

PRESIDENT-ELECT

Discussion Notes



Ole Man River
Multi-District
President-Elect Training Seminar



March 17 – 18, 2023

LEADERSHIP: Planning an Effective Year

LEADERSHIP

Leading _____

Managing _____

Rotary leadership skills _____

Succession Planning _____

My club needs me to _____

DETAILS

Club governing documents _____

Club reporting duties _____

PLANNING

Vision _____

Mission _____

APPLICATION

What was valuable to you? _____

How will you put it into practice? _____

*Failure to plan is a plan for failure.
(paraphrased)*
— Benjamin Franklin

*If you don't know where you are going,
you might wind up someplace else.*
--- Yogi Berra

Planning an Effective Year

SWOC Analysis

Club strengths _____
Club weaknesses _____
Club opportunities _____
Club challenges _____

Vision Statement

At the end of my year, I see my club: _____

Goals

Club's 3-year goals _____

Your goals this year _____

Leadership

Leadership team positions _____

Committees needed _____

Administration

Review governing documents? _____
Verify Rotary reporting requirements _____
RI _____
District _____
DaCdb _____
Assess tax situation _____
Federal & state? _____
Tax ID? _____
Tax return filed? _____
Annual budget _____

Meetings

Location & food _____
Speakers _____
Technology _____
Other? _____

Membership

Numbers _____
People diversity _____
Vocation diversity _____
Other _____

Public Image

Traditional media _____
Social media _____
Name & logo recognition _____
Other _____

Service Projects

Evaluate _____
Community need _____
Member participation _____
Other _____

Other

Vision Statement: Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

Mission Statement: The Rotary Foundation helps Rotary members to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty.

MEMBERSHIP: Attract, Engage, & Develop

BEST PRACTICES

Attract _____

Orientation _____

Engage & Retain _____

Develop _____

MEMBERSHIP

Who champions membership? _____

What is your responsibility regarding membership goals? _____

APPLICATION

What was valuable to you? _____

How will you put it into practice? _____

Coming together is a beginning, staying together is progress, and working together is success.

--- Henry Ford

Alone we can do so little; together we can do so much.

--- Helen Keller

**Rotary
Resources**



**SCAN TO VIEW
MEMBERSHIP
TOOLS**

MEMBERSHIP

Breakout Questions to Discuss

Note: Your flip chart page should show best practices, not answers to the questions.

ATTRACT (Provide an experience that people want)

- What attracted your recent new members?
- What challenges does your club face to bring in new members?
- What are the values of diversity in industries, work roles, gender, ethnicity, etc. for your club?
- What makes a Rotary club attractive compared to other organizations?
- What does your club offer that people want to experience?

ORIENTATION (Provide club and RI visions, practices, opportunities, history, etc.)

- What is the benefit of Orientation?
- What should be included in orientation?
- How long should orientation(s) last?
- Who should be involved in orientation events?
- Who else can participate?

ENGAGE & RETAIN (Work with and improve what we already have)

- What do members value in your club? What tools are available to find out?
- What are the benefits your club provides to members to be worth their time and resources?
- What keeps people in your club?
- Why do members leave?
- Are the reasons people join and the reason they stay always the same?

GROW & DEVELOP (Develop and grow members & leaders)

- What will grow leaders in your club?
- What could be the benefits of succession planning in growing leaders?
- What benefits are provided by making Rotary education a high priority in your club?
- What resources are available to provide that knowledge to your members?
- How do you provide more leadership opportunities?

PUBLIC IMAGE: It's Who We Are!

PUBLIC IMAGE

Public image is _____

Your club's public image _____

How do people find your club? _____

Tools available for public image _____

Social media best practices _____

PUBLIC IMAGE FIX

Issues _____

Solutions _____

APPLICATION

What was valuable to you? _____

How will you put it into practice? _____

*People do not buy goods and services.
They buy relations, stories, and magic.*
— Seth Godin

*... If you don't create some type of public
image, it gets created for you.*
--- Tom Verlaine, singer & guitarist

PUBLIC IMAGE

Breakout Scenarios

With the scant information available, determine the issues, the priorities, and create an action plan for these scenarios that protects and/or enhances the public image of both the club and Rotary International.

#1 The Missinginaction Rotary Club just celebrated its Centennial. It is proud that their average length of membership is 15 years and that they have done some of the same service projects for just as long. A few new members are younger, have children, and wish to be more hands-on with child-related projects. The School Board Superintendent just announced that they completed a thorough vetting process with all of the service-oriented non-profit organizations in the community. The Superintendent was proud to announce a partnership with Activenandvisible to provide dictionaries to third graders and story-reading time to the first grade students. Missinginaction members are shocked they were not contacted. Everyone knows that Rotary does dictionaries for third graders!

#2 The headline story of the local television news station was “Local Accountant and Board Member of Ohmigosh Rotary Club arrested for embezzlement.” This same accountant has been the treasurer for the Rotary club for seven years. The club was the catalyst bringing together two additional investors in a building remodel project for a new emergency shelter.

#3 The city had identified a recycling company to build and run a collection and sorting facility. The two organizations need a third partner for both the construction cost and to ensure the community is educated about recycling and willing to participate so the project is sustainable. Word on the street is that the deal is about to fall apart because they have not located a third party.

#4 Several club members at a two-day Rotary District event, hosted by your club, headed out for supper and drinks. They were proud of the work they were doing with Rotary and were eager to share with whoever would listen. “Two bar sslater, we was umm arressed for discorderly conduct and public intossicashun.” The story, with video and eloquent quote, made the 10:00 PM news cycle. As evidenced by the video, they were proudly wearing their Rotary logo shirts.

SERVICE PROJECTS: It's What We Do!

PROJECT PROCESS

Idea/Pre-project _____

Approval _____

Planning _____

Debrief/evaluate _____

Outcomes _____

SERVICE PROJECT

What makes projects valuable to members? _____

Benefits of partners _____
Evaluating effectiveness of programs _____

International projects _____

APPLICATION

What was valuable to you? _____
How will you put it into practice? _____

Whatever good things we build end up building us.
-- Jim Rohn

Power is the ability to do good things for others.
--- Brooke Astor