The 2019 International Assembly Leader’s Guide has been prepared to help you lead and facilitate discussions on the topics chosen by the president-elect, the moderator, and the 2019 International Assembly Committee and its advisers. The guide provides a detailed outline of the content to be covered.

The 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 content of this guide will help you lead productive and inclusive sessions with governors-elect and Rotaractors. The workbook Rotaractors receive contains identical breakout session pages as governors-elect.

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 you to cover all of the content in this guide for each session to ensure all participants receive standardized training. Use the questions to guide the direction and pace of 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 leaders seminar in San Diego.
How to Use the Leader’s Guide
The guide for each session starts with the following components:

**Learning objectives**
What each participant should learn during the session. Review them at the start and end of each session. These objectives are also listed in the workbook.

**Workbook**
Pages and topics in the workbook that will be referred to during the session.

**Timeline**
A list of the sections of the session and how much time to spend on each. Helpful for planning to cover all the information in the allotted time.

**Flip charts**
A list of flip charts that should be prepared in advance of each session.

You were provided a supplementary document called the [IA Discussion Guide Template](#). Some training leaders find this template useful in planning their sessions. You can use it to record the times and key points of 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 leaders seminar.

**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, and for the participants to write down an action item in their workbooks. In the final session of each day, additional time is allotted for governors-elect to fill out a daily evaluation. It is important that each governor-elect complete this daily evaluation form so that we can improve future assembly programs.
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**
When you should start and end the section.

**TRAINING LEADER’S NOTES**

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

**KEY POINTS**

- Key Point 1
- Key Point 2

**Discussion question 1?**

**Discussion question 2?**

- Sample response 1
- Sample response 2

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

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

**Training leader’s notes**
Cites specific pages of the workbook, which includes activities that are directly related to the material in the leader’s guide. Also includes information, suggestions, and directions for facilitating sessions.

**Discussion questions**
Questions that you pose to participants to encourage discussion about a key concept. These can be restated in your own words.

**Sample responses**
Examples of answers that participants might give to a discussion question. Use the sample responses to encourage discussion if participants are having difficulty answering a question. You do not have to share all sample responses with participants.
Leading With Vision

Activating Our Strategy

Our Foundation’s Global Impact

Membership Match Gameshow*
(led by selected panelists and contestants)

Understanding Your Role and Financial Responsibilities*
(led by Club and District Support staff)

Doing Good in the World

Promoting Rotary

Supporting and Strengthening Membership

Leading Change

From Assembly to Action

*Session is not led by training leaders, so leader’s guide pages are not included in this guide.
Date: Monday, 14 January 2019
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 2019-2020 presidential theme to inspire clubs to adopt Rotary’s vision
2. Plan how to use the 2019-2020 Rotary Citation to strengthen clubs
3. Leverage the district structure to successfully balance work, life, and Rotary

WORKBOOK

Page 7 Learning Objectives and Resources
Page 7 2019-2020 Presidential Theme Bag and Gifts
Page 8 Leading With Vision
Page 9 The Rotary Citation
Page 10 Finding Balance: The District Leadership Plan
Page 62 Action Plans for 2019-2020

TIMELINE

Introduction 11:00 (10 min.)
Leading With Vision 11:10 (20 min.)
The Rotary Citation 11:30 (30 min.)
Finding Balance 12:00 (20 min.)
Review and Action Item 12:20 (10 min.)
FLIP CHARTS

- Prepare a flip chart with the session title, the session page in the governor-elect workbook, and your name and country.
- Prepare a flip chart with the 2019-2020 presidential theme written in large letters.

TRAINING LEADER’S NOTES

- Workbooks, tent cards, and the 2019-2020 Presidential Theme and Rotary Citation brochure 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

TRAINING LEADER’S NOTES

- Welcome governors-elect to the 2019 International Assembly.
- Briefly introduce yourself.
- Explain the role of the training leader and emphasize the importance of governor-elect participation.
- Ask governors-elect to state their name, district, and country.

TRAINING LEADER’S NOTES

- Refer to governor-elect workbook.
- Ask governors-elect to write their names and districts in their workbooks in case they are lost or misplaced during the week.
- The beginning of the workbook contains space for participants to record the names and district numbers of classmates. Encourage governors-elect to cross-reference names or district numbers with the 2019-2020 Leadership Directory for contact information.

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.
Who has downloaded the International Assembly mobile app?

KEY POINTS

- You need to download the app on Wi-Fi, but you can then access it offline throughout the week.
- The app lets you quickly view the event program, including general session speakers, find venue maps, and connect with one another at the assembly using the app’s networking features.
- Emergency procedures are outlined in the app and in the International Assembly program book.

TRAINING LEADER’S NOTES

- Refer to workbook page 7, Learning Objectives and Resources.
- Review the learning objectives.
- Let governors-elect know that at the end of each session, they will be asked to write one action item from that session in the Action Plans section of their workbooks. They will be asked to use these notes to complete the action-planning activity in the last session.
LEADING WITH VISION  
11:10-11:30

Theme

TRAINING LEADER’S NOTES

- Refer to workbook page 7, 2019-2020 Presidential Theme Bag and Gifts.
- Ask governors-elect to check their bags to make sure they have everything that is listed in the workbook.
- If anyone is missing an item, encourage them to visit the Assembly Office after the session for a replacement.
- Participants heard the theme for the first time at the opening session.
- Ask participants to form pairs and discuss their first reactions to the theme for 2-3 minutes, then ask the whole group to share participants’ reactions.

KEY POINTS

- The theme communicates the president-elect’s vision and goals for the year and helps Rotarians organize around a common idea.
- The Rotary Resource Center at the assembly has additional theme ties and scarves for those who donate $150 to The Rotary Foundation.

What are your first reactions to the theme?
What other highlights for the 2019-2020 year did you hear about in the general session?

KEY POINTS

- The 75th anniversary of the United Nations will provide an opportunity to highlight Rotary’s involvement in global humanitarian efforts.
  - Rotary-UN Presidential Peace Conferences will be held throughout the world.
  - A one-day Rotary-UN Presidential Conference preconvention event will be held at the 2020 Rotary Convention in Honolulu.
- President-elect Maloney shared details of his vision for the coming year including a focus on growing Rotary through supporting innovation and diversity in our clubs, involving our families in Rotary activities, and organizing Rotary leadership responsibilities in such a way that Rotarians active in their business and professions can still assume leadership roles.
How does the theme relate to the vision statement?

How will you help club presidents relate to Rotary’s vision and the 2019-2020 theme?

KEY POINTS

- Rotarians can use the theme and vision statement as part of their short, but important, Rotary message, or “elevator speech.”
- You can help club leaders create their own vision and goals for the year, inspired by the theme and vision statement.
The Rotary Citation
11:30-12:00

Training Leader’s Notes

- Refer to the 2019-2020 Presidential Theme and Rotary Citation brochure.
- Allow 3 minutes for governors-elect to review the brochure.
- Encourage them to consider Rotary’s vision statement and the remarks from this morning’s general session while they read.

Key Point

- You will receive additional copies of the brochure in a mailing this week: one per club and 25 additional copies per district for distribution.

What Did You Read in the Citation That Interested You?

Key Points

- The citation is divided into two parts: Unite People and Take Action.
- Achieving the citation with Presidential Distinction means that clubs achieve goals in four additional areas: Connect leaders, Connect families, Connect professionally, and Connect communities.
- There is a citation for Interact and Rotaract clubs.
Why does the president ask clubs to achieve the citation each year?

**KEY POINT**

- The citation is a tool to build strong clubs and is organized around Rotary’s strategic priorities and goals.

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**TRAINING LEADER’S NOTES**

- Refer to workbook page 9, The Rotary Citation.
- Allow 2-3 minutes for participants to read the information in the workbook section What You Need to Know About the 2019-2020 Rotary Citation.

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**KEY POINTS**

- To recognize achievements from the entire Rotary year, the Rotary Citation gives clubs from 1 July 2019 to 30 June 2020 to achieve their goals. As a result, certificates will be ready for distribution after you and your club presidents have left office.
- Several of the citation’s goals are linked to Rotary Club Central goals.
- This week, you can ask questions about Rotary Club Central at the technology labs.
How can involving the family of Rotary — Rotary program participants, Rotaractors, Interactors, personal family members, and friends — help clubs reach citation goals?

How can you convey the importance of achieving the citation at your presidents-elect training seminar?

KEY POINT

- When promoting the citation, you should consider how achieving it benefits clubs and their members.
KEY POINTS

- 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.

What other ideas do you have to balance work, life, and Rotary in the year ahead?
REVIEW AND ACTION ITEM

12:20-12:30

TRAINING LEADER’S NOTES

- Ask a volunteer to read the instructions for Action Plans for 2019-2020.
- Emphasize that at the end of each session, governors-elect should choose a learning objective and write an action item that relates to it.
- Let them know they should take 10-15 minutes each day to reframe that action item as a goal, and to outline their plan to achieve that goal.
- Explain that they should be ready to discuss their action plans for the coming year during Friday’s last session, From Assembly to Action.
- Allow 2-3 minutes for governors-elect to record one action item from this session in their workbooks.
- 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, 14 January 2019
Session time: 16:00-17:30
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the governors-elect will be able to:
1. Activate Rotary’s new strategic priorities and annual goals
2. Identify strategies to engage young leaders
3. Describe the value of a more inclusive organization

WORKBOOK

Page 11 Learning Objectives and Resources
Page 12 Emerging Leaders
Page 14 A More Inclusive Rotary
Page 64 Action Plans for 2019-2020
Appendix 1 Rotary International’s Strategic Planning Priorities and Objectives
Appendix 2 2019-2020 Annual Goals
**TIMELINE**

<table>
<thead>
<tr>
<th>Session</th>
<th>Time</th>
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<tbody>
<tr>
<td>Introduction</td>
<td>16:00 (5 min.)</td>
</tr>
<tr>
<td>Looking Forward</td>
<td>16:05 (30 min.)</td>
</tr>
<tr>
<td>Emerging Leaders</td>
<td>16:35 (30 min.)</td>
</tr>
<tr>
<td>A More Inclusive Rotary</td>
<td>17:05 (15 min.)</td>
</tr>
<tr>
<td>Review and Action Item</td>
<td>17:20 (5 min.)</td>
</tr>
<tr>
<td>Evaluation</td>
<td>17:25 (5 min.)</td>
</tr>
</tbody>
</table>

**FLIP CHART**

Prepare a flip chart with the session title, the session page in the governor-elect workbook, and your name and country.
TRAINING LEADER’S NOTES

- Refer to workbook page 11, 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.
LOOKING FORWARD

How do our core values of fellowship, integrity, diversity, service, and leadership define Rotary today?

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 road map — it guides the actions of Rotary at every level.
- Some Rotarians may find it challenging to adapt to new strategic priorities. We will discuss change management on Friday.

TRAINING LEADER’S NOTES

- Refer to workbook Appendix 1, Rotary International’s Strategic Planning Priorities and Objectives.
- Ask participants to review Rotary International’s Strategic Planning Priorities and Objectives in their workbook and to consider how they relate to our core values.
- After 3 minutes, ask participants to share one or two objectives that relate to one of our core values.
KEY POINTS

- Rotary also sets annual goals to help direct our membership, fundraising, and public image efforts.
- The goals of the Rotary Citation align with the goals of the organization, and clubs’ progress toward these goals moves the whole organization closer to its goals.

<table>
<thead>
<tr>
<th>TRAINING LEADER’S NOTES</th>
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<tbody>
<tr>
<td>– Refer to workbook Appendix 2, 2019-2020 Annual Goals.</td>
</tr>
<tr>
<td>– Ask participants to form pairs and allow 5 minutes to review the annual goals in appendix 2, compare that information with the 2019-2020 Rotary Citation, and answer the following question:</td>
</tr>
<tr>
<td>o Which citation goals relate to the 2019-2020 annual goals?</td>
</tr>
<tr>
<td>– After 2-3 minutes, ask pairs to share what they discussed.</td>
</tr>
<tr>
<td>– When everyone is finished, ask the following question.</td>
</tr>
</tbody>
</table>

What ideas do you have for helping clubs understand and support Rotary’s annual goals and new strategic priorities?
What programs and activities of Rotary and the Foundation engage young leaders?

- Interact (ages 12-18)
- Rotaract (ages 18-30)
- Rotary Youth Exchange (ages 15-19)
- Rotary Youth Leadership Awards (RYLA) (ages 14-30)
- New Generations Service Exchange (ages 18-30)
- Opportunities to volunteer on projects
- Rotary Community Corps
- Scholarships
- Alumni associations

<table>
<thead>
<tr>
<th>TRAINING LEADER’S NOTES</th>
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<tbody>
<tr>
<td>– Refer to workbook page 12, Emerging Leaders.</td>
</tr>
<tr>
<td>– In pairs, ask governors-elect to answer the following question in their workbooks:</td>
</tr>
<tr>
<td>o How can engaging young leaders and younger professionals (ages 18-45) help us achieve our annual goals and support our strategic priorities?</td>
</tr>
<tr>
<td>– After 2-3 minutes, or when everyone is done, invite participants to share what they wrote with the group.</td>
</tr>
</tbody>
</table>
Has your district’s involvement in these programs grown or changed in recent years?

If your district struggles to engage young leaders in any of these programs, which ones? Do you know why?

How can working with young leaders and young professionals benefit Rotary clubs and Rotarians?

- Rotarians’ mentorship of young leaders helps cultivate community- and service-minded individuals, benefiting both mentors and young leaders.
- Young professionals bring new ideas to clubs, are eager to take on leadership roles, and take action related to causes they care about.
- Doing so engages current and prospective members looking to leverage their skills, interests, and connections in service to young people or alongside them.
### TRAINING LEADER’S NOTES

- Refer to workbook page 13, Ideas to Involve Young Leaders and Younger Professionals chart.
- Ask governors-elect to form pairs.
- Assign each pair one of the strategic priorities (some pairs will have the same priority):
  - Increase our impact
  - Expand our reach
  - Enhance participant engagement
  - Increase our ability to adapt
- Ask pairs to review the objectives of the assigned priority and to mark which objectives young leaders and young professionals might be able to contribute to.
- After 2-3 minutes, ask pairs to think of specific examples of projects, activities, or programs in the coming year to involve young leaders and young professionals to support this objective.
- Ask if anyone would like to share their ideas.

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

**KEY POINTS**

- Create a meaningful relationship with Rotary so they will want to stay involved.
- Invite Interactors, Rotaractors, and their friends to participate in service projects in ways that put their leadership skills into action.
• Explore flexible club models such as reduced dues for Rotaractors or alumni.
• Develop opportunities for younger professionals to participate in Rotary with their families.

TRAINING LEADER’S NOTES

- Refer to the Presidential Theme and Rotary Citation brochure.
- Ask governors-elect to spend 2-3 minutes reviewing details of the Rotary Citation for Interact and Rotaract in their brochures.

How can the Rotary Citation for Interact and Rotaract clubs engage young leaders in the coming year?
A MORE INCLUSIVE ROTARY

What percentage of clubs in your district are open to engaging young leaders and to inviting young professionals to become members?

What percentage of your clubs’ memberships reflect the age, gender, and ethnic and cultural diversity of their communities?

What can you do to encourage clubs to increase these percentages?

TRAINING LEADER’S NOTE

– Refer to workbook page 14, A More Inclusive Rotary.
Why is it important to be an inclusive organization?

KEY POINTS

- Rotary clubs should reflect the diversity of their communities.
- Rotarians are more engaged in Rotary when they can serve with non-Rotarian friends and family members.
- Many non-Rotarians commit volunteer hours, money, and skills to Rotary projects.
- If we keep up our relationship with all who are interested in Rotary, regardless of their age, profession, or location, clubs will benefit by having friends who want to commit time and money, and maybe even become members.

How will you make Rotary more inclusive?
**REVIEW AND ACTION ITEM**

17:20-17:25

**TRAINING LEADER’S NOTES**

- 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.

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**EVALUATION**

17:25-17:30

**TRAINING LEADER’S NOTE**

- Daily evaluation forms will be distributed and collected at the end of the session.
Date: Tuesday, 15 January 2019
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. Understand the ways our Foundation helps do good in the world
2. Describe how our ability to raise and spend funds amplifies our impact
3. Assess their clubs’ involvement in polio eradication efforts

WORKBOOK

<table>
<thead>
<tr>
<th>Page</th>
<th>Description</th>
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<tbody>
<tr>
<td>15</td>
<td>Learning Objectives and Resources</td>
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<tr>
<td>16</td>
<td>Our Foundation</td>
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<td>17</td>
<td>Our Role in Polio Eradication</td>
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<td>18</td>
<td>Taking Action</td>
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<td>19</td>
<td>Funding Our Service</td>
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<tr>
<td>65</td>
<td>Action Plans for 2019-2020</td>
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<td></td>
<td>Appendix 2 2019-2020 Annual Goals</td>
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TIMELINE

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
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<tbody>
<tr>
<td>Introduction</td>
<td>10:30 (5 min.)</td>
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<tr>
<td>Our Foundation</td>
<td>10:35 (10 min.)</td>
</tr>
<tr>
<td>Our Role in Polio Eradication</td>
<td>10:45 (25 min.)</td>
</tr>
<tr>
<td>Taking Action</td>
<td>11:10 (15 min.)</td>
</tr>
<tr>
<td>Funding Our Service</td>
<td>11:25 (30 min.)</td>
</tr>
<tr>
<td>Review and Action Item</td>
<td>11:55 (5 min.)</td>
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</tbody>
</table>
FLIP CHARTS

Prepare a flip chart with the session title, the session page 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 15, 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.
Why is supporting and promoting giving to our Foundation important?

- Speeds progress toward the goal of eradicating polio globally
- Allows Rotarians and community members to make a difference locally and globally with a gift of any size
- Engages members who see the results of grant-funded projects
- Increases the visibility of Rotary’s impact on communities by funding local and global projects

What are the different funds of The Rotary Foundation and how do contributions support Rotary’s key initiatives?

- **PolioPlus Fund** — supports polio eradication
- **Annual Fund** — supports Rotary’s work today
- **Endowment Fund** — supports the same programs as the Annual Fund, but perpetually
- **Within these funds there are opportunities to give to a specific area of focus, approved global grants, or the Rotary Peace Centers.**
KEY POINTS

- In addition to raising funds for local and international service projects, every club and district is encouraged to promote and raise funds for the PolioPlus Fund.

- Every $1 Rotary commits to direct support for polio immunization (up to $50 million per year) will be matched 2-to-1 by the Bill & Melinda Gates Foundation through 2020.

### TRAINING LEADER’S NOTES

- Refer to workbook page 17, Our Role in Polio Eradication.

- Ask governors-elect to form pairs and consider the state of their district’s efforts toward polio eradication, using these questions in their workbooks as a guide:
  - Do clubs in your district:
    - Consistently promote and raise funds for the PolioPlus Fund?
    - Rank polio eradication as our organization’s No. 1 priority?
    - Plan projects and events to promote awareness among non-Rotarians of our polio eradication efforts?
    - Know that the Bill & Melinda Gates Foundation’s 2-to-1 match continues through 2020?
  - Does your district earmark District Designated Funds for PolioPlus?
  - What is your role in ensuring that each club in your district is knowledgeable about PolioPlus and supports and promotes these efforts?

- After 5 minutes, ask pairs to tell the group what they discussed.
What activities have you planned for World Polio Day?

KEY POINTS

- World Polio Day is held on 24 October and is an opportunity to increase giving and awareness of polio eradication.
- Clubs and districts are encouraged to register their World Polio Day events at endpolio.org.

How will you engage community members, young leaders, and local media?

How can you help keep the momentum going in your district as we near our goal of a polio-free world?
<table>
<thead>
<tr>
<th>TAKING ACTION</th>
<th>11:10-11:25</th>
</tr>
</thead>
</table>

**TRAINING LEADER’S NOTE**

- Refer to Appendix 2, 2019-2020 Annual Goals.

## Which of the 2019-2020 goals relate to the Foundation?

**KEY POINTS**

- Publicize the role of Rotary and Rotarians in polio eradication.
- Increase local and international projects by fully utilizing District Designated Funds to fund district grants, global grants, PolioPlus, and the Rotary Peace Centers.
- Increase contributions to the Annual Fund and PolioPlus while building the Endowment Fund to $2.025 billion by 2025.
- Build awareness of Rotary, and promote the People of Action campaign.
What kind of impact can we make by spending DDF?

KEY POINTS

- Spending DFF helps create positive change in communities at home and around the world.
- Our Foundation helps us grow the funds we raise, amplifying the impact of each individual donor.
- In many areas of the world, districts are hesitant to spend their District Designated Funds. It is important to take full advantage of the opportunities our Foundation provides to serve communities around the world.

How can you help Rotary reach the 2019-2020 goals related to the Foundation?

TRAINING LEADER’S NOTES

- Refer to the Presidential Theme and Rotary Citation brochure.
- Ask participants to take 2-3 minutes to review the citation and to find goals that relate to The Rotary Foundation.

How can you support clubs in achieving the Foundation-related citation goals?
How do you raise funds for service projects?

- Local fundraising events
- Community partnerships
- Partnering with other clubs, other districts, or The Rotary Foundation
- Leveraging Rotarian Action Groups and international service chair networks
- Crowdsourcing through Rotary Ideas

What strategies do you have for meeting the ambitious fundraising goal of building the Endowment Fund to $2.025 billion by 2025?

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?

– Show the impact of donor’s support — talk about the results of global and district grant projects.
– Talk about Rotary’s role in eradicating polio — highlight Rotarians working on the “front lines” or personal experiences such as administering the vaccine.
– Connect a donor’s passion with an opportunity to give, such as the areas of focus, scholarships and peace fellowships, outright gifts (which let them see their gift used immediately), or bequests (which let them see their gift serve as their legacy).

Has anyone experienced Rotary’s virtual reality films?

KEY POINT

• Visit the VR Zone here at the assembly to experience one of Rotary’s three films:
  o “I Dream of an Empty Ward” tells the inspiring story of Alokita, one of the last children in India to be paralyzed by polio.
  o “One Small Act” takes us on the journey of a child whose world has been torn apart by conflict.
  o “Two Drops of Patience” follows a Rotaractor and local Rotarians in Uganda as they travel to a remote region to help reach children with the polio vaccine.
How can we use virtual reality to raise funds and promote Rotary?

KEY POINT

• Evidence 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.

Who can share a fundraising success story?
REVIEW AND ACTION ITEM

11:55-12:00

TRAINING LEADER’S NOTES

– 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.
Date: Wednesday, 16 January 2019
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 importance of community assessment in project success
2. Understand the role of the governor in projects and global grants
3. Support Rotary’s efforts toward achieving peace throughout the world

WORKBOOK

Page 31   Learning Objectives and Resources
Page 32   From Local to Global
Page 33   The Power of Service
Page 34   Global Grants
Page 37   Areas of Focus
Page 37   Rotary Builds Peace
Page 67   Action Plans for 2019-2020

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<td>Introduction</td>
<td>10:30</td>
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FLIP CHART

Prepare a flip chart with the session title, the session page in the governor-elect workbook, and your name and country.

INTRODUCTION

Session title

TRAINING LEADER’S NOTES

– Refer to workbook page 31, 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.
How is Rotary both a local and a global organization?

KEY POINTS

- Much of Rotary’s strength is at the local level, and many club-level Rotarians see Rotary as a community organization.
- Service is done both locally and globally.

As governor, how can you help members think about Rotary on a global level?

- Help Rotarians scale up local community service projects to larger, international projects.
- Engage your district international service committee chair in project planning.
- Encourage more clubs to tap into Foundation funding by applying for district and global grants.
- Encourage club members to join or engage a Rotarian Action Group to support projects worldwide.
- Encourage club members to join or form a Rotary Fellowship.
- Support our global fight to eradicate polio.
- Encourage clubs to get involved in programs such as Rotary Friendship Exchanges and Rotary Youth Exchange, project fairs, and vocational training teams.
How can your district support effective service projects?

- Appoint district community service committee chairs and district international service committee chairs to inspire clubs to undertake well-planned community service activities.
- Promote resources: project lifecycle tools (community assessments, Rotarian Action Groups, district resource networks, Rotary grants, online tools, Rotary Community Corps).
- Build cooperating partnerships with young leaders, Rotaract clubs, and external organizations.

TRAINING LEADER’S NOTES

- Refer to workbook page 33, The Power of Service.
- Allow governors-elect to think about a recent Rotary project completed in their community and to briefly answer the questions related to community assessments, sustainability, and monitoring and evaluation.
- Allow 5-7 minutes for participants to work.

How many of the projects you described:

- Began with a community assessment?
- Focused on sustainability?
- Included a plan for monitoring and evaluation?
KEY POINTS

- These elements are often associated with successful large, international projects or global grants but are equally important in smaller-scale or local community projects.
- Applying these strategies to smaller projects at the local level will make larger, multiclan, and district projects more successful and prepare these activities to grow into projects that would be eligible for global grants.

SCALING UP PROJECTS

11:05-11:30

TRAINING LEADER’S NOTES

- Refer to workbook page 34, Global Grants.
- Allow governors-elect 2-3 minutes to review the global grant statistics for 2017-18 and the governor’s role in global grants.

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.
For those who received a global grant, how did you find your international partner?

How many of you plan to task your district Rotary Foundation chair (DRFC) to help clubs apply for global grants for their projects?

TRAINING LEADER’S NOTES

– Refer to workbook page 35, Global Grant Characteristics list.
– Ask governors-elect, in pairs, to review the global grant characteristics and discuss the following:

  Reflecting on the global grant characteristics, think about recent projects in your district:
  o Did any of these projects have the potential to receive global grant funding with a few changes?
  o What steps would it take to become eligible?
– After 5 minutes, or when everyone is finished, discuss as a group.

KEY POINT

• One of most commonly reported challenges of a global grant is meeting the sustainability requirement.
What does it mean for a project to be sustainable?

**KEY POINTS**

- Sustainability means different things to different organizations. For Rotary, sustainability means providing long-term solutions to community needs that the beneficiaries can maintain after grant funding ends.
- Sustainability is often a challenge for clubs trying to scale up a local project to a project that could be eligible for a global grant.

**TRAINING LEADER’S NOTES**

- Refer to workbook page 36, Sustainability graphic.
- Allow 1-2 minutes for review.

What role do community assessments play in sustainability?

**KEY POINTS**

- The most successful projects begin with a community need, build on community strengths, and align with local values and culture.
• Community members are more likely to feel ownership of projects that align with community needs and strengths.
• Community assessment is important in both community and international service projects.
• As of 1 July 2018, any club or district that applies for a global grant to support a humanitarian project or a vocational training team must conduct a community assessment first and include the results in their grant application.

Who can help you locally with service projects?

How do you engage with them?

KEY POINTS

• Appoint district community service committee chairs and international service committee chairs to inspire clubs to undertake well-planned community service activities.
• Rotarian Action Group members and district resource networks — coalitions of local Rotarians, Rotaractors, alumni, and partners with expertise in the areas of focus, project planning, and project implementation — can help guide clubs on humanitarian projects.
• Young leaders in your communities, including Rotaractors, can also help.
How can the district international service chair help?

– They inspire clubs to get involved in international service activities.
– They can help identify international partners or opportunities for service projects.
– They can represent your district at a project fair and help identify international partners for a service activity.
– They build district resource networks.
Which area of focus aligns most closely with your district goals for the year?

How do the areas of focus increase our global impact?

KEY POINTS

- Aligning global grant-funded projects with the goals of one or more of the areas of focus allows Rotarians worldwide to consolidate their efforts and have a larger, measurable impact on the world.
- Each of the areas of focus contributes to creating a more peaceful world and to addressing environmental issues.
- Research has shown that non-Rotarians contribute to Rotary to connect with specific causes and projects. An increase in donors leads to a greater global impact.
Do any of you plan to focus on peace projects or initiatives in the coming year?

KEY POINT

- Peace and conflict prevention and resolution is one of our areas of focus, but all of Rotary’s efforts are aimed at building a more peaceful world.

TRAINING LEADER’S NOTES

- Refer to workbook page 37, Rotary Builds Peace.
- Ask governors-elect to read the information about Rotary Peace Centers and the strategic partnership with the Institute for Economics and Peace and answer the questions in their workbook.
- After 3 minutes, discuss the questions as a group.

How can Rotary’s strategic partnership with the Institute for Economics and Peace support local peace initiatives?

- It provides members with tools for designing and implementing peace projects and training at the club, district, and wider community levels.
How do the Rotary Peace Centers contribute to the vision or legacy of Rotary?

– Rotary may become known for its efforts to create a more peaceful world.
– Rotary inspires and increases peacebuilding at the community level.
– Rotary Peace Centers educate leaders of the future who are dedicated to peacebuilding.
– The network of Rotary Peace Fellows continues to grow, expanding the overall base of individuals committed to peace.
REVIEW AND ACTION ITEM 11:50-11:55

TRAINING LEADER’S NOTES

- 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 11:55-12:00

TRAINING LEADER’S NOTE

- Daily evaluation forms will be distributed and collected at the end of the session.
Date: Thursday, 17 January 2019
Session time: 10:30-12:00
Duration: 90 minutes

LEARNING OBJECTIVES

At the end of the session, the participants will be able to:
1. Understand how increasing the public’s understanding about our work helps us do the most good in the world
2. Inspire districts and clubs to use the new messaging and public image campaign to tell their Rotary People of Action stories

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</table>
FLIP CHARTS

- Prepare a flip chart with the session title, the session page in the participant workbooks, and your name and country.

Elements of a Good Story

Elements to Avoid

INTRODUCTION 10:30-10:35

Session title

TRAINING LEADER’S NOTES

- Refer to workbook page 39, Learning Objectives and Resources.
- 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 all 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.
BRINGING ROTARY’S STORY TO LIFE

10:35-10:50

KEY POINT

- As Rotarians and Rotaractors, we are people of action who work to understand and find solutions to real problems facing communities around the globe.
  - Rotary joins leaders from all continents, cultures, and occupations.
  - We exchange ideas, bringing together our expertise and diverse perspectives to help communities address tough problems.
  - We take action to bring lasting change to our communities around the world.

What is your role in bringing Rotary’s story to life?

- Model how to tell compelling stories about the impact and value of Rotary and how we are people of action.
- Increase understanding and awareness of Rotary worldwide by sharing the stories we uncover during the year — with other clubs, leaders, and the public.
- Encourage clubs to use our new public image resources locally to help Rotary become more visible and understood.
- District governors should appoint a district public image chair whose professional experience is in marketing, advertising, or communications.
How does the public’s lack of awareness or understanding about our work affect our ability to attract new members? Raise funds?

Although the study did not directly address Rotaract, what findings apply to Rotaract? Which ones might not apply?

What information from the research can help Rotarians and Rotaractors tell our story more effectively?
What opportunities will you have in the coming year to communicate with the public about Rotary or Rotaract?

– Professional networking events
– Speaking engagements
– Donor recognition events
– Meetings with program or funding partners

What audiences do you need to consider when communicating about Rotary and Rotaract?

– Rotarians and Rotaractors
– The public and those who know little or nothing about us
– Potential members
– Existing and potential donors
– Community partners

KEY POINT

• Members of the public may hear engaging stories of our good work and be inspired to learn more and support us, by volunteering, donating, or inquiring about how to become a member.
Do these stories truly represent the club experience or what Rotary membership is really like?

KEY POINTS

- Stories about formal club meetings, long lunches, or unengaging speakers can be a poor representation of our work.
- Stories that focus only on international service work may not showcase the club experience, which is often focused on local projects and personal and professional networking.

How can we use stories to promote Rotary to non-Rotary audiences and help them understand our work?
Elements of a Good Story

What are the elements of a good story?

– Describes a meaningful transformation
– Includes proof points that show demonstrable impact
– Includes personal anecdotes, real-life examples, and stories that touch our emotions and grab our attention
– Is tailored to the audience

KEY POINT

• A good story affects you strongly or makes you think, feel, or behave in a new way.

Elements to Avoid

What makes a story unclear or gives the wrong impression about Rotary?

– Rotary jargon or acronyms
– Some descriptions that make Rotary sound exclusive, uninviting, or unwelcoming
– No clear mention of our programs, areas of focus, or initiatives
– No proof points highlighting our impact or the specific ways we improve communities
KEY POINTS

• Rotary’s Messaging Guide provides examples to ensure that we always tell a clear, compelling Rotary story that inspires audiences to engage with us, no matter who is speaking or who is listening.

• Rotary has resources available at rotary.org/brandcenter to customize your messaging to specific audiences’ motivations and their different levels of Rotary knowledge and experience.
How can social media be used to share People of Action stories effectively?

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**TRAINING LEADER’S NOTES**

- Refer to workbook page 41, Telling a Stronger Story.
- Ask participants to consider the sample People of Action social media ads and to think about what makes these stories engaging. After 2-3 minutes, share the following key points.

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**KEY POINTS**

- The People of Action campaign was designed to help us tell local stories — the stories of Rotary and Rotaract — that show how we engage fellow members, community partners, and thought leaders to develop lasting solutions for the pressing needs and challenges in our communities.

- The campaign provides a narrative and visual framework for Rotary and Rotaract clubs to tell and share their stories across the media that is relevant with their target audiences.
Why is it important for each of you to develop and tell your own People of Action stories?

KEY POINTS

- As influencers in your clubs and communities, sharing your People of Action stories on social media can have a large impact and reach prospective members.
- Telling your People of Action stories at club and community speaking events, including club visits, can inspire members and encourage them to tell their own stories.

TRAINING LEADER’S NOTES

- Refer to workbook page 42, Telling Your Club’s People of Action Story.
- Ask participants to review “Telling Your Story: 5 Questions to Answer” and to think about a story they want to tell from their own club experience. They can use that story to answer the questions in their workbooks.
- After 5-7 minutes, or when everyone is finished, ask participants to create a sample social media post by writing a short text and to describe an image they would use to convey their story. Encourage them to refer back to the sample posts for guidance.
- After 3-5 more minutes, ask participants to share what they wrote.
How can you help clubs understand and use Rotary’s public image resources?

KEY POINTS

• Encourage clubs to assemble a People of Action team who can:
  o Plan a local campaign
  o Localize the ads
  o Use social media to tell People of Action stories
  o Post Rotary’s People of Action video and online ads on club websites

• Governors-elect can work closely with your Rotary public image coordinator, who serves as a brand ambassador for Rotary.

How can Rotaractors and Rotarians work together to promote our members as people of action?
**REVIEW AND ACTION ITEM**

11:55-12:00

### TRAINING LEADER’S NOTES

- Ask participants to record an action item from this session.
- Refer Rotaract participants to the instructions in their workbooks for writing action items. Let them know that if they do not have time to complete their action item now, they should take time to do it at the end of the day.
- 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, 17 January 2019
Session time: 15:30-17:00
Duration: 90 minutes

LEARNING OBJECTIVES

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

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

**INTRODUCTION 15:30-15:35**

- Session title

**TRAINING LEADER’S NOTES**

- Refer to workbook page 46, 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.
Why do people join Rotary and Rotaract?

KEY POINTS

- Individuals are driven to join, donate to, or volunteer with our organization because they take an interest in our causes and the local impact we make.
- We are attractive to “purpose seekers,” people who want to create lasting change across the globe, in their local communities, and in themselves.

Why do they stay in Rotary and Rotaract?

KEY POINT

- Once members join, they stay for relationships.
Why do some members leave Rotary and Rotaract?

– Clubs do not offer programs and activities to suit 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.

How can a membership committee, at the district or club level, affect member attraction and engagement?

KEY POINTS

- Governors-elect, you should have already appointed a qualified individual as your district membership chair to lead your district’s membership committee.
- At the club and district levels, ensure that your membership committee includes several members who represent the diversity of your membership and that all committee members collaborate on efforts and share responsibility for success.
PROSPECTIVE MEMBERS 15:50-16:10

KEY POINTS

- Rotary and Rotaract must continue to be attractive to prospective members so they can thrive and be sustainable in the future.
- Clubs can accommodate the needs of current and prospective members by changing the schedule, frequency, or format of meetings, and offering additional membership types.
- One of the 2019-2020 annual goals is to increase the number of female members, members under 40, and Rotaractors joining Rotary.

Who are potential members in your district? Are they different for Rotary and Rotaract? Why or why not?

- All professionals and people with leadership traits who are passionate about making a difference
- For Rotary, recent retirees with professional expertise
- Younger professionals looking to make a positive impact and connections in their community
- The family of Rotary, including alumni of Rotary programs such as Interact, Rotaract, Rotary Youth Exchange, and RYLA, and of Foundation-funded programs
- People and professions in the community that currently are not being represented, including women, members of ethnic minorities, and those from other underrepresented groups.
What might be different about a club that attracts younger professionals?

How might Rotary clubs benefit if Rotaractors also became Rotarians?

KEY POINTS

- Over 60 percent of the prospective members who complete the join form — people who are telling us they want to join a Rotary club — are not being contacted. When these prospective members do not hear from us, their perception of Rotary turns negative.
• Having an effective plan for managing membership leads at the district level benefits Rotary and Rotaract clubs by increasing opportunities for membership growth and creating a positive experience for people who want to engage with Rotary.
What are some ways to raise the likelihood that a new member will stay in their club?

- Providing a new member orientation to make them feel welcome and get them involved in club activities
- Getting new members involved from the beginning in ways that are meaningful to them
- Starting a mentor program that pairs a new member with a current one
- Offering options for meeting days and times and lifting attendance requirements

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

KEY POINT

- Research and member experiences have consistently shown that when clubs have more freedom to determine how they hold their meetings, who they invite to membership, and what defines engagement, the club is more vibrant and better able to grow.
How have Rotaract clubs set a good example of responding to members’ needs in terms of club meetings and attendance?

How can club leaders deliver an experience that will keep members excited about Rotary and Rotaract?

- Vary the ways the club meets, including social gatherings, service projects, and online activities.
- Make sure gatherings and meetings are fun and informative.
- Recognize members regularly for their experience, skills, knowledge, and achievements, inside and outside Rotary.
- Encourage members to take leadership roles.
- Help members connect with others in the club and district, and introduce them to new ways to get involved.
- Regularly survey members to gauge their satisfaction with their club, and implement changes to address member feedback.
How might including the friends and families of your club members help member engagement?

TRAINING LEADER’S NOTES

– Refer to the Presidential Theme and Rotary Citation brochure.
– Allow participants 2-3 minutes to review the Rotary and Rotaract Citations.

How can the Rotary Citation for Rotary and Rotaract clubs help grow and strengthen their membership?

STARTING NEW CLUBS 16:35-16:50

TRAINING LEADER’S NOTES

– Refer to workbook page 50, Starting New Clubs.
– Divide participants into pairs, making sure to pair the Rotaract participants together.
– Allow 5 minutes for them to consider the following questions:
  o When is the right time to start a new club?
  o Should Rotaract clubs start new Rotary clubs? What are the benefits?
  o What resistance might you encounter to starting new clubs from existing clubs who view new clubs as competition?
  o How will you respond to that resistance?
– After 5 minutes, or when everyone is finished, ask participants to share what they discussed.
### REVIEW AND ACTION ITEM

**TRAINING LEADER’S NOTES**

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<td><strong>Refer to workbook page 69, Action Plans for 2019-2020.</strong>&lt;br&gt;- Ask participants to record an action item from this session.&lt;br&gt;- Make sure that all discussion questions have been answered.&lt;br&gt;- Review the learning objectives to ensure that all topics were covered sufficiently.&lt;br&gt;- Thank participants.</td>
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### EVALUATION

**TRAINING LEADER’S NOTE**

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<tr>
<td>16:55-17:00</td>
<td><strong>Daily evaluation forms will be distributed and collected at the end of the session.</strong></td>
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Date: Friday, 18 January 2019
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 agent in personal, professional, and Rotary experiences
2. Use Rotary’s model to successfully plan for change

**WORKBOOK**

- Page 51 Learning Objectives and Resources
- Page 52 Change Readiness
- Page 52 Leading Change
- Page 54 Identifying Gaps in the Change Plan
- Page 55 Case Studies
- Page 58 Responding to Resistance
- Page 59 The Change Journey
- Page 70 Action Plans for 2019-2020

**TIMELINE**

- Introduction 10:30 (10 min.)
- Be a Change Agent 10:40 (20 min.)
- What Is New in Rotary? 11:00 (25 min.)
- Responding to Resistance 11:25 (30 min.)
- Review and Action Item 11:55 (5 min.)
FLIP CHARTS

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

Change Planning Gaps
- Vision:
- Skills:
- Rewards:
- Resources:
- Action Plan:

The Change Journey
- Stage 1
- Stage 2
- Stage 3
- Stage 4
- Stage 5
- Stage 6
INTRODUCTION

Session title

TRAINING LEADER’S NOTES

- Refer to workbook page 51, 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.

TRAINING LEADER’S NOTES

- Refer to workbook page 52, Change Readiness.
- Ask participants how they respond to change. Using the change readiness scale, ask them to indicate if they:
  - Do not adopt change easily
  - Adopt new ideas and actions if motivated
  - Seek out and embrace new ways of doing things
- Allow 1-2 minutes. Ask participants to answer the following questions with a show of hands.

How many of you identify as a person who does not accept change easily?

A person who needs a little motivation to accept change?
A person who seeks out and embraces change?
A mix of these categories?

Does anyone want to share an example of how you reacted to change in the past?

How can understanding the ways people react to change help you successfully lead individuals, teams, and organizations through change?

KEY POINT

- A successful change 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 People of Action campaign.
- To improve and grow as an organization, Rotary must continuously adapt how we operate to meet new challenges.
- Improvement and growth will happen only when members of our organization agree they want them and change how they do things. Change leaders guide and support people through the transition from where they are to where they want to be — that means getting people to think, act, or believe differently.
- To adopt change successfully, address the personal and emotional changes that people experience when adapting to new ways of thinking or acting.
Would anyone like to give an example?

**KEY POINTS**

- There are five key parts of change planning that ease acceptance of a new change:
  - **Vision** — what does the new change look like when it is completely in place? What will people do differently? What will look different?
  - **Skills** — what skills are needed to implement and sustain the change? Are the right people in the right positions? Do the people responsible for implementing the change have the needed skills? If not, how will they acquire the skills or who else can do the job?
o Rewards — what are the benefits of the change and how will they be reinforced so the change is more readily adopted? How do you answer the question “What’s in it for me?” from the individuals you are asking to change?

o Resources — what will be offered (for instance, information, tools) to ensure that people have easy access to resources they need to support, adopt, and make the desired change?

o Action Plan — what will you do to make sure a comprehensive change plan is put in place? How do you ensure the plan is followed?

• Apply the five 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?
WHAT IS NEW IN ROTARY?  11:00-11:25

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 new options, and others may struggle for many different reasons.
- Rotary-wide changes, such as expanded club meeting flexibility, the People of Action campaign, and a new strategic plan, offer good case studies to understand change management.
Change Planning Gaps

**TRAINING LEADER’S NOTES**

- Refer to workbook page 54, Identifying Gaps in the Change Plan.
- Ask participants, in pairs, to consider the consequences of having a gap in their change plan. Refer to the icons in the workbook to guide their responses.

What would be the result 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.

- **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 you are trying to implement may not get started at all if you have not thoroughly planned ahead.

- Ask participants to share their responses for the negative repercussions of a gap in their change plan, and record their responses on the flip chart.
In the change examples you gave before this exercise, were any of the five key parts missing?

Did you experience a negative consequence as a result?

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

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**TRAINING LEADER’S NOTES**

– Refer to workbook page 55, Case Studies.

– Ask participants to 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.

– Pair participants, making sure to pair Rotaract participants together.

– Ask the pairs to follow these instructions in their workbooks:
  
  o Write which case study you chose, and why adopting this change is valuable to members in the coming year.

  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.

– After 10 minutes, have volunteers describe any areas where they struggled to identify a part of their plan.

– Encourage group members to quickly and freely suggest any possible solutions as soon as they occur to them.

– Encourage participants to take notes in their workbooks.
RESPONDING TO RESISTANCE

TRAINING LEADER’S NOTES

- Refer to workbook page 58, Responding to Resistance.
- In the same pairs from the earlier exercise, ask participants to complete the following activity in their workbook:
  - Reflecting on the change plan you developed in the last exercise, consider some reasons that clubs and their members might be resistant to that change. Below, identify each of those reasons, how you might recognize signs of resistance, and what steps you can take to help clubs embrace the change.
- Allow 5-7 minutes for pairs to work.
- Discuss the questions below as a group.

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.
- They believe implementing the change is too much work.
- Members like their club the way it is.
- They 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 change made by peers has 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 mitigates resistance.
- One model to help us understand how some individuals and groups experience change is adapted from Swiss psychiatrist Elisabeth Kübler-Ross.
TRAINING LEADER’S NOTES

- Refer to workbook page 59, The Change Journey.
- In pairs, ask participants to review the change journey graphic in their workbook and explain that the graphic highlights the experience of a person who is resistant to change.
- The start of the journey shows the moment of change. This person may then experience denial, followed by doubt, and eventually acceptance.
- Using the word bank provided, allow participants 2-3 minutes to match the intermediate stages of the change with their placement on the journey.
- When everyone is finished, use the key points below to discuss each part of the graphic.
- Encourage participants to take notes and update the change journey graphic in their workbook if needed.

KEY POINTS

- Stage 1, Blame Others: People often experience shock or denial that the change is happening and blame others — often the leader of the change — for the discomfort they are experiencing.
- Stage 2, Blame Self: People may begin to blame themselves and express negativity about the ability to adapt to the change.
- Stage 3, Uncertainty/Confusion: As the change, and reactions to it, begin to progress, people begin to ask questions about what the change will look like, such as, What will this change mean for my work? How will my experience be different?
• Stage 4, Acceptance/Rationalization: People begin to internalize that the change is happening and to accept it.

• Stage 5, Problem Solving: With the anxieties of the impending change behind them, people begin to embrace the change and develop new models for the things they did before the change.

• Stage 6, Moving On: The change becomes the “new normal” and people embrace their new environment.

How can understanding the journey people take through change help you be a change leader?
## REVIEW AND ACTION ITEM

11:55-12:00

### TRAINING LEADER’S NOTES

- 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, 18 January 2019
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 action plans to implement in their districts
  2. Effectively share the messages they learned at the assembly

WORKBOOK

Page 60   Learning Objectives and Resources
Page 61   Summarize the Week
Page 62   Action Plans for 2019-2020

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>Looking Forward</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 CHARTS

📅 Prepare a flip chart with the session title, the session page in the governor-elect workbook, and your name and country.

✍️ Tips for Effective Public Speaking
Session title

<table>
<thead>
<tr>
<th>TRAINING LEADER’S NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>– Refer to workbook page 60, Learning Objectives and Resources.</td>
</tr>
<tr>
<td>– Welcome governors-elect and introduce yourself.</td>
</tr>
<tr>
<td>– Ask governors-elect to state their name and country.</td>
</tr>
<tr>
<td>– Review the learning objectives.</td>
</tr>
<tr>
<td>– Remind governors-elect to take notes in their workbooks.</td>
</tr>
<tr>
<td>– Refer to the list of resources in the workbook.</td>
</tr>
</tbody>
</table>
REFLECTING ON THE ASSEMBLY

14:05-14:15

TRAINING LEADER’S NOTES

– Refer to workbook page 61, Summarize the Week.
– Ask governors-elect to take 5 minutes to record in their workbooks:
  o One or two of the most important things they learned this week
  o One or two messages they would like to communicate to clubs when they return
  o Any advice they have for the district governor-nominee
– Let them know they will have an opportunity to complete the public speaking tips section later in the session and that they will return to discuss these questions at the end of the session.

What will you do differently next year because of something you learned this week?
KEY POINTS

- Goals are an important part of a successful year as governor.
- Rotary Club Central empowers club and district leaders to monitor club progress and achievements, work with assistant governors to support club progress, track club goals and progress, and rate clubs.

TRAINING LEADER’S NOTES

- Governors-elect were asked to record an action item at the end of each session this week.
- They were also encouraged to take additional time throughout the week to reframe each action item as a goal and to think about three steps to support that goal.
- Allow them 7-10 minutes to review the goals they developed throughout the week and to develop a specific, measurable plan for themselves based on one or two of their action items, if they have not already.
- Encourage participants to continue this exercise for the rest of the action items after the assembly.
- Have governors-elect tell the group their most important action item and the plan they will implement after the assembly.
- Make sure everyone gets a chance to speak.
- Encourage participants to take notes in their workbooks as they hear good ideas.
LOOKING FORWARD  

KEY POINTS

- Shortly after you return home from the assembly, you will hold presidents-elect training seminars.
- One of your most important roles is to motivate and inspire club leaders.

Why is it important for a district governor to be an effective public speaker?

KEY POINTS

- When visiting clubs, governors are typically asked to make remarks. You are charged with communicating the message of the Rotary president to the clubs.
- As the top representative of your district, you may have opportunities to speak to the media on behalf of Rotary.
TRAINING LEADER’S NOTES

– Refer to workbook page 61, Summarize the Week.
– Ask the governors-elect to suggest tips for public speaking, and record them on the flip chart. Add any key points that are not mentioned.

Tips for Effective Public Speaking

What are some techniques that make a person an effective public speaker?

KEY POINTS

Tips for effective public speaking include:

- Know your material.
- Practice, practice, practice.
- Know the audience.
- Know the room.
- Relax.
- Visualize yourself giving your speech.
- Realize that people want you to succeed.
- Do not apologize for nervousness.
- Concentrate on the message, not the medium.
- Gain experience.
What are some messages from this week that you plan to communicate to clubs?

KEY POINTS

- Rotary is about uniting people.
- Rotary welcomes not just individuals, but also families.
- Rotary allows us to network and build relationships professionally.
- Rotary brings us together in a global community.

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**

<table>
<thead>
<tr>
<th>TRAINING LEADER’S NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>– Make sure that all questions from the discussion have been answered.</td>
</tr>
<tr>
<td>– Review the learning objectives to ensure that all topics were covered sufficiently.</td>
</tr>
<tr>
<td>– Thank governors-elect for their participation in the International Assembly.</td>
</tr>
</tbody>
</table>

### EVALUATION

**15:20-15:30**

<table>
<thead>
<tr>
<th>TRAINING LEADER’S NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>– Governors-elect are asked to complete an evaluation on the day’s training and some overall program elements. An evaluation on general sessions and logistics will be emailed at the close of the assembly.</td>
</tr>
<tr>
<td>– The RI staff representative will distribute and collect the evaluation form on the day’s sessions.</td>
</tr>
<tr>
<td>– You may leave the room at this time.</td>
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</tbody>
</table>