The 2020 International Assembly Leader’s Guide is designed to help you lead discussions on the topics chosen by the president-elect, the moderator, and the 2020 International Assembly Committee and its advisers. The guide provides a detailed outline of the content to be covered.

The district governor-elect workbook, which each governor-elect receives on the first day of the assembly, is a companion to this leader’s guide. You will also receive a copy.

We are pleased to welcome a select group of Rotaract participants to this year’s International Assembly. Rotaractors will participate in sessions with governors-elect on Thursday and Friday. The workbook Rotaractors receive contains identical breakout session pages as those found in the governors-elect workbook. The content of this guide will help you lead productive and inclusive sessions with all participants.

You will facilitate discussions in which participants are asked to exchange ideas with fellow leaders or complete activities in their workbooks. These discussions and activities give them a chance to learn from each other and share their knowledge and experiences. Although you will need to be flexible and sensitive to group dynamics during discussions, we ask that you cover all of the content in this guide for each session to ensure that all participants receive standardized training. Use the questions provided in your leader’s guide to direct the discussion.

Sessions are conducted by RI training leaders unless otherwise noted. If you have any questions about the content, please ask them at the leader’s seminar in San Diego.
How to Use the Leader’s Guide

The guide for each session starts with the following components:

**Learning objectives**
This lists what each participant should learn during the session. Review the learning objectives with the participants at the start and end of each session. These objectives are also listed in the workbook.

**Workbook**
The pages and topics in the workbook that will be referred to during the session are listed.

**Timeline**
This lists the sections planned for the session and how much time to spend on each section. This is helpful for planning how to cover all the information in the allotted time.

**Flip charts**
This lists any flip charts that should be prepared in advance of each session.

**Closing each session**
At the end of each session, time is allotted for you to review the learning objectives and discuss any issues that were not covered during the session. There is also time allotted for the participants to complete an activity in their workbooks. In the final session of each day, additional time is allotted for each participant to fill out a daily evaluation. It is important that each participant complete this daily evaluation form so that we can improve future assembly programs.

You were provided with a supplementary document called the **Session Outline Template**. Some training leaders find this template useful in planning their sessions. You can use it to record the times and key points of each session’s sections in the leader’s guide. This may help you stay on track during each session and cover all the material in the allotted time. Additional hard copies will be available during the leader’s seminar.
INSIDE THE LEADER’S GUIDE

Each session in the leader’s guide contains these standard components.

TITLE OF SECTION

Flip Chart

11:30-11:50

Time lists when you should start and end the section.

TRAINING LEADER’S NOTES

- Refer to workbook page XX.
- Additional notes or directions for training leader

Training leader’s notes cite specific pages of the workbook related to the material in the leader’s guide. These notes also include information, suggestions, and directions for leading each section.

KEY POINTS

- Key Point 1
- Key Point 2

Discussion questions encourage group discussion about a key concept. These can be shared with the group in your own words.

Discussion question 1?

Discussion question 2?

- Sample response 1
- Sample response 2

Sample responses include some common examples of answers that participants might give to a discussion question. Use the sample responses to encourage discussion if participants are having a difficult time answering a question. You do not have to share all the sample responses with participants.

Flip chart icon lets you know what flip charts to prepare. Rotary will provide blank flip charts in San Diego.

Key points are important concepts you should be sure to cover. Share them with the group in your own words.

2020 International Assembly Leader's Guide
Introduction

3
Leading With Vision
Engaging Young Leaders
Innovating New Club Models*
Doing Good in the World
Increasing Our Foundation’s Impact
Understanding Your Role and Financial Responsibilities*
(led by Club and District Support staff)
Creating a Positive and Safe Culture*
Growing Rotary
Promoting Rotary
Leading Change
Planning for Action
Regional Review Sessions*

*Sessions are not led by training leaders, so leader’s guide pages are not included in this guide.
Date: Monday, 20 January 2020
Session time: 11:00-12:30
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:

1. Use the 2020-21 presidential theme to inspire clubs to adopt Rotary’s vision.
2. Plan how to use goal setting to strengthen clubs.
3. Leverage the district structure to successfully balance work, life, and Rotary.

WORKBOOK

<table>
<thead>
<tr>
<th>Page</th>
<th>Learning Objectives and Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page</td>
<td>2020-21 Presidential Theme Bag and Gifts</td>
</tr>
<tr>
<td>Page</td>
<td>Rotary’s Past and Future</td>
</tr>
<tr>
<td>Page</td>
<td>Goal Setting Helps Grow Rotary</td>
</tr>
<tr>
<td>Page</td>
<td>Finding Balance</td>
</tr>
<tr>
<td>Page</td>
<td>Key Messages for 2020-21</td>
</tr>
</tbody>
</table>

TIMELINE

<table>
<thead>
<tr>
<th>Introduction</th>
<th>11:00 (10 min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rotary’s Past and Future</td>
<td>11:10 (20 min.)</td>
</tr>
<tr>
<td>Goal Setting Helps Grow Rotary</td>
<td>11:30 (30 min.)</td>
</tr>
<tr>
<td>Finding Balance</td>
<td>12:00 (20 min.)</td>
</tr>
<tr>
<td>Review and Key Messages</td>
<td>12:20 (10 min.)</td>
</tr>
</tbody>
</table>
FLIP CHARTS

Prepare a flip chart with the session title, the first page number of this session’s worksheet in the governor-elect workbook, and your name and country.

Prepare a flip chart with the 2020-21 presidential theme written in large letters.

TRAINING LEADER’S NOTES

– Workbooks and tent cards have been placed at participants’ seats before the session.

– Participants’ seats are assigned with consideration to language ability, physical challenges, and more. Please do not rearrange them.
INTRODUCTION

11:00-11:10

Session title

TRAINING LEADER’S NOTES

− Welcome governors-elect to the 2020 International Assembly.
− Briefly introduce yourself.
− Explain the role of the training leader and emphasize the importance of governor-elect participation.
− Ask governors-elect to introduce themselves by stating their name, district, and country.
− Refer to the governor-elect workbook.
− Ask governors-elect to write their names and districts on their workbooks in case they are lost or misplaced during the week.
− Encourage governors-elect to use the space in the beginning of their workbooks to record the names and district numbers of classmates. Encourage participants to use the 2020-21 Leadership Directory to find contact information for their classmates.

KEY POINTS

− You should use the workbook as a tool during this week’s sessions to write notes and to review important resources.
− You can download an interactive PDF of the workbook to access resources and take notes electronically.
− You should also download the Rotary Events mobile app by scanning the back of your badge. The app offers program details, maps, and networking opportunities.
TRAINING LEADER’S NOTES

– Refer to workbook page 5, Learning Objectives and Resources.
– Review the learning objectives.
– Let governors-elect know that at the end of each session they will be asked to select one of the learning objectives, write a goal, and develop a key message for communicating that goal to clubs. They will be asked to use these notes to complete an activity in the last session.
– Note that there are resources listed in the beginning of each session, and a list of relevant links located at the back of the workbook that can be accessed online using the PDF version of the workbook.
– Refer to workbook page 5, 2020-21 Presidential Theme Bag and Gifts.
– Ask governors-elect to check their bags to make sure they have all the items listed in the workbook.
– Encourage any participant who is missing an item to visit the Assembly Office after the session for a replacement.
– Let the governors-elect know that the Rotary Resource Center at the assembly has additional theme ties and scarves available to those who donate $150 to The Rotary Foundation.
What are your first reactions to the theme?

**KEY POINT**

- The theme helps communicate the president-elect’s vision and goals for the year and brings Rotarians together around a common idea.

What are Rotary’s core values? And how does the theme communicate these values?

How are our core values evident in Rotary today?
TRAINING LEADER’S NOTES

– Refer to workbook Appendix 1, Rotary’s Strategic Priorities and Objectives.
– Remind governors-elect that they discussed these priorities and objectives at GETS, focusing on opportunities and challenges the new strategic plan might present in their districts.
– Allow 1-2 minutes to review.
– Ask participants to form groups of two or three and respond to the following scenario on page 6 of the workbook:

  At an event early in your governor year, a Rotarian tells you, “This new vision statement and strategic priorities take Rotary in the wrong direction! I don’t like it. What happened to our core values?”

– Allow 5 minutes for groups to develop their responses and then ask a few pairs to share, as time allows.

KEY POINTS

• Rotary’s core values have always been at the center of our organization and still inspire our members, our clubs, and our strategic priorities.
• Rotary’s strategic plan is our organization’s roadmap — it guides the actions of Rotary at every level.
• Some Rotarians may find it challenging to adapt to new strategic priorities. We’ll discuss change management on Friday.
How do you plan to help clubs understand and support Rotary’s new strategic priorities?

KEY POINTS

- Our new strategic plan is a corporate roadmap for Rotary International and The Rotary Foundation.
- Implementation will be different in every club.
- Club leaders need to think about what works best and is needed in their club, community, or region.
- It is important for the governor to be able to communicate the priorities and objectives of the strategic plan in their own words and in ways that inspire club leaders.
- You will develop key messages for communicating the priorities and objectives of the strategic plan throughout the week.
GOAL SETTING HELPS GROW ROTARY

11:30-12:00

Rotary’s priorities will direct our work over the next five years. How do we get started?

KEY POINTS

• Incremental progress at the club level moves the whole organization closer to its goals.
• If clubs pursue activities and participate in programs that their members are passionate about, the club will help us achieve our vision.
• Governors should work with clubs on best practices for increasing our impact, expanding our reach, enhancing participant engagement, and increasing our ability to adapt.
How does goal setting help us achieve Rotary’s strategic priorities and objectives?

KEY POINTS

• Clubs in your district may have pursued the Rotary Citation in the past; however, in 2020-21, we’re taking a new approach.

• To shift the focus from achieving the citation to making progress toward goals, this year we’ll focus on clubs setting their goals in Rotary Club Central and working to achieve those goals.

• It’s our hope that as clubs set their own goals, they’ll choose goals that are more meaningful and effective.

• Clubs should consider the citation to be a recognition of their great work rather than a driver of their priorities for the year.

• There is no longer a citation brochure.

• You can ask questions about Rotary Club Central at the technology labs during the assembly.
How will you promote the use of Rotary Club Central to clubs? How will you support their progress toward achieving their goals?
Who has already developed a calendar of trainings, meetings, and potential club visits for their governor year?

KEY POINTS

- Supporting clubs is time-intensive, especially in large districts or for governors who work full time.
- The governor year can be a challenging time for Rotarians to balance work, family, and Rotary.
- A strong district leadership team with a plan for sharing district responsibilities is one way to help navigate work-life balance.

TRAINING LEADER’S NOTES

- Refer to workbook page 8, Finding Balance.
- Ask participants to form groups of two or three and review the following questions in their workbook:
  - How often will you meet with your district leadership team to discuss how you’ll share tasks and measure the progress on those tasks?
  - What tasks and projects can committee chairs manage?
  - How can you use Rotary Club Central to help you in your role?
  - What new ideas do you have for leveraging assistant governors to manage your workload more effectively?
- Allow 3-5 minutes for discussion.
- Ask governors-elect to share what they discussed.

What other ideas do you have to balance work, life, and Rotary in the year ahead?
**TRAINING LEADER’S NOTES**

- Refer to workbook page 67, Key Messages for 2020-21, found in the session Planning for Action.
- Allow 1-2 minutes for participants to read the instructions for Key Messages for 2020-21.
- Emphasize that at the end of each session, governors-elect should choose a learning objective and write a goal that relates to it.
- Give the participants time to write down their goal. After they have finished, have them consider the strategic priority that relates to their goal and develop key messages to take back to clubs to communicate that goal.
- Explain that they should be ready to discuss their goals and key messages for the coming year during Friday’s session, Planning for Action.

Why is it important to develop clear key messages about your priorities and goals?

What opportunities do you have for communicating with your clubs in the coming year?
## TRAINING LEADER’S NOTES

- Refer to workbook page 68, Key Messages for 2020-21, found in the session Planning for Action.

- Ask participants to choose a learning objective from this session in their workbooks and write a goal. Remind them that this goal does not need to be final and can continue to develop throughout the week.

- Encourage participants to complete the next steps of the activity if time allows. If time does not allow, encourage participants to complete the activity for this session this week.

- Make sure that all questions from the discussion have been answered.

- Review the learning objectives to ensure that all topics were covered sufficiently.

- Thank participants.
Date: Monday, 20 January 2020
Session time: 16:15-17:45
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:
1. Describe the value of engaging young leaders in Rotary.
2. Identify strategies to communicate across generations.
3. Promote the value of a more inclusive organization.

WORKBOOK

Page 9 Learning Objectives and Resources
Page 10 Emerging Leaders
Page 12 Communicating Across Generations
Page 13 What Rotaractors Want
Page 14 A More Inclusive Rotary
Page 69 Key Messages for 2020-21

TIMELINE

<table>
<thead>
<tr>
<th>Event</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>16:15 (5 min.)</td>
</tr>
<tr>
<td>Emerging Leaders</td>
<td>16:20 (30 min.)</td>
</tr>
<tr>
<td>Communicating Across Generations</td>
<td>16:50 (25 min.)</td>
</tr>
<tr>
<td>A More Inclusive Rotary</td>
<td>17:15 (15 min.)</td>
</tr>
<tr>
<td>Review and Key Messages</td>
<td>17:30 (10 min.)</td>
</tr>
<tr>
<td>Evaluation</td>
<td>17:40 (5 min.)</td>
</tr>
</tbody>
</table>
FLIP CHART

Prepare a flip chart with the session title, the first page number of this session’s worksheet in the governor-elect workbook, and your name and country.

INTRODUCTION

Session title

16:15-16:20

TRAINING LEADER’S NOTES

- Refer to workbook page 9, Learning Objectives and Resources.
- Welcome governors-elect and introduce yourself.
- Ask governors-elect to state their name and country.
- Review the learning objectives.
- Remind governors-elect to take notes in their workbooks.
- Refer to the list of resources in the workbook.
Does your district struggle to engage young leaders in any of these programs? Do you know why?

What is the goal of engaging young leaders in Rotary? Why should this be a focus in your district?

KEY POINTS

- As one of Rotary’s five Avenues of Service, Youth Service recognizes the importance of empowering youth and young professionals through leadership development programs.
- When we bring young people into Rotary, we create future leaders and teach leadership skills, empathy, the value of diversity, and service orientation.
- Young people are ready to serve and can provide immediate and lasting contributions and solutions to our areas of focus.
How can Rotarians collaborate with young leaders to achieve their shared goals?

– The work we do together with young leaders provides current and prospective members with new opportunities for personal connections.
– This work engages Rotarians interested in using their skills, interests, and connections in service to young people or alongside young people.
– Young leaders bring new ideas to clubs, and help clubs build a culture of innovation.
– Young leaders are eager to take on leadership roles and take action related to causes they care about.

Has anyone supported a group of young people who are leading or organizing their own project or event? How did you support them?

<table>
<thead>
<tr>
<th>TRAINING LEADER’S NOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer to workbook Appendix 1, Rotary’s Strategic Priorities and Objectives.</td>
</tr>
</tbody>
</table>

What role can young leaders play in supporting the priorities of Rotary’s strategic plan?
Do you have any members of your club that are in Generation Z, or does your district have programs that support members of Generation Z?

KEY POINTS

- Generational differences between people can be extremely difficult to overcome.
- Rotaractors will join us for programming this week. Rotaractors are between ages 18 and 30, meaning they could be Millennials or part of Generation Z.

What do you expect from working with members of younger generations?
Do these findings change the ways in which you plan to engage and work with Rotaractors?

TRAINING LEADER’S NOTES

- Refer to workbook page 13, What Rotaractors Want.
- Allow 1-2 minutes for governors-elect to review these results from a recent survey of almost 6,000 Rotaractors.
- Ask governors-elect to reflect on their own Rotary experience and to think about what characteristics each generational group might have in common.

- Refer to workbook page 13.
- Ask governors-elect to form pairs and spend 3-5 minutes discussing how they can improve intergenerational communication in their district.
- Ask participants to share what they discussed.
- Remind them to take notes in their workbooks.
How can you help improve intergenerational collaboration in your district?

- Create mentorship programs where both parties benefit.
- Build intergenerational committees or project teams.
- Encourage club presidents to assess the interests of club members and work to support them.
- Include Interactors and Rotaractors in training events.
- Ask Rotaractors to fill district leadership roles, since they can now be appointed to these leadership opportunities.

How can intergenerational collaboration strengthen your district?
A MORE INCLUSIVE ROTARY  17:15-17:30

What barriers might your clubs experience in attracting young leaders to Rotary or Rotary programs?

- Our club practices might not be something younger people enjoy (singing, Happy Dollars, reciting The Four-Way Test, etc.).
- Our club currently doesn’t have any service projects.
- Our club doesn’t offer leadership development opportunities.
- Our club doesn’t include any members under 50.
- Our club meeting time doesn’t appeal to younger people.
- Our club assumes young people can’t be strong leaders.

TRAINING LEADER’S NOTES

- Refer to workbook page 14, A More Inclusive Rotary.
- Allow 1-2 minutes for governors-elect to review Rotary’s newly adopted Diversity, Equity, and Inclusion Statement found in their workbooks.

Why is it important to be an inclusive organization?

KEY POINTS

• Rotary clubs should reflect the diversity of their communities.
• Younger generations seek out diverse environments and experiences.
• Rotarians are more engaged in Rotary when they can participate in events and service projects with non-Rotarian friends and family members.

What steps can you take in the coming year to engage young leaders and attract young professionals?

KEY POINTS

• Foster a meaningful relationship between young leaders and Rotary so they will want to stay involved.
• Invite Interactors, Rotaractors, and their friends to participate in service projects in ways that use their leadership skills.
• Explore flexible club models that may appeal to younger people or other underrepresented groups.
• Develop opportunities for younger professionals to participate in Rotary with their families.
REVIEW AND KEY MESSAGES  17:30-17:40

TRAINING LEADER’S NOTES

- Refer to workbook page 69, Key Messages for 2020-21, found in the session Planning for Action.
- Ask governors-elect to record an action item from this session.
- Make sure that all discussion questions have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

EVALUATION  17:40-17:45

TRAINING LEADER’S NOTE

Daily evaluation forms will be distributed and collected at the end of the session.
INNOVATING NEW CLUB MODELS

A self-directed session for governors-elect
Selected training leaders will be assigned as support.

Date: Tuesday, 21 January 2020
Session time: 10:30-12:00
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:
1. Describe the opportunities clubs have to adapt to the needs of current and potential members.
2. Recognize the value of all available club models.
3. Imagine and form new clubs to support the needs of their community.
4. Appreciate how to serve a variety of people with different needs.

WORKBOOK

Page 15 Learning Objectives and Resources
Worksheets will be distributed at the session.
Date: Tuesday, 21 January 2020
Session time: 15:45-17:00
Duration: 75 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:
1. Describe the elements of successful projects.
2. Use the district resource network for better projects.
3. Understand the role of the governor in projects and global grants.

WORKBOOK

Page 16 Learning Objectives and Resources
Page 17 From Local to Global
Page 20 Areas of Focus
Page 20 Global Grants
Page 71 Key Messages for 2020-21

TIMELINE

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>15:45 (5 min.)</td>
</tr>
<tr>
<td>From Local to Global</td>
<td>15:50 (10 min.)</td>
</tr>
<tr>
<td>Building Better Projects</td>
<td>16:00 (30 min.)</td>
</tr>
<tr>
<td>Global Grants</td>
<td>16:30 (15 min.)</td>
</tr>
<tr>
<td>Review and Key Messages</td>
<td>16:45 (10 min.)</td>
</tr>
<tr>
<td>Evaluation</td>
<td>16:55 (5 min.)</td>
</tr>
</tbody>
</table>
FLIP CHART

Prepare a flip chart with the session title, the first page number of this session’s worksheet in the governor-elect workbook, and your name and country.

INTRODUCTION

Session title

TRAINING LEADER’S NOTES

– Refer to workbook page 16, Learning Objectives and Resources.
– Welcome governors-elect and introduce yourself.
– Ask governors-elect to state their name and country.
– Review the learning objectives.
– Remind governors-elect to take notes in their workbooks.
– Refer to the list of resources in the workbook.
TRAINING LEADER’S NOTES

– Refer to workbook page 17, From Local to Global.

– Ask governors-elect to think about what they heard in the general session about the first of Rotary’s strategic priorities, “Increase Our Impact.”

– Allow governors-elect 2-3 minutes to think about a recent Rotary project completed in their community and briefly answer the questions about community assessments, sustainability, and monitoring, evaluation, and measurement.

– Ask the participants to respond to the following questions with a show of hands.

How many of the projects you described:

• Began with a community assessment?
• Focused on sustainability?
• Included a plan for monitoring, evaluation, and measurement?
What does it mean for a project to be sustainable?

**KEY POINTS**

- A sustainable project provides long-term solutions to a community’s needs and can be maintained by the project beneficiaries after the grant funding ends.
- Sustainability is often a challenge for clubs that are trying to make a small project big enough to be eligible for a global grant.

**TRAINING LEADER’S NOTES**

- Refer to workbook page 18, Sustainability graphic.
- Allow 1-2 minutes for the governors-elect to review the graphic.

What role do community assessments play in sustainability?

**KEY POINTS**

- The most successful projects begin with a club working together with the community to identify its needs, build on its strengths, and make sure the proposal project aligns with its values and culture.
• A community assessment is required for all vocational training or humanitarian service global grant applications.
• All projects of all sizes, regardless of their funding source, should begin with a community assessment.

How can community assessments help us measure the impact of projects?

KEY POINTS

• “Impact” refers to the long-term effects, or end results, of a project — for example, a reduced incidence of disease or improved nutritional status that leads to a positive change in a community’s health.
• Community assessments form a baseline by which our progress and impact can be measured.

How can your district increase the quality, impact, and sustainability of projects?

– Appoint district community service chairs and district international service chairs to work directly with clubs to connect them with project planning resources.
– Build cooperating partnerships with young leaders, Rotaract clubs, and external organizations.
Does anyone have experience working with the district international service chair?

How have they increased the impact of projects in your district?

- They inspire clubs to get involved in international service.
- They can represent your district at a project fair and help identify international partners for a local service activity.
- They build district resource networks to connect clubs with local professionals who are working within an area of focus and mentors skilled in grant writing, project planning and implementation, and monitoring and evaluation.
How do the areas of focus increase our impact?

KEY POINTS

- These causes help us focus all of our work to contribute to lasting change.
- Projects that are funded by global grants and are within the areas of focus offer Rotarians worldwide the opportunity to work together to have a larger, measurable impact on the world.
- Most areas of focus now include projects designed to protect the environment.
- Research has shown that non-Rotarians contribute to Rotary in order to support specific causes and projects. An increase in donors leads to a greater global impact.
GLOBAL GRANTS

16:30-16:45

Have any clubs in your district ever received a global grant?

KEY POINT

- Activities eligible for global grants include humanitarian projects, vocational training, and scholarships.

TRAINING LEADER’S NOTES

- Refer to workbook page 20, Global Grants.
- Allow 1-2 minutes for review.

For those of you whose own club has received a global grant, how did you find your international partner?

How can you help your district Rotary Foundation chair (DRFC) and your district international service chair (DISC) work together to support clubs and their projects?
Why do we want to measure the impact of our projects?

KEY POINTS

• If we want people to join us, we need to show that we are creating lasting change.
  o Sixty-eight percent of respondents to a 2015 Charities Aid Foundation survey said knowing that a charity makes an impact is among the most valuable information they can have and affects their donation decisions.
  o Seventy-eight percent of respondents ages 22-37 to the 2015 Millennial Impact Report say they are very likely or somewhat likely to stop donating to an organization if they are not told how their donation has made an impact.

• Rotary is focusing our efforts and resources on larger-scale sustainable projects that meet significant needs in communities around the world.
REVIEW AND KEY MESSAGES  16:45-16:55

TRAINING LEADER’S NOTES

– Refer to workbook page 71, Key Messages for 2020-21, found in the session Planning for Action.
– Ask governors-elect to record a key message from this session.
– Make sure that all discussion questions have been answered.
– Review the learning objectives to ensure that all topics were covered sufficiently.
– Thank participants.

EVALUATION  16:55-17:00

TRAINING LEADER’S NOTE

Daily evaluation forms will be distributed and collected at the end of the session.
Date: Wednesday, 22 January 2020
Session time: 10:30-12:00
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:
1. Assess your clubs’ involvement in polio eradication efforts.
2. Describe how our ability to raise and distribute funds increases our impact.
3. Use the power of storytelling to increase our Foundation’s impact.

WORKBOOK

<table>
<thead>
<tr>
<th>Page</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>Learning Objectives and Resources</td>
</tr>
<tr>
<td>23</td>
<td>Our Role in Polio Eradication</td>
</tr>
<tr>
<td>24</td>
<td>Your Polio Message Calendar</td>
</tr>
<tr>
<td>26</td>
<td>Funding Our Service</td>
</tr>
<tr>
<td>28</td>
<td>Taking Action</td>
</tr>
<tr>
<td>72</td>
<td>Key Messages for 2020-21</td>
</tr>
</tbody>
</table>

TIMELINE

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>10:30 (5 min.)</td>
</tr>
<tr>
<td>Our Role in Polio Eradication</td>
<td>10:35 (35 min.)</td>
</tr>
<tr>
<td>Funding Our Service</td>
<td>11:10 (25 min.)</td>
</tr>
<tr>
<td>Taking Action</td>
<td>11:35 (15 min.)</td>
</tr>
<tr>
<td>Review and Key Messages</td>
<td>11:50 (10 min.)</td>
</tr>
</tbody>
</table>
FLIP CHARTS

Prepare a flip chart with the session title, the first page number of this session’s worksheet in the governor-elect workbook, and your name and country.

Fundraising Through Storytelling

INTRODUCTION

10:30-10:35

Session title

TRAINING LEADER’S NOTES

- Refer to workbook page 22, Learning Objectives and Resources.
- Welcome governors-elect and introduce yourself.
- Ask governors-elect to state their name and country.
- Review the learning objectives.
- Remind governors-elect to take notes in their workbooks.
- Refer to the list of resources in the workbook.
OUR ROLE IN POLIO ERADICATION

What did you hear in this morning’s general session that inspired you?

TRAINING LEADER’S NOTES

- Refer to workbook page 23, Our Role in Polio Eradication.
- Ask governors-elect to form pairs and discuss their district’s efforts toward polio eradication for 2-3 minutes, using these questions in their workbooks as a guide:
  - Do clubs in your district:
    - Understand Rotary’s history and impact toward eradicating polio worldwide?
    - Consistently promote and raise funds for the PolioPlus Fund?
    - Rank polio eradication as our organization’s first priority?
    - Plan projects and events to promote awareness among non-Rotarians of our polio eradication efforts?
    - Celebrate World Polio Day?
    - Know about the Bill & Melinda Gates Foundation’s 2-to-1 matching grant lasting through 2023?
    - Know that the Trustees of The Rotary Foundation have requested clubs make at least a $1,500 contribution to the PolioPlus Fund?
  - Does your district earmark any of its District Designated Funds for PolioPlus?
- Ask the pairs to tell the group what they discussed.

What is your role in ensuring that your clubs are knowledgeable about End Polio Now and support and promote these efforts?
How can you help keep the momentum going in your district as we near our goal of a polio-free world?

KEY POINTS

- Once the final case of polio caused by wild poliovirus is detected, it will take three years of no more polio cases caused by wild poliovirus before the world can be declared polio-free.
- The recognition of donors to the PolioPlus Fund highlights our efforts and encourages new donors.
- Ending polio will be a major steppingstone for the UN Sustainable Development Goals, particularly Goal 3: “Ensure healthy lives and promote well-being for all at all ages.”
What are some opportunities throughout the year for you to raise awareness and funds for polio eradication?

KEY POINTS

- World Polio Day, 24 October, is an opportunity to increase giving toward and raise awareness of polio eradication.
- World Immunization Week, held during the last week of April, is another opportunity for clubs to raise awareness of polio eradication efforts and hold a polio eradication fundraiser.
- You should inspire and lead clubs by consistently promoting how members can contribute to these efforts.

TRAINING LEADER’S NOTES

- Refer to workbook page 24, Your Polio Message Calendar.
- Allow 2-3 minutes for participants to review the calendar.
- Discuss opportunities throughout the year for the governor to raise awareness of and funds for polio eradication.
- Encourage participants to take notes for reference as they plan for the year.
FUNDING OUR SERVICE

11:10-11:35

TRAINING LEADER’S NOTE

Refer to workbook page 26, Funding Our Service.

How can you encourage others to support our Foundation? How can you raise funds from people who aren’t involved in Rotary?

– Events with a fundraising component
– Community partnerships
– Partnerships with other clubs, other districts, or The Rotary Foundation
– Rotarian Action Groups and district resource networks
– Crowdsourcing through Rotary Ideas

Fundraising Through Storytelling

TRAINING LEADER’S NOTES

– Ask the following question and record ideas on a flip chart.
– Remind participants to take notes in their workbooks.
How can we use storytelling to engage donors and raise funds for our Foundation?

KEY POINTS

- Personal stories can be an effective way to reinforce key messages.
- If you don’t have your own stories, use the stories from other members and beneficiaries that are featured on Rotary’s website, video and social media channels, and in our magazines.
- Rotary has created three virtual reality films. Research shows that after watching a VR film, viewers often feel empathy and want to take action. In today’s visual world, showing makes more of an impact than telling.

TRAINING LEADER’S NOTES

- Refer to workbook page 26, Funding Our Service.
- Allow 1 minute for participants to read the information under “Connecting a Donor’s Passion With an Opportunity to Give” and the first prospective donor profile.
- Ask governors-elect to form pairs and spend 5 minutes completing the chart in their workbooks. Each pair should:
  - Read the description of a potential donor.
  - Consider which of the listed funds of The Rotary Foundation or giving opportunities might be the best fit for that person.
  - Think about what story they might tell to encourage the prospective donor to give.
- Ask each pair to share one of their stories.
Who has already developed a strong story or key message about raising funds for the Foundation that they would like to share?

**TRAINING LEADER’S NOTE**

Allow 3-5 minutes for governors-elect to share their messages.

**TAKING ACTION** 11:35-11:50

How can you help Rotary reach the 2020-21 goals that relate to the Foundation?

What kind of impact can we make by spending DDF?

**KEY POINTS**

- Spending DDF helps create positive change in communities at home and around the world.
- Our Foundation helps us grow the funds we raise, increasing the impact of each individual donor.
- In many areas of the world, districts are hesitant to spend their DDF. It is important to take full advantage of the opportunities our Foundation provides to use our resources to serve communities around the world.
How can you support clubs in setting and achieving Foundation-related goals in Rotary Club Central?

<table>
<thead>
<tr>
<th>REVIEW AND KEY MESSAGES</th>
<th>11:50-12:00</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TRAINING LEADER’S NOTES</strong></td>
<td></td>
</tr>
<tr>
<td>– Refer to workbook page 72, Key Messages for 2020-21, found in the session Planning for Action.</td>
<td></td>
</tr>
<tr>
<td>– Ask governors-elect to record an action item from this session.</td>
<td></td>
</tr>
<tr>
<td>– Make sure that all discussion questions have been answered.</td>
<td></td>
</tr>
<tr>
<td>– Review the learning objectives to ensure that all topics were covered sufficiently.</td>
<td></td>
</tr>
<tr>
<td>– Thank participants.</td>
<td></td>
</tr>
</tbody>
</table>
Date: Wednesday, 22 January 2020
Session times: 14:00-15:15, 15:45-17:00
Duration: 75 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:
1. Understand the Rotary funding and district financial statement reporting policy.
2. Address common questions and issues they will face as governors.

WORKBOOK

Page 29 Learning Objectives and Resources
Page 30 Rotary Funding
Page 31 District Financial Statement
Page 32 District Governor’s Role and Responsibilities
Date: Wednesday, 22 January 2020
Session times: 14:00-15:15, 15:45-17:00
Duration: 75 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:

1. Identify their conflict management style and its strengths and challenges.
2. Prepare for situations that will require conflict management in their year as governor.

WORKBOOK

Page 23  Learning Objectives
Page 23  Scenario 1: Resistance to a New Club
Page 34  Scenario 2: Member Dispute Within a Club
Page 35  Conflict Management Styles
Page 38  Scenario 3: Youth Protection Incident
Date: Thursday, 23 January 2020
Session time: 10:30-12:00
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the participants will be able to:
1. Identify opportunities to start new clubs.
2. Implement strategies for attracting and engaging members.
3. Understand how flexibility can strengthen Rotary’s membership.

WORKBOOK

<table>
<thead>
<tr>
<th>Page</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>39</td>
<td>Learning Objectives and Resources</td>
</tr>
<tr>
<td>40</td>
<td>Our Membership</td>
</tr>
<tr>
<td>40</td>
<td>Your Club Experience</td>
</tr>
<tr>
<td>41</td>
<td>Club Models</td>
</tr>
<tr>
<td>43</td>
<td>Starting New Clubs</td>
</tr>
<tr>
<td>44</td>
<td>Keeping Our Clubs Relevant</td>
</tr>
<tr>
<td>45</td>
<td>What Rotary Offers Prospective Members</td>
</tr>
</tbody>
</table>

TIMELINE

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>10:30 (5 min.)</td>
</tr>
<tr>
<td>Our Membership</td>
<td>10:35 (15 min.)</td>
</tr>
<tr>
<td>Starting New Clubs</td>
<td>10:50 (25 min.)</td>
</tr>
<tr>
<td>Keeping Our Clubs Relevant</td>
<td>11:15 (35 min.)</td>
</tr>
<tr>
<td>Review and Key Messages</td>
<td>11:50 (10 min.)</td>
</tr>
</tbody>
</table>
FLIP CHART

Prepare a flip chart with the session title, the number of the first page of this session in the participant workbooks, and your name and country.

INTRODUCTION 10:30-10:35

Session title

TRAINING LEADER’S NOTES

– Welcome Rotaractors to their first session of the International Assembly.
– Note that Rotaractors will participate in breakout sessions with governors-elect today and tomorrow morning.
– Welcome participants and introduce yourself.
– Ask participants to state their name and country.
– **Refer to workbook page 39, Learning Objectives and Resources.**
– Review the learning objectives.
– Remind participants to take notes in their workbooks.
– Refer to the list of resources in the workbook.
Why do people join Rotary and Rotaract?

KEY POINTS

• Every Rotary membership experience feedback survey since 2011-12 has shown that the top two reasons for joining a Rotary club are local service and friendship or fellowship.

• Recently, that survey revealed that young professionals who join Rotary want to support a cause with a global reach, make a positive impact locally as well as globally, and pursue personal and professional growth and learning opportunities.

• A recent survey of almost 6,000 Rotaractors showed that their top reason for joining Rotaract was for opportunities to participate in service in their communities.

• Rotary is attractive to people who want to create lasting change across the globe, in their local communities, and in themselves.
Why do members leave Rotary and Rotaract?

- Clubs do not offer programs and activities that meet their interests.
- Clubs do not offer enough service or leadership opportunities.
- Their club experience is not enjoyable or meaningful.
- Their schedule does not allow them to participate.
- Their club experience does not match their expectations or what they were promised as prospective members.

TRAINING LEADER’S NOTES

- Refer to workbook page 40, Your Club Experience.
- Ask participants to form pairs, reflect on the two questions, and discuss their own club experience.
- Allow 2-3 minutes for discussion and then ask the following question.

How could Rotary grow if club presidents asked each of their members those two questions?
STARTING NEW CLUBS

If our clubs aren’t meeting the needs of our current or prospective members, how can we offer new experiences?

KEY POINTS

- Governors-elect participated in a workshop earlier this week in which they imagined new club models.
- Rotary and Rotaract must continue to be attractive to prospective members while also engaging current members.
- Clubs can sometimes accommodate the needs of current and prospective members by changing the schedule, frequency, or format of meetings, or offering additional membership types.
- New clubs can offer experiences and opportunities for service, fellowship, and leadership that are not currently being offered.

What might be different about a club that attracts younger professionals?

TRAINING LEADER’S NOTES

- Refer to workbook page 41, Club Models.
- Allow 2-3 minutes to review the models.
Does anyone have clubs like these in their districts?

How can developing new ways to experience Rotary help us meet our strategic goals?

KEY POINT

- New club models can help us expand our reach and enhance participant engagement.

TRAINING LEADER’S NOTES

- Refer to workbook page 43, Starting New Clubs.
- Divide participants into pairs.
- Allow 5 minutes for them to consider the following questions:
  - When is the right time to start a new club?
  - Should Rotaract clubs start new Rotary clubs? What are the benefits?
  - What resistance to starting new clubs might you get from existing clubs that view new clubs as competitors?
  - How will you respond to that resistance?
- Ask participants to report what they discussed.
Who are potential members in your district? Are those potential members different for Rotary and Rotaract?

- All professionals and people with leadership traits who are passionate about making a difference
- For Rotary, recent retirees with professional expertise
- Younger professionals who want to make a positive impact and connections in their community
- Members of the family of Rotary, including alumni of Rotary programs such as Interact, Rotaract, Rotary Youth Exchange, and RYLA, and alumni of Foundation programs such as Rotary Peace Fellowships and Rotary Scholarships
- People in the community who are currently underrepresented in your district, including women, members of ethnic minorities, and those from other underrepresented groups and professions

What are some ways to raise the likelihood that a new member will stay in their club?

- Provide a new member orientation to teach them about Rotary and their club.
- Make them feel welcome by introducing them to members of the club.
- Get them involved from the beginning of their membership in ways that are meaningful to them.
- Start a mentor program that pairs a new member with an established one.
– Accommodate their needs, for example by offering different options for meeting days and times or changing attendance requirements.
– Encourage new members to take on leadership roles and start projects.

How can changing the frequency and format of the club meeting, and not focusing on strict attendance requirements, engage current members?

KEY POINTS

• When clubs have more freedom to determine how they hold their meetings, who they invite to join, and how they define engagement, the club is more vibrant and better able to grow.
• When members feel that the meetings are interesting and relevant, and not too frequent, they will be more motivated to attend and participate.
• When members see that their needs are considered and changes are made to accommodate them, they feel valued and more committed to the club.
What steps can be taken to further strengthen the partnership between Rotary and Rotaract?

– Governors and presidents can invite Rotaractors to attend district training and to serve on committees.
– Rotaractors can now serve on or chair district committees – encourage them to take on these leadership roles.
– Rotarians can invite Rotaractors to plan and participate in service projects, and Rotaractors can invite Rotarians to participate in the projects they plan.

TRAINING LEADER’S NOTES

– Refer to workbook page 45, What Rotary Offers Prospective Members.
– Ask participants to read the information and use the empty boxes to add opportunities specifically for their districts.
– Ask participants to spend 5-7 minutes answering the following questions in their workbooks:
  o Does your district have clubs that offer each of these opportunities? Which of these is not represented in your district?
  o How can clubs let prospective members know that these opportunities are available?
  o Who is the best person to match prospective members to the right clubs?
  o If you were to develop three new clubs in your district, what would they offer prospective members that clubs in your district don’t offer now?
  o What types of club models would be most effective for these new clubs?
  o How would you support the growth of those clubs in the first three years?
– Discuss as a group.
REVIEW AND KEY MESSAGES

TRAINING LEADER’S NOTES

- Refer to workbook page 75, Key Messages for 2020-21, found in the session Planning for Action.
- Ask participants to record an action item from this session. (Rotaract participants discussed writing key messages in their orientation session on Wednesday.)
- Make sure that all discussion questions have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.
Date: Thursday, 23 January 2020  
Session time: 15:30-17:00  
Duration: 90 minutes

**LEARNING OBJECTIVES**

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

1. Inspire districts and clubs to use Rotary’s resources to increase public awareness of Rotary and its work.
2. Communicate to clubs the importance of presenting a consistent brand identity to the world.
3. Serve as a Rotary brand ambassador by leading by example.

**WORKBOOK**

<table>
<thead>
<tr>
<th>Page</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>47</td>
<td>Learning Objectives and Resources</td>
</tr>
<tr>
<td>48</td>
<td>Rotary’s Public Image</td>
</tr>
<tr>
<td>49</td>
<td>Appendix 1</td>
</tr>
<tr>
<td>50</td>
<td>Rotary’s Strategic Priorities and Objectives</td>
</tr>
<tr>
<td>51</td>
<td>We Are People of Action</td>
</tr>
<tr>
<td>52</td>
<td>Case Study 1</td>
</tr>
<tr>
<td>53</td>
<td>Case Study 2</td>
</tr>
<tr>
<td>54</td>
<td>Using Rotary’s Brand Marks</td>
</tr>
<tr>
<td>56</td>
<td>Case Study 3</td>
</tr>
<tr>
<td>57</td>
<td>Case Study 4</td>
</tr>
<tr>
<td>76</td>
<td>Key Messages for 2020-21</td>
</tr>
</tbody>
</table>

**TIMELINE**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>15:30 (5 min.)</td>
</tr>
<tr>
<td>Rotary’s Brand and Public Image</td>
<td>15:35 (15 min.)</td>
</tr>
<tr>
<td>We Are People of Action</td>
<td>15:50 (25 min.)</td>
</tr>
<tr>
<td>Rotary’s Brand and Visual Identity</td>
<td>16:15 (30 min.)</td>
</tr>
<tr>
<td>Review and Key Messages</td>
<td>16:45 (10 min.)</td>
</tr>
<tr>
<td>Evaluation</td>
<td>16:55 (5 min.)</td>
</tr>
</tbody>
</table>
FLIP CHART

Prepare a flip chart with the session title, the first page number of this session’s worksheet in the participant workbooks, and your name and country.

INTRODUCTION 15:30-15:35

Session title

<table>
<thead>
<tr>
<th>TRAINING LEADER’S NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>– Refer to workbook page 47, Learning Objectives and Resources.</td>
</tr>
<tr>
<td>– Welcome all participants and introduce yourself.</td>
</tr>
<tr>
<td>– Ask participants to state their name and country.</td>
</tr>
<tr>
<td>– Review the learning objectives.</td>
</tr>
<tr>
<td>– Remind participants to take notes in their workbooks.</td>
</tr>
<tr>
<td>– Refer to the list of resources in the workbook.</td>
</tr>
</tbody>
</table>
Why does public image matter? Why is it important to promote Rotary and its work?

KEY POINTS

- Often a person’s perception of Rotary is based on limited information or experience — one event, one story in the newspaper, or one social media post.
- Our public image — how others see us and our organization — directly affects our ability to attract new members and partners in service.
- Research shows that while many people recognize the Rotary name and logo, most don’t know much about who we are or what we do.
- To expand our reach, we need to build awareness of our impact and brand.

What will you say to clubs to help them understand the importance of increasing public awareness of Rotary?

- Better public awareness of Rotary and the good work that it does:
  - Leads to greater involvement and support
  - Helps us stand out as we compete with other organizations for time, money, and resources
  - Keeps members engaged and enthusiastic about their clubs
Refer to workbook Appendix 1, Rotary’s Strategic Priorities and Objectives.

Ask participants to form pairs and review Rotary’s strategic plan.

Ask participants to think about how an emphasis on increasing public awareness of Rotary supports each priority of our strategic plan.

Encourage participants to think about the objective “build awareness of our impact and brand” (found under the priority “Expand our reach”). In their pairs, ask participants to discuss what we mean by “impact” and “brand” and take notes in their workbooks.

- “Impact” refers to the long-term effects or end results of a program (for example, changes in health status like reduced disease incidence or improved nutritional status). When we ask the question “what difference was made?”, the answers tell us what our impact was.

- A brand is many things. Many people think of a brand as an organization or a company. But when we talk about Rotary’s brand, we are referring to (1) the way that others think about Rotary, (2) the promise that Rotary makes to give our members and partners a meaningful and life-changing experience, (3) the ways that we are different from other organizations, and (4) the emotional connection people have with Rotary’s work, its members, and its name. When we use these things together consistently and repeatedly, our brand is instantly recognized.
How does an emphasis on increasing the public awareness of Rotary support Rotary’s strategic plan?

KEY POINT

- Better public awareness of Rotary’s brand:
  - Helps us expand our reach and grow our membership, volunteer networks, partnerships, and financial support, which means we can do more good in the world
  - Increases our openness and appeal
  - Helps us diversify our membership and participation by reaching people who don’t yet know about Rotary
WE ARE PEOPLE OF ACTION 15:50-16:15

Why did we develop materials and resources to help Rotarians promote themselves as people of action?

KEY POINTS

- Research has shown that most people don’t know much about who we are and what we do, even if they recognize our logo or know our name.
- Close to 60% of those surveyed did not know there was a Rotary club in their community.
- The People of Action materials in the Brand Center help clubs tell stories in a consistent and compelling way, and show their local communities how Rotary changes lives.

How can you show clubs the value of using People of Action resources?

KEY POINT

- Emphasize that we lose potential members because they don’t know who we are and what we do. Without members, we can’t do as much good in the world.
TRAINING LEADER’S NOTES

– Refer to workbook page 50, Case Study 1.
– Ask participants to form pairs, read the case study in their workbook, and discuss their responses for 2-3 minutes.
– Ask the following questions.

What advice will you give to Rotaract or Rotary club presidents about ways they can increase awareness of their clubs and projects?

Think about the Rotary and Rotaract club members you know who post on social media. How do their posts depict them? Are they people of action, or are they people in meetings?

KEY POINTS

• People often post on social media without considering the impression they give. As members, we are always representing Rotary or Rotaract when we share our stories.
• Members should use every opportunity to increase awareness of the good that Rotary is doing in the world.
How can you use your social media presence to communicate that Rotary is an inclusive organization?

How could you be inadvertently communicating that Rotary is not diverse or inclusive?

KEY POINT

- Negative, offensive, political, or inappropriate posts can send the message that Rotary is not welcoming or not diverse, which may cause people to think that Rotary is “not for me.”

How can you communicate to club members the importance of a social media presence that promotes Rotary as an open and welcoming organization?
How does our logo and our visual identity relate to our public image?

KEY POINTS

- Logos can be a visual reminder of an organization’s brand, but a brand is much more than its logo.
- Our logo and visual identity support our brand.
- Consistent messaging and use of the logo can help move people who don’t know us from awareness to understanding and eventual engagement with us.

TRAINING LEADER’S NOTES

- Refer to workbook page 51, Case Study 2.
- Ask participants to form pairs and read the case study in their workbook, then discuss their responses for 2-3 minutes.
- Ask the following question.

What was the problem with the event put on by the Anytown Breakfast Club? What could have been done to avoid this outcome?
Think about all the instances in your district where the Rotary logo is used. How often is the logo used correctly?

KEY POINTS

• Since we launched our new visual brand and identity in 2013, many clubs and districts have successfully adopted our new Rotary marks and messaging, but many have not.

• Brand integrity is a priority of the Board of Directors, and district leaders play a key role in ensuring the consistent and correct use of our Rotary marks and messaging around the world.
How can you help the clubs in your district get up to date with our visual identity?

How can inconsistency in our visual identity hurt Rotary?

How will you communicate to clubs the value of a consistent brand and visual identity?

KEY POINTS

- Look at how you’re using Rotary’s marks and logos in your communications to members and the general public.
- Make sure that your online or digital resources, such as your website, social media channels, and email signatures are up to date.
- Model how to tell compelling stories about the value of Rotary and how we are people of action by sharing these stories on your social media channels.
- Tell your People of Action stories at club and community speaking events to inspire members and encourage them to tell their own stories.
Do you anticipate any resistance from clubs about updating Rotary’s visual identity or following Rotary’s guidelines? How will you handle this?

**REVIEW AND KEY MESSAGES  16:45-16:55**

**TRAINING LEADER’S NOTES**

- Refer to workbook page 76, Key Messages for 2020-21, found in the session Planning for Action.
- Ask participants to record an action item from this session.
- Make sure that all discussion questions have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.

**EVALUATION  16:55-17:00**

**TRAINING LEADER’S NOTE**

Daily evaluation forms will be distributed and collected at the end of the session.
Date: Friday, 24 January 2020
Session time: 10:30-12:00
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the participants will be able to:
   1. Act as a change leader in personal, professional, and Rotary experiences.
   2. Use Rotary’s model to successfully plan for change.

WORKBOOK

<table>
<thead>
<tr>
<th>Page</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>55</td>
<td>Learning Objectives and Resources</td>
</tr>
<tr>
<td>56</td>
<td>Change Readiness</td>
</tr>
<tr>
<td>56</td>
<td>Leading Change</td>
</tr>
<tr>
<td>57</td>
<td>Planning for Change: Rotary’s Change Model</td>
</tr>
<tr>
<td>58</td>
<td>The Rotary Club of Eliot Sunrise Prepares for Change</td>
</tr>
<tr>
<td>60</td>
<td>Identifying Gaps in the Change Plan</td>
</tr>
<tr>
<td>61</td>
<td>Case Studies</td>
</tr>
<tr>
<td>64</td>
<td>Responding to Resistance</td>
</tr>
<tr>
<td>77</td>
<td>Key Messages for 2020-21</td>
</tr>
</tbody>
</table>

TIMELINE

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>10:30 (10 min.)</td>
</tr>
<tr>
<td>Be a Change Leader</td>
<td>10:40 (25 min.)</td>
</tr>
<tr>
<td>What’s New in Rotary?</td>
<td>11:05 (25 min.)</td>
</tr>
<tr>
<td>Responding to Resistance</td>
<td>11:30 (20 min.)</td>
</tr>
<tr>
<td>Review and Key Messages</td>
<td>11:50 (10 min.)</td>
</tr>
</tbody>
</table>
FLIP CHARTS

Prepare a flip chart with the session title, the number of the first page of this session in the participant workbooks, and your name and country.

Change Planning Gaps
Vision:
Collaborative commitment:
Skills:
Rewards:
Resources:
Action plan:

INTRODUCTION 10:30-10:40

Session title

TRAINING LEADER’S NOTES

- Refer to workbook page 55, Learning Objectives and Resources.
- Welcome participants and introduce yourself.
- Ask participants to state their name and country.
- Review the learning objectives.
- Remind participants to take notes in their workbooks.
- Refer to the list of resources in the workbook.
How many of you said:

- You don’t accept change easily?
- You need a little motivation to accept change?
- You find change exciting?

How many are a mix of these categories?

Does anyone want to give an example of how you reacted to change in the past?
How can understanding how people react to change help you successfully lead others through change?

KEY POINTS

• By determining how ready people are to change, you’ll have a better idea of where to focus your efforts while you implement the changes.

• A successful leader works to empathize with the feelings and experiences of the people affected by the change.
KEY POINTS

- Throughout this week, we have discussed Rotary’s past, present, and future, from our core values to our new strategic plan.
- To improve and grow as an organization, Rotary must continuously adapt to meet new challenges.
- Improvement and growth will happen only when our members agree and change how they do things.
- Change leaders guide and support people as they transition from where they are to where they want to be. Change leaders get people to think, act, or believe differently.
- To help people change successfully, a change leader addresses the personal and emotional challenges that people experience when adapting to new ways of thinking or acting.

TRAINING LEADER’S NOTES

- Refer to workbook page 56, Leading Change.
- Ask participants to think about a time when they had to implement or communicate a change. Allow 2-3 minutes to respond to these questions in their workbooks:
  - What happened?
  - How did people react?
  - How well was the change adopted?

Would anyone like to give an example?
KEY POINTS

- There are six key parts of change planning that ease acceptance of change: **vision, collaborative commitment, skills, rewards, resources**, and an **action plan**.
- Use the six elements of change planning to help clubs successfully adopt new initiatives.

Has anyone ever used a model like this to lead change? How successful was it?

TRAINING LEADER’S NOTES

- Refer to workbook page 57, Planning for Change: Rotary’s Change Model.
- Allow participants 2-3 minutes to review the chart.

- Refer to workbook page 58, The Rotary Club of Eliot Sunrise Prepares for Change.
- Ask participants to read each section of the scenario and write which change element describes each section. (In order, the corresponding elements are: vision, collaborative commitment, skills, resources, rewards, action plan.)
- Review each section of the scenario as a group. As you discuss, ask the participants to think about:
  - How the traditions of the Rotary club in the scenario affect its ability to change.
  - How the perspectives of Rotaractors and other young leaders can benefit our organization as we go through changes large and small.
TRAINING LEADER’S NOTES

- Refer to workbook page 60, Identifying Gaps in the Change Plan.
- Ask participants to form pairs and consider the consequences of missing one of the elements of their change plan. Refer to the icons in the workbook to guide their responses.
- Ask participants to spend 5 minutes sharing their responses about the negative repercussions of a gap in their change plan and recording their responses on the flip chart.
- Discuss what the results would be if:
  - A clear vision is not communicated for the change plan?
    - People may be confused about the intended purpose or value of the change, leading to incomplete or failed adoption.
  - Team members are not included in the planning or implementation of the change?
    - Individuals may not be committed to the change or resist implementation.
  - Individuals do not have the right skills to adopt the change?
    - Individuals may feel anxious about their ability to adopt the change or about their lack or loss of knowledge and expertise, leading to resistance or rejection.
  - Rewards are not provided for those who adopt the change?
    - People may be slow to adopt the change if they do not see the benefits or do not recognize the rewards of embracing the change.
  - Resources (people, information, or materials) are not provided or are hard to access?
    - A lack of resources makes it difficult for people to learn what they need to know. It may frustrate them and, for some, cause resistance to change.
  - Each step of the change is not supported with a clear action plan?
    - The change may not get started at all if you have not thoroughly planned ahead.
- Remind participants to take notes in their workbooks.
Think back to the examples of change that you shared with the group before this exercise. Were any of the six key parts — vision, collaborative commitment, skills, rewards, resources, or an action plan — missing?

Did you experience a negative consequence as a result?

If a key part was missing, what would you do differently in the future?

**WHAT’S NEW IN ROTARY?**

**11:05-11:30**

**KEY POINTS**

- Rotary is a changing organization, and Rotary relies on club and district leaders to implement changes that keep Rotary strong, relevant, and thriving.
- Some club members may readily embrace these changes and others may struggle for various reasons.
- Rotary-wide changes, such as more flexibility for club meetings, an emphasis on brand consistency, and a new strategic plan, offer good case studies to understand change management.
<table>
<thead>
<tr>
<th>TRAINING LEADER’S NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>– Refer to workbook page 61, Case Studies.</td>
</tr>
<tr>
<td>– Ask participants to form pairs, review the three change management case studies in the workbook, and choose one they think might be challenging for club members to adopt in the coming year.</td>
</tr>
<tr>
<td>– Ask the pairs to follow these instructions in their workbooks:</td>
</tr>
<tr>
<td>o Write which case study you chose, and why adopting this change is valuable to members in the coming year.</td>
</tr>
<tr>
<td>o Consider the change management plan you would use to implement this change. Complete this chart by outlining each element needed to form a change plan.</td>
</tr>
<tr>
<td>– After 10 minutes, have volunteers describe any areas where they struggled to identify a part of their plan.</td>
</tr>
<tr>
<td>– Encourage group members to quickly and freely suggest any possible solutions as soon as they occur to them.</td>
</tr>
<tr>
<td>– Encourage participants to take notes in their workbooks.</td>
</tr>
</tbody>
</table>
Why might some clubs or their members be resistant to the changes presented in these case studies?

- Members believe Rotary should stay grounded in its traditions.
- Clubs believe implementing the change is too much work.
- Members like their club the way it is.
- Clubs tried to adopt the change before and were not successful.

What might that resistance look like? What are its characteristics? What tactics or actions show a resistance to change?
What steps can you take to reduce resistance and help people embrace change?

- Clearly communicate the reason for change.
- Find examples where similar changes made by peers have been successful.
- Honor the work and contributions of those who have brought success to the club in the past.
- Involve as many people as possible by asking for suggestions and including their ideas.
- Discuss aspects of change in small, achievable goals.
- Celebrate success.

KEY POINTS

- Change management is about reshaping actions, beliefs, and ways of thinking.
- It is about creating an environment that recognizes and lessens resistance.

REVIEW AND KEY MESSAGES 11:50-12:00

TRAINING LEADER’S NOTES

- Refer to workbook page 77, Key Messages for 2020-21, found in the session Planning for Action.
- Ask participants to record an action item from this session.
- Make sure that all discussion questions have been answered.
- Review the learning objectives to ensure that all topics were covered sufficiently.
- Thank participants.
Date: Friday, 24 January 2020
Session time: 14:00-15:30
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:
1. Develop an action plan to implement in their district.
2. Communicate key messages to clubs.
3. Promote Rotary’s new strategic plan as a tool to achieve our vision.

WORKBOOK

Page 65  Learning Objectives and Resources
Page 66  Summarize the Week
Page 67  Key Messages for 2020-21

TIMELINE

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>14:00 (5 min.)</td>
</tr>
<tr>
<td>Reflecting on the Assembly</td>
<td>14:05 (10 min.)</td>
</tr>
<tr>
<td>Action Planning</td>
<td>14:15 (40 min.)</td>
</tr>
<tr>
<td>Summarize the Week</td>
<td>14:55 (20 min.)</td>
</tr>
<tr>
<td>Review</td>
<td>15:15 (5 min.)</td>
</tr>
<tr>
<td>Evaluation</td>
<td>15:20 (10 min.)</td>
</tr>
</tbody>
</table>

FLIP CHART

Prepare a flip chart with the session title, the first page number of this session’s worksheet in the governor-elect workbook, and your name and country.
Session title

TRAINING LEADER’S NOTES

- Refer to workbook page 65, Learning Objectives and Resources.
- Welcome governors-elect and introduce yourself.
- Ask governors-elect to state their name and country.
- Review the learning objectives.
- Remind governors-elect to take notes in their workbooks.
- Refer to the list of resources in the workbook.
- Note that this workbook should be used as a resource throughout the year.
## Training Leader’s Notes

- Refer to workbook page 66, Summarize the Week.
- Ask governors-elect to take 3-5 minutes to record:
  - One or two of the most important things they learned.
  - Something they learned from a Rotaract participant this week.
  - How they plan to work with Rotaract clubs and Rotaractors as governor.
  - A piece of advice for their district governor-nominee.
- Ask each participant to share one of the most important things they learned this week with the group.
- Let them know they will return to discuss the rest of their responses at the end of the session.
KEY POINTS

• Goals are an important part of a successful year as governor.
• Rotary Club Central empowers club and district leaders to track club progress and achievements toward goals, work with assistant governors to support club progress, and rate clubs.
• Clear, motivational messages are an effective way to inspire members to action.

TRAINING LEADER’S NOTES

– Refer to workbook page 67, Key Messages for 2020-21.
– Remind the governors-elect that at the end of each session this week, they were asked to develop key messages to help communicate goals to their clubs.
– Allow them 7-10 minutes to review the messages they developed throughout the week and to complete the related questions for each session, if they have not already.
– Encourage participants to continue this exercise for the rest of the key messages after the assembly.
– Have governors-elect share some of the key messages they developed throughout the week, and how and when that message might be delivered.
– Make sure everyone gets a chance to speak.
– Encourage participants to take notes in their workbooks as they hear good ideas.
SUMMARIZE THE WEEK

14:55-15:15

TRAINING LEADER’S NOTE
Refer to workbook page 66, Summarize the Week.

What have you learned from the Rotaract participants?

How do you plan to work with Rotaract clubs and Rotaractors as governor?

What advice will you have for the district governor-nominee?

What questions do you still have about succeeding as governor?
REVIEW  15:15-15:20

TRAINING LEADER’S NOTES

– Make sure that all questions from the discussion have been answered.
– Review the learning objectives to ensure that all topics were covered sufficiently.
– Thank governors-elect for their participation in the International Assembly.
– Remind participants to attend the regional review session this afternoon.

EVALUATION  15:20-15:30

TRAINING LEADER’S NOTES

– Governors-elect are asked to complete an evaluation on the day’s sessions and some overall program elements. An evaluation of general sessions and logistics will be emailed to participants at the close of the assembly.
– The RI staff representative will distribute and collect the evaluation form on the day’s sessions.
– You may leave the room at this time.
Date: Friday, 24 January 2020
Session time: 16:00-17:00
Duration: 60 minutes

The International Assembly is an exciting time for governors-elect. Throughout the week our leaders have the opportunity to learn, network, and explore Rotary internationally. This year, we are inviting governors-elect to attend an informal discussion hosted by Rotary International directors and other senior leaders. This discussion will take place in regional groups on the last day of the assembly.
DISCOVER ALOHA
AT THE 2020 ROTARY CONVENTION
Honolulu, Hawaii, USA | 6-10 June 2020
Register today at riconvention.org

FEEL THE ENERGY IN TAIPEI
ROTARY CONVENTION
12-16 JUNE 2021 | TAIPEI, TAIWAN
SAVE THE DATE!