

Rotary Carolinas' PETS



Assistant Governor
Curriculum Materials

***CREATE
LASTING
IMPACT***

March 19-21, 2026

HOW TO TALK ABOUT OUR ACTION PLAN

Like the People of Action who inspired it, Rotary's plan for the future is bold.

This glossary will help all of us at Rotary speak about our goals with one voice and one vocabulary so we can move forward and act as one.

VISION

"Together, we see a world where people unite and take action to create lasting change across the globe, in our communities, and in ourselves."

ACTION PLAN

The name for our five-year strategic plan, including four strategic priorities and 14 objectives.

PARTICIPANTS

All Rotary members and other individuals who engage in Rotary activities.

STRATEGIC PRIORITIES

INCREASE OUR IMPACT

Define, measure, track, and capture data from service projects to measure our impact, improve project quality, and create lasting change.

EXPAND OUR REACH

Develop new models of engagement to attract diverse Rotary participants and unite them in taking action.

ENHANCE PARTICIPANT ENGAGEMENT

Create new ways to inspire participants and provide valuable experiences that make them want to stay.

INCREASE OUR ABILITY TO ADAPT

Make Rotary's operating and governance structures more efficient, representative, flexible, and effective.

OBJECTIVES

The specific things we want the *Action Plan* to accomplish.

INITIATIVES

The actionable steps to achieve each objective. The Secretariat, with oversight from the Strategic Planning Committee, is responsible for accomplishing them.

INPUTS

The resources invested in a program.
Example: The materials used in a literacy program.

OUTPUTS

The immediate results of a program.
Example: The number of people who complete a literacy program.

OUTCOMES

The short-term or intermediate results of a program.
Example: The number of people who gain reading proficiency in a literacy program.

IMPACT

The long-term effects or end results of a program.
Example: The changes in education outcomes for the community.

Assistant Governor Discussion Materials

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

ASSISTANT GOVERNOR SESSION

Learning Objectives

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

1. Assume the responsibilities & expectations of an Assistant Governor and the characteristics of a good AG.
2. Identify the key relationships within the District that will serve as resources for the clubs.
3. Understand engagement necessary with clubs to:
 - Guide club presidents in goal-setting, strategic planning, & accountability
 - Apply the Action Plan to strengthen the clubs
 - Facilitate effective collaboration across the clubs
 - Focus on Membership Action Plans and promote Foundation giving
 - Identify challenges early and provide strategic support
 - Strengthen Foundation giving and PolioPlus efforts
 - Build community partnerships and enhance Rotary’s public presence

Notes & follow-up:



THE ROLE OF THE ASSISTANT GOVERNOR

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

Official Responsibilities

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

How to prepare

- Become familiar with Rotary initiatives, policies, and resources
- Help incoming club presidents assess their clubs and develop club goals
- Attend the district training assembly and presidents-elect training seminar (PETS)

Rotary's Online Tools

- Track each club's goals and progress in [Rotary Club Central](#)
- Take the AG courses in the [Learning Center](#)

Rotary support

- District governor and district committee leaders
- [Regional Coordinators](#)

CHARACTERISTICS OF A GOOD AG

The responsibilities of an Assistant Governor...

Expectations of an Assistant Governor...

Key resources within the District for the clubs...



ASSISTANT GOVERNOR SESSION, continued

Engagement with clubs...

Leading interactive sessions...

Promotion of District events...

ASSISTANT GOVERNOR SESSION, continued

Assistance with a Membership Action Plan...

Assistance with Public Image...

Communication with clubs and creating club interaction...



ASSISTANT GOVERNOR SESSION, continued



ROTARY IS A MEMBERSHIP ORGANIZATION!

Membership Goal Setting Worksheet

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

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

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

My club's Annual Net Growth Rate _____%

Success targets include:

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

The problem we need to solve is:

___ Low Retention (Attrition Rate exceeds 15%)

___ Insufficient New Member Attraction (Attraction Rate is lower than our Attrition Rate or Below 20%)

___ Neither ~ we need to build on our current membership growth culture and strategies

Actual Club Data at: RIZones33-34.org/Zone33MGI (find your District/Club)

Membership History:

Club Year Members at start of year (July 1)

2024-25 _____

2023-24 _____

2022-23 _____

2021-22 _____

2020-21 _____

2026-2027 Membership Goal Setting:

Starting Membership July 1, 2025 _____

Current Membership Jan. 5, 2026 _____

Estimated Membership July 1, 2026 _____ a

*Membership Goal July 1, 2027 _____ b

Net growth (b-a=c) _____ c

Average Annual Attrition to Replace _____ d

New Members Needed (c+d) _____ *

Membership Action Plan: Treasure Chest of Tools Await You

MEMBERSHIP SUCCESS CENTER

The Roadmap to Club Membership Growth



The Rotary Zones 33/34 **Membership Action Plan (MAP)** is a multi-year approach to creating a membership **culture** that will result in consistent, moderate membership **growth**.



In 2007, the Odyssey Marine Exploration salvage team found the largest ever monetary treasure haul off the coast of Gibraltar with more than 17 tons of coins valued at approximately 500 million dollars.

Zones 33 and 34 leadership have found our own treasure haul. We have a treasure chest of membership tools contained in the Membership Action Plan (MAP). These cutting-edge tools will help your clubs **GROW MORE TO DO MORE**.

1) **Membership Success Center** – Provides a treasure trove of club membership information. By clicking on the District Tab labeled MAPSys on DACdb, you will see comprehensive club data and links to address club challenges all at your fingertips!

2) **Monthly MAP Webinars** – On the 2nd Monday of each month, the MAP team provides exciting and informative 45 minute sessions on Rotary Membership topics! These “bite-size” webinars feature tips and strategies from top performing clubs across 34 Districts.

3) To assist you in accessing and using these resources, we have created the MAP Ambassador Team. These membership leaders are trained to assist you in getting connected to the valuable tools right away. Reach out to MAP Ambassador team members or District leaders for assistance.

The Membership Action Plan is created to assist **YOU AND YOUR MEMBERSHIP TEAM** deliver The Magic of Rotary.



**FIND ALL OF THE
ABOVE DESCRIBED
TREASURE HERE!**





ASSISTANT GOVERNOR SESSION, continued

Protocol for DG Visit...

Dealing with conflict and potential landmines...

Promote The Rotary Foundation...

ASSISTANT GOVERNOR SESSION, continued

FOUNDATION GOAL SETTING

ANNUAL FUND

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

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

POLIO PLUS

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

ASSISTANT GOVERNOR SESSION, continued

RESOURCES

Rotary International

Rotary.org
my.rotary.org/en
brandcenter.rotary.org
learn.rotary.org
[Membership](#) page on My Rotary
[Be a Vibrant Club Course](#)
[Public Relations](#) page on My Rotary
[Rotary Foundation](#)
[Governance](#) documents on My Rotary

My Rotary
Rotary Brand Center
Learning Center
Membership
Leadership
Public Relations
TRF Resources
Governance

Carolinas' PETS

carolinaspets.org

Rotary Zone 33 Website

rizones33-34.org
Membership Action Plan

Resource Libraries/District Leader

Your District's Website

Your Club's Website

Discussion Leader:

Nancy Barbee

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Rotary Carolinas' PETS



Arden, Asheville, Asheville Breakfast, Asheville-Biltmore, Asheville-Metro, Asheville-South, Asheville-West, Assistant Governor, Avery County, Black Mountain, Blowing Rock, Boone, Boone Sunrise, Brevard, Bryson City, Burke-Sunrise, Burnsville, Caldwell County, Cashiers Valley, Catawba Valley (Conover), Clay County, Denver/Lake Norman, Discussion Leader, District Governor 2022-2023, District Governor 2023-2024, District Governor 2024-2025, District

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