksheet 10: My District's Membership, to consider their district's membership strengths, weaknesses, opportunities, and risks. After discussing their region's membership plan, have them work together to come up with ideas to address each of these categories.

**Individual work:** What opportunities do you have during your year as governor-nominee to get to know the clubs in your district? Write your ideas on the notes worksheet.

**Post-training assignment:** Sign in to My Rotary and go to Rotary Club Central to view membership trends in your area. Look carefully at the reports on clubs in your district, club growth, and member vitality and growth to inform your membership efforts for your term.

# SESSION 4: FINANCIAL MANAGEMENT



Governors-nominee should begin thinking about their fiscal responsibilities, such as managing the district's finances, practicing good stewardship, and ensuring that the district complies with all local laws, particularly those relevant to taxes and not-for-profit organizations.

## LEARNING OBJECTIVE

- Become familiar with financial best practices, financial controls established in the district, and the financial responsibilities of district governors.

## SPEAKING POINTS

- Districts can establish one or more funds for administrative and service activities. A district governor should:
  - Vote on decisions about such funds at the district training assembly, presidents-elect training seminar, or district conference
  - Assign more than one person to monitor and control the fund(s)
  - Present an annual statement and report of income and expenditures of the fund(s) to all clubs
- It is the governor's responsibility to make sure that clubs pay their dues on time.
- Reduce liability when planning activities and events for your year as governor by asking these questions:
  - What can go wrong?
  - If something goes wrong, how will I or the district respond?
  - How will any losses be covered?
  - How can the activity be changed to reduce the chance of something going wrong?

## DISCUSSION QUESTIONS

- What are the responsibilities of the district finance committee?
- How will you, as governor, work with this committee?
- How can a governor help clubs that are not paying their dues?
- How does your district handle risk management for events?
- What controls does your district have in place to ensure proper stewardship of its funds?

## SUGGESTED ACTIVITIES

**Group work:** Ask groups of participants to review worksheets 12: Financial and Risk Management Best Practices Checklist, and 13: Sample Financial Controls. Have them discuss additional controls the district might institute.

**Case studies:** Ask groups of participants to discuss one or both of the scenarios on worksheet 14: Financial Management Case Studies.

**Action item:** Ask participants to write on the notes worksheet one idea from this session that they will take back to their districts. If time permits, have some of them share what they've written with the group.

# SESSION 5: COMMUNICATION



Effective communication is necessary to support clubs' efforts to increase membership, increase support for The Rotary Foundation, and promote the work of clubs to the general public.

## LEARNING OBJECTIVE

- Learn the importance of communication and identify those with whom you will need to communicate as governor-elect and governor.

## SPEAKING POINTS

- Governors are responsible for organizing and sharing information with district chairs, assistant governors, and clubs.
- Because different people prefer different methods of communication, you should get to know your key contacts' communication preferences. Also, you should use different communication methods for different purposes.
- To communicate with people outside of Rotary, become familiar with the functions of the district public relations committee, listed on worksheet 5: District Committees.
- The following resources are available to support public relations efforts:
  - [Brand Center](#) at Rotary.org
  - [Worksheet 17: Rotary Messages for External Audiences](#)
  - Other resources (see [Public Relations](#) at Rotary.org, under Learning & Reference)

## DISCUSSION QUESTIONS

- How can a district governor effectively communicate with the district leadership team? What is the communication preference (phone, email, etc.) of each contact with whom you, as district governor, will communicate most?
- What role does the governor play in communicating to the public what Rotary is and does?
- How does your district public relations committee work with local media?

## SUGGESTED ACTIVITIES

**Individual work:** Ask participants to write a one-minute speech that answers the question "What is Rotary?" (*Refer to worksheet 16.*) Ask a few to share their speech.

**Case study:** Write the following scenario on a flip chart or dry-erase board and have small groups of participants discuss it:

*You are coordinating a district service project. What steps do you take to promote it, and whom do you need to communicate with?*

**Group work:** Ask volunteers to give answers of one minute or less to the “What is Rotary?” question. Tell them to use language that is easy for a non-Rotarian to understand. (Download the [Voice and Visual Identity Guidelines](#) from the Brand Center at Rotary.org beforehand to have as a reference or handout.)

**Action item:** Ask participants to write on the notes worksheet one idea from this session that they will take back to their districts. If time allows, have some of them share what they’ve written with the group.

# SESSION 6: DISTRICT CONFERENCE



The district conference is a time for celebration, fellowship, inspirational addresses, and the discussion of club and district affairs. Planning can begin as early as the term of the governor-nominee, who, with the approval of the RI Board, may choose the conference site based on a vote of either current club presidents or club presidents-nominee in the district.

## LEARNING OBJECTIVE

- Begin thinking about your district conference and what you need to do to make it successful.

## SPEAKING POINTS

- As governor-nominee, think about:
  - Selecting the time and place of the district conference
  - Observing other district conferences in your zone
  - Appointing your district conference committee, subcommittees, and aide to the president's representative
  - Serving on the district conference committee
  - Promoting your district conference
- Appendix 3 of the [District Conference Manual](#) is a good resource for general planning and contract guidelines.

## DISCUSSION QUESTIONS

- What have you done to start planning your district conference?
- When is your district conference typically held?
- Are you currently serving on a district conference committee?
- What did you like about district conferences you've attended?
- What would you improve?

## SUGGESTED ACTIVITIES

**Group work:** Ask participants, who've been organized into groups, to discuss best practices for planning the district conference, program elements they would like to include, and committees to appoint and serve on. Ask them to write their ideas on the notes worksheet.

**Individual work:** Ask participants to use worksheet 19: District Conference Checklist, checking off what is already done and think about what remains to be done.

**Action item:** Ask participants to write on the notes worksheet one idea from this session that they will take back to their districts. If time allows, have some of them share what they've written with the group.

# SESSION 7: CREATING A CALENDAR



As part of planning for their years as governor-elect and governor, governors-nominee should make an effort to observe a variety of district meetings, attend the Rotary International Convention, and organize leadership training for their district.

## LEARNING OBJECTIVE

- Create a calendar to plan for your year as governor-nominee.

## SPEAKING POINT

- Plan for the activities on worksheet 21: *Your Calendar*. (*Review together.*)

## DISCUSSION QUESTIONS

- What else can you do as governor-nominee to prepare for your years as governor-elect and governor?
- What can you do throughout your years as a governor-nominee, governor-elect, and governor to strengthen clubs, increase service and giving, and enhance public awareness in your district?

## SUGGESTED ACTIVITIES

**Individual work:** Have participants review worksheet 21: *Your Calendar*. Ask them to write in the dates that they will attend the district meetings listed and to list any other planning activities.

**Action item:** Ask participants to write on the notes worksheet one idea from this session that they will take back to their districts. If time allows, have some of them share what they've written with the group.

# EVALUATION FORM FOR GOVERNORS-NOMINEE



Have participants complete an evaluation immediately following the training. Their views will help us plan future governor-nominee training, as well as training for governors-elect. Consider sending another evaluation to participants 6 to 12 months after this training to identify the skills that participants applied and the topics that need more attention.

### Sample Governor-nominee Evaluation Form

We appreciate your time and thoughtful answers to the following questions. Your feedback helps us assess our training methods and improve future training seminars.

Indicate your knowledge level by putting an X in the appropriate space below.

	Before this seminar			After this seminar		
	Not very knowledgeable	Somewhat knowledgeable	Knowledgeable	Not very knowledgeable	Somewhat knowledgeable	Knowledgeable
District governor-nominee responsibilities						
Getting to know your district						
Membership						
Financial management						
Communication						
District conference						
Creating a calendar						

**Program presentation:** Characterize the following statements by putting an X in the appropriate space below.

	Agree	Somewhat agree	Somewhat disagree	Disagree	Not applicable
Topics discussed during group discussions were relevant to me as a governor-nominee.					
The amount of time given to each training topic was appropriate.					

The group came up with practical ideas I plan to use.					
Training leaders facilitated group discussions well.					
[other]					
[other]					

**Logistics:** Characterize the following statements by putting an X in the appropriate space below.

	<b>Agree</b>	<b>Somewhat agree</b>	<b>Somewhat disagree</b>	<b>Disagree</b>	<b>Not applicable</b>
The date of the seminar was convenient.					
The location of the seminar was convenient.					
The length of the meeting was appropriate.					
I received timely notice of the seminar.					
I received all the information I needed in my registration packet.					

It would be helpful to have additional information about:

My district governor and district governor-elect can support me in the following ways:

Additional comments:

**Thank you for completing this evaluation.**

# EVALUATION FORM FOR TRAINERS



Your perspective on your own training and on the seminar training materials is invaluable to us, enabling us to better shape preparations for next year. Thank you again for your willingness to serve and for your comments on this year's seminar.

**Program presentation:** Characterize the following statements by putting an X in the appropriate space below.

	Agree	Somewhat agree	Somewhat disagree	Disagree	Not applicable
The District Governor-nominee Leader's Guide and workbook were easy to use.					
The time allocated for each session was adequate.					
I had enough time to prepare for this training.					
The participants were well prepared to discuss the designated topics.					
The length of the training meeting was appropriate.					
The session guides were effective in group discussions.					
The participants understood the material presented.					
The worksheets contributed to participants' learning experience.					
The size of the group-discussion rooms was adequate.					
The date of the seminar was convenient.					
The location of the seminar was convenient.					

If insufficient time was allocated for any topics, please list them.

List any other topics that should have been covered.

How can the training be improved?

Additional comments:

**Thank you for completing this evaluation.**