

Carolinas' PETS 2020: Effective Leadership

(Includes: *Goal Setting*) (Total Time: 60 minutes)

Discussion Leader Notes

- ***Smile! Plan your “engagement” plan! (Note: This session has an IMPORTANT “Best Practices Grid and other Discussion Materials/Reference Documents)***
- ***Pre-arrange your flip chart(s) and markers to a location that you are comfortable with***
- ***Introduce yourself to the group and explain your role as the facilitator of their discussion; you may wish to greet each participant individually as they enter and find a seat***
- ***Discuss your expectations and group guidelines (such as taking turns speaking, welcoming and accepting all questions/comments, and asking the group to turn off all cell phones)***
- ***Review the session’s learning objectives with the participants (flipchart and your notes)***
- ***Encourage participants to take notes; try to gauge the participants’ knowledge and Rotary experience and adjust your facilitated discussions accordingly***

Session Opening

Learning Objectives

Review with group (in Discussion Materials)

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

- 1. Understand the importance and process of goal setting in planning for the coming year**
- 2. Use Rotary Club Central at www.rotary.org/ClubCentral to post and track club goals & Rotary Citation progress for the coming year**
- 3. Understand the importance of developing and/or updating the club's strategic plan**
- 4. Understand the key leadership issues in operating a Rotary Club:**
 - a. Planning & Goal Setting**
 - b. Budgets & Budgeting**
 - c. Assembling & Preparing a Leadership Team**
 - d. Club Assemblies**
 - e. Leading Meetings**
 - f. Strategic Planning**
 - g. Succession and Sustainability planning**
- 5. Use proven “best practices” for club leadership (NOW and throughout your year of leadership)**

**Specifically point out the “Best Practices” GRID for this session
(in Discussion Materials)**

SHARE YOUR BEST PRACTICES

<u>Club Goal Setting</u>	<u>Club Budgets/Budgeting</u>
<u>Preparing YOUR Leadership Team</u>	<u>Club Assemblies</u>
<u>Leading Meetings</u>	<u>Strategic Planning/</u>
<u>Other</u>	<u>Club Sustainability</u>

Planning Your Year of Effective Leadership – **(in Discussion Materials)**

DL: If you haven't already done so, please refer to PETS Discussion Guide "VISION, OBJECTIVES & GOALS" Section.

DL: Let's think about Vision and Objectives for a moment:
(10 Minutes)

What are key elements of a VISION for your club?

DL: Talking Points (Look for these ideas)

1. Imaginable -- A picture of the future
2. Desirable -- Appeals to the long-term interests of stakeholders
3. Feasible -- Realistic, attainable goals
4. Focused -- Guides decision making
5. Flexible -- Allows initiative
6. Communicable -- Can be successfully explained within five minutes

What are key elements of COMMUNICATING your Vision?

DL: Talking Points (Look for these ideas)

1. Simplicity -- All jargon and technobabble eliminated
2. Metaphor, analogy, and example -- A verbal picture
3. Multiple forums -- Big meetings and small, emails, bulletins and newsletters, formal and informal interaction
4. Repetition

Q: What are the differences between OBJECTIVES and GOALS?

DL: *Let's start with an everyday example:*

Objective: Improve my family's financial security

DL: *What are some GOALS that, if achieved, would contribute to that?*

DL: Talking Points (Look for these ideas) – SPECIFIC, MEASURABLE, TIME BOUND

- Pay off credit card debt by ____
- Pay off car loans by ____
- Increase savings rate from ____% to ____% of salary
- Increase 401(k) contributions by 2% per year
- Track spending and look for expense reduction opportunities

DL: *What about a Rotary example?*

Objective: Improve my club's support of The Rotary Foundation

DL: *What are some GOALS that, if achieved, would contribute to that?*

DL: Talking Points (Look for these ideas)

- Achieve \$ _____ Per Capita Annual Fund giving (10% increase from last year)
- Achieve \$ _____ Per Capita PolioPlus giving
- 5 new Paul Harris Fellows
- 3 members to new Multiple Paul Harris Fellow levels
- 1 new Paul Harris Society member (\$1,000/year pledge)
- ____ % Sustaining Members (\$100 per member per year)
- 3 new Benefactors

DL: *What are some ACTION PLANS needed to reach these goals?*

DL: Talking Points (Look for these ideas)

Action Plans - Objective 1		
Action Plan	Who	By When
Identify a Rotary Foundation Chair	President-Elect	May
Have a Rotary Foundation Program quarterly	Program Chair	Aug., Nov., Feb., May
Add TRF Sustaining Member to club invoice (\$25/quarter)	Treasurer	June 1
Run a Paul Harris Fellow match campaign with TRF points	Foundation Chair	November
President, PE & TRF Chair to District Foundation Training	President	November

DL: *Group Work Activity* (10 Minutes)

Walk the PEs through creating a Vision, choosing some Objectives for their clubs, creating some Goals and Action Plans around those.

DL: "Turn to the VISION, OBJECTIVES & GOALS page of your Discussion Materials"

1. "Write 1 or two sentences about how your club will look at the end of your term as President" --

- "How are you going to leave the campground in better shape than you found it?"
- "For what do you want your year as President remembered?"

HINT: Start with "I see....."

2. "From the 4 Key Performance Areas listed, identify two or three (no more than 4) Objectives -- things you're passionate about or you think are important to your club"

IMPORTANT: One of those should be MEMBERSHIP GROWTH

- Membership Growth
- Service Projects Effectiveness
- The Rotary Foundation Growth
- Sustainability/Succession

3. "What are some incremental **GOALS** that would contribute to those Objectives? What will it take to accomplish those?"

HINT: TRF Examples in Discussion Materials

Action Plans

- Determine WHO will do WHAT, by WHEN to achieve critical goals
- Decide what "good" looks like - what defines success?
- Monitor/evaluate/report on the progress toward the goal

1. ENTER and TRACK your Goals in Rotary Club Central:

www.Rotary.org/ClubCentral

- Do you have a working login to Rotary Club Central?

DL: *Group Work Activity – Club Leadership* (5 Minutes)

DL: "Turn to the VISION, OBJECTIVES & GOALS page of your Discussion Materials"

DL: "Behind each of the key positions listed, put the name of the person you've asked or are considering for that role. These individuals are critical to your success -- choose wisely"

Leadership Team

- Effective clubs have effective leadership **TEAMS**; it's hard for one person to make a truly effective club! How are you developing your leadership **team**? **LOOK FOR NEW** (and also proven) **IDEAS** in **this** session.
- Timing -- The time to have your leadership team lined up is **NOW**. If you don't have these key positions filled today, make that a priority for the month of April:
 - Membership Chair
 - Service Projects Chair
 - RI Foundation Chair
 - Club Administration Chair
 - Public Image/PR Chair
 - Fundraising Chair

DL: *Let's talk about Leading Effective & Engaging Meetings*
(10 minutes)

Q. What does an effective Rotary club meeting look like?

Refer to: "*Leading Effective & Engaging Meetings*" section of *Discussion Materials*

Refer to: "*Club Meeting Agenda (Sample)*" section of *Discussion Materials*

NOTE: If your invocators can't understand what an **ECUMENICAL** invocation is, you don't need to have one. Likewise, Pledge of Allegiance and song are optional, as well.

Q. What is the purpose and content of Club Assemblies?

Refer to: "*Club Assemblies*" section of *Discussion Materials*

DL: "There is some great reference material at the end of this section - You'll want to refer to that as you build your plan."

- *Sample Club Meeting Agenda*
- *Sample Board Meeting Agenda*
- *Budgets & Financial Management*

Strategic Plan (5 minutes)

Q. What would it take to expand the Club Plan we worked on (Vision, Objectives, Goals/Action Plans) into a 3-year Strategic Plan? HINT: It's not as daunting as it seems

DL: Talking Points (Look for these ideas)

- Objectives – Create at least one for EACH of the 4 key performance areas – 3-year (or longer) time horizon
 - Membership Growth
 - Service Projects Effectiveness
 - The Rotary Foundation Growth
 - Sustainability/Succession
- ADD: Goals/Action Plans to achieve each (Who, What and by When?)
- ADD: Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis
- If needed, find a facilitator with business planning experience

More ideas in Rotary's Strategic Planning Guide:

<https://my.rotary.org/en/document/strategic-planning-guide>

DL: *Let's talk about Succession Planning and Your Club's Long-Term Sustainability* (5 minutes)

See: "*Sustainability & Succession Planning*" section of *Discussion Materials*

- What is your role in sustaining the club's future?
- What are the risks of failure?
- What are your club's practices that identify and prepare members for future leadership?
- How do elections of Directors and Officers work in your club? When does that process start?

DL: *Let's talk about Club Administration* (5 minutes)

See: "*Club Administration*" section of *Discussion Materials*

- What does the phrase "Club Administration" mean to you?
- Your Club's Bylaws:
 - What's IN your club's Constitution & Bylaws?
 - Are your Bylaws up-to-date? (HINT: Should have been revised since the 2016 COL)
 - Do your members have a copy?
 - Do YOU have a copy?
 - Do your Bylaws need changing?
 - HOW do you do this?
- Do your Officers and Directors/Board Members FULLY understand their function and duties?
- What are the reporting requirements of Rotary International and of your Rotary District?
- What is your club doing regarding "risk management"?

Discussion Leader's Reference Notes:

- The Standard Rotary Club Constitution and Recommended Rotary Club Bylaws are available from Rotary.org
- Encourage presidents-elect to review their club's bylaws against the recommended version
- Presidents-Elect and all club Board members should become familiar with all Rotary Governance
- The Standard Rotary Club CONSTITUTION, used by ALL clubs (no editing), provides guidelines for the operation of a Rotary Club in areas such as:
 - Name, locality, and meetings of the club
 - Attendance requirements
 - Membership qualifications
 - Directors and officers
 - Admission fees and dues
 - Bylaws
 - Amendments
- Presidents-elect should check that their club is using the most recent version of the Standard Rotary Club Constitution
- The *Recommended Rotary Club Bylaws* are additional guidelines for the governance of the club that are not included in the club Constitution.

Q. Your Role In Club Administration (time permitting)

Q. What is your role in the administration of your Rotary Club?

DL: Talking Points (Look for these ideas)

- Club Presidents should:
 - Know the club's administrative policies and procedures (particularly as they relate to the role of the Board, the Secretary, and the Treasurer) that serve as the framework for the operation of a Rotary club
 - Fulfill administrative duties to the district and RI
 - Oversee the responsible stewardship of club finances
 - Understand what meetings you will lead, and which ones you will delegate
 - Know/use the "best practices" for running meetings
 - Prepare to make your Governor's visit the best in the district
 - Ensure that ALL Rotary logos are CURRENT and used properly (see "Public Image" section of the Discussion Guide)

DL: *Close the session with these points and the final review*

- When the year you serve is over, will your club be viewed by your members and your community as:
 - A. MORE EFFECTIVE AND ENGAGING?
 - B. ABOUT THE SAME?
 - C. LESS EFFECTIVE?
- Will you leave the campground in better shape than you found it?
- Will you and your officers (and your club) set measurable and meaningful goals for your year of leadership? (Hint: If you don't, how will you determine what has been accomplished and what worked well – or didn't?)
- Are your club “financials” in good order? Does your club have a well-prepared and communicated Budget? Are there changes that should be made to your club's budget? (Hint: Does our club have unnecessary expenses that raise the cost of Rotary membership?)
- Are your regular club meetings viewed by the membership as well-run and “effective”? (Hint: Have you done a recent survey of your membership to see how they feel about the weekly meetings; there may be some great ideas and new suggestions awaiting you?)
- Could your club benefit by having a CLUB TRAINER?
- When is your NEXT (or first) Club Assembly? (Hint: This is a very powerful communication and information-sharing tool for a club president!)

Session Review (Closing Comments)

- Review the Learning Objectives to ensure that all topics were covered sufficiently. Answer any questions and let the participants know how to contact you if they have questions later (Your contact information is in the Carolinas' PETS Program and on the Carolinas' PETS website).
- Ask participants to share something that they learned during the session and an action they will take as a result of this session
- **THANK THE GROUP**

PLANNING YOUR YEAR OF
EFFECTIVE LEADERSHIP

DISCUSSION MATERIALS

&

ROTARY REFERENCES