

Rotary Carolinas' PETS



Assistant Governor Curriculum Materials



CREATE HOPE
in the **WORLD**

March 16-18, 2023

Assistant Governor Discussion Materials

	<i>Page</i>
Learning Objectives	2
The Role of the Assistant Governor	3
Characteristics of a Good AG	4
Engagement with Clubs	5
Assistance w/Membership & Public Image	6
Leadership Matters and TRF	9
Resources	12

All materials utilized or referred to at Carolinas' PETS are available: www.carolinaspets.org



THE ROLE OF THE ASSISTANT GOVERNOR

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

Official Responsibilities

- Visit your clubs regularly. Discuss their concerns & needs plus provide information, resources, and advice that will allow them to be more attractive, diverse, and successful.
- Promote the best practices recommended and help club leaders implement those practices. Motivate incoming presidents and encourage club leadership continuity.
- Keep the governor up to date on each club's progress and identify areas that may need support. Help clubs reach their potential.
- Help club leaders prepare for the governor's official visit and encourage involvement in district activities & training.
- Monitor the progress of your clubs toward their goals. Use [Rotary Club Central](#) to make sure your clubs are on track with their goals and achievements in areas such as membership, service initiatives, and giving to The Rotary Foundation. Collaborate with club leaders regarding their strategic planning process.

How to prepare

Become familiar with Rotary initiatives, policies, and resources

Help incoming club presidents assess their clubs and develop club goals

Attend the district training assembly and presidents-elect training seminar (PETS)

Rotary's Online Tools

Track each club's goals and progress in [Rotary Club Central](#)

Take the AG courses in the [Learning Center](#)

Rotary support

District governor and district committee leaders

[Regional Coordinators](#)



CHARACTERISTICS OF A GOOD AG

The responsibilities of an Assistant Governor...

Expectations of an Assistant Governor...

Key resources within the District for the clubs...



ASSISTANT GOVERNOR SESSION, continued

Engagement with clubs...

Leading interactive sessions...

Promotion of District events...



ASSISTANT GOVERNOR SESSION, continued

Assistance with a Membership Action Plan...

Assistance with Public Image...

Communication with clubs and creating club interaction...



ASSISTANT GOVERNOR SESSION, continued



ROTARY IS A MEMBERSHIP ORGANIZATION!

Membership Goal Setting Worksheet

This worksheet will help you set your membership growth goals and calculate the number of new members needed to reach your goal. ***Be intentional and focus on Attrition & Attraction!***

My club's Annual Attrition Rate (3-year average) _____%

My club's Annual Attraction Rate (3-year average) _____%

My club's Annual Net Growth Rate _____%

Success targets include:

- Attrition less than 15% (July 1 membership x .15)
- Attraction greater than 20% (July 1 membership x .20)

The problem we need to solve is:

- Low Retention (Attrition Rate exceeds 15%)
- Insufficient New Member Attraction
 - Attraction Rate is lower than our Attrition Rate or Below 20%
- Neither; we need to build on our:
 - current membership growth culture and
 - strategies

Club Membership Tools, Forms, Checklists, Reports, Videos and more:

rizon33-34.org/club-membership-committee/



MEMBERSHIP ENGAGEMENT, GROWTH, AND DEVELOPMENT, continued

Membership Goal Setting Worksheet, continued

Actual Club Data can be researched at: RIZones33-34.org

Login and search for Zone33MGI; then find your District and Club

Membership History:

Club Year Members at start of year (July 1)

2021-22 _____

2020-21 _____

2019-20 _____

2018-19 _____

2017-18 _____

2023-2024 Membership Goal Setting:

Starting Membership July 1, 2022 _____

Current Membership Jan. 5, 2023 _____

Estimated Membership July 1, 2023 _____ a

*Membership Goal July 1, 2024 _____ b

Net growth (b-a=c) _____ c

Average Annual Attrition to Replace _____ d

New Members Needed (c+d) _____ *



ASSISTANT GOVERNOR SESSION, continued

Protocol for DG Visit...

Dealing with conflict and potential landmines...

Promote The Rotary Foundation...



ASSISTANT GOVERNOR SESSION, continued

FOUNDATION GOAL SETTING

ANNUAL FUND

All necessary data for the goal-setting process described below is on the **Club Fundraising Analysis**, available from My Rotary – Reports — Rotary Foundation Giving — District Reports

- Consider the club's historical giving levels
 - Per capita Annual Fund (based on July 1 membership)
 - Total Giving (based on Rotary year)
- If the club's per capita giving is below the District average:
 - Set the goal at the District average OR
 - Close the gap by half
- If the club's per capita giving exceeds the District average:
 - Take the best of the past 5 years' per capita and beat it by \$1.
 - The club's Total Giving goal for the Annual Fund is the per capita goal times your estimated July 1 membership

POLIO PLUS

- Take the best of the club's past 5 years Polio contributions and beat it by \$1
- Encourage participation in World Polio Day to create publicity and education
- Encourage a Polio Plus fund-raising campaign or project for the club to raise funds though the local community
- Promote the Polio Plus Society to your clubs

ASSISTANT GOVERNOR SESSION, continued



Discussion Leader
Assistant Governors
Lee Dixon
Lee@coastalarchitecture.net

RESOURCES

Rotary International

Rotary.org	
my.rotary.org/en	
brandcenter.rotary.org	My Rotary Rotary Brand Center
learn.rotary.org	Learning Center
my.rotary.org/en/learning-reference/learn-topic/membership	Membership Club Leadership Plan
Be a Vibrant Club [PDF materials]	Public Relations
Public Relations	TRF Resources
Rotary Foundation	Documents
Governance	

Carolinas' PETS

carolinaspets.org/pages/resources/index Resources

RI Zone 33 Website

rizones33-34.org Resource Libraries | District Leader

Your District's Website

Your Club's Website

Rotary Carolinas' PETS



Arden, Asheville, Asheville Breakfast, Asheville-Biltmore, Asheville-Metro, Asheville-South, Asheville-West, Assistant Governor, Avery County, Black Mountain, Blowing Rock, Boone, Boone Sunrise, Brevard, Bryson City, Burke-Sunrise, Burnsville, Caldwell County, Cashiers Valley, Catawba Valley (Conover), Clay County, Denver/Lake Norman, Discussion Leader, District Governor 2021-2022, District Governor 2022-2023, District Governor 2023-2024, District

Secretary, Franklin, Franklin Daybreak, Granite Falls, Haywood County (Canton), Hendersonville, Hendersonville-Four Seasons, Hickory, Hickory Sunrise, Highlands, Highlands-Mountaintop, Lake Hickory (Hickory), Lenoir, Lincolnton, Lincolnton-Sunrise, Madison County, Marion, Morganton, Murphy, Newton-Conover, PETS Staff, Pisgah Forest, Sherrills Ford-Terrell, Spruce Pine, Sylva, Tryon, Valdese, Waynesville, Waynesville-Sunrise, Albemarle, Alleghany County, Alleghany County Evening, Ashe County, Ballantyne, Belmont, Boiling Springs Area, Cabarrus County, Charlotte, Charlotte Dilworth South End, Charlotte International, Charlotte North, Charlotte Providence, Charlotte South, Charlotte South Park, Charlotte Top-of-the-Week, Charlotte West, Cherryville, China Grove, Concord, Concord Afton-Sunset, Davidson, Gaston Breakfast, Gastonia, Gastonia East, Gastonia Evening, Greater Statesville, Hamlet, Huntersville Happy Hour, Kannapolis, Kings Mountain, Lake Norman-Huntersville, Marshville, Matthews, Mecklenburg County-South, Monroe, Monroe-Union Breakfast, Mooresville, Mooresville-Lake Norman, Mount Holly, North Mecklenburg County, North Wilkesboro, Rockingham, Rowan County, Salisbury, Shelby, Shelby Breakfast, Southwest Cabarrus, Statesville, Statesville/Fourth Creek, Taylorsville, The Queen City, Top of the Lake-Mooresville, Troutman, Union West (Indian Trail), Wadesboro, Waxhaw-Weddington, West Stanly, Alamance (Burlington), Archdale-Trinity, Asheboro, Burlington, Carthage, Clemmons, Crescent, East Greensboro, Eden, Furnitureland, Gate City, Global Trekkers, Graham, Greensboro, Greensboro Airport, Guilford, High Point, Jamestown, Jonesboro, Kernersville, King, Lexington, Liberty, Madison-Mayodan, Mebane, Midstate, Mocksville, Mount Airy, Pinehurst, Pittsboro, Randolph, Reidsville, Reynolda, Sandhills, Sanford, Siler City, Southern Guilford, Southern Pines, Stoneville, Stratford, Summit, Surry Sunrise, Thomasville, Troy, Western Forsyth, Winston-Salem, Yadkin Valley, Yadkinville, Angier, Apex, Apex Sunrise, Capital City, Cary, Cary Central, Cary MacGregor, Cary-Kildaire, Cary-Page, Central Johnston County, Chapel Hill, Chapel Hill-Carrboro Sunrise, Clayton, Clayton Mid-Day, Cleveland School, Crabtree, Dunn, Dunn-Erwin, Durham, Durham Sunrise, East Chapel Hill, E-Club of D7710, Fuquay-Varina, Fuquay-Varina Downtown, Garner, Garner Mid-Day, Henderson, Hillsborough, Holly Springs, Knightdale, Lillington, Morrisville, North Raleigh, Oxford, Raleigh, Raleigh Midtown, Raleigh/Cary Parkside, Research Triangle Park, Roxboro, South Granville County, Southwest Durham, Wake Forest, Wakefield/Wake Forest, Warrenton, Wendell, West Raleigh, Zebulon, Ahoskie, Ayden, Belhaven-Pantego, Bethel, Columbia, Currituck Wild Goose, Edenton, Elizabeth City, Elizabeth City Morning, Elm City, Farmville, First Flight (Kill Devil Hills), Fremont, Goldsboro, Goldsboro-Three Eagles, Greater Wilson, Greenville, Greenville (Morning), Greenville Noon, Havelock-Cherry Point, Hertford, Kitty Hawk, Manteo, Mount Olive, Murfreesboro, Nash-Rocky Mount, New Bern, New Bern-Breakfast, North Banks (Kill Devil Hills), Oriental, Roanoke Rapids, Rocky Mount, Tarboro, Vanceboro, Washington, Washington (Noon), Williamston, Wilson, Windsor, Beaufort-Ole Towne, Bladenboro, Burgaw, Clinton, Clinton-Sampson County, Coastal Pender, District Governor 2022-2023, Duplin, Elizabethtown, Fair Bluff, Fairmont, Fayetteville, Jacksonville, Jacksonville Breakfast, Jacksonville South, Kinston, La Grange, Laurinburg, Leland Area, Liberty Point, Lumberton, Maysville, Morehead City, Morehead City After Hours, Morehead City Navigators, Morehead City-Lookout, Morehead City-Noon, Morehead City-Soundview, New River (Onslow County), Newport, Passport, Pollocksville, Red Springs, Richlands, Shallotte, Sneads Ferry, South Brunswick Islands, Southport, Southport Evening, Surf City, Swansboro, Trenton, Wallace, West Fayetteville, Whiteville, Wilmington, Wilmington Cape Fear, Wilmington Central, Wilmington East, Wilmington South, Wilmington West, Abbeville, Aiken, Aiken Sunrise, Anderson, Batesburg-Leesville, Blacksburg, Chester, Clemson, Clemson-Calhoun, Clinton, Clover, District Administrator, District Trainer, Easley, E-Club of the Carolinas, Emerald City, Fort Mill, Fountain Inn, Gaffney, Golden Strip Sunrise, Greater Anderson, Greenville, Greenville Breakfast, Greenville City Center, Greenwood, Guest of District Governor, Indian Land, Indian Land Lunch, Inman, Lake Wylie, Lancaster, Lancaster Breakfast, Laurens, Mauldin, Newberry, North Augusta, North Spartanburg, Pickens, Pleasantburg, Reedy River Greenville, Rock Hill, Seneca, Seneca Golden Corner, Simpsonville, Spartan West, Spartanburg, The Foothills, Travelers Rest, Twin City Batesburg-Leesville, Union, Walhalla, Westminster, Winnsboro, York, Manning [SC], Rumford - River Valley [ME], Exhibitor, Guest Speaker, RI Director, RI Past Director, RI Past Vice President, RI Staff - Club & District Support, RI Staff - Membership Officer, RI Staff - Rotary Foundation, RI Staff - Service & Engagement, Rotary Coordinator, Rotary Foundation Alumni, Rotary Public Image Coordinator, Rotary Regional Foundation Coordinator, Rotary Regional Membership Coordinator, Sergeant-At-Arms, Vendors