

# Rotary

Zones 28 & 29



FACILITATOR GUIDE

VERSION 2.0

2016 - 2017

Welcome to the facilitator guide for Rotary Zones 28 & 29 One Rotary Summit. We have worked to refresh the One Rotary Summit content from last year to encourage even more dialogue and interaction amongst participants.

**The materials include:**

- One Rotary Summit Facilitator Guide (this document)
- One Rotary Summit Presentation – *Download via Dropbox*
- One Rotary Summit Hometown Scenarios document – *Download via Dropbox*
- One Rotary Summit Nametag Organization Template spreadsheet – *Download via Dropbox*
- Setting the Stage Prep Checklists for Membership, Public Image and the Rotary Foundation. – *Download via Dropbox*
  - We strongly recommend using these checklists to develop your talking points in the One Rotary Summit Presentation.
- Prospective Member Brochure: Impact Begins with You [Sku001] – *Available on shop.rotary.org\**
- The Rotary Foundation Reference Guide [219-EN (10-15)] - *Available on shop.rotary.org\**
- Club Fundraising Analysis – *Available on My Rotary\**

*\*Each District has access to \$300 for ordering materials via My Rotary. Please see the Reimbursement Request Form at the end of this Facilitator Guide. Some of the above materials have a free download option on the order page.*

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## PREPARING FOR YOUR ONE ROTARY SUMMIT

Follow the steps below to prepare for your One Rotary Summit:

- Schedule your One Rotary Summit and pick a facility/location that is conducive for adult learning.
- Determine the following roles:
  - Lead facilitator – Responsible for leading the One Rotary Summit.
  - Support facilitators – The number will vary based on the number of participants. Recommend having one support facilitator per two groups (16 people). These facilitators will roam and support groups/tables if they require any support.
- Fully review and explain materials and add-in District specific information on Slides #4-6. Work with your District Membership, Public Image and Rotary Foundation representatives to help you identify the proper information for these slides and use the Setting the Stage Prep Checklist for guidance.
- Make up nametags for participants. You'll want participants to visit three different tables (one table per round) for the hometown scenarios activity.
  - Use the ORS Nametag Organization Template spreadsheet to help you organize participants.

- You'll want to make sure you have a few people from the same club at each table.
- Assign each participant a Number (Round #1), a Letter (Round #2) and a Color (Round #3) and provide these three identifiers on their nametag.
  
- Gather needed supplies which include:
  - Nametags with assigned table numbers listed.
  - Laptop and projector for displaying the One Rotary Summit presentation.
  - Print materials – Hometown Scenarios document (one per participant)
  - Flip charts
  - Markers
  - Easels (optional)
  - Note paper for participants (optional)

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## FACILITATOR INSTRUCTIONS

Follow the instructions below to facilitate your One Rotary Summit.

### PART I: WELCOME & SETTING THE STAGE – 30 MINUTES

- Use the One Rotary Summit Presentation as your visual aid throughout the One Rotary Summit. This section includes Slides #1 - #7.
  
- Welcome participants and introduce yourself (and any other facilitators for today's One Rotary Summit).
  
- Keep the "Setting the Stage" section concise and to the point. You only have 20-25 minutes to get through this content so please stick to your bullets and let your audience know where they can learn more after the One Rotary Summit.
  - It is very important to relay to participants that although you are going to give District specific information regarding Membership, Public Image and The Rotary Foundation separately, all three support each other in a variety of ways. When we focus on the synergistic relationship among Membership, Public Image and The Rotary Foundation we better see how success in any one of these areas automatically benefits the others.
  
- Review the instructions for the day (Slide #7) and direct participants to the One Rotary Summit Hometown Scenarios handout for more detailed instructions.
  
- Let the participants know that additional support facilitators will be roaming and are available to assist groups if need be.
  
- Reinforce that you will give them time checkpoints throughout the next two hours so they know where they're at and can ensure to finish the activity.
  
- Go over all of the information in the "Instructions to Participants" section of the Hometown Scenarios document and note that those instructions are in the document for reference as they discuss the scenarios in Rounds 1 through 3.

## PART II: HOMETOWN SCENARIOS – 120 MINUTES

- You will use Slide #8 for this section.
- Time to transition into group work – reinforce to all participants that the best learning happens when everyone feels they can share ideas, ask questions and build off of one another’s thoughts. Encourage an environment that is safe for sharing no matter a Rotarian’s experience, tenure and/or knowledge base.
- You can show Slide #8 throughout the 120 minutes of group work.
- Give a time reminder at 15 minutes reminding groups to move into the discussion portion of round one.
- Give a time reminder at 30 minutes reminding groups to summarize their ideas/discussion points on flip chart paper.
- Call time at 40 minutes and ask groups to rotate and begin the second round of Hometown Scenarios. Repeat the same time check announcements for rounds two and three.
- Once you hit your 120 minutes ask groups to put their markers down and wrap up their discussion as you’ll transition into the final part of the One Rotary Summit.

## PART III: WRAP UP & IDEA SHOP – 30 MINUTES

- You will use Slides #9 - #14 for this section.
- Begin with Slide #10 and spend just 5 minutes collecting participant’s Ah-Ha moments. Let them know you only have five minutes and you’d like to collect as many as possible so keep them short and sweet.
- Slide #11 call attention to their take home materials.
- Slide #12 reinforces what today was all about. Be enthusiastic and encourage participants to continue their conversations when they leave the One Rotary Summit by taking notes during the Idea Shop and reaching out to other clubs for more information, to ask questions and to collect any additional resources they can to better their own club.
- Slide #13 sets up the Idea Shop. Tell participants that when you get to the end of the wrap up you’ll ask all groups to post their flip charts where everyone can see. Encourage everyone to stay as long as possible to review the posted flip charts and take detailed notes.
- Thank everyone for their willingness to participate, keep an open mind and have fun!
- Ask groups to now post their flip charts and end the One Rotary Summit by kicking off the Idea Shop!
  - o Best Practice – Ask that groups identify one person to stand by their flip chart(s) during the Idea Shop to provide any clarity and/or more information.



**ROTARY INTERNATIONAL AND ROTARY FOUNDATION EXPENSE STATEMENT**

Name:		Total Expenses (US\$):	\$ -	Today's Date:	24-Aug-16	<b>For AP Dept Use Only:</b>	
Rotarian/Staff/Officer:	Rotarian			Date(s) Covered:		Vendor # - Location:	
Staff Liaison:	Sheena Lilly	Total Advance Amount:	\$ -	Title/Office:		Currency:	
Rotary ID:				Location of Assignment:		Exch Rate:	
Address:		Due to Individual or (Due RI):	\$ -	Assignment:		<input type="checkbox"/> 0 Day <input type="checkbox"/> Dup. Pmt. <input type="checkbox"/> Dut. Adv. <input type="checkbox"/> Spouse Form (if app.) <input type="checkbox"/> Proof of Pmt. <input type="checkbox"/> Business Purpose <input type="checkbox"/> Totals	
Country:	United States of America (USA)	Any Spouse Related Expenses?		Signature:	<b>Pamela Harkema</b>		
E-mail:		Payment Option:					

Date	Expense Type	Description/ Business Purpose of Expense	Others Present (Business Relationship & Number)	Amount of Expense (in local currency)	Currency	Exchange Rate	US\$ Total	Documentation	For RI Staff Use Only	
									Acct	Cost Ctr - Prod Code
	Other	Membership Materials for ORS Item A-2 in Zone 28-29 membership plan								
							\$ -	<b>TOTAL (Local Curr)</b>	\$ -	<b>TOTAL US\$</b>

Department (Cost Center) Approval: _____	* Date: _____	Director/Staff Contact Approval: _____	* Date: _____
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**Disclaimer**

*\*By signing this document, I confirm the accuracy of all calculations and that appropriate documentation (i.e., receipts or proof of payment) has been submitted and is in compliance with Rotary expense reimbursement guidelines. Documentation is required for any expense equal to or over US\$75 (Rotarian)\*\* / US\$25 (staff)\*\* and for all lodging expenses. Expense statements must be submitted within 60 days (Rotarian) / 30 days (staff) of the date on which the expenses were incurred to be eligible for reimbursement. For air travel, the unused portion or receipt portion of the ticket (and copy of authorization if purchased by source other than RITS) must be attached in order to process this request. If you have questions about completing this expense statement, click the tab labeled "Instructions" below.*

**\*\* Note: If your country's regulations for documentation of expenses are more strict than the Rotary guidelines, please follow those regulations when providing receipts with your expense statement**