

# District Director Training Agenda

## Thursday, February 11, 2010

- 3:00 Welcome and Introductions – PDG Jim Puryear
- 2010 – 2011 Theme
    - Building Communities, Bridging Continents
- 3:10 Introduction to Areas of Focus advocated by  
RI President Elect Ray Klingensmith – PDG Jim Puryear
- Areas of Focus (Tab 1)
    - Peace and Conflict Prevention/Resolution
    - Disease Prevention and Treatment
    - Water and Sanitation
    - Maternal and Child Health
    - Basic Education and Literacy
    - Economic and Community Development
  - Review RI Presidential Citation (Tab 2)
- 3:20 Introduction to Areas of Focus advocated by DGE Lloyd Horadan
- Future Vision
    - It's coming. Will we be ready in three years?
    - Strategic Planning at the Club and District Level
      - Planning for Succession
  - Rotary Leadership (Learning) Institute (Tab 2)
  - Family of Rotary – Let's put the fun and family back in "Rotary"
  - Membership
    - Retention, retention, retention
    - Recruit Rotarians vs. members
  - Literacy Projects
    - GED Scholarships (Youths and Adults)
    - Ferst Foundation (Birth to age 5)
  - Foundation
    - EREY
    - Paul Harris Society
    - Gates Challenge Grants
    - 100% Paul Harris Clubs
  - Governor's Award of Excellence (Tab 2)

- 3:35 Overview of District Leadership and Training Plan - DGE Lloyd Horadan
- Organization and structure of the 2010 – 11 District Leadership Team
    - Organization Chart for District Leadership (Tab 1)
    - Leadership Contact Information (Tab 1)
  - District Training; PETS – District Assembly – District Seminar Training
    - Overview of District Training Plan (Tab 1)
  - District Director Leadership Roles
    - DD Leadership Assignments and Focus Areas (Tab 1)
    - AG club assignments (Tab 1)
    - Communication, communication, communication.....
    - Follow-up, follow-up, follow-up.....
  - District Initiatives for 2010-11
    - Family of Rotary – Putting “Fun and Family” Back Into Rotary (Ron May)
    - Membership – Retention, Retention, Retention (Bruce Peyton)
    - Literacy – Developing a better educated/prepared community (Bert Guy)
    - Rotary Leadership Institute (Bill Booth)
    - Coordination with DDs and Progress with District Goals (Paula Goodnow)
    - Rotary Foundation (Dallas Simon)

- 4:00 Building the AG/President Elect Team – Jeff Kublin, AG “Emeritus”
- Pre-PETS Presentation
    - Setting the stage for PETS
    - Getting PEs off on the right foot
    - Building the “Team”
    - Communicate, communicate and communicate some more.....

- 4:20 Training Sequence for Assistant Governors – Lloyd Horadan, DGE
- Review of AG Training Manual (Tab 6 - Homework)
  - Time lines are the keys to success with AGs and PEs
    - Review key dates and training sequence for AGs and PEs (Tab 1-Homework)
    - Review AG time lines (Tab 6 - Homework)
  - Review President’s Manual (Tab 7 - Homework)
    - Time lines Presidents (Tab 7 - Homework)
  - Team building with DD/AG
    - Planning for Round Table Discussions
    - Review of Power Points planned for PETS (Tab 5 Homework)
    - Complete Mock Forms with AGs
      - GOAL Forms (Tab 3 Homework)
      - Planning Guide for Effective Rotary Clubs (Tab 2 Homework)
      - Memo of Club Visit (Tab 2 Homework)

- 4:40    Wrap-up – PDG Jim Puryear
- Evening’s Game Plan
  - Friday’s Plan – AG Training Plan and Sequence of Events
- 4:50    Adjourn
- 6:00    Reception for RI Vice President and Director Eric Adamson
- Happy Hour – Cash Bar
- 7:00    Hosted Dinner at Hotel

# Assistant Governor Training Agenda

## Friday, February 12, 2010

- 1:00 Welcome and Introductions
- District Trainer PDG Jim Puryear
- 1:10 Disaster Relief for Haiti and Other Important Challenges for Rotary
- RI Vice President and Director Eric Adamson
- 1:40 State of the District Report
- District Governor Clyde Taylor
- 1:55 Training Objectives -- PDG Jim Puryear
- The purpose of the Assistant Governor Training is to provide district Assistant Governors
    - A clear definition of the AG responsibilities
    - Current information on the goals and current activities of Rotary International
    - Current information on the plans and goals of the governor for the district
    - Basic information on the programs and activities within the district and how the AG's may be involved
    - An opportunity to become better acquainted with other AG's, other district leaders, and the RI zone leadership
    - An experience that will emphasize the importance of district reporting requirements and assure their knowledge of the reporting system
    - Motivation to effectively serve their clubs and the rest of the district
    - Information on effective communication and other leadership skills which will enhance their leadership effectiveness
    - An opportunity to ask questions about and discuss matters of interest
- 2:05 Overview of District Leadership and Training Plan – DGE Lloyd Horadan
- 2010 – 2011 Theme Announcement by RI President Elect Ray Klinginsmith (video)
  - Areas of Focus (Tab 1)
    - Peace and Conflict Prevention/Resolution
    - Disease Prevention and Treatment
    - Water and Sanitation
    - Maternal and Child Health
    - Basic Education and Literacy
    - Economic and Community Development

- District leadership/training plan for 2010-11
  - Organization and structure of district leadership team (Tab 1)
    - District Committee Leadership (Tab 1)
  - Leadership Seminar -- PETS – District Assembly – District Seminar (Tab 1)
- District Initiatives for 2010 - 2011
  - Family of Rotary – Putting “Fun and Family” Back Into Rotary
  - Membership – Retention, Retention, Retention
  - Literacy – Developing a better educated/prepared community
  - Foundation – EREY, Polio Challenge Grants, etc., etc.
  - Rotary Leadership (Learning) Institute – RLI

2:35 DD to Lead Roundtable Discussion with AGs regarding Administrative Information

- Travel and expense information (Tab 2)
  - Travel and Expense Form (Tab 2)
- Planning Guide for Effective Rotary Clubs (Tab 2)
- Memo of Club Visits (Tab 2)
- Calendar of RI and District Events (Tab 2)

3:15 BREAK

3:30 Assistant Governor – Key to District’s Leadership Success — PDG Jim Puryear

- Expectations
  - AG duties and time lines (Tab 6)
  - Presidents time lines (Tab 7)

3:45 Assisting Clubs with Goal Setting – District Director Bill Booth

- Key tool “Planning Guide for Effective Rotary Clubs” (Tab 2)
  - Due to DGE Lloyd Horadan by June 1, 2010
  - Excellent tool for helping AG/DG identify areas of “need” at club for assistance
- Setting Club Goals – A good goal is:
  - Achievable – Overly ambitious goals lead to frustration
  - Challenging – Requires broad club support and teamwork to accomplish
  - Shared – Those who set the goal and the strategies for achieving it are committed to implementing the goal
  - Measurable – If you can’t measure it, how do you know you have achieved it
- Memo of Club visit due to DGE Lloyd Horadan by May 15, 2011 (Tab 2)

- 4:10 The District Governor's Visit – District Director Ron May
- Check the official visit schedule early and make sure there are no conflicts (Tab 4)
  - Make sure accommodations for DG, if required, have been made and arrange for club or clubs to cover cost if possible (Tab 4)
  - AG should be present for the DG's Official Visit
  - Get to know DG's bio and plan to give the introduction during the official visit (Tab 4)
  - Make the event as smooth as possible
    - Schedule of Club Visits (Tab 4)
    - District Governor Bio (Tab 4)
    - Preparing for the Governor's Visit (Tab 4)
- 4:30 Club Data Base – District Chief of Staff: Paula Goodnow
- AG use of Club Data Base to enhance communications
  - AG use of Club Data Base to assist club leadership
  - Overview of district web site
    - Key resources stored on web site
  - Demonstrate tips for email and streamlining on line organization
- 5:00 Wrap-up – PDG Jim Puryear
- Evenings Game Plan
  - Saturday's Plan
- 5:05 Adjourn
- 6:00 Happy Hour – Cash Bar
- 7:00 Fellowship Dinner in Hotel

## **Saturday, February 13, 2010**

7:00-8:30 Buffet Breakfast in Hotel Dining Room

8:30 Family of Rotary – District Director: Ron May

- District Co-Chairs: Gerald Smith and Jep Craig
  
- Goals
  - Club -- Minimum of one family centered program per quarter
  - Club -- Minimum of one club fellowship activity per quarter
  - District -- Plan minimum of three family oriented activities at District Conference

8:45 Membership – District Director: Bruce Peyton

- District Membership Chair: Jeff Kublin
  - Membership Video
  
- Goals
  - Club -- Reduce club membership losses by 50%
  - Club – Conduct membership satisfaction survey
  - Club – Recruit minimum of one new ROTARIAN for Net plus one by 10-31-10
  - Club – Recruit minimum of one new ROTARIAN for Net plus two by 3-31-11
  - District – Reduce district membership losses by 50%
  - District – Increase district net membership by minimum of 3%

9:10 Literacy – District Director: Bert Guy

- District Chair: Joan Puryear
  
- Goals
  - Club – Establish a minimum of 15 new Ferst Foundation Scholarships
    - (Work with community to develop Community Action Team)
  - Club – Establish a minimum of 5 new GED scholarships (Tab 8)
  - District – Increase Ferst Foundation Scholarships by 1000 and GED Scholarships by 325.
  
- More to come regarding FERST Foundation Scholarships.....

9:30 Foundation – Dallas Simon

- District Foundation Chair: PDG Dallas Simon
  
- Goals
  - Gates Challenge Grant
    - Club Goal
      - \$2,000 minimum per club
  - Annual Fund - EREY
    - Club Goal
      - \$100 minimum per member per year
  - Paul Harris Society
    - District Goal
      - Increase PH Society Members by 15%
  - Grants
    - District Goal
      - Work within District to provide at least two matching grants in support of a district located outside of D6920
  - District Simplified Grants
    - District Goal
      - Work with District clubs to fund a minimum of 25 community based DSGs
  - Benefactors and Bequest Society
    - District Goal
      - Increase number of Rotarians who are benefactors by 20%
      - Increase number of Rotarians who are Bequest Society members by 15%
  - Ambassadorial Scholarships
    - District Goal
      - Sponsor at least one Ambassadorial Scholarship
  - Major Donors
    - District Goal
      - Increase number of major donors in District by 10%

10:00 Break

10:15 Rotary Leadership (Learning) Institute – District Director Bill Booth

- District RLI Director: Maureen Horvath
  
- Review Curriculum and Structure of RLI (Tab 8)
  
- Goal
  - Reduce number of cancelled RLI sessions to Zero due to low enrollment
  - Each club to have a minimum of 3 RLI participants in 2010 - 2011

- 10:30 Group Study Exchange – DGN Gordon Mathews
- District Chair: Justin Godchaux
  - New Zealand Team, District 9930
    - Inbound Team Dates (Vocational Team)
      - Approximate Dates: April 15 to May 23, 2011
    - Outbound Team Dates (Vocational Team)
      - Approximate Dates: April 1 to May 10, 2011
- 10:45 Georgia Rotary Student Program – PDG Kenan Kern
- District Chair: Ron Lewis
    - Endowment report
    - Sustaining GRSP by Partnering with neighboring Clubs
  - Ferst Foundation – PDG Kenan Kern
    - Establishing Ferst Foundation Scholarship Programs in your community
      - Work in Community to Create Community Action Teams
    - Point of contact with Ferst Foundation
- 11:00 Round table Discussions – PDG Jim Puryear  
(District Directors to lead Round table discussions with their AGs to address the following topics)
- Building the leadership team for a stronger district
    - DD/AG planning and discussion session
  - View PETS Power Point Programs
    - Membership
    - Foundation
    - Club Administration
  - Develop format/structure for PETS Break-out sessions with AGs
    - Develop recommendations for content to be included during PETS Break-out sessions with AGs
    - Discuss list of PETS TAB 3 materials to be included on Flash Drive (TAB 8)
    - Brainstorm support strategies for PEs
  - Completion of mock forms for Planning Guide, Memo of Club Visit and GOAL forms
- 12:15 Closing Comments
- RI Vice President Eric Adamson
  - DGE Lloyd Horadan
- 12:30 Lunch in Hotel

## **Table of Contents**

**Tab 1: District Organization and Training Plan**

**Tab 2: District and Club Administrative Information**

**Tab 3: District and Club Goal Setting**

**Tab 4: Governor's Visit**

**Tab 5: Pets Presentations**

**Tab 6: Assistant Governor Training**

**Tab 7: Club President Training**

**Tab 8: Other Resources**