

PRESIDENT-ELECT

Facilitator Discussion Guides



Ole Man River
Multi-District
President-Elect Training Seminar



March 17 – 18, 2023

Clarification Notes

For PETS Alliance Members

To understand some of the instructions in the documents

ACTIVITIES

These PE sessions and some of the instructions for the facilitators are designed with a combination of Q&A and group activities.

SESSION LENGTH

There are only two sessions. Each session is two hours long. They are:
Leadership & Membership (inward facing)
Public Image & Service Projects (outward facing)

Having two full hours provides more discussion time, less interruption, and more flexibility for the facilitator.

CHANGES

These documents are works in progress. We plan to replace the activity in “Public Image” with a “create a public image campaign” type of activity.

APPLICATION

Since we want the participants to actually use what they learn, we ask them to write down how they will apply something they learned in each topic. This improves the chance that they will actually use it.

EVALUATIONS

Evaluations, either online or paper, are completed at the end of each topic. This greatly improves our chance of getting evaluations.

Ice Breaker

Do this only in the first session of the event.

To save time, use an ice breaker that includes introductions.

In your own words and style, do something similar to this. It is to warm them up to speaking, allow them to start learning each other, and get them more comfortable sharing.

Hi. Welcome to your first session and topic.

Of course, y'all don't know each other. Let's fix that.

Please tell us

- your name,
- what city you are from
- and 2-3 words that best describe how you are feeling about your upcoming presidential year?

May I get your agreement that you will keep your feeling description to 2-3 words? Otherwise, we'll be so long, we'll all miss the fun dinner tonight!

After you receive group acceptance, ask for a volunteer to start. The person sitting beside them goes next, and so forth.

Once everyone is finished, introduce yourself, then begin your first topic of the day.

Leadership: Planning an Effective Year

Facilitator Discussion Guide

Black = What to say

Red = Things you don't say. Use "Look for" notes to help guide them to the answers.

Good _____. My name is _____. I am your facilitator for the Leadership session. Let's start by discussing leadership. See page 2 in your handouts.

LEADERSHIP

- By a show of hands, who has received some leadership training in the past?
 - *If so*, What was a favorite take-away?
- What is the main difference between leading and managing?
 - *Look for: We lead people, we manage processes (or similar)*
- What leader skills are different in Rotary than in for-profit businesses?
- Do large clubs operate differently than small clubs? In what ways?
- What happens if you try to do it all yourself?
- What other positions are in your club's leadership team?
- What is succession planning and what are the benefits of it?
- What does your leadership team need from you?
 - *Look for: Strategic thinking; a plan; guidance on what to do, etc.*

Let's look at some of the necessary, although not so exciting, details of leading a Rotary club.

DETAILS

- What are club governing documents?
 - *Look for: Constitution and Bylaws*
- By a show of hands, have you reviewed your governing documents?
- When did your club last review its bylaws?
- What reporting duties do all clubs have to Rotary International, the Foundation, and the District? What resources do you have to learn about this?
 - *Look for: member data, dues, other*
- Let's say you know there are dues to pay for each member. Where could you go to learn how much, when it is due, and any other questions about it?
 - *Assistant Governor, District Governor, Club Administration in My Rotary, etc.*
- What may happen if your club fails to meet these reporting requirements?
- What one document could help you organize as you prepare for your year as President?
 - *Look for: a plan, or strategic plan, etc.*

PLANNING

Perhaps you already started a plan. Maybe not yet. While not a full-blown strategic plan, your handout is a quick and easy way to get started.

- First, let's define Vision and Mission.
 - Vision – looks forward, creates mental image of ideal state club wishes to achieve
 - Mission – concise explanation of clubs reason for existence; purpose & intent
- Look in your handouts on the bottom of page 4 for Rotary vision & mission statements.
- What is the distinct purpose of each statement?
 - Vision inspires. Mission supports vision & provides purpose and direction.

ACTIVITY: Start a Plan

- Think on this for a minute. What do you want your club to look like at the end of your year? This would not be a list of accomplishments. What do you want it to LOOK like? In one year, when you walk into your club meeting, what do you want to SEE? In one year, when doing service projects, what do you want to SEE? Make notes to yourself.
 - Give them a few minutes to think and write.
- In just a minute I will ask you to separate into groups of about 4 people.
- Using the handout on pages 3 & 4, help each other determine a Vision Statement for what your club will look like at the end of your year, and at least 2 goals that you would like to accomplish to help make that vision a reality.
- If you have time, start working on some of the other items.
- Are there some questions about what to do? **Pause.**
- You have _____ minutes. Your time starts now. *******SET TIMER*******
When alarm sounds, have everyone stop working. Ask teams to share some of their Visions and goals. Have as many teams as possible share their ideas in the remaining time.

+/- 10 minutes before the end of the hour:

APPLICATION

Say these 2 sentences **ONLY** in the first session of the event. To use what we learn, we must know how we will apply it. Here is your last question for this topic.

- What was valuable to you in this session and what will you do to put it in practice?

EVALUATION

Please complete your evaluation for this topic. Yes, we really do use them to improve each year. **You may have to explain how to fill out the form the first time.**

THANK YOU for all of your great comments and ideas.

Membership: Attract, Engage, & Develop

Facilitator Discussion Guide

Black = What to say

Red = Things you don't say. Use "Look for" notes to help guide them to the answers.

We will now start the Membership session on page 5. And, let's start with an activity.

ACTIVITY: Membership Best Practices

- There are 4 flipchart pages on the walls around the room. As you can see, the titles are:
Attract Orientation Engage & Retain Grow & Develop
- Y'all will split into 4 groups, each at one of the flip chart pages.
- See page 6. Each group reads and discusses only the questions that pertain to their topic. Then, using your flip chart paper, list best practices for your topic.
- Let me restate. Answer questions in your discussion. Put best practices on the paper.
- Are there some questions about what we will do? **Pause**.
- Take out page #6 from your binders. Choose one of the 4 flip chart pages, and go to it. As you move around, please be sure that each page has plenty of people at it.
- **While they are moving into place, provide each group with a marker.**
- You have _____ minutes. Your time starts now. *******SET TIMER*******
- **Once time is up, have everyone stop working.**
- Starting with Attraction, let's share best practices with each other, allowing for questions and additional suggestions from the entire group.

These are great ideas. Let's tie them back into leadership. Turn back to Page 5 .

DISCUSSION

- Who is responsible for championing membership in your club?
 - *Look for: membership chair, team, hint: "everyone" does not enable responsibility and accountability to meet goals*
- As President, what can you do to put some of these ideas into practice at your club?

+/- 10 minutes before the end of the hour:

APPLICATION

- What was valuable to you in this session?
- What will you do to put it in practice?

EVALUATION

- Please complete your evaluation form for this topic.
- **Say this ONLY if it is the last session for the day.** Once finished, please fold your evaluation forms in half and pass them down toward the front of the room.

THANK YOU for sharing so many excellent best practices.

Public Image: It's Who We Are!

Facilitator Discussion Guide

Black = What to say

Red = Things you don't say. Use "Look for" notes to help guide them to the answers.

Good _____. My name is _____. I am your facilitator for the Public Image session. Let's start with an activity. We are on page 7 in your discussion notes.

ACTIVITY: Tell Your Rotary Story

- Think about these two questions. How would you answer each of them in only one short sentence? **Read the questions, then give them a minute to think.**
 - Why did you accept the offer to join Rotary? "Because someone invited you to a meeting" is not the reason you actually joined.
 - Why have you stayed in Rotary?
- We will alternate between the two questions.
- **Choose a person and ask them the first question. Ask the second question to the next person. Continue alternating back and forth until everyone has had a chance to answer.**

Do you think your communities know these things about Rotary?

Let's talk about public image regarding Rotary and your clubs.

GROUP DISCUSSION

- What is your perception of public image?
- Have you seen Jay Leno or other talk show hosts survey folks on the street about basic American History or other questions? Yep, they are funny and sad at the same time.
- If you did a street-survey and asked 10 people what your Rotary club does, what would they say?
- What, then, is your club's public image?
- Let's say some people in your town want to get involved in community service projects. How would they know you exist, what all you do, and how to contact you?

- What Rotary tools are available to you and where do you find them?
- What Rotary tools have you used? Do you have examples?

- What social media sites have been effective for your club?
- What do you share on those sites?
- What is your opinion of websites that are not mobile-friendly?
- Is your club's website mobile-friendly?

- What are best practices to keep websites and social media sites up-to-date?
 - **Facilitator, be sure plenty of best practices are shared.**
- What are the benefits of having a Public Image Committee?

Let's do an activity regarding public image.

ACTIVITY: Fix Public Image Issues

- In just a minute, I will ask you to separate into groups of 4-5 people.
- As a small group, choose 1 of the scenarios on page #8 in your handouts. The instructions are at the top of that page.
- Are there some questions?
- You have _____ minutes. Your time starts now. *******SET TIMER*******
- **When the alarm sounds, have everyone stop working. Ask teams to say which scenario they chose and their action plans. Hear as many as possible in the remaining time.**

+/- 10 minutes before the end of the hour:

APPLICATION

Say these 2 sentences **ONLY** in the first session of the event. To use what we learn, we must know how we will apply it. Here is your last question for this topic.

- What was valuable to you in this session and what will you do to put it in practice?

EVALUATION

Please complete your evaluation for this topic. Yes, we really do use them to improve each year. **You may have to explain how to fill out the form the first time.**

THANK YOU for all of your participation.

Service Projects: It's What We Do!

Facilitator Discussion Guide

Black = What to say

Red = Things you don't say. Use "Look for" notes to help guide them to the answers.

We will now start the Service Project session on page 9. And, let's start with an activity.

ACTIVITY: Fast Project List

- Think of all the projects that your club has done.
- Using the Rotary 7 Areas of Focus as a guide, write down the projects, using 1 sticky-note per project. Make it legible, please.
- Get as many sticky-notes as you can in 1 minute!
- Your time starts now. *******SET TIMER*******
- **After time is up**, Leave your pile of sticky-notes in front of you. I'll collect them in a few minutes. We will have them organized for you to see by the end of this session.
****EITHER YOU OR A HELPER ORGANIZE STICKY NOTES – SIMILAR ONES TOGETHER****

Let's do another sticky activity.

ACTIVITY: Project Planning

- This is a rough chronological process for a service project.
- The 5 titled flip chart sheets each represent one of the basic steps of project planning. We are skipping the Execution step, which would go in the middle.
- There are 30 sticky-notes on the blank flip chart sheets on the walls. Each of these is an item that goes on one of the Project Step sheets.
- Work with each other to get the sticky-notes attached to the correct sheets.
- Some may seem to belong in several places. Choose the best position.
- Are there some questions about what we are doing?
- You have _____ minutes. Your time starts now. *******SET TIMER*******
- **Facilitate** questions that arise & if they have items on incorrect sheets.

<u>Idea/Pre-project</u>	<u>Approval</u>	<u>Planning</u>	<u>Debrief/evaluate</u>	<u>Project Outcomes</u>
Community needs	Board buy-in	Project leader	Was need met	More guests at meetings
Potential partners	Club buy-in	When	Budget to actual	Public awareness of Rotary
Potential investors	Partner(s) buy-in	Where	Best practices	Community appreciation
Good fit for club	Investor(s) buy-in	Budget	Lessons learned	Membership increase
A project champion	Beneficiary buy-in	Volunteers	Member engagement	Club pride
Available grants	Community buy-in	Committees	Community participation	Community asks to partner

- Please share your thoughts about this.
- Are there some changes or additions you would make?
- Why does this matter?

GROUP DISCUSSION

- What are reasons that some service projects fail?
- What makes service projects valuable to your members?
- What are benefits of partnering with other clubs or organizations?
- How often should you evaluate the effectiveness of your club's existing, ongoing projects?
- Why should we evaluate older projects?
Do this if there is extra time.
- What questions will help you evaluate the effectiveness? (Look for these:)
 - *Declining or weak projects?*
 - *Need more enthusiasm?*
 - *Still meeting community needs? Or only meeting member needs?*
 - *Member participation rate for the projects?*
 - *Span more than one Areas of Focus?*
- What international service projects has your club participated in?
- What was your club's experiences from it?
- What support is available from RI and TRF to support your service projects?
- What would happen if we did not participate in or create an international service project?
- As the leader, what is your role in Community Service?

+/- 10 minutes before the end of the hour:

APPLICATION

- What was valuable to you in this session?
- What will you do to put it in practice?

EVALUATION

- Please complete your evaluation form for this topic.
- **Say this ONLY if it is the last session for the event.** Once finished, please fold your evaluation forms in half and pass them down toward the front of the room.

THANK YOU for all of your participation in the learning sessions.

Best wishes to each of you in preparation and execution of your Presidential year.