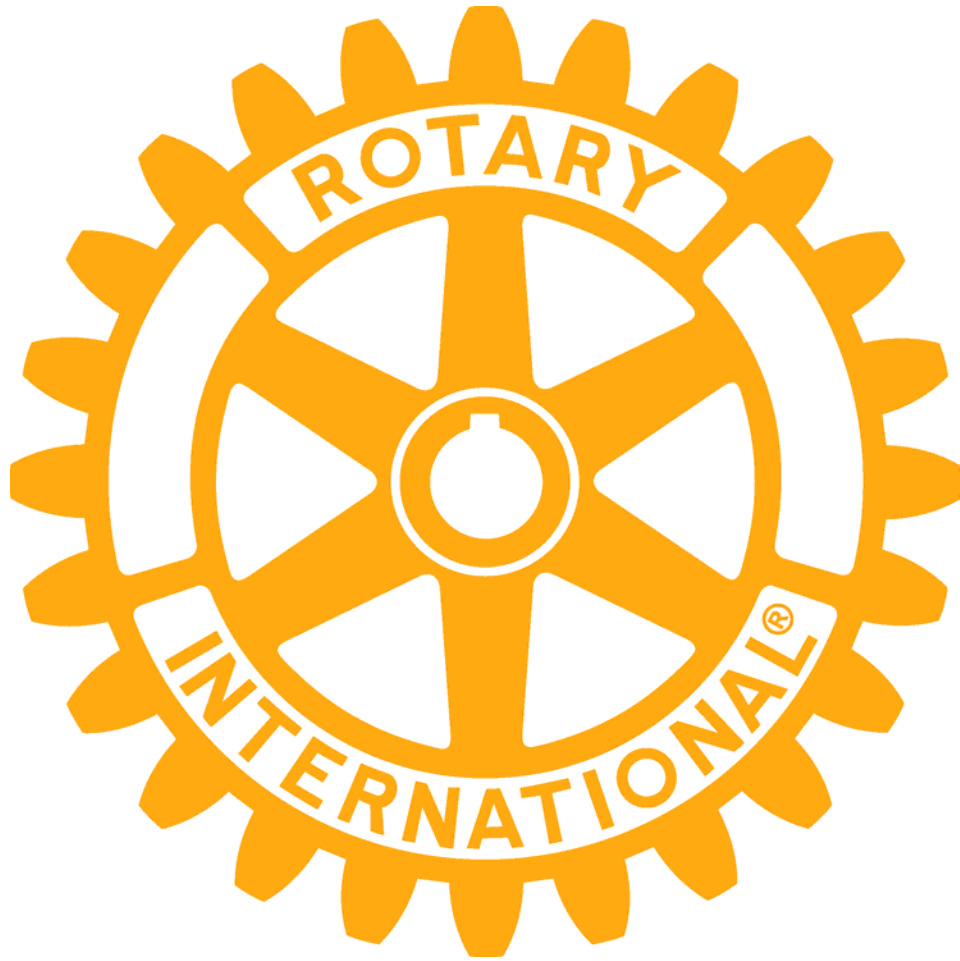


ALL OHIO ASSISTANT GOVERNOR WORKBOOK

March 13-14, 2026



The ROTARY ACTION PLAN



TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

As we work together to build a stronger world, **Rotary's Action Plan** — our strategic plan — is leading our organization to form more meaningful connections and make a more sustainable difference through service. Using the plan's four priorities as a guide, we're fulfilling the vision of Rotary International and The Rotary Foundation: creating healthy clubs, providing engaging experiences for all, and uniting people to take action with us to create lasting change.

INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new ways for participants to experience Rotary
- Increase club flexibility and appeal
- Build understanding of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Improve understanding and support for individual participants
- Offer new opportunities for personal and professional connection
- Provide learning opportunities for leadership development and skill building

INCREASE OUR ABILITY TO ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Foster more diverse perspectives in decision making

4410-EN—(724)

THE ROTARY ACTION PLAN

LEARNING OBJECTIVES

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

- Explain the four priorities of the Rotary Action Plan and how they work together
- Identify which action plan priority areas clubs need support with based on common scenarios
- Guide clubs in aligning their activities and goals with the Action Plan priorities

RESOURCES FOR CLUBS

- [Rotary Action Plan on My Rotary](#)
- [Action Plan Flyer](#)
- [Club Health Check](#)

YOUR CLUBS

EXPERT GROUP MATERIALS

Your group will become experts on one priority. Read your assigned section and discuss with your group. The other three sections are provided for your reference.

PRIORITY 1: INCREASE OUR IMPACT

Purpose: Strengthen our ability to make a lasting difference in communities through focused, sustainable, and measurable service.

Key strategies clubs use:

- Involve more members in service projects to increase community impact
- Focus projects on Rotary's seven areas of focus
- Build partnerships with community organizations to maximize resources
- Measure project outcomes to demonstrate impact

What this looks like in clubs: A club shifts from hosting one-time charity events to developing multi-year partnerships with local schools, involving members in mentoring programs, and tracking student success metrics.

How AGs support this: Help clubs identify community needs, connect them with Foundation grant opportunities, encourage member involvement in project planning and implementation, and share best practices from other clubs.

Group Discussion Notes:

Which of your clubs needs help with this?

PRIORITY 2: EXPAND OUR REACH

Purpose: Grow and diversify membership while creating new ways for people to experience Rotary.

Key strategies clubs use:

- Attract diverse new members through inclusive practices and strategic outreach
- Create welcoming environments where all members feel valued
- Build club flexibility and appeal through varied meeting formats and participation options
- Build understanding of Rotary's impact and brand in the community

What this looks like in clubs: A club analyzes its membership demographics, identifies underrepresented groups, partners with diverse community organizations, and creates multiple pathways for involvement (project volunteers, social members, traditional members).

How AGs support this: Encourage clubs to use membership assessment tools, share successful recruitment strategies from other clubs, connect clubs with district membership resources, and help clubs develop inclusive practices.

Group Discussion Notes:

Which of your clubs needs help with this?

PRIORITY 3: ENHANCE PARTICIPANT ENGAGEMENT

Purpose: Ensure all members have meaningful experiences that keep them engaged and connected.

Key strategies clubs use:

- Understand member interests and skills through entrance surveys and conversations
- Create opportunities for members to contribute based on their unique strengths
- Foster strong relationships between members through social connections
- Provide leadership development and skill-building opportunities

What this looks like in clubs: A club implements entrance surveys for new members, matches members with projects aligned to their interests, creates mentorship pairs, and regularly gathers feedback through satisfaction surveys.

How AGs support this: Share engagement tools (entrance surveys, Connect for Good resources), help clubs develop member recognition programs, encourage clubs to gather and act on member feedback, and connect inactive members with re-engagement opportunities.

Group Discussion Notes:

Which of your clubs needs help with this?

PRIORITY 4: ADAPT

Purpose: Build a culture of innovation and responsiveness by adapting club practices to meet member needs.

Key strategies clubs use:

- Experiment with meeting formats, frequency, and locations to better serve members
- Gather member input before making decisions about club practices
- Foster diverse perspectives in decision-making
- Build willingness to take risks and try new approaches

What this looks like in clubs: A club pilots hybrid meetings to accommodate member schedules, surveys members about meeting content preferences, rotates meeting locations to improve accessibility, and adjusts club traditions based on member feedback.

How AGs support this: Encourage clubs to pilot changes rather than resist them, share innovative practices from other clubs, remind clubs of their flexibility in meeting formats and requirements, and support clubs through periods of transition.

Group Discussion Notes:

Which of your clubs needs help with this?

HOW THE PRIORITIES WORK TOGETHER

The four priorities aren't separate initiatives—they reinforce each other. Success in one area strengthens the others.

Think: How do these priorities connect in one of your clubs?

Share: What connections did you discuss with your partner?

CASE STUDY ACTIVITY

Your group will analyze one case study scenario. Read your assigned scenario and work together to develop recommendations.

CASE STUDY 1: THE BUSY CLUB

Scenario:

A 45-member club has excellent attendance at their weekly breakfast meetings, but project participation is low. Only 8-10 members regularly volunteer for service projects. The club president says members are 'too busy' and that the same core group does all the work. Member surveys show people joined Rotary to make a difference but don't feel their skills are being utilized. Several members have expressed interest in hands-on projects but can't commit to planning committees.

Which Action Plan priority (or priorities) does this club need support with?

Why did you select this priority?

2-3 specific recommendations for the club president:

What resources or support can the AG provide?

CASE STUDY 2: THE AGING CLUB

Scenario:

A club of 28 members has lost 6 members in the past year. Average member age is 62. The club has tried recruiting younger professionals but hasn't been successful. Meetings are held at noon on Tuesdays at a restaurant with limited parking. The club president is frustrated because 'young people just don't want to commit to Rotary.' When asked, prospective members say they're interested in Rotary's mission but the meeting time doesn't work and they're not sure how they'd fit in with the current membership.

Which Action Plan priority (or priorities) does this club need support with?

Why did you select this priority?

2-3 specific recommendations for the club president:

What resources or support can the AG provide?

CASE STUDY 3: THE EVENT CLUB

Scenario:

A 35-member club is known for hosting excellent fundraising events—a golf tournament, wine tasting, and holiday auction that together raise \$75,000 annually. However, the club distributes funds to 15-20 different charities with small checks ranging from \$2,000-\$5,000. When asked about impact, the president says 'we help a lot of organizations.' Members are starting to question whether their efforts are making a real difference. The club hasn't applied for Foundation grants and doesn't track outcomes of their giving.

Which Action Plan priority (or priorities) does this club need support with?

Why did you select this priority?

2-3 specific recommendations for the club president:

What resources or support can the AG provide?

CASE STUDY 4: THE ATTENDANCE PROBLEM

Scenario:

A club of 40 members has seen meeting attendance drop from an average of 28 to 15 over the past year. The club president is concerned and has tried various speakers and programs, but attendance continues to decline. Exit interviews with departing members reveal that meetings feel 'routine,' 'not relevant to my interests,' and 'I didn't feel like I contributed much.' Current members say they attend out of obligation but don't find meetings particularly valuable. The club follows the same format every week and hasn't changed its meeting structure in 10 years.

Which Action Plan priority (or priorities) does this club need support with?

Why did you select this priority?

2-3 specific recommendations for the club president:

What resources or support can the AG provide?

KEY INSIGHTS FROM CASE STUDIES

What did you learn from hearing all four case studies? What patterns or themes emerged?

APPLYING THE ACTION PLAN TO YOUR CLUBS

Think about the clubs in your area.

Based on the case studies, which Action Plan priority do you think will be most important in your area?

What's one thing you learned that you'll use when working with clubs?

What district resources or support can you connect them with?

ADDITIONAL NOTES

SESSION 2: ASSISTANT GOVERNOR RESPONSIBILITIES

LEARNING OBJECTIVES

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

- Develop a practical plan for supporting club presidents throughout the year
- Identify signs that a club is struggling and determine appropriate support strategies
- Explain how to promote and support new and diverse club types in collaboration with district resources

RESOURCES

- [Assistant Governor Information Page](#)
- [Rotary Club Central](#)
- [Vibrant Clubs in Action](#)

AG RESPONSIBILITIES OVERVIEW

Your primary role is to assist the District Governor with the administration of your assigned clubs by helping them be more effective.

Three Focus Areas

1. Supporting Club Presidents

- Check in regularly (at least quarterly, more often if needed)
- Help them set and track progress toward club goals
- Connect them with district resources and other successful presidents
- Coordinate the governor's official visit to their club
- Be a sounding board and problem-solver

2. Identifying Struggling Clubs

Warning signs to watch for:

- Declining membership or attendance
- Unpaid dues or financial problems
- Leadership turnover or difficulty filling officer positions
- Lack of service projects or member engagement
- Internal conflicts or low morale

3. Promoting New Club Types

- Help promote, organize, establish, and support new and different types of clubs
- Collaborate with the district membership committee
- Work with the District Rotaract representative to support Rotaract clubs
- Share information about diverse club models (e-clubs, cause-based clubs, flexible meeting formats)

ROUNDTABLE DISCUSSION NOTES

Discussion 1: Supporting Club Presidents

What concerns do you have about supporting your club presidents? What do you think they'll need most from you?

Key ideas I heard:

My thoughts:

Discussion 2: Recognizing Warning Signs

Have you seen struggling clubs in your Rotary experience? What were the warning signs?

Warning signs discussed:

What helped clubs turn things around:

Discussion 3: Promoting New Club Types

What opportunities do you see in your area for new or different types of Rotary clubs? What populations or communities might we be missing?

Opportunities discussed:

Collaboration partners:

PROBLEM-SOLVING WORKSHOP

Work with your group to solve a realistic AG challenge. Learn from experienced AGs while developing practical strategies together.

Scenario 1: The Overwhelmed President

A club president calls you in September—it's only her second month and she's already exhausted. She says: "I had no idea how much work this would be. I'm getting emails constantly, members expect me to solve every problem, I haven't even started working on our service projects, and I still have my full-time job and family. I don't think I can do this for a whole year." She sounds close to tears.

What would you do as the AG? What's your action plan?

Key insight or learning:

Scenario 2: The Silent Club

One of your assigned clubs has gone "radio silent." You've sent three emails to the president with no response. You left a voicemail—nothing. You reached out to the secretary—she said "I'll have the president call you" but that was three weeks ago. The club is still meeting according to their website, but you have no idea what's happening or why they're avoiding you.

What would you do as the AG? What's your action plan?

Key insight or learning:

Scenario 3: The Young Professional Initiative

The membership committee chair contacts you—they've been working with a local tech company whose employees have expressed interest in Rotary, but the traditional noon meetings don't work for them. About 15 people are interested in starting something new—maybe an evening club, maybe a cause-based club focused on STEM education. They're asking: "Can you help us figure out what's possible? How do we start? Which existing club might sponsor?"

What would you do as the AG? What's your action plan?

Key insight or learning:

Scenario 4: The Governor Visit Conflict

You're scheduling the governor's official visits to your clubs. Two club presidents are being difficult: One insists the governor **MUST** come to their annual gala in November (black tie, \$150/plate) and "anything else would be an insult to our club's importance." Another president says "Just tell the governor to come whenever—we meet every week, any week is fine, whatever works for her schedule, we're flexible." Both approaches are problematic for different reasons.

What would you do as the AG? What's your action plan?

Key insight or learning:

INSIGHTS FROM OTHER GROUPS

As you hear other groups present, capture key ideas or approaches you want to remember.

Group 1:

Group 2:

Group 3:

Group 4:

MY REFLECTION AND COMMITMENT

Based on what I heard today, what's ONE thing I'll do in my first 30 days as AG?

What's ONE question I still have or resource I need?

KEY CONTACTS

District Governor:

Name:

Contact:

District Governor-Elect:

Name:

Contact:

District Membership Committee Chair:

Name:

Contact:

Fellow Assistant Governors:

Name:

Contact:

Name:

Contact:

Name:

Contact:

Name:

Contact:

Name:

Contact:

Name:

Contact:

Name:

Contact:

ADDITIONAL NOTES

SESSION 3: UTILIZING MY ROTARY

LEARNING OBJECTIVES

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

- Log in to My Rotary and navigate to key tools (Rotary Club Central, Club Administration, Learning Center)
- Set or review club goals in Rotary Club Central
- Access club data, reports, and resources you'll need as president

MY LOGIN INFORMATION

Record your login credentials here for easy reference:

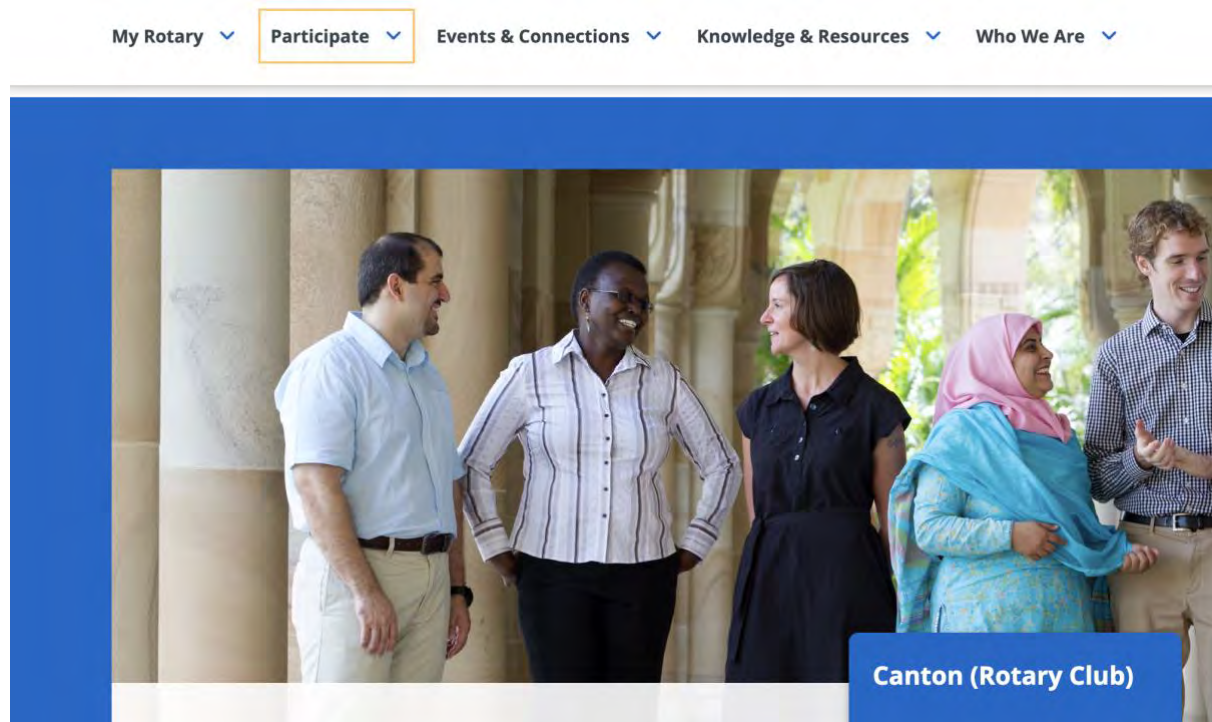
My Rotary Email/Username:

Password hint (DO NOT write actual password):

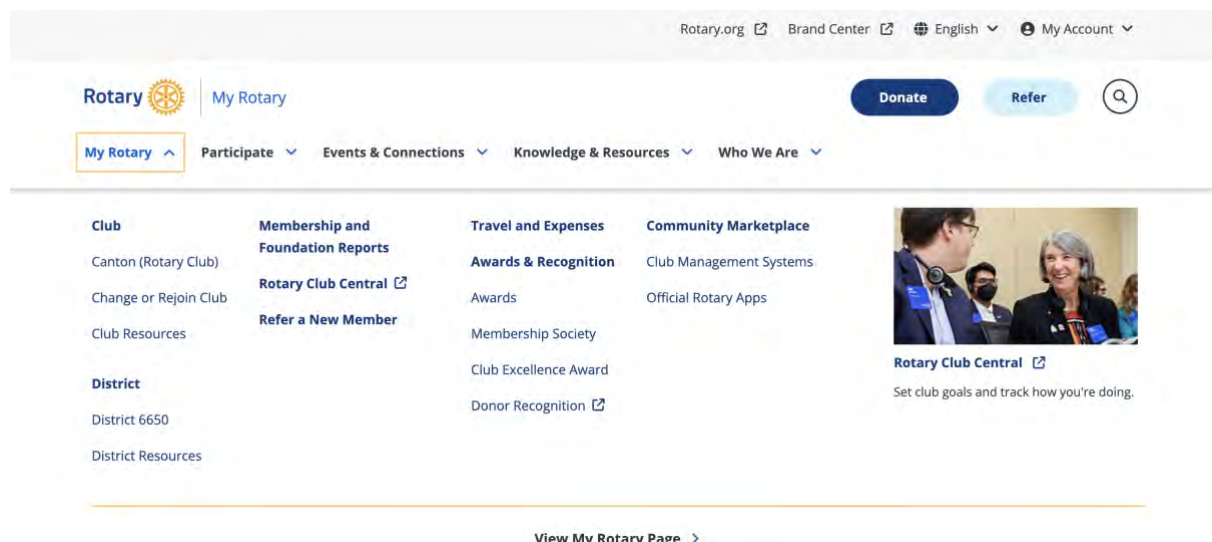
Part 1: Logging In and Home Page

Instructions:

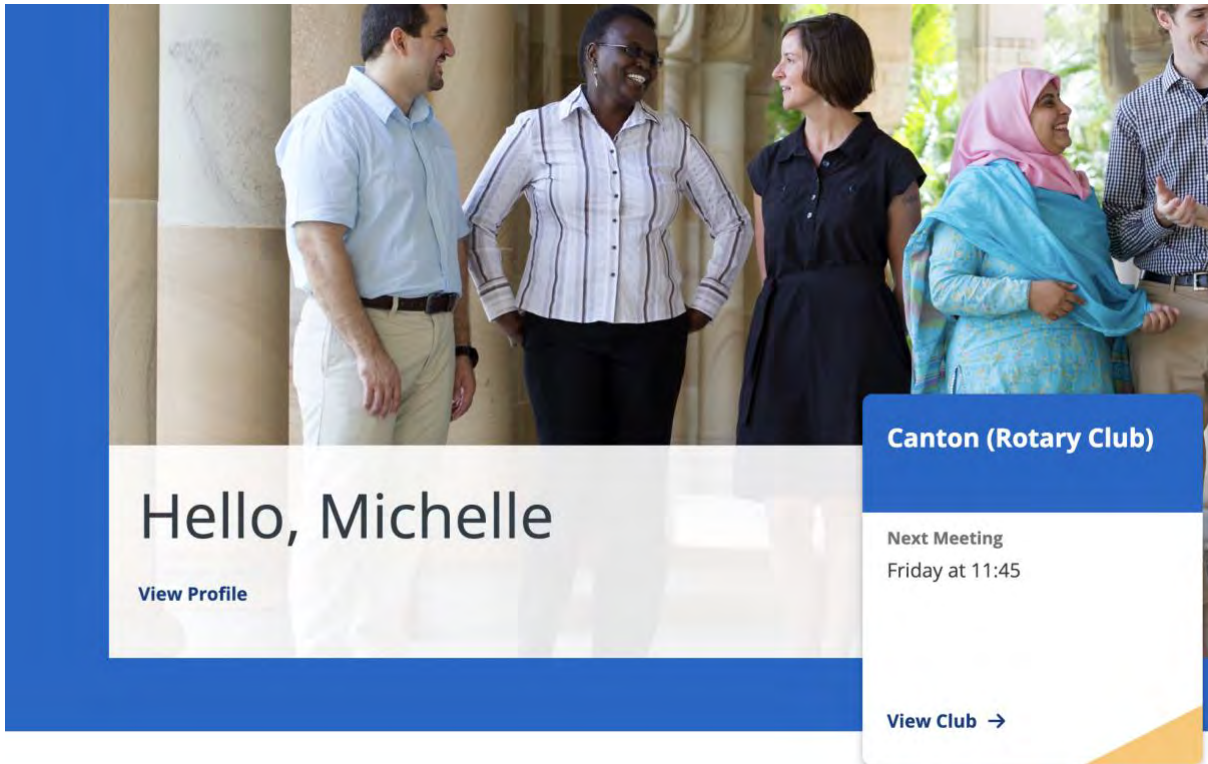
1. On your device, go to my.rotary.org
2. Click 'Sign In' at top right
3. Enter your email/username and password
4. Once logged in, you will see your home page



Click on the arrow beside “My Rotary” to see all the features and links:



Do the same for “Participate”, “Events & Connections”, “Knowledge & Resources”, and “Who We Are”



View Club: This section gives all of your club information in one handy place! You can see all of the information about where your club meets, a list of all of your members, and more!

The rest of the features of My Rotary:

<p>Rotary Club Central » Set club goals and track how you're doing. Monitor your progress with detailed reports.</p>	<p>Grant Center » Launch and manage all your Rotary Foundation grants in one place.</p>	<p>Membership and Foundation Reports » Find reports with data about membership, contributions, recognition, and more.</p>
<p>Brand Center » Find logos, photos, videos, and all the resources you need to promote Rotary in your community.</p>	<p>Learning Center » Learn new skills with online classes and materials created for your specific role or interests.</p>	<p>Service Project Center » Browse successful club projects from around the world.</p>

Part 2: Rotary Club Central

Instructions:

1. Click **Rotary Club Central**
2. Club Goals will open.

Rotary Club Central

My Rotary English Michelle Charles

Club Goals

Choose and set the goals your club will focus on and track progress.
[Learn how to set and track your club's goals](#)

View Club: All Clubs

Rotary Club of Canton

< 2025-26 > PRINT

0 goal achieved of 0 selected

All Goals Enhance Participant Engagement Increase our Impact Expand Our Reach Increase Our Ability to Adapt

SAVE CANCEL Which goals will your club track this year? Browse goals by category and select only those you plan to pursue. Then save. Sort selected goals

★ Priority Goals

GOAL	CLUBS WITH GOAL	2025-26 ACHIEVEMENT	2025-26 GOAL	VIEW CLUB GOALS
Club membership	7 / 46	313	of 311	View Club Goals

Global Summary shows you goals either Worldwide, by your Zone, by your District, or by Club Group (if assigned).

Rotary Club Central

My Rotary English Michelle Charles

Global Summary

View the collective progress towards each goal worldwide and across your zone, district or club groups

District 6650

View Club Type: All

< 2025-26 > PRINT

All Goals Enhance Participant Engagement Increase our Impact Expand Our Reach Increase Our Ability to Adapt

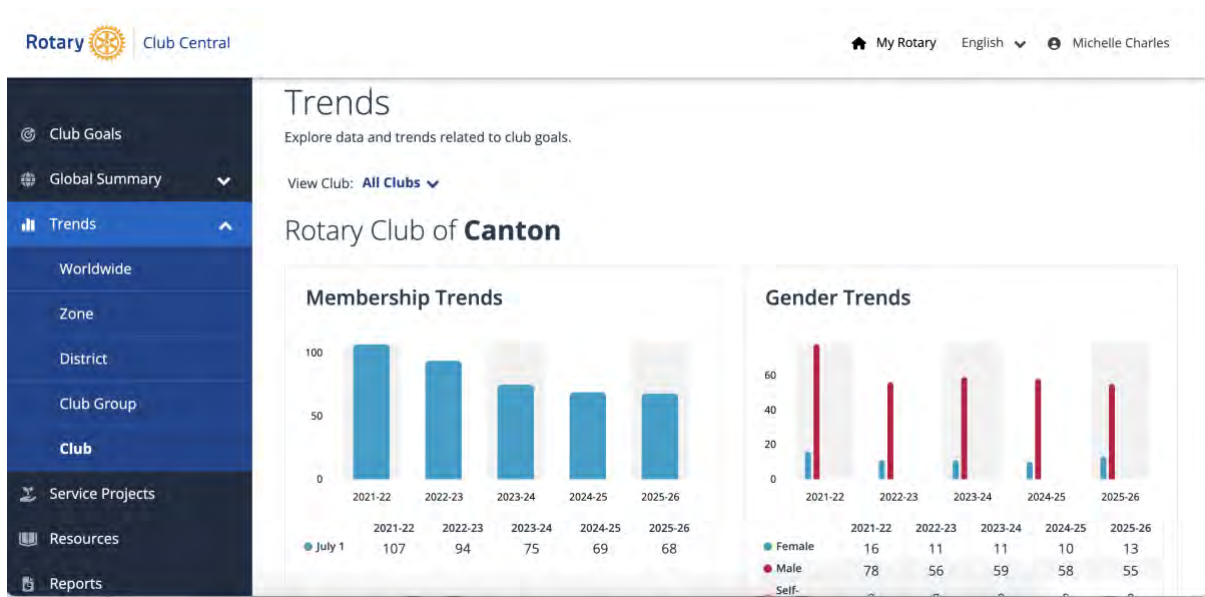
All Goals | 2025-26
 Current Membership: 30
 as of: 20-Feb-2026

★ Priority Goals

GOAL	CLUBS WITH GOAL	2025-26 ACHIEVEMENT	2025-26 GOAL	VIEW CLUB GOALS
Club membership	7 / 46	313	of 311	View Club Goals

What the dashboard shows you:

- Dashboard displays membership, gender, and Foundation giving trends over 5 years
- This is your club's 'report card' - use it to identify patterns and opportunities

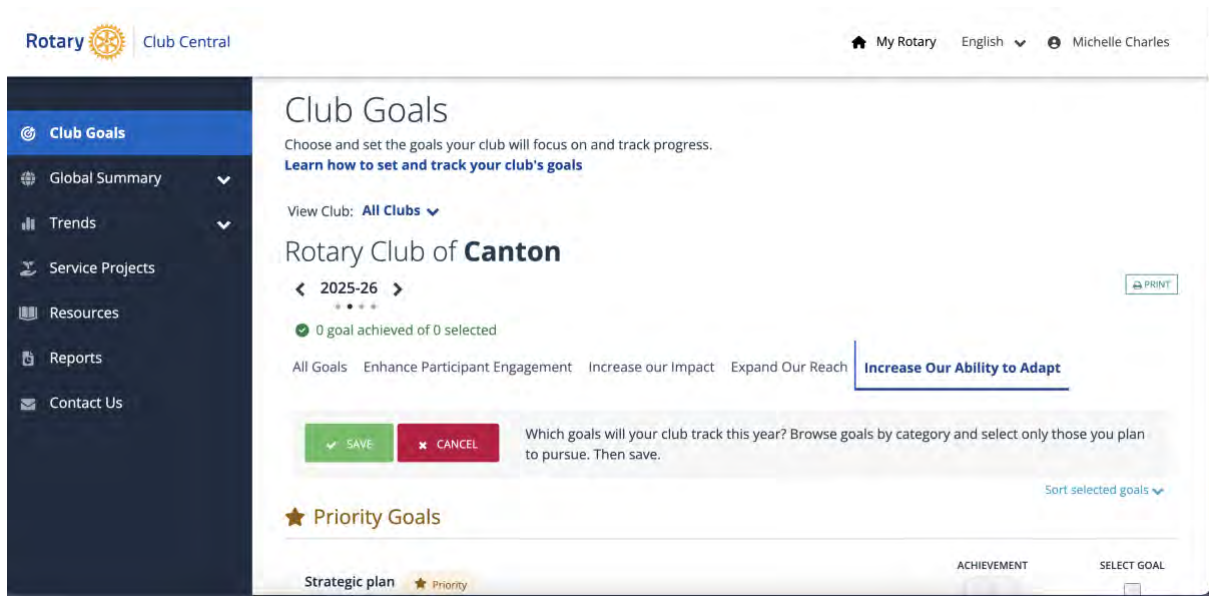


What I learned about my club's trends:

Questions or notes:

Setting Goals:

1. Click “Club Goals” in left sidebar
2. Select 2026-27 for your Rotary year (check dropdown at top)



Goal Categories that are a RI Priority Focus:

Club Membership

Strategic Plan

Service Participation

Annual Fund Contributions

PolioPlus Fund Contributions

Benefactors

Entering Your Goals

Rotary Club Central

2025-26 Canton Goals

Club membership ★ Priority

Hide goal details and history

How many total members does your club want by the end of the Rotary year?

ACHIEVEMENT 68 OF GOAL 120
As Of 6-Mar-26 Enter Goal Value

Goal History

YEAR	ACHIEVEMENT	GOAL
2024-25	-	-
2023-24	-	-
2022-23	-	-
2021-22	94	120
2020-21	-	-

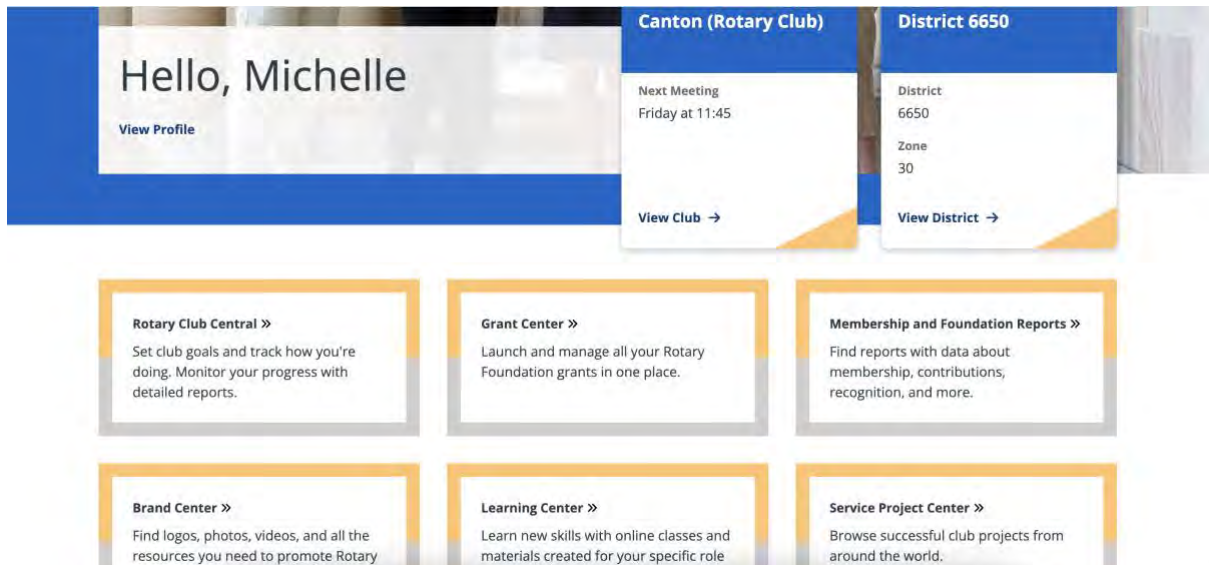
*denotes 5-year high

1. Click the select goal button and enter your goal. The Achievement Column shows current progress.
2. Enter a goal number
3. You can also enter other goals in the other categories if you wish.

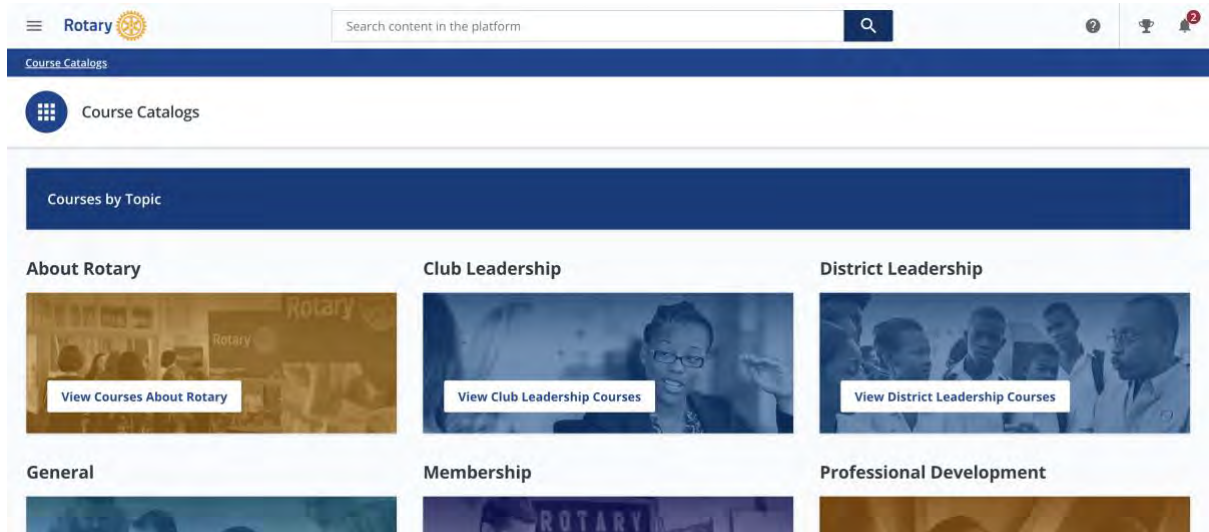
Part 3: Learning Center and Resources

Instructions:

1. Click 'Learning Center'



Courses will show by topic



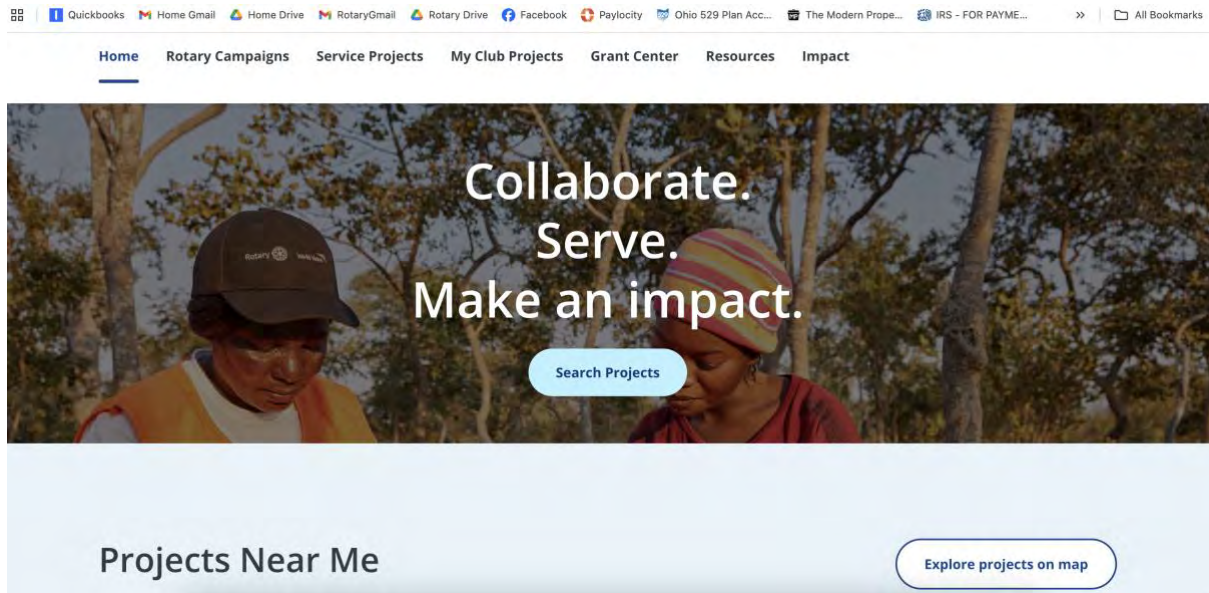
What the Learning Center offers:

- Hundreds of free online courses on every Rotary topic
- Search by topic or browse by category
- Courses range from 5-30 minutes
- Great resource when you have questions as president

Topics I want to explore later:

Part 4: Other Key Features of My Rotary

Service Project Center: - The intention of the Service Project Center to support your club's efforts in serving communities locally and around the world. This new online tool continues to evolve so check back often! Here you can search projects by location.



Rotary Campaigns: Showcases the two priorities for Rotary International.

My Club Projects: Lists all projects specific to your club both current and past.

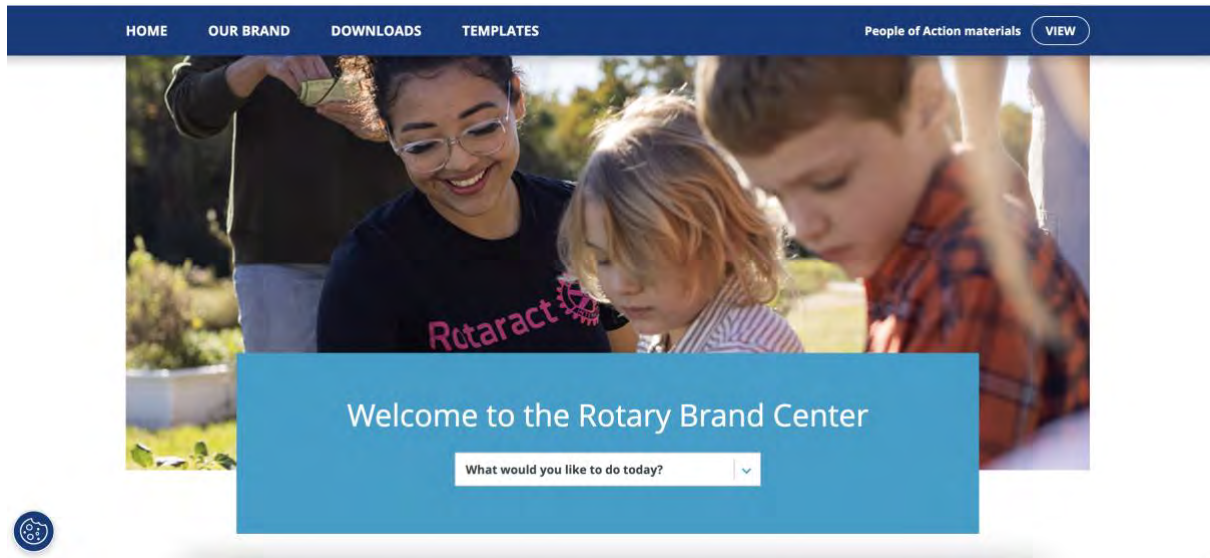
Grant Center: This is where you apply for district and global grants

Resources: Tools and materials to help you be successful with your service projects.

Impact: A fun little quiz to learn about Rotary's impact in the world.

Membership Reports: Personal and club reports

[Rotary Brand Center](#): Download brand logos and templates for brochures, social media, and more!



ADDITIONAL NOTES