

Leadership, Running Your Club, Strategic Planning & Goal Setting

PETS DISCUSSION LEADER GUIDE – FRIDAY, 8:30 TO 11:45 A.M.

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

- Consider ways to use strategic planning in their own clubs to meet goals pertaining to strengthening clubs, increasing humanitarian service and enhancing public image and awareness.
- State the five (5) qualities of a SMART goal.
- Have a plan in mind to complete their planning for their year as president; and how they will engage their club to support them in achieving their own goals for their year as president.
- State the three (3) strategic priorities or goals of RI.
- Understand what meetings they will be leading as club presidents.
- Know how to run a club meeting and a club board meeting.
- Understand their basic duties regarding club finances, budgeting, and risk management.
- Identify ways to make club meetings interesting, fun and a valuable use of time.
- Understand the purpose of the District Governor’s visit to their club.
- Identify skills needed to serve as effective club leaders.
- Anticipate potential challenges in leading fellow Rotarians, and develop strategies for handling them.

Resources:

- Club Presidents Manual
- Strategic Planning Guide
- Be A Vibrant Club
- Robert’s Rules of Order
- Sample Agendas

Minutes	Time	Content/Process Steps	Teaching Materials
5 min	8:30-8:35	<p>Introduction - welcome PEs - remind them of evaluation process. Fill out your survey sheets (located in the center of the program book) and keep them for the Survey Monkey evaluation that will be emailed to you within a week.</p> <p>Since this is the first session, have PEs do very short introductions (Name, Club, Club Size, Years in Rotary)</p>	Program book survey sheets
60 min	8:35-9:35	<p>Leadership</p> <p><i>What is really exciting to you about being Club President? How will you convey that excitement to your club?</i></p> <ul style="list-style-type: none"> • Leading Your Club <ul style="list-style-type: none"> ✓ communication skills ✓ leadership styles ✓ leading and motivating volunteers ✓ mentoring ✓ time management ✓ goal setting and accountability ✓ strategic planning ✓ ethics and the Four-Way test ✓ building consensus ✓ teamwork 	<p>Refer to <i>Club President's Manual</i>, p 51 - 64.</p> <p>Distribute and discuss <i>Leadership Development: Your Guide to Starting a Program</i></p> <p>Distribute and discuss <i>Be a Vibrant Club: Your Club Leadership Plan</i></p>

Minutes	Time	Content/Process Steps	Teaching Materials
		<ul style="list-style-type: none"> • Discussion questions <ul style="list-style-type: none"> ✓ What is the difference between being a leader and being a manager? Do you need to be both? ✓ What are the important leadership skills you will need for your role? ✓ Who makes up your club leadership team, how and when will you select them, and how will you involve them in carrying out your club's goals? ✓ What committees does your club have? (Club Administration, Membership, Public Relations, Foundation, and Service Projects) ✓ What tasks can you delegate during your year and how do you plan to follow up to make sure they are getting done? ✓ Do you have any concerns about working with the other leaders in your club and how might you handle disagreements that might arise? ✓ How do your district leaders communicate with your club and how do you plan to communicate with them? ✓ How will you work toward continuity of leadership within your club? ✓ Motivating volunteers - how is it different than motivation in the professional world? ✓ How will you periodically measure your personal success as a leader during your presidential year? <p>Activity (Choose one)</p> <p>Group Activity</p> <ul style="list-style-type: none"> • Have participants list their challenges with leading volunteers. Summarize those concerns on a flip chart, then divide participants into groups and assign each group one of the challenges listed. Each group's task is to come up with a creative way to overcome the challenge. <p>Pair and Share Activity</p> <ul style="list-style-type: none"> • Have participants pair off, then and have each pair think of a problematic scenario, such as: <ul style="list-style-type: none"> ✓ finding a replacement for a resigning club treasurer ✓ getting buy-in on an innovative idea that changes a club tradition ✓ changing the club's committee structure ✓ members can't commit to a service project 	

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		<ul style="list-style-type: none"> ✓ past president isn't supportive of your ideas, ✓ new club president is overwhelmed ✓ a committee chair is not active ✓ assistant governor is unavailable. • Ask each pair to discuss the situation they have identified, come up with ways to resolve it, and then report their solution to the larger group. 	
15 min		Break	
55 min	9:45-10:40	<p>Running Your Club</p> <p><i>What makes your club fun?</i></p> <p>Club Meetings</p> <ul style="list-style-type: none"> • What club meetings will you plan to conduct? <ul style="list-style-type: none"> ✓ Weekly club meeting ✓ Club assemblies/business meetings ✓ Board meetings ✓ Other meetings <p>Discuss handouts, go over agendas, and run through Robert's Rules of Order cheat sheet.</p> <ul style="list-style-type: none"> • What do you need to consider and do to maximize the impact of a weekly meeting? • How will you handle special events like new member inductions and awarding PHFs? • How does your club develop interesting relevant and informative programs? • Why are club assemblies important? • What is the District Governor's official visit? How should you prepare for it? • How will you use your Assistant Governor's visits? <p>District Meetings</p> <ul style="list-style-type: none"> • How will you promote District Meetings? • Why is promoting District events important to your club and its members? <ul style="list-style-type: none"> ✓ District Training Assembly ✓ District Conference ✓ District Rotary Foundation seminars ✓ District Membership seminars ✓ District Grant Management seminars ✓ Rotary International Convention 	<p>Discuss and show Club President's Manual, Chapter 3, <i>Running Your Club</i>, p. 34-36.</p> <p>Hand out <i>Suggested Club and Board Meeting Agendas</i></p> <p>Hand out <i>Robert's Rules of Order</i> sheet</p>

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		<p>Reporting Requirements</p> <ul style="list-style-type: none"> • What reporting requirements do you have to RI, The Rotary Foundation and your District? • Why do you need to report this information? • RI reporting (My Rotary) <ul style="list-style-type: none"> ✓ Semiannual reports (SAR) containing per capita dues. Secretary and Treasurer’s roles. How clubs are notified when invoices are due. ✓ Changes in membership, officers or meeting information ✓ Information for Official Directory ✓ Use of Foundation funds (<i>will be discussed on Saturday</i>) • RI and District reporting <ul style="list-style-type: none"> ✓ Membership Goal - Club Central ✓ Foundation Goals - Club Central ✓ Monthly attendance figures ✓ District dues (<i>varies by district</i>) supporting officer administration and training, insurance, Youth Exchange, RYLA, other district project expenses. ✓ Protection Policy requirements ✓ TRF grant applications • What happens if you do not fulfill reporting requirements? <ul style="list-style-type: none"> ✓ Incorrect data results in mailing and directory errors. ✓ May not participate in Foundation grants. ✓ Failure to remit dues results in club termination. ✓ Improper stewardship of funds will result in investigation. <p>Club Finances</p> <ul style="list-style-type: none"> • How will you ensure that your club’s finances are managed responsibly? • What is your role in preparing your club’s budget? • How is your club’s budget approved? • Are club’s financial records reviewed at year-end? 	
53 min	10:50-11:43	<p>Strategic Planning and Goal Setting</p> <p>RI Strategic Plan Rotary is a worldwide network of inspired individuals who translate their passions into relevant social causes to change lives in communities.</p>	Refer to Club President's Manual - Chapter 2, <i>Planning for Your Year.</i>

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		<p>Core Values</p> <ul style="list-style-type: none"> • Service • Fellowship • Diversity • Integrity • Leadership <p>Strategic Priorities and Goals</p> <ul style="list-style-type: none"> • Support and Strengthen Clubs <ul style="list-style-type: none"> ✓ Foster club innovation and flexibility ✓ Balance activities in all avenues of service ✓ Promote membership diversity ✓ Improve member recruitment and retention ✓ Develop leaders ✓ Extend Rotary • Focus and Increase Humanitarian Service <ul style="list-style-type: none"> ✓ Eradicate polio ✓ Increase sustainable service ✓ Six areas of focus ✓ Expand strategic partnerships ✓ Create significant projects locally and internationally • Enhance Public Image and Awareness <ul style="list-style-type: none"> ✓ Unify image and brand awareness ✓ Publicize action-oriented service ✓ Promote core values ✓ Emphasize vocational service ✓ Promote networking opportunities and signature activities <p>Ask which clubs have developed Strategic Plans.</p> <ul style="list-style-type: none"> • For clubs with Strategic Plans, how are they being used? How is a Strategic Plan helpful? • For clubs without a Strategic Plan, what are the pros and cons of developing one? <p>How might a plan develop your club’s public image and increase awareness of Rotary in your community?</p> <p>How might you assess the current status of your club?</p> <ul style="list-style-type: none"> • Brainstorm with club, including current and former members. • Speak to community members. • Talk to District leadership. 	<p>Point out <i>Rotary Strategic Plan</i> in Appendix 4, and <i>Strategic Planning Guide</i> in Appendix 3. Briefly discuss Club Central, and <i>Planning Guide for Effective Rotary Clubs</i>. Refer again to <i>Be a Vibrant Club: Your Club Leadership Plan</i>.</p>

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		<p>Discuss Club Visioning as one method to get this process started (only some districts have it). Club Visioning is the first step in preparing long-range plans/Strategic Plans. The goal is to elicit ideas about where members want the club to be in five years. Through a visioning process, members can imagine and describe their club - not as it is today, but how they want it to be in the future.</p> <p>Goal Setting Why is it important to establish goals? What are key characteristics of effective goals?</p> <ul style="list-style-type: none"> • Shared and specific • Measurable • Achievable • Reaching and challenging • Time specific <p>What goals do you have for your year as Club President? What do you think you will need to do to make these goals effective? How will your board be involved in setting / monitoring goals? How can you motivate club members to embrace your goals?</p>	
		<p>Activity</p> <p>Ask PE's to think about their club's strengths and weaknesses and then to formulate two goals they would like to accomplish during their year. Record the goals on a flip chart. If some are similar, group those participants together, otherwise pair them up. Ask them to spend 10 minutes discussing how they are going to accomplish one of the goals and create an action plan.</p> <ul style="list-style-type: none"> • Actions needed to achieve the goal • Persons responsible for each action • Timeline for actions • How progress will be measured • Available resources <p>As time allows, let volunteers present a goal and strategy to the full group and allow comments.</p>	
2 mins	11:43-11:45	<p>Evaluations Fill out the survey sheets and keep them for the survey monkey evaluation that will be emailed within a week.</p>	Center of program book