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District Strategic Plan Subcommittee on Education & Training Recommendations – July 22, 2010

Subcommittee Members:

- DGN Rick Sterne, Co-chair
- District Trainer Kevin Crosby, Co-chair
- AG Anne Bermingham
- AG John Boronkay
- Past AG Pat Castiglia
- Karen Oakes

The “Education & Training” subcommittee held four online meetings between June 1 and July 9, 2010, producing the following recommendations. A consolidated timeline, reflecting specific activities to implement all four goals, is provided at the end of this document. The four goals below are taken from the results of the District Strategic Planning Session conducted in February, 2010.

Strategic Goal #1:

To strengthen the role of the AG in helping the district to support the educational needs of the clubs.

Recommendations:

- **Create the AG TEAM** - The purpose of this goal is to strengthen the role of the Assistant Governor through the creation of the AG TEAM which would include all Assistant Governors, the DG, DGE, and DGN. The AG TEAM would report to the DGN who is empowered by the DG. By working together as a team, the Assistant Governors will hopefully become more effective in assisting their Area Clubs, respective Club Presidents and the District. Regular AG TEAM conference calls should be held between the District Council Meetings.
- **AREA TEAMS** - A secondary goal is to create Area Teams headed by the Assistant Governor and includes the respective Club Presidents and Presidents Elects. Each Area Team should try to implement at least two new ideas to improve communication and involvement with the District each year.

Strategic Goal #2:

To develop measurement tools that enable the district to assess the needs as well as satisfaction of Rotarians throughout the district as it relates to education and training; and to collect the needs and satisfaction ratings of Rotarians in district and ensure that actions are taken annually to meet needs and increase satisfaction.

Recommendations:

- Develop an on-line survey that will be sent to as many Rotarians as possible in the district



- Share the results with the key decision makers within the district – gathering questions to which further input is desired after analyzing the on-line survey results
- Gather this additional information, using focus groups and other processes, in order to create a meaningful action plan in response to results received
- Implement an action plan that will deliver improved satisfaction ratings in the year to follow

Strategic Goal #3:

Improve utilization of education programs at club level – as measured by achieving a 30% utilization rate of these offerings. The goal of “30% utilization rate” is interpreted to mean that at least 30% of members in each club participate in at least one training/educational program

Recommendations:

- Establish a mechanism for tracking participation in training / educational programs. It is recommended that one person in the club be designated as the “Club Education Coordinator.” One of the responsibilities of this position would be to report participation of club members in training programs. As an alternative, we could survey members to capture data about participation in educational programs.
- Create a “Guide to Training & Education Programs” that can be disseminated to clubs and put on the District website. It would provide information about formal programs offered in the District as well as online courses. This could include a calendar of scheduled programs (updated as needed) as well as a list of online resources with links.
- Give clubs suggestions for a sequence of training/education programs for the “average” Rotarian. It is suggested that new members progress through a series of orientation to become fully qualified/credentialed members.
- Create some form of recognition for Rotarians who complete a certain number of training/education programs. These might include both “required” and “elective” programs. Perhaps we could have our own District 7090 Virtual University (like corporate universities). We could offer basic and advanced certificates. It is recommended that, in addition to courses about Rotary, we offer self-development courses (e.g., Effective Speaking, Project Management, Life Goal Setting).
- Create a regular feature of District Conference: A Rotary Knowledge Club Competition (have to think up a clever name). Clubs would field teams that would compete against each other to answer questions about Rotary at the District and International level. We could use Dennis George (“The Quiz Master”) to host the show. This could stimulate interest in learning about Rotary.



Strategic Goal #4:

Form Education Committee by July 1, 2010 to focus on orientation of new members and continued growth of current members.

Recommendations:

- Two research and development teams – made up of two persons each -- should be formed.
 - 1 R&D team one would focus on orientation of new members.
 - 1 R&D team two would focus on continued growth of current members.
- The first action of both teams would be to conduct a review of the training and informational materials currently available – with most attention given to the material available from various Rotary sources.
 - The purpose of the review is to select and recommend resources.
- The two R&D teams would merge into one and outline plans for multi-event programs.
 - A plan for orientation of new members.
 - A plan for continued growth of current members.
 - The plans should include learning activities that bridge all levels - club, district and international.
 - The multi-event programs should make use of learning modules, multi-media technologies, digital delivery systems and face-to-face sessions.
- Both “The Rotary Leadership Institute” and “Vision Facilitation Program” should be promoted and supported

Timetable for Activities to Implement Goals

Short-term (to be implemented by 9/30/10 or early Fall):

Goal #1

- District Council Mtg. – Saturday, September 11, 2010: Introduce the concept of the AG TEAM. Self introductions. DG will present AG Badges and Pins. What is the role of an Assistant Governor? We are here to assist each other strengthen our clubs and District. We are mentors to the Club Presidents and the link to the District. How can we become more effective in our role? Review the DG’s goals for the year. Review the quarterly AG Report.
- AREA TEAM Meetings. - Encourage AGs to hold their first Area Team Meeting if they haven’t done so. Include both Presidents and President Elects. Area Team Meetings should be held quarterly and have a theme, usually in line with the monthly RI



themes. Each Club should take a turn hosting the quarterly Area Team meeting. Each AREA TEAM meeting should have a goal and an agenda.

- DG OFFICAL CLUB VISIT - AGs must attend the respective DG Club visit and introduce the DG.
- District Conference – Friday, September 24, 2010; Host a social hour (cocktail party) for the AG TEAM and spouses. (Exact timing to be determined once the Conference Agenda is known.) Purpose is to get to know each other better and build the AG TEAM.
- AG TEAM Conference Call – Thursday, October 14, 2010. How is it going? Who needs help? Have they visited each of their Clubs? Have they invited one of their Area Chairs to their next Area Meeting? November is RI Foundation Month. Promote the Foundation Dinner at Salvatore's on Friday, November 5, 2010.

Goal #2

- Develop an on-line survey that could be sent to all Rotarians in district
- Receive input on the survey itself from education task force and other interested stakeholders within the district (includes input at September council meeting)
- Gather the email addresses of as many Rotarians as possible to ensure on-line survey will be received by as many Rotarians as possible in district

Goal #3

- Form District Education Advisory Committee
- Define the role of "Club Education Coordinator" and promote to clubs
- Develop "Guide to Training & Education Programs" & distribute to clubs and post on District website
- Define process for tracking/reporting participation in training at club level

Goal #4

- Revised goal adopted.
- The two Research & Development Teams formed.
- Begin promotion of "The Rotary Leadership Institute" and "Vision Facilitation Program"

Mid-term Goals (to be implemented by Jan 1, 2011)

Goal #1

- DISTRICT COUNCIL MEETNGS are held quarterly and the AGs are expected to attend. Each AG should invite their AREA TEAM or



one/ two of their Club Presidents to join them at a District Council Mtg? (Next one is November 20, 2010) They should try and have each of their Presidents attend a District Council Mtg during the year.

- AG TEAM Conference Calls will be held quarterly between the District Council Meetings to maintain regular communication and continuity. Dates for each call will be established during the previous call.
- AG REPORTS should be submitted to the DGN a week before the District Council Meeting.
- AGs should promote and encourage their Club Presidents Elect to attend both PETS 1 & 2, and the District Assembly along with the AG as a first step in building next years AREA TEAM.
- All AGs should attend the AG training session at the annual District Assembly. Experienced AGs can help new AGs by sharing their experience.

Goal #2

- Implement the survey in a manner that helps ensure respectable response rate
- Analyze the results and share with key district leaders (ideally presented at November council meeting)
- Determine some short term actions that will be implemented in last 6 months of the year to improve satisfaction
- Finalize questions to be pursued in focus groups and other conversations (e.g., AGs to cover at area meetings) that help to further determine other actions to be taken to enhance satisfaction and address stated education needs
- Receive input on the survey itself from education task force and other interested stakeholders within the district (includes input at September council meeting)

Goal #3

- Develop guidelines/suggestions for new member orientation and distribute to clubs and post on District website
- Develop personal development courses for club members

Goal #4

- The Research & Development Teams review and select material
- The Research & Development Teams merge and outline plans for multi- event programs.



Long-term (to be implemented by June 30, 2011)

Goal #1

- AG terms of office should be three years. One third of the AGs should complete their term each year. They should start recruiting their replacement at the end of their second year so that the new AG can understudy for a year before taking over. This procedure will help build continuity.
- The District Budget for AGs should be increased next year to provide funding for the AGs to attend PETS 2 with their Area Team.

Goal #2

- Analyze the results of focus groups and develop some additional actions to take to enhance satisfaction and address needs
- Monitor action plans to ensure actions are implemented before end of Rotary year

Goal #3

- Develop some form of recognition for members who complete a certain number of educational programs
- Develop fun event to promote knowledge about Rotary, possibly at District Conference or District Assembly

Goal #4

- Launch of multi-event programs.
- Delivery of “The Rotary Leadership Institute” and Vision Facilitation Program.”