

WORKSHOP #1, FRIDAY MORNING (2:45)

"ENGAGING MEMBERS"

DISCUSSION LEADER GUIDELINES

This session is designed to focus on why we exist in the first place: Service. What kind of service? For whom? Is it effective? Is it stale? What does your service mean to your members? Are your service projects a membership recruitment tool or a deterrent?

The first half of the morning should be geared toward discussing actual service projects, and the second half geared toward what those projects have meant to your members, your growth, and your club's stature within your community. All timelines are approximate guidelines only.

9:00-9:10 Introductions

- Can you make introductions a learning opportunity? Something other than now-let's-go-around-the-room-with-name-rank-and-serial-number?

9:10 – Break [9:10 through 11:20 is 130 minutes, less 15 for break leaves 115 minutes for content, split for illustration at 65 minutes followed by 50]

- Do you have a signature local project? Do you need one?
- Which of your projects generates greatest sense of pride of ownership?
- Discuss projects that involve little or no cash.
- Find examples of projects funded in part with District Grants. Did the district grant process result in a better grant?
- Find examples of Global Grants. Discuss piggy-backing on another club's idea. How did the ideas originate?
- How to/issues around retiring a service project that has run its course.
- When fundraising and service projects are intertwined. Pros and cons. Are you fundraising for another entity? What does that do for internal club satisfaction?
- Does the club legal structure enhance or detract from the goal of providing service? [Many clubs operate solely as a 501c(4). Many others also have a separate 501c(3). Others have yet a third structure, in the form of a stand-alone endowment.] Does it matter? Are there trade-offs?

15 minute break [precise timing for each room yet to be determined]

Break – 11:20. 50 minutes

- Step back for a minute. So what does your club's service mean to your community? How do you articulate that role?
- Is your club known for how it raises money or how it spends it? What are the implications?
- How will your goals enhance the role of your club in your community?

- Rotary is designed to Unite Leaders, Exchange Ideas, and Take Action. Find examples where clubs reached out to unite community leaders, or became the community leader, or provided forums, be they internal or external to the club, to Exchange Ideas.

11:35-11:43

- Clean up of unanswered questions; allowance for robust discussion carry-over (you got behind your intended schedule) or a closing discussion to pull out a light-bulb moment or two from the session that participants will use to help focus on why service matters to begin with, and/or how they, as the visible face of the club, will help articulate that message.

11:40-45 EVALUATIONS

1. One minute for you to highlight major points from session
2. Two minutes for participants to highlight/star/circle action items
3. Two minutes for evaluation notes

WORKSHOP #2 (Friday afternoon, 90 minutes)

ATTRACTION AND ENGAGEMENT

DISCUSSION LEADER GUIDELINES

This session is designed for discussion about the very basic building blocks of how a club operates and how that structure enhances or detracts from ATTRACTING and ENGAGING members. The underlying theme is to reinforce that absolutely nothing happens if the club platform isn't solid in its underpinnings and purpose, always remembering that what works well in one space may not work in another.

- The luncheon speaker was Drew Kessler. Start off with feedback from the room on his message (HINTS: Take some notes, focus on *BALANCE Family-Work-Life; REMOVING ROADBLOCKS; ENGAGING EXISTING MEMBERS*); what makes Rotary *RELEVANT* to the broad discussion)
- Drew's message was about balancing family/work/rotary.
 - What does your club do to balance family, work, rotary? What more can be done?
 - Does your club encourage or hinder flexibility? Opportunities for balance? Proactively or lip-service?
 - How are you/can you adjust to needs of current and potential members?
 - How is your Rotary experience (not just the service component) relevant to current and potential members? What can be done to make it more so? Can you define the need your club is meeting?
- Rotary is encouraging flexibility of club structures. Meeting attendance is *passee*. But a sputtering club that shifts from weekly to bi-monthly meetings will still be a sputtering club if that's the only change.
 - Seek examples of where clubs successfully navigated a large structural change (or failed in the attempt)
 - Seek examples where a community is now better off with two clubs of differing structures.
 - Brainstorm what the face of a "club" might look like (ex.: a hybrid partial meet/partial electronic; a monthly meet w/ weekly "committee"/service; a late evening business networking group that does service; a 3pm targeting retirees)
- Spend some time on the visuals and subliminals of a club meeting.
 - Is your image across all channels vibrant and current?
 - Does your club look and feel pertinent to a busy, young professional?
 - Banners and Badges? Still look like grandfather's?
 - Does your road sign convey a message?

- Welcoming? (or is it only welcoming to you, the person who knows the ropes?)
- Happy dollars/fines/raffles/sergeants? Does it make sense when your guest speaker explains what she saw to her husband?
- Are there other traditions that might be perceived as awkward or a waste of time? Might some traditions only occur sporadically?
- Must every one of the weekly meetings look and feel the same?
- Speaker program as a part of the membership attraction element
 - Do all speakers need to be headliners?
 - Clubs use various structures to obtain speakers- take a couple of minutes to let them hear how others do it.
 - If time permits, attendees are always interested in speaker suggestions (not the headliners, just some rocks to look under)
 - Club presidents rarely are responsible to schedule speakers, but what happens when the president asks that each quarter contain x, y, and z?
 - What to do with guest speakers after they've left.
- Website Importance and Social Media. These are two distinct topics, each with its own quirks. It's not simply "technology".
 - Why it matters
 - What to do about it
 - [Mitty Chang will make an offer, I'm sure on Thursday, and again shortly after this breakout re his free website tool. Discussion Leaders need to be familiar with what he is offering. Scope it out in advance at mittychang.com (and consider adapting within your own club?)]

FINAL FIVE MINUTES: EVALUATIONS

1. One minute from you to highlight major points of session
2. Two minutes for participants to highlight/star/circle action steps
- 3.** Two minutes for evaluation notes.

WORKSHOP #3 (Saturday morning, 90 minutes)

"SUCCESS STORIES & ACTION STEPS"

DISCUSSION LEADER GUIDELINES

This session is designed for sharing of success stories re both membership growth and retention. What's worked? How do you know what's worked? What is needed to keep the positive momentum going, or to create a new sense of enthusiasm?

- At this point in the weekend participants will have already had four breakout sessions – two with mixed participants and two within their district, as well as multiple hallway conversations. Be mindful of the "sense of the room" (avoid overkill).
- Seek examples of positive membership growth and engagement. Some might be:
 - Who joined recently? What was the attraction?
 - Did they find the club? If so, how?
 - Did the club find them? An organized campaign? A disorganized campaign? A casual conversation?
- This is the final session. Seek discussion to tie the two days' content together:
 - Examples of where enthusiasm, defined sense of purpose in community, appreciation for effects of service projects, eagerness to share the club's story, and so on, resulted in heightened vitality.
 - Examples of steps – however large or small – you know you have to implement, or at least introduce.
 - One example of one of those steps might be to reimagine how to use the club board of directors as a tool for positive momentum
 - Are you only using the board to accept/review/approve reports and expenditures?
 - What type of conversations can happen at the board level that might not be appropriate in a club general meeting?
 - How does the board hold each other responsible toward action steps that strengthen service output, membership engagement, and new member attraction?
- Participants came to this conference with club goals already largely in place. Ask them to reflect on the messages from President-Elect Ian Riseley, Drew Kessler, Shirley Pat Chamberlain, Mitty Chang, and countless workshop and hallway conversations.
 - How are they adjusting their goals?
 - What conversations will happen with the club board in April, May and June?
 - Where's the accountability in September? Next February?
 - Specifically, what are the ideas they are bringing to the club?
- Anyone leaving here with a renewed sense of pride out Rotary? Close with a few testimonials.

10:55-11:00 Evaluations

1. One minute recap from you on the major points of the session
2. Two minutes for participants to highlight/star/circle action steps
3. Two minutes for evaluation notes.