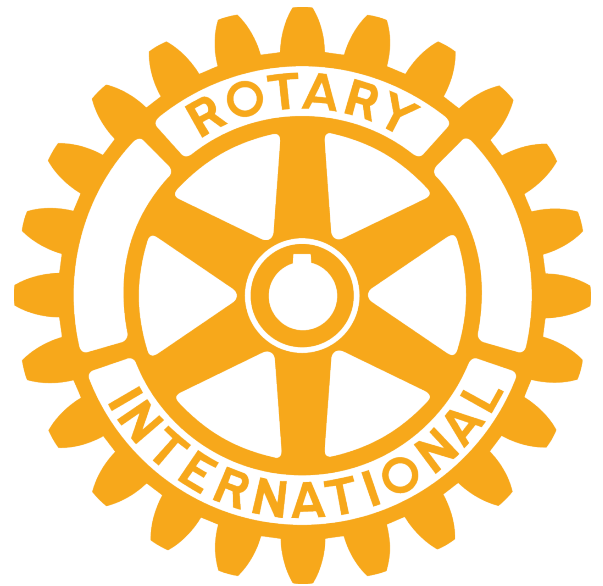


PETS 2020



MID-NORTHEAST PRESIDENTS-ELECT TRAINING SEMINAR 2020

Assistant Governor Work Session Summaries

March 20, 2020



Mid-Northeast PETS
Presidents-Elect
Training Seminar

2020-21 District Governors

D7210 Tony Marmo
D7230 Mary Shackleton
D7255 Jacquelyn Yonick
D7410 Joe Loughman
D7475 Ann Walko
D7490 Carl Hassett



Mid-Northeast PETS Presidents-Elect Training Seminar

2019-20 District Governors

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D7230 Mahbub Ahmad
D7255 Justin Quaranta
D7410 Karen DeMatteo
D7475 Raymond Freaney, Jr.
D7490 John Mitchell

PETS 2020 Assistant Governor Work Session Summary

Supporting a More Flexible Rotary

March 20, 2020

Key Outcomes:

1. Understand and be able to promote the benefits of alternative club models.
2. Understand how the presence of alternative club models benefits traditional clubs.
3. Create a plan to support new club and satellite development in your area.

Relevance:

Innovative club models are critical to Rotary's 21st century success. Here in North America, we have been losing membership for more than two decades, and the numbers show that Rotary must expand beyond the traditional club format of a meal and a speaker. New membership varieties, new club models, and combinations of each must be tried and given a chance to succeed if Rotary is to continue to do good in the world. Assistant Governors need to understand the options and opportunities offered by these new models to be able to properly support them and to explain their relevance to Rotarians, including those in traditional clubs.

Resources:

- Assistant Governor Basics courses on MyRotary Learning Center <https://learn.rotary.org/members/learn/catalog>
- Starting a Rotary Club handbook on My Rotary Learning Center
- Club Model handout available on MyRotary Learning Center
- District Membership Chair, Rotary Coordinator, and RI's New Club Ambassadors

1. Need for new clubs and new club models

- a. Rotary growth has stagnated worldwide and is falling in North America and is now at a crisis point.
- b. Data shows that the biggest reason Rotarians drop out is expense (time, money), and for most Rotarians, the weekly or twice-monthly meals that are part of their meetings are by far their largest expense. We need to recognize that this type of meeting is not attracting younger professionals in sufficient numbers to be sustainable and that new club models must be employed in order to attract younger Rotarians.
What innovative clubs are active in your District? Are they reaching a new membership demographic?
- c. In today's world, the traditional reasons for a weekly, "terra" meeting over a meal – communication and fellowship – can be accomplished in other, less expensive and less time-consuming ways, including on-line.
What are the pros and cons of traditional vs. web-based club models?
- d. Growing Rotary involves a two-part strategy that aligns with the priorities of Rotary's new strategic plan:
 - i. Supporting our traditional clubs so they are relevant and attractive to new members while they remain engaging to existing members.
 - ii. Developing new models for a Rotary experience that may appeal to people from underrepresented demographic groups who are either unable or unwilling to be members of traditional clubs.
Have you been asked to support a club that follows an alternative model?
What was the same/what was different about the experience? What did you find most challenging?
- e. Prospective members (or members on the verge of leaving Rotary) may be more likely to be attracted to a club that better accommodates their busy schedule, one that more closely resembles the diversity of their community, or one that supports a cause they are passionate about.
Are there alternative club models you would like to see made available in your District?

2. Supporting new clubs and satellites

- a. Club Models handout: Pair off and consider the question:
What demographic groups are NOT represented in the Rotary clubs in your area? Consider:
 - i. Millennials
 - ii. Parents of young children
 - iii. Immigrants
 - iv. LGBTQ and racial minorities
 - v. Other?
- b. What about Rotary would these groups find particularly attractive? What would be a barrier? What would a club that caters to these groups look like? Where are these demographics to be found?
Think of possible demographic groups in your District that might thrive as Rotarians if the club model were changed.

- c. Discuss Potential Obstacles:
 - i. Lack of support by existing clubs. It's important to remember that new club models are for potential members who have rejected existing clubs for whatever reason (cost, inconvenience, job situation, travel, time of day). In other words, a new club model is unlikely to cannibalize an existing club.
 - ii. Concern that potential new members may turn away from existing clubs. Explain that if the existing club's value proposition is strong, it has nothing to fear.
 - iii. Fear that a new club in the same community will "dilute the brand". Explain that Rotary data shows the opposite – two clubs that offer different culture/club experience actually strengthen the Rotary brand throughout the community.
- d. Discuss ways to mitigate these concerns
 - i. A club may be less concerned about starting a satellite that meets at a different time/less often than starting a full-blown club in its community.
 - ii. A club may be less concerned about change if it has been watching its numbers decrease anyway.

3. Work Session Recap & Evaluation

- a. Have Key Outcomes been covered?
- b. Please be sure to immediately evaluate this session on the MNE PETS app!



CLUB MODELS

Rotary is a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves. The criteria for membership are simple. For Rotary clubs, a member needs to be an adult — or for Rotaract clubs, a person age 18-30 — who demonstrates good character, integrity, and leadership; has a good reputation within their business or profession and community; and willing to serve in the community or have an impact elsewhere in the world. All clubs share similar values and a passion for service, but no two clubs are the same because each community has its own unique needs.

Club Model	Description	Appeals to	Minimum number of charter members
<u>Traditional Rotary Club</u>	Professionals and aspiring leaders who meet regularly for service, connections, and personal growth	People looking for connections, service opportunities, and traditions Learn more at <u>Start a Club</u> .	20
<u>Satellite Club</u>	A Rotary club sponsored by a traditional club but with its own meetings, projects, bylaws, and board	Those who want a club experience or meeting format or time other than what's offered by the traditional clubs in the area Learn more in the <u>Guide to Satellite Clubs</u> .	8
<u>E-Club</u>	A Rotary club that meets primarily online	People who travel frequently, whose schedules make it difficult to meet in person, or who prefer an online experience Learn more about <u>online club meetings</u> .	20
<u>Passport Club</u>	A Rotary club that allows members to attend other Rotary club meetings as long as they attend a specified number of meetings in their own club each year	People who travel frequently, or those who enjoy trying a variety of club experiences and meeting lots of new people Learn more in the <u>Guide to Passport Clubs</u> .	20
<u>Corporate Club</u>	A club whose members (or most of them) work for the same employer	Employees of an organization who want to come together to do good in their community	20
<u>Cause-Based Club</u>	A club whose members are passionate about a particular cause and focus their service efforts in that area	People who want to connect with others while addressing a particular set of problems.	20
<u>Alumni-based Club</u>	A club whose members (or most of them) are former Rotary or Rotary Foundation program participants	People who have participated in Rotary outside of a club	20
<u>Rotaract Club</u>	A club of members ages 18-30 that is sponsored by a Rotary club and often works with that club on projects	Younger people who want to serve their communities, develop leadership and professional skills, and have fun through service. Learn more in the <u>Rotaract Handbook</u> .	n/a

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



Mid-Northeast PETS Presidents-Elect Training Seminar

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PETS 2020 Assistant Governor Work Session Summary AG Role and Responsibilities: New Assistant Governors

March 20, 2020

Key Outcomes:

- Learn and Understand Best Practices by hearing from other AG's from other Districts
- Build stronger relationships with Club Presidents

Relevance:

Assistant Governors not only have a wide variety of responsibilities in their District, those responsibilities vary from District to District. By hearing from other AG's, especially those who are in their 3rd year of service, AG's can broaden their view of their jobs and learn from others how to be more effective. One thing common to all Districts is the responsibility to support and strengthen clubs. The better we are at establishing relationships with Club Leadership, the better we will be at supporting clubs in way that is meaningful to them. As some clubs struggle, perhaps the best way we can help strengthen them is to encourage them to understand and live the Core Values of Rotary.

Resources:

- Assistant Governor Basics courses on MyRotary Learning Center <https://learn.rotary.org/members/learn/catalog>
- Assistant Governor Role & Responsibilities Summary (enclosed)
- Rotary Hierarchy of Need chart (enclosed)

1. Best Practices

In this session we will discuss what our role is as AG, and what we are tasked with by our Districts. By sharing our ideas and how we do our job, we can learn from each other.

2. Understanding our Role and Purpose

Facilitated Instruction –

a. What is the purpose of the District?

Different Districts use Assistant Governors in different ways.

Without speaking to specific tasks:

- What is the larger purpose of the AG and what role does he or she play in your District Leadership?
- To support and strengthen clubs on behalf of the District

b. Responsibilities:

What are your responsibilities to the governor and your assigned clubs?

c. What are the tasks of an Assistant Governor in Your District?

4. Being a More Effective Assistant Governor

a. *Guided Discussion:*

“How Can We Go from Good to Great as an Assistant Governor?”

- Referring to the Hierarchy of Needs Charts in your package, consider and share the area on the hierarchy you feel is most important to your success supporting Clubs and their Presidents.

b. *Large Group Discussion*

“What Is the one best thing you do as AG that helps clubs?”

c. *Large Group Discussion:*

Looking at the answers we received regarding “Best Practice” are there trends or linkages we can identify across all districts?

4. Work Session Recap & Evaluation

- Have Key Outcomes been covered?
- Please be sure to immediately evaluate this session on the MNE PETS app!

Assistant Governor Role & Responsibilities Summary

March 20, 2020

1. General Overview

- a. The Assistant Governor's primary role is to help the Clubs in your Region become more effective & vibrant by assisting the Club Presidents and the District Leadership with their administration. It is an honor to be an AG, be supportive, engaged, respectful and responsive to ensure that your Clubs are successful!
- b. The Assistant Governor's general responsibilities include:
 - Assist to develop/monitor District Goals
 - Facilitate quarterly Club President meetings
 - Visit Clubs regularly to monitor progress
 - Coordinate DG visits to Clubs
 - Promote & participate in all District events
 - Help Clubs develop/post their Goals on RCC
 - Identify/record Club strengths & challenges
 - Help Clubs identify/develop leadership
 - Attend Club special events & activities
 - Assist District to identify/resolve Club needs

2. Pre-PETS Planning (November - February)

- a. Review District Goals with DGE and Program Directors to develop/confirm specific strategies for success.
- b. Review your Region's Clubs with current DG & AG's to identify Club strengths & challenges (RCC Rating).
- c. Confirm that all your Clubs have identified/posted their incoming officers (particularly President).
- d. Review all Leadership Resources (see below) to ensure complete familiarity with all available tools.
- e. Assist DGE with scheduling Pre-PETS meetings and ensure 100% PE attendance from your Region.
- f. Ensure that 100% of your Region's PE's are registered for PETS prior to Pre-PETS.

3. PETS & District Assembly Planning (March – May)

- a. Work with DG & Program Directors to develop agenda for District's PETS & Assembly Programs.
- b. Meet with each of your PE's prior to PETS & Assembly to identify potential training needs/issues.
- c. Coordinate with DG to set preliminary AG & DG visit schedule for review with PE's.
- d. Work with Program Directors to set preliminary schedule for Program events in your Region.
- e. Assist your PE's to set Club Goals and post them on Rotary Club Central (RCC).
- f. Help Clubs identify Committee Chairs for Service, Foundation, Membership, Youth & Communication.
- g. Ensure that Clubs will apply for District Grants prior to deadline.
- h. Set Agenda for PE meeting at PETS, covering Rotary Citation, all Program areas & annual events.
- i. Promote maximum participation in PETS & District Assembly by members from your Clubs.
- j. Review Regional/District Calendar with PE's to ensure maximum participation in all events & activities.

4. Be Ready to Start the New Rotary Year! (June) Confirm that your Clubs have:

- a. Posted their Officers & Goals on ClubRunner/MyRotary/Rotary Club Central.
- b. Updated their online Membership Roster prior to July 1 to ensure correct dues invoice.
- c. Appointed Committee Chairs for Service, Foundation, Membership, Youth & Communication.
- d. Created/updated Club budget, calendar and committee membership lists.

5. District Governor Visit

- a. Meet with Club Leadership prior to DG visit to review needs and progress on Club & District Goals.
- b. Update DG with Club status prior to DG visit and confirm/coordinate all details between Club & DG.
- c. Assist DG in setting agenda for meeting with Club Board immediately prior to Club general meeting.
- d. Prepare to intro DG at meeting, discuss formality with DG (no other speakers/events at meeting).
- e. Document visit and follow-up with DG/Club Leadership on any/all issues raised.

6. Ongoing During Rotary Year

- a. Hold quarterly Presidents meetings, review each Club's progress toward District Goals using RCC reports.
- b. Schedule Regional Service, Foundation, Membership, Youth & Communications Program training events.
- c. Visit each Club regularly to monitor and review progress toward Club & District Goals.
- d. Assist DG & District Leadership in promoting maximum participation in all District Events.
- e. Proactively engage District Leadership to see how you can help ensure Club & District success!

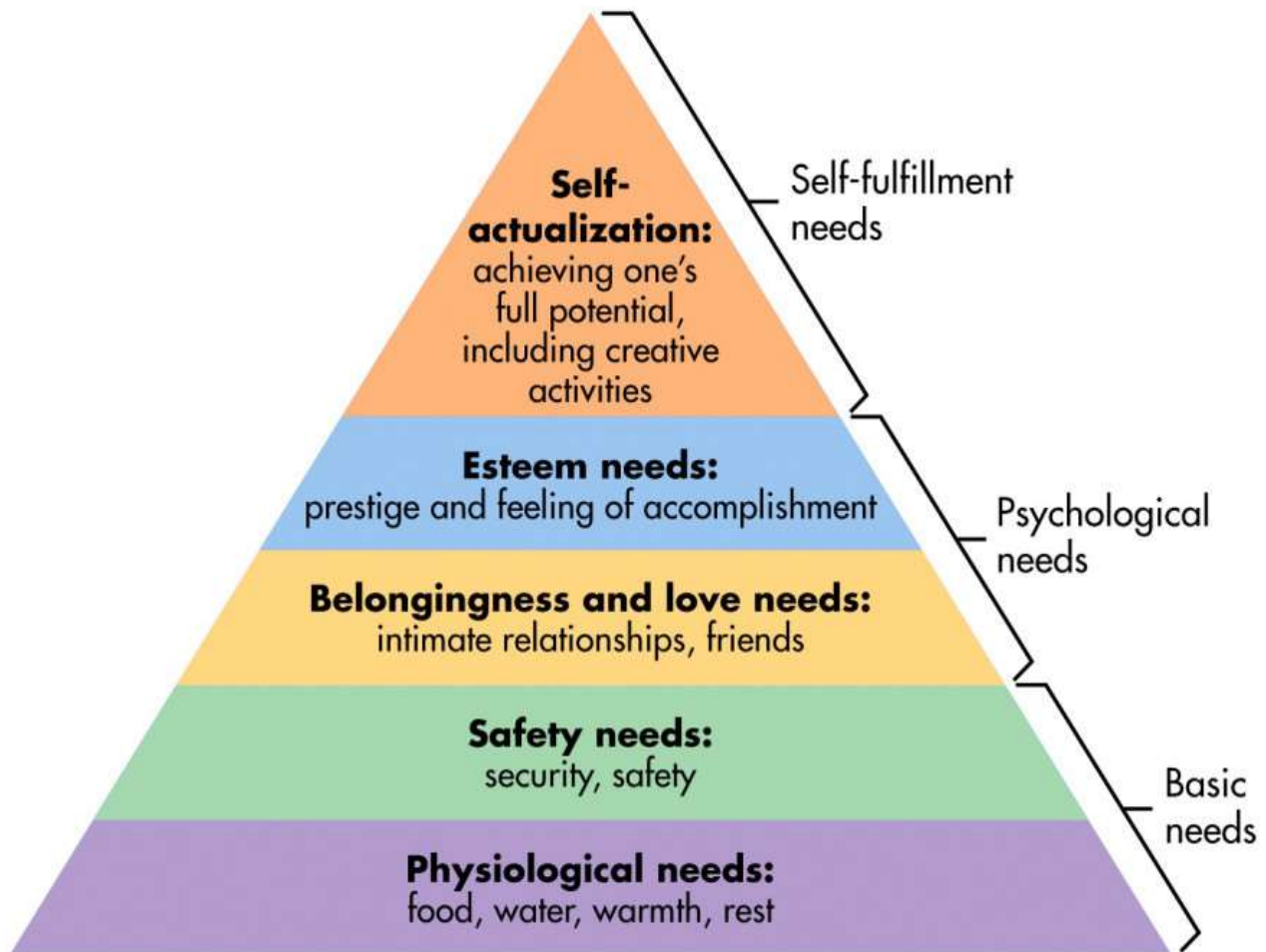
7. Rotary Year End

- a. Assist DG in posting confidential Club rating on RCC, and review Clubs with incoming DG/AG.
- b. Assist incoming Club and District Leadership with smooth transition.
- c. Celebrate your Clubs', and the District's, many successes at District year-end events.

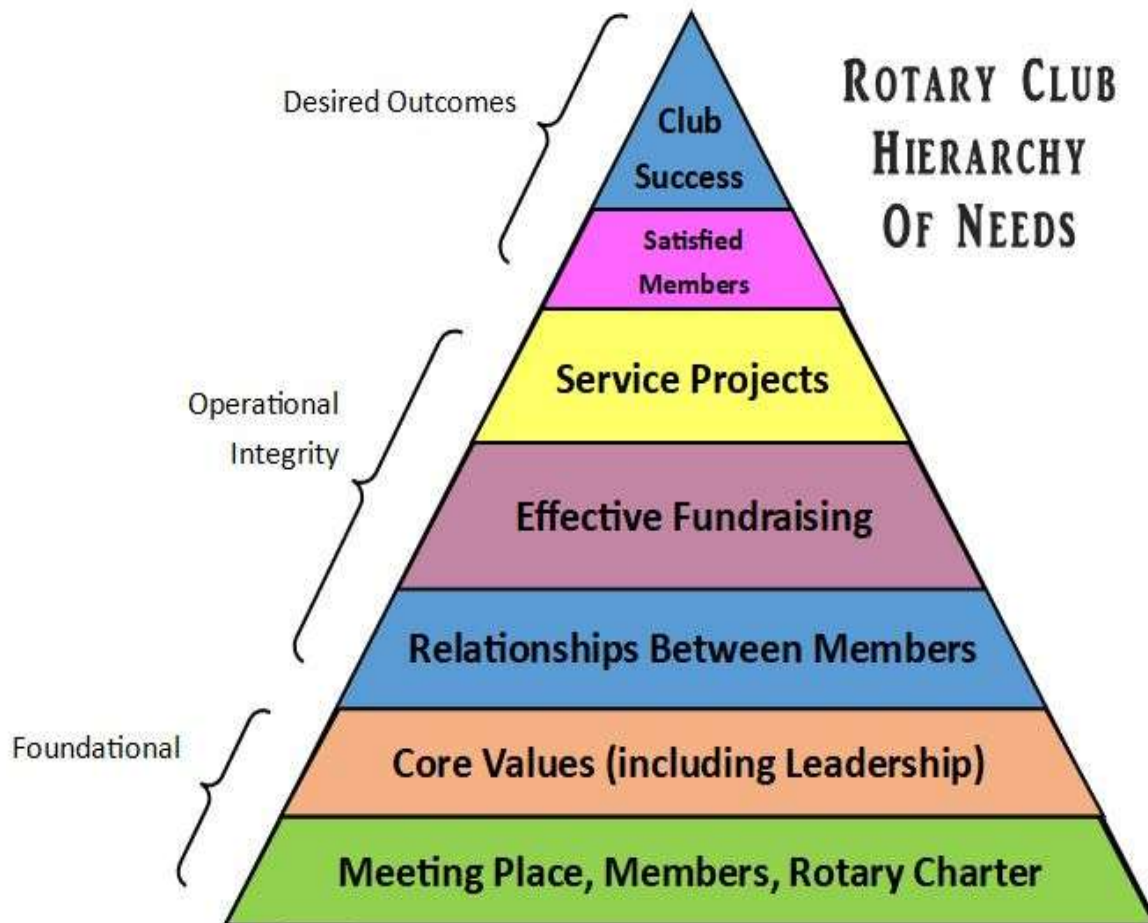
8. Leadership Resources & Tools

- a. MyRotary.org - Assistant Governor page: <https://my.rotary.org/en/learning-reference/learn-role/assistant-governor>
- b. MyRotary.org Learning Center AG and PETS Mid-Northeast courses.
- c. Rotary Citation: New for 2020-21 completely on Rotary Club Central by setting & achieving 13 of 25 goals.
- d. District Leadership Team: The District Governor, senior District leaders, and your AG peers.

Discuss the one element of your role you believe is the key to success



Just as every human has a hierarchy of needs, a healthy Rotary Club also has a hierarchy of needs:



While going through this, stress the fact that it is Rotary's Core Values that define us as Rotarians. Without knowing about, buying into, and living the Core Values, a Rotary Club is just a group of people meeting for lunch and doing service projects. Our Core Values are what differentiate us and make Rotary meaningful for its members and attractive to others.



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PETS 2020 Assistant Governor Work Session Summary Building Stronger Relationships: Experienced Assistant Governors

March 20, 2020

Key Outcomes:

- Learn and Understand Best Practices by hearing from other AG's from other Districts
- Build stronger relationships with Club Presidents

Relevance:

Assistant Governors not only have a wide variety of responsibilities in their District, those responsibilities vary from District to District. By hearing from other AG's, especially those who are in their 3rd year of service, AG's can broaden their view of their jobs and learn from others how to be more effective. One thing common to all Districts is the responsibility to support and strengthen clubs. The better we are at establishing relationships with Club Leadership, the better we will be at supporting clubs in way that is meaningful to them. As some clubs struggle, perhaps the best way we can help strengthen them is to encourage them to understand and live the Core Values of Rotary.

Resources:

- MyRotary Learning Center courses <https://learn.rotary.org/members/learn/catalog>
Essentials of Understanding Conflict Leading Change
Is Your Club Healthy Practicing Flexibility and Innovation
- Rotary Hierarchy of Need chart

1. Benefits of Strong Relationships with Your Presidents

Facilitated Discussion

Your customers are your Club Presidents.

- a. How would you make new customers feel welcome in your business?
- b. How would you treat repeat customers to build better relationships?
- c. What are Benefits of Building a Strong Relationships with Club Presidents?

2. Opportunities to Build a Relationship with a Club President

Facilitated Discussion

- a. When is the Best Time to Begin Building a Strong Relationship with your Club Presidents?
- b. How might you reach out to begin the relationship with a PE?
- c. What District and Club Events Give You Opportunities to Build on Your Relationship with PE's?

3. Tips for Building Relationships

Friendships and relationships are one of the main reasons people join and stay in Rotary. For many Rotarians, being Club President is their first opportunity to build friendships outside their club in the District. As AG, you are their first contact outside their club. Building a strong relationship with your Club Presidents can give them the confidence to begin building relationships outside their club and invite them into District Leadership. Let's share some tips for relationship building. How might we as AG's:

- a. Listen Effectively
- b. Give People Your Time
- c. Accept Differences
- d. Develop Your Communication Skills
- e. Learn to Give and Take Feedback
- f. Develop and Exhibit Empathy

4. Work Session Recap & Evaluation

- a. Have Key Outcomes been covered?
- b. Please be sure to immediately evaluate this session on the MNE PETS app!

PETS 2020 Assistant Governor Work Session Summary

AG Resources

March 20, 2020

Key Outcomes:

- Identify the various people in Rotary who serve as resources to Rotary Club leaders and members.
- Learn what resources are available on the District and Rotary International websites.

Relevance:

As Assistant Governors, you serve as a primary point of contact for questions from Club leaders and members. As such, it is imperative that you are very familiar with the various resources available, whether they are leaders in your District or Rotary International, or are online digital resources such as the MyRotary.org website. There is far too much information available for you to immediately know every answer, but you need to be able to help Club leaders and members efficiently find the information they are seeking.

Resources

See the list of AG Resources and Presidents-Elect Resources enclosed at the end of this document.

1. District Resources

- District website & Social media
- Training events
- Leadership communications
- District leadership team
- District committees

2. Rotary Online Resources

- My Rotary at Rotary.org
- Rotary Club Central
- Learning Center

3. Rotary Support Team

- Club & District Support Representatives
- Rotary Regional Coordinators (via District Governor)

4. Work Session Recap & Evaluation



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Resources: AG Resources Session

District Resources

- Club Runner Online Membership Administration Resources
 - Club and Membership Detail page – data integration
 - Member add and termination
 - Club Executives - Compare and Synchronize
 - District Organization Chart - Assistant Governors - Area

Rotary Online Resources

- My Rotary: <https://my.rotary.org/en>
 - Learning & Reference/
Learn by Role
 - Assistant Governor: <https://my.rotary.org/en/learning-reference/learn-role/assistant-governor>
 - Club President: <https://my.rotary.org/en/learning-reference/learn-role/president>
 - Club Secretary: <https://my.rotary.org/en/learning-reference/learn-role/secretary>
 - Club Treasurer: <https://my.rotary.org/en/learning-reference/learn-role/treasurer>
 - Club Committee: <https://my.rotary.org/en/club-committee>
 - Learn by Topic
 - Membership: <https://my.rotary.org/en/learning-reference/learn-topic/membership#assess>
 - Service Projects: <https://my.rotary.org/en/take-action/develop-projects/project-lifecycle-resources>
 - Public Relations: <https://my.rotary.org/en/learning-reference/learn-topic/public-relations>
 - Youth Programs: <https://www.rotary.org/en/our-programs/youth-programs>
 - Manage/Club & District Administration/Club Administration
 - Club Administration: <https://my.rotary.org/en/manage/club-district-administration/club-administration>
 - Take Action: <https://my.rotary.org/en/take-action>
 - The Rotary Foundation: <https://www.rotary.org/en/about-rotary/rotary-foundation>
 - News & Media
 - Presidential Theme & Rotary Citation: <https://my.rotary.org/en/news-media/office-president/presidential-theme>
 - Rotary Newsletters: <https://my.rotary.org/en/news-media/newsletters>
 - Calendar: <https://my.rotary.org/en/news-media/calendar>
 - Exchange Ideas: <https://my.rotary.org/en/exchange-ideas>
 - Member Center
 - Rotary Brand Center: <https://brandcenter.rotary.org/en-GB>
 - Rotary Shop: <https://shop.rotary.org> illustrate how to obtain hard copy materials “Be a Vibrant Club”
 - Rotary Club Central: <https://rcc.rotary.org>
- Rotary Club Central: <https://rcc.rotary.org>
 - Dashboard + tabs
 - Resources in 7 topics (incl. “How to set Goals”)
 - Goal Center + years
 - Reports in 3 areas
 - Service Activities
- Learning Center courses or downloads: <https://learn.rotary.org/members/learn/catalog>
 - Mid-Northeast PETS Courses
 - Assistant Governor Basics Courses
 - Club President Basics course
 - Club Secretary Basics course
 - Club Treasurer Basics course
 - Club Administration Committee Basics course
 - Membership Committee Basics course
 - Foundation Committee Basics course
 - Service Project Committee Basics course
 - Public Image Committee Basics course
 - Is Your Club Healthy course
 - Practicing Flexibility and Innovation course
 - Best Practices for Engaging Members course
 - Building a Diverse Club course
 - Kick Start Your New Member Orientation
 - Strategies for Attracting New Members course

Rotary Support Team

- Club & District Support Representatives: <https://my.rotary.org/en/contact/representatives>
- Rotary Regional Coordinators (via District Governor): <https://my.rotary.org/en/regional-leaders>



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PETS 2020 Presidents-Elect Resource Summary

March 20, 2020

Club Leadership Resources

* indicates resources also available for download at <https://petsmidnortheast.org>

- My Rotary: <https://my.rotary.org/en>
 - Club President: <https://my.rotary.org/en/learning-reference/learn-role/president>
 - Club Secretary: <https://my.rotary.org/en/learning-reference/learn-role/secretary>
 - Club Treasurer: <https://my.rotary.org/en/learning-reference/learn-role/treasurer>
 - Club Committee: <https://my.rotary.org/en/club-committee>
 - Club Administration: <https://my.rotary.org/en/manage/club-district-administration/club-administration>
 - Club Flexibility: <https://my.rotary.org/en/club-flexibility>
 - CDS Representatives: <https://my.rotary.org/en/contact/representatives>
 - Calendar: <https://my.rotary.org/en/news-media/calendar>
 - Membership Dues: <https://my.rotary.org/en/membership-dues>
 - Rotary International Club Dues Invoice FAQ: <https://my.rotary.org/en/club-invoice-faq>
 - Rotary Brand Center: <https://brandcenter.rotary.org/en-GB>
 - Rotary's Guiding Principles: <https://my.rotary.org/en/guiding-principles>
 - Rotary International's Strategic Plan: <https://my.rotary.org/en/learning-reference/about-rotary/strategic-plan>
 - Rotary Presidential theme resources: <https://my.rotary.org/en/news-media/office-president/presidential-theme>
- Rotary Club Central: <https://rcc.rotary.org>
- Learning Center courses or downloads: <https://learn.rotary.org/members/learn/catalog>
 - Mid-Northeast PETS Courses
 - Lead Your Club – President 2019-22 manual*
 - Be a Vibrant Club brochure*
 - Rotary Basics brochure*
 - Rotary Club Health Check brochure*
 - Strategic Planning Guide
 - Club President Basics course
 - Club Secretary Basics course
 - Club Treasurer Basics course
 - Club Administration Committee Basics course
 - Public Image Committee Basics course
 - Is Your Club Healthy course
 - Practicing Flexibility and Innovation course

Membership Resources

- My Rotary: <https://my.rotary.org/en>
 - Membership: <https://my.rotary.org/en/learning-reference/learn-topic/membership#assess>
 - Engaging Younger Professionals: <https://www.rotary.org/en/engaging-younger-professionals-toolkit>
 - Satellite Clubs: <https://my.rotary.org/en/nofollow/cda-link/208976>
 - Rotary Alumni: <https://my.rotary.org/en/exchange-ideas/club-connections/alumni>
- Learning Center courses or downloads: <https://learn.rotary.org/members/learn/catalog>
 - Mid-Northeast PETS Courses
 - Strengthening Your Membership manual*
 - Introducing New Members to Rotary brochure
 - Club Membership Committee Basics course
 - Best Practices for Engaging Members course
 - Building a Diverse Club course
 - Kick-start Your New Member Orientation
 - Strategies for Attracting New Members course

Service & Rotary Foundation Resources

- My Rotary: <https://my.rotary.org/en>
 - Take Action: <https://my.rotary.org/en/take-action>
 - Our Causes – Areas of Focus: <https://www.rotary.org/en/our-causes>
 - Empower Leaders: <https://my.rotary.org/en/take-action/empower-leaders>
 - Youth Programs: <https://www.rotary.org/en/our-programs/youth-programs>
 - Rotary Grants: <https://www.rotary.org/en/our-programs/grants>
 - Project Lifecycle Resources: <https://my.rotary.org/en/take-action/develop-projects/project-lifecycle-resources>
 - Rotary Showcase: https://map.rotary.org/en/project/pages/project_showcase.aspx
 - Rotary Ideas: <http://ideas.rotary.org/>
 - Donor Recognition: <https://www.rotary.org/en/donate/recognition>
- Learning Center courses or downloads: <https://learn.rotary.org/members/learn/catalog>
 - Mid-Northeast PETS Courses
 - Club Public Image Committee Basics course
 - Areas of Focus course
 - Rotary Foundation Reference Guide*
 - Club Foundation Committee Basics course
 - Guide to Global Grants