

Planning for Your Year 1st Time Presidents

Session Goals

- To review the expectations of a Club President
- To begin the discussion on the effective planning for a year

Resources

- **Lead Your District - President** - Initial Pages Describing list of responsibilities
- Chapter 1 - Planning your Year

Discussion Questions

1. **Introductions** - Allow your group to introduce themselves. Suggestion is name, club location and size. You could also ask for the one thing that their club is passionate about.

2. **Using the Resource Pages** - Have participants read and briefly discuss

- Responsibility as President-Elect
- Responsibility as President

Facilitator may either use the easel and create the list from the participants, or, have the group take turns reading the lines. Leave time for discussion of these points, but this entire exercise should not exceed 25 minutes. Appropriate questions would include: Why is this important? Or Have you thought of this? Place particular emphasis on Club Central.

3. **Why is it important to have a plan for your year as President?**

Facilitator is expected to lead the group to the conclusion that success hinges upon good planning.

4. **What are you planning for your year as President? Who should be involved in the planning process?**

Facilitator should allow discussion to progress. Ask about the plans for Membership, Public Image, Service Projects and Foundation. The crux of the discussion should get to the point that the entire club needs to be part of the planning process for success. Feel free to ask for examples.

5. **How will you actively seek to increase the Leadership and Succession Planning process in your club?**

Facilitators should allow open idea exchange. There is no right answer. The idea is to get your Presidents to think about succession planning earlier rather than later.

6. **What is the difference between a “Boss” and a “Leader” and how might it affect how you approach leading Volunteers?** *The idea behind this question is to get the group to think about their approach to leadership.*

Second Time Around - Problem Solving and Planning

Session Goals

- To discuss participant's previous experiences as Club President
- To use that information to plan their year

Resources

Resources

Lead Your District - Initial Pages Describing list of responsibilities

- Chapter 1 - Planning your Year

Discussion Questions

1. **Introductions** - Allow your group to introduce themselves. Suggestion is name, club location and size. Ask them to list the one thing that they will definitely change in their next term, as compared to their last term.

2. **Using the Resource Pages** - Have participants read and briefly discuss

- Responsibility as President-Elect
- Responsibility as President

Facilitator may either use the easel and create the list from the participants, or, have the group take turns reading the lines. Leave time for discussion of these points, but this entire exercise should not exceed 25 minutes. Appropriate questions would include: How did you do this in your last term as President?

3. **Do you feel that you adequately planned for your last term as President ?**

Facilitator is expected to lead the group in a discussion which may end up with what was right/wrong about their last term.

4. **What are you planning to do differently this time? Who should be involved in your planning process?**

Facilitator should allow discussion to progress. Ask about the past and future plans for Membership, Public Image, Service Projects and Foundation. The crux of the discussion should get to the point that the entire club needs to be part of the planning process for success. Feel free to ask for examples.

5. How will you actively seek to increase the Leadership and Succession Planning process in your club?

Facilitators should allow open idea exchange. There is no right answer. The idea is to get your Presidents to think about succession planning earlier rather than later.

6. With your previous experience as a Club President, did you ever regret acting more like a “Boss” and less like a “Leader”? Would you change it in the future?

This is intended to have the group think about their leadership style, and if they might change it the second time around.

Membership

Session Goals:

- To use facilitated discussion to create an attainable Membership Plan
- To explore new options for club Membership Expansion
- To discuss options for Membership Retention

Resources

- **Leading Your Club - President - Chapter 4**
- **Membership Assessment Tools**
- **Council on Legislation Changes - 2016**

Discussion Questions

1. Has your club net membership grown in the past 24 months?

This discussion should be short, UNLESS a participant has had a significant growth in their club. Then, it would be great for the successful ones to discuss their situations.

2. Does your club represent a cross-section of your community, or do you feel that your club is diverse in its nature? *Rotary is not exactly known for its diversity. Try to lead the group in a discussion of how to change that. Try to encourage ideas that will promote club diversity in classification, race, gender, nationality, language, and age.*

3. How does your club look for new members? Has it been successful?

This discussion could go so many different ways. Try to be prepared with ideas from the two resource guides. Don't forget to mention the empty-nesters and the newly retired, besides the young professionals.

4. Do you feel that your club has good retention of its members? Is it hanging on to members which are no longer healthy for the club? *It is worthwhile to have a discussion about how to keep members. Don't forget to discuss the changes from COL 2016, with regards to flexibility.*

5. Does your club use Rotary resources to seek out Rotary Alumni? Who are Rotary Alumni? *Try to get the group to understand who the Rotary Alumni are; RYLA, Interact, Rotaract, Youth Exchange, Scholarship Recipients, GSE, VTT, Rotary Volunteers.*

6. How can you best determine what the best course of action could be for the future of your club? *This is a segway into the introduction of The Membership Satisfaction Survey, found on page 5.1- 5.10 in the Membership Assessment Tools. Also, one might mention exit surveys.*

Rotary Foundation

This discussion will be tailored to the level of the group. If you are in a 2nd Term Presidents Group, try not to dwell on the minutia.

Session 3 – 50 Minutes

Since this is the 3rd session that this group will be together, there is only a need for the facilitator to introduce themselves

Discussion Questions:

1. What do they already know?

- a. TRF Reputation – *Charity Navigator, Edison Award, CNBC Ranking, Transparency*
- b. Three Main Divisions – APF, PolioPlus, Permanent Fund – *Be able to distinguish and be able to give additional details.*
- c. What are Paul Harris Recognitions? Who can get them?
- d. What is a Major Donor?
- e. What is the Bequest Society?
- f. What does EREY mean?
- g. How does APF money come back to clubs?
- h. How do you apply for Grants? Can anyone do this?
- i. Where are the resources for information?
- j. Should every club have a Foundation Chair?

2. How can you promote Foundation giving in your clubs? *This should be a general discussion with an emphasis on goal setting.*

3. How can you promote Foundation giving in your communities? *Depending on time, this could easily be a segway into a discussion about Public Image.*

4. How can you use the Foundation achievements to promote Rotary in your Community? *Same idea as Question 3.*

5. Does your club participate in Foundation donations? Why or why not? *Encourage active discussion, which should increase the group's awareness of reasons for other club's levels of participation. Please try to end this session on a high note, perhaps by inquiring if anyone has had a positive experience with a Rotary Grant, or mention the Polio Promise.*

Elective - Club Operations and Administration

Session Goals

- To review best practices for running a meeting
- To discuss the basics of club management
- To review best practices for administration

Resources

Leading Your Club - President - Chapter 2 and 3

Leading Your Club - Club Administration Manual

Discussion Questions

ICEBREAKER - Ask the participants to describe the qualities of the WORST meeting they have ever attended - Rotary or not. After the scribe writes down the list, take the paper down, tear in half and say “Don’t do that!”

1. Based upon the exercise just completed, ask participants how they will run engaging and fun meetings. *This is a great opportunity for the participants to exchange ideas. At some point, make sure that you mention the importance of an agenda. Discuss strategies for dealing with meetings that start to veer off course, like tabling and making it clear that the meeting will stay on point and, if time permits, bring the item back up for discussion. Also, make sure that the participants get the idea that it is important to be fully prepared. Review Pages 12-13 to get additional ideas.*

2. Ask the participants to discuss how they are planning to oversee the club’s reporting requirements. *Be ready to list the reporting requirements, including dues payments and membership reporting. A complete list is on Page 15. The facilitator should guide the participants to get to the conclusion that the easiest way to do this is through Rotary Club Central. Club Presidents should get into the habit of checking their dashboards on a weekly basis.*

3. Discuss with the group the value of the District Governor’s visit. How can they get club members involved in planning for the visit? *Discuss how the club should prepare. Make sure that you mention that the DG visit is to be the only program of discussion. Be sure to mention that the Board should be involved with a personal visit, as well. The District should be a valuable resource for any questions regarding Club Operations.*

4. Lead the group in a discussion about Financial management for the club.

Discuss the importance of a budget and that dues are due July 1 and January 1. Make sure that they realize that all invoices are now electronic. Ideas for this discussion may be found on pages 16-18.

5. Discuss the benefits of having a written Risk Management plan. *Planning for anything that can go wrong, decreases risk exposure and safeguards the members.*

6. Discuss how the participants will encourage their club members and officers to attend training events.

7. Ask the group if they have ever seen the Club By-Laws. *It is very important that if they avail themselves of some of the key changes from COL 2016, the club by-laws must reflect those changes. Reference p. 15-16.*

8. Open the floor for any questions regarding the administration and management of their clubs. *Be prepared for any number of questions. If you are asked something that you do not know, be sure to have the individual contact their District Governor Elect. Don't forget that the Manual of Procedure is online and searchable.*

Elective - Strategic Planning and Continuity

Session Goals

- To discuss the importance of a strategic plan
- To review the strategic plan of Rotary International
- To discuss methods used to create a strategic plan for a club

Resources

- **Lead Your Club - President Pages 3-4**
- **Lead Your Club - President Pages 6-7 (Rotary International Strategic Plan)**
 - *RI Strategic Plans Survey Results 2017 – Facilitator Should Read*

Discussion Questions - *Remember that the last discussion from the morning centered around how the participants will actively seek to increase Leadership and Succession in their clubs. You will need to be very careful with time in this session.*

1. What is the definition of Strategic Planning?

Engage the group in a discussion of the benefits of planning. How far in advance should a club plan? Who would have to be involved in that planning process? How is Strategic Planning different from normal planning? (Planning done based upon facts)

2. Look at the Rotary International Strategic Plan on Pages 6.

Have the group notice that the Values in Action is the first part of the plan. Divide the group into groups of 3-4 members. Ask them to develop a list of values that would be appropriate for their own clubs. It is perfectly fine to use the RI list, the goal is to have a discussion. Have the groups briefly present their Value List.

3. Visioning - *In order to make a strategic plan, the end goal must be chosen. Ask participants to go back to their groups and create a vision of what their Rotary club will be like in 3-5 years. This is the most difficult part of this process. Have the groups share their visions.*

4. Look at the Strategic Plan on Page 6 again. Go over the three main categories of Goals - *1. Support and Strengthen Clubs 2. Focus on Humanitarian Service 3. Enhance Public Image and Awareness. Now, ask the groups to use their visions to create THREE major goal areas which would support that vision. For instance, Develop Leaders, Engage Club Members, Start an International Project, Have better*

meetings, etc., etc. **Ask the groups to share their three goal areas. These will become the Strategic Priority.**

5. Ask the participants to pick one Strategic Priority per group. Ask them to create a list action items which would support that main goal area with the following requirements:

- Specific
- Measurable
- Attainable
- Realistic
- Time-Specific

Ask the groups to share their ideas. Allow the group to decide if the action item(s) fulfill the requirements.

Depending on time, the facilitator needs to express to the group that this is a process that they need to do with their club members and leaders. Remind them that they have district support and club support from RI. Also remind them that the easiest way to track goals is to enter them in Rotary Club Central.

Rotary International summarized their strategic goals with the image on Page 7. Tell the group to consider creating some sort of image for their own club.

Elective - Strengthening Your Club

Facilitator needs to review the Vibrant Club Brochure and be ready for anything

Session Goals

To encourage participants to create a club environment where every member feels empowered to shape the club's future and make it extraordinary. This session should be covered with a great deal of enthusiasm and will require a skilled facilitator.

Resources

- **Be A Vibrant Club**

Discussion - take FIVE minutes for each of the following

- 1. Decide Where Your Club wants to be in three to five years**
- 2. Set annual goals and enter them into Rotary Club Central**
- 3. Hold club assemblies to keep members engaged and knowledgeable**
- 4. Communicate openly in your club**
- 5. Prepare members for future roles to maintain a smooth leadership transition.**
- 6. Adapt your club's bylaws to support the way your club works.**
- 7. Develop strong relationships.**
- 8. Make sure that all members are involved in activities that genuinely interest them.**
- 9. Coach new and current members in leading**
- 10. Create Committees that are practical for your club**

Elective - Leading Volunteers

Session Goals

- To use group problem-solving to troubleshoot volunteer issues
- To develop a personal leadership plan that optimizes volunteer cooperation
- To review best practices for successful retention of volunteers

Resource - This Document and Facilitator's Experience

Discussion Questions - *Although the answers listed are the key points, other ideas may come up. Please pace your discussions.*

1. Why do people volunteer? *A useful segway into this discussion could be asking the participants why they personally volunteer.*

- They were asked
- They want to do something good for others and their community
- They are looking for social networking
- They want to remain active
- Personal fulfillment

2. What are barriers to volunteerism? *It is useful to think of these things when one is trying to work with volunteers. It also helps to shape one's approach to the volunteer.*

- Time - *remember that it may not be lack of time, it might be lack of priority*
- The need for flexibility, unable to commit, afraid to commit
- Costs - *financial and personal resources*
- Location
- Lack of child care
- Type of service (homeless, prisoner, etc.)- *unappealing*
- You are not asking in the right manner - *it takes more than a blurb in a newsletter. Direct, personal interactions work best.*
- The task is not clear – *people don't understand what you are asking for. Whether the volunteer is a potential club member or a helper, you need to define the scope of what is expected.*

3. Why do people stop volunteering? *This is the the main part of this session. These points are very important to get to the parts of a leadership plan.*

- They feel that their skills and time is not being utilized well.
- There is a lack of clarity with regards to the club's purpose or goals.
- Leaders don't give up their roles easily or are very slow to embrace others.
Insecure leaders often act like they are the only ones who can perform a task and disregard the need to share leadership roles.
- You don't provide a volunteer friendly environment – create a culture where volunteers are given high expectations and know that they are playing an important role.
- Inadequate supervision or leadership quality
- Lack of training - *Great example - Rotary continues to train its leaders in a measured and predictable manner. Kiwanis discontinued this a few years ago and has experienced a large loss of clubs.*
- Nonexistent or ineffective communication
- Lack of feedback or recognition - **CELEBRATE!!!**

4. What do volunteers want - or what makes them happy? *Again, this is a facilitated discussion. Ask for a scribe and try to hit all of these points.*

- Be prepared for them.
- Make them feel welcome.
- Train them.
- Make the work interesting.
- Know up front how much time the job will take.
- Make them feel appreciated.
- Communicate with them.
- Let them know that they are making a difference.
- Make them socially connected.
- Make sure that they learn something new.

5. Review Best Practices to Retain Volunteers

- Volunteers stay if their tasks and procedures are clear.
- Volunteers stay if they feel welcomed and appreciated.
- Volunteers stay if they bond to someone within the organization.

- Volunteers stay if they receive feedback that connects their job to program success. *Volunteers like to see the outcome of their work.*
- Volunteers stay if they have a voice *-involve them in the decision making process*
- Volunteers are motivated by opportunities to learn new skills.
- Volunteers are motivated by opportunities to “change the world.”
- Make sure that the work is meaningful to the individual
- Promote volunteers to other roles that take advantage of their experience (*volunteer ladder*)
- Ask for feedback - *it will only improve your program*

6. Rules of Retention - *if time permits, then this is a discussion, otherwise, this is a final wrap-up list for the session.*

- Retention doesn't happen in a vacuum.
- Retention is an outcome, not a task.
- Don't waste the volunteer's time.
- Let volunteers do the work they want to do.
- Thank volunteers for their efforts. REWARD + RECOGNITION = RETENTION
- Don't automatically assume you've lost a volunteer.

Best Practices to Increase Club Diversity

Session: 60 minutes

Resource: Diversity Pages from Membership Assessment Tools 2.1-2.6

Initial Introductions – Should include Name, Classification, Size of Club, and whether or not they feel that their club is already a diverse representation of their community.

Discussion Questions:

- 1. What do you think that the term “Diversity” means?** *The idea is to get the participants in the mode of thinking about the topic. Does this mean that a divergent group becomes homogeneous? Or do they maintain their individuality and come together? Is it a mix of both?*
- 2. What types of diversity exist? How many of these types can result in discrimination?** *This is intended to continue and build upon the previous discussion question. Participants should be talking about classifications, ethnicities, gender, social groups, sexual orientation, etc. Use the easel and a scribe to list*
- 3. Why is a high degree of diversity important to a club?** *There is strength in diversity. The opportunity to bring Rotary service to all parts of the community. No correct answer here.*
- 4. How would a “specialty club” fit into the ideal of diversity? (e.g. Latino Club, Hospital Club, LGBTQ club)** *A specialty club may seem to be the antithesis of promoting diversity, however, if these specialty groups become Rotarians, then the diversity infusion will happen at a District level.*
- 5. How could you determine if your club’s diversity matches your community?** *The Membership Tools have very clear directions on how to accomplish this.*
- 6. How could you create an environment which attracts a diverse population?** *This question is conducive to a smaller group discussion. The facilitator could take Discussion question 6 and 7 and divide the group into smaller discussion groups.*
- 7. After creating that environment, how could you promote your club to your target market?** *See Above*
- 8. When you go back to your clubs this week, what single immediate action will you consider to promote diversity in your club?** *Try to include some form of accountability. Have the participants report to a partner in 2 weeks (they could write emails or cell numbers on the back of another participant’s name badge).*