One Rotary Summit
2015 - 2016
Facilitator Guide

ONE ROTARY SUMMIT FACILITATOR INSTRUCTIONS

DO
- **Show slide #1 (Title slide)**
- Welcome participants to today's One Rotary Summit! Thank them for all taking the time to be here today.
- Introduce yourself.

DO
- **Show slide #2**
- **Review bullets on the slide #2.**

SAY
- We want today to be a learning experience for everyone no matter how long you've been a Rotarian, no matter your position within your club

DO
- **Show slide #3**
- **Review the bullets on slide #3.**

SAY
- When you arrived today you received a small piece of paper or a card that had a specific number and letter on it. That is going to determine your teams for the day.
- You will have the chance today to work through two case studies as teams. We want to ensure you get a chance to work with a variety of peers of all different Rotary experience levels so we are going to make sure you work on different teams for each round.

DO
- **Show slide #4**
- **Review the bullets on slide #4.**

SAY
- The first round you'll be asked to divide into teams by the number on your card. We will ask that after I review the instructions on this slide that you then break into your teams by going to the table assigned to your number.

SAY
- There are additional facilitators who will float throughout the room. They are tasked with supporting your groups if you have any questions and/or need some direction. They will also help keep time. I will call out time reminders during your 35 minute working period.
- Remember, although we have laid out supporting materials and tools that your team may (or may not) want to reference and leverage, know that you have creative freedom! Don't be afraid to think outside the box! This is a safe space and we want you all to feel encouraged to throw things against the wall and see what sticks! Let's work together to come up with some very creative solutions!

DO
- Assign teams to tables. You can do this best by just starting with number 1 and pointing at different tables (work areas).
- Ask teams to quickly move to their assigned table.

SAY
- Please take a few seconds and introduce yourself to the rest of your team if you haven't done that already.
- Before we jump in with our first case study, I'd like to first take some time to discuss the materials and tools that you most likely will be utilizing today.

DO
- **Show slide #5**
- **Review the bullets on slide #5.**

ASK
- Are you excited to start with the first case study?
- What questions do you have before we get started?

DO
- **Show slide #6**

SAY
- Let's now take a couple minutes to setup the first case study you'll be working on with your teams.

DO
- **Review the bullets on slide #6.**

SAY
- Please take a few minutes (I'll be keeping a close eye on time) to read through the first Case Study (which can be found in your workbooks). As you read through take some notes and jot down your thoughts in the margins as it may help you as you transition into your group work.

DO
- Begin time.
- Call out time reminder at 1 min remaining.
- Call out time is up!

SAY
- Are you ready to get started with case study #1? Remember, the additional facilitators here today are here to support if need be.

ASK
- What questions do you have before we get started?

DO
- **Begin time.**
- **Call out time reminders at 15 min (half way through)**
- **Call out time reminder at 5 min remaining**
- **Call out time reminder at 1 min remaining**
- **Call out time is up!**

SAY
- Congrats! You and your team just worked through your first case study!
- I'd like us to take just a few minutes to review this first case study and the great solutions your teams came up with. To do this, we'll look at the three questions you were tasked with answering.

DO
- **Show slide #7**
- **Review the question on slide #7**
- Allow participants to respond. Keep an eye on time.

DO
- **Show slide #8**
- **Review the question on slide #8**
- Allow participants to respond. Keep an eye on time.

DO
- **Show slide #9**
- **Review the question on slide #9**
- Allow participants to respond. Keep an eye on time.

SAY

- Great job on your first case study. I heard some very creative responses and it sounded like you all worked well together as a team. We're now going to transition into our next case study which means you'll work with some new individuals.
- Please look at your team assignment card and for case study #2 we'll divide by the letter on your card.

- Direct teams to work stations by assigning colors to each work station (table).
- Ask them to move quickly.

DO

- **Show slide #10**
- **Review bullets on slide #10**

DO

- Are you ready to tackle case study #2? Let's get rolling!

- What questions do you have before we get started?

SAY
ASK
DO

- **Begin time.**
- **Call out time reminders at 15 min (half way through)**
- **Call out time reminder at 5 min remaining**
- **Call out time reminder at 1 min remaining**
- **Call out time is up!**

SAY

- Great job and completing your second case study. I'm sure you felt more comfortable with the task at hand the second time around.
- It's important, like last time, to review the case study you just worked on. We'll follow the same format we did for case study #1.

- **Show slide #11**
- **Review the question on slide #11**
- Allow participants to respond. Keep an eye on time.

DO

- **Show slide #12**
- **Review the question on slide #12**
- Allow participants to respond. Keep an eye on time.

DO

- **Show slide #13**
- **Review the question on slide #13**
- Allow participants to respond. Keep an eye on time.

SAY

- Great responses!
- Congrats! You've completed the case studies!
- It sounded like your teams worked really well together to develop some innovative ideas and creative solutions that can be brought back to your clubs.
- The reason that I didn't give you my thoughts on creative solutions is because there's not one way of doing things. Having you all work together in diverse teams hopefully created a platform for a variety of perspective and insights to be shared.

DO

- **Show slide #14**
- **Review the question on slide #14.**
- Allow participants to respond (but keep an eye on your time. You may only have time for

5-7 quick responses.)
- Thank participants for their responses.

DO
- **Show slide #15**

SAY
- It's important that you all leave here today with some tools for your tool kit. Obviously, the workbooks that you utilized today are yours to keep. We hope you leverage the information you wrote down today back within your clubs.
- There are other tools we want you to have access to once you leave. Let's review those tools.

DO
- **Review bullets on slide #15.**

ASK
- Are there any other tools and/or resources that we may have missed that you'd like to offer up to the group?
- Allow participants to respond. Keep an eye on time.

DO
- **Show slide #16**

SAY
- As we come to the end of our One Rotary Summit, let's put a bow on our time together today.

DO
- **Review bullets on slide #16.**

- **Show slide #17**

SAY
- You all worked hard in your groups today to come up with creative solutions to the case studies presented to you but it's important you do a short personal reflection on the day.
- Take a moment (you'll only have 2 minutes) and write down one thing you plan to do when you return to your club. You can write more if time permits and I'd challenge you to write down two more (so you have three in total) when you leave here today.

DO
- **Call time at two minutes.**

ASK
- Would anyone like to share their one item?
- Allow participants to respond. Keep an eye on time.
- Thank participans for sharing!

DO
- **Show slide #18**

SAY
- Thank you all so much for taking the time to participate in our first ever One Rotary Summit. If you are taking home at least one lesson learned or one thing new that you believe will be a value add to your club, then that's a big win! Today was all about creating a synergistic space to allow new ideas and diverse perspectives to be shared.
- Not all clubs are the same and there isn't a one size fits all answer therefore having the opportunity to share with one another and not be afraid to think outside of the box is a great opportunity for all of us as Rotarians as we look to continue to do the amazing work we do as clubs around the world.

- Thank all of your assistant facilitators.

- Thank any additional volunteers / support staff.

SAY

- Please, if you have any additional questions or items you'd like to discuss I'll stay after but you can also send them to XXXXX (contact info??).

ADDITIONAL FACILITATOR RESPONSIBILITIES

- The number of additional facilitators is dependent on the number of participants you have. We suggest you have one additional facilitator per two groups.
- This person should be familiar with one or all of the three major areas (Membership, Public Image, and The Rotary Foundation).
- This person must have read all three case studies ahead of time and encouraged to answer the questions for each scenario. This will help them become more familiar with what the participants are asked to do.
- This person must be a good listener and be able to ask open ended follow up questions vs being a lecturer. We don't want them to give teams answers, we want them to help guide them.

REQUIRED MATERIALS FOR YOUR ONE ROTARY SUMMIT

- Laptop computer and projector
- Pens - put out on tables in case participants didn't bring one
- Team Assignment Cards - see attached example and instructions to create your own
- One Rotary Summit Facilitator ppt file - sent digitally
- One Rotary Summit Participant Workbook - sent digitally. Print one copy per participant
- Tools and materials for case studies - available to you for print in the ORS dropbox.

TO DO'S PRIOR TO YOUR ONE ROTARY SUMMIT

- Print required materials
- Send your Assistant Facilitators the participant workbooks and ask them to complete each case study.
- Create your team assignment cards (see attached instructions)
- Edit the One Rotary Summit Facilitator Presentation power point file to ensure it includes proper contact information and survey link (if using an online survey).
- Reach out to your liaison if you have any questions and/or need support.

EXAMPLE TEAM ASSIGNMENT CARD

Please create your own Team Assignment cards using cut up pieces of paper, index cards, or whatever material you prefer. You'll need one team assignment card per participant. Make a few extra just in case you have additional people show up without registering.

Here is an example Team Assignment card (but feel free to put your own creative spin on it):

1
C
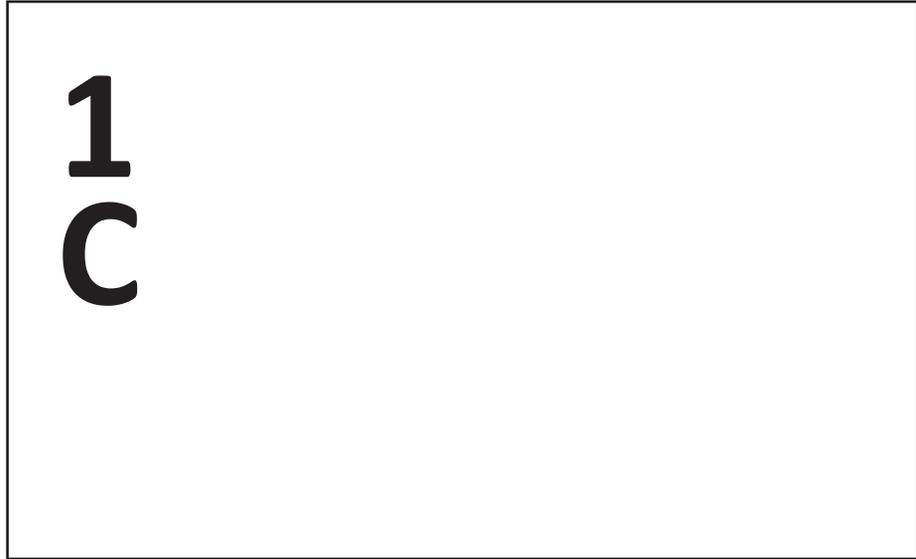
One Rotary Summit

Case Study #1

For a Rotary Club to truly provide Service Above Self it is critical to review current practices related to public image, membership development, community service (local and international) the culture of TRF giving and to create a plan to build on current strengths and to address identified weaknesses.
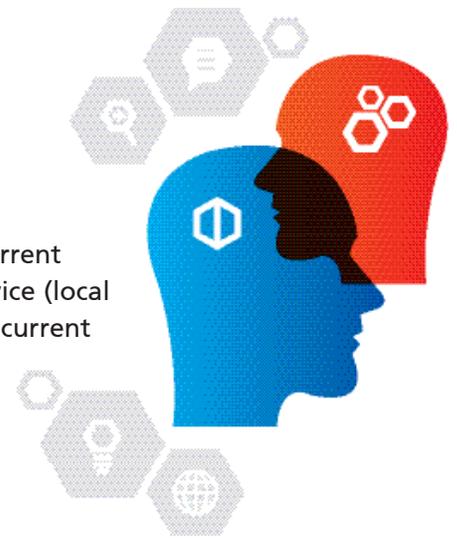
CLUB CHART

(The Club Chart is a brief overview of club data that may be insightful for you as you work on this case study)

- Club founded in 1917
- Annual giving to The Rotary Foundation's Annual Fund is an aver age of $73 per member per year + average of $25 per member to PolioPlus. The club has 3 PHF Society members (donating $1000 per year) and 59% are PHF. Only 4% have never donated to the Rotary Foundation
- Annual Dues are $900.00 including lunch (you pay for your $16 lunch whether you attend the meeting or not)

- Demographics:
  - 62% male / 38% women
  - 35% of members 60 years or older
  - 41% of members ages 50 - 59
  - 18% of members ages 40 - 49
  - 6% of members ages 30 - 39

SCENARIO

- The culture of your club feels welcoming, high-energy and fun but it hasn't had much success getting/ keeping members, especially under the age of 40.
- Younger guests have visited, but your club hasn't been able to get any of those visitors to move to the membership application phase.
- Current members in the 40-49 age range show enthusiasm for membership at first, but often do not show up for regular weekly meetings and some have left the club within a few years.
- Members in the 50- 59 age range attend meetings when possible, are willing to serve on club commit- tees and enjoy getting engaged in one or more of the club's signature activities throughout the year.
- Those members in the 60 and up age range tend to be the most consistent attendees at weekly meet- ings, although their participation in activities and events varies greatly.
- Most members believe the club is very active, providing dictionaries to 3rd graders, a scholarship to a high school student, and providing financial support to a sister club's global grant year to year. Annually, you conduct two fundraisers, ring the bell for the Salvation Army, collect canned goods and perform highway clean ups.
- You also sponsor one Interact club and co-sponsor a Rotaract club with a neighboring Rotary club. From what you have heard, the Rotaract club is struggling with membership and hasn't had much growth either.
- Your club President has mentioned a few times now that he is feeling pressure to improve the club's membership and the community's awareness of your existence so he has asked members to start bring- ing more guests by asking friends, colleagues and peers and to generate ideas to improve club mem- bers' involvement.

Case Study #1 Worksheet

Complete the worksheet with your team (we encourage everyone to fill in their worksheet as a great tool to take home.)

As a group, using the information given and the One Rotary concept, develop a plan that can address the above concerns and can accomplish the following (be creative):
- Increase membership attraction and engagement
- Increase public awareness of the club and its activities
- Enhance community service and increase public support for your service projects
*Note: What resources might be available to assist your club to help with your plan of action?

Case Study #2

Rotary International's Strategic Plan calls for RI and District leaders to support and strengthen clubs, for clubs to focus and increase humanitarian service, and for all Rotarians to enhance Rotary's public image and awareness.
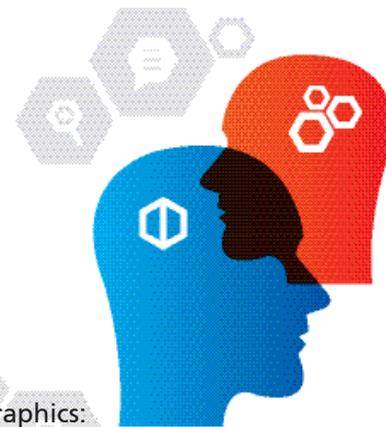
CLUB CHART

(The Club Chart is a brief overview of club data that may be insightful for you as you work on this case study)

- Club founded in 1975
- Giving to The Rotary Foundation's Annual Fund is an average of $61 per member per year + an average of $30 per member to PolioPlus. The club also gives a donation to PolioPlus each year, varying in amount and depending on their budget.
- Annual dues are $550, but do not include lunch ($10/meeting; pay as you go)
- Average attendance has been hovering around 55%

- Demographics:
- Club membership (vacillating between 26 and 32/currently at 29) reflects senior leadership in the community including local schools, public libraries, the community foundation, several large businesses, dentists, the local hospital and the Chamber of Commerce and is:
- 66% male / 34% women
- 62% of members are 50 and older
- 30% of members are 40-49
- 8% of members are 30-39

SCENARIO

- The District Governor has challenged every club to start gearing up for the 100th anniversary of The Rotary Foundation in 2016-17 by raising public awareness of The Rotary Foundation supported service.
- Since a milestone has been reached with the polio eradication success in Nigeria, your club's leadership has asked the members to support an event on 23 October, World Polio Day, and 23 February, the anniversary date of Rotary and our PolioPlus Campaign, to help promote Rotary's "End Polio Now" movement. To get things started, one of the members came up with the idea to ask local merchants to participate by agreeing to donate one percent of sales to PolioPlus on the dates selected.
- The club's only plan for communication/PR is to put an announcement in the local newspaper, post the event on Facebook and put some information on the club website prior to the event by updating materials they have used for the last five years.
- The club members realize this is an opportunity to create community involvement in fundraising efforts to support The Rotary Foundation and the "End Polio Now" campaign and to make this day "fun and appealing to the non-Rotary public."

Case Study #2 Worksheet

Complete the worksheet with your team (we encourage everyone to fill in their worksheet as a great tool to take home.)

As a group, using the information given and the One Rotary concept, develop a plan of action that can improve the ideas/plan above including:
- How could your club tell the Rotary story more effectively via this fundraiser?
- What could your club do to capitalize on this project to potentially attract new members at the same time?
- What action steps can your club take to improve your future fundraising efforts, Rotary Foundation supported service, member attraction and public awareness of Rotary in general?

*Note: What resources might be available to assist your club to help with your plan of action?