**Spring Roundup!**

*An “Open Space” Workshop*

*For Rotary*

**What?**

This year’s Spring Roundup was the second annual strategic planning event designed to improve our Rotary Clubs while having fun at the same time! Thanks once again to our local hosts the Rotary Club of Summerland for setting this up for us.

**When & Where?**

Saturday 5 May, 2018, meeting 10:00am – 2:00pm, social 2:30pm - ~4:30pm

Meeting:

Summerland Secondary School, 9518 Main St, Summerland BC

Social:

 Saxon Winery, 9819 Lumsden Ave, Summerland BC

**How?**

Register and pay for the event (District website), and promote it to your club!

**General Agenda** *(see below for detail)*

10:00-11:00 Group session – Facilitated by Peter

Introduction of Open Space Technology, description of how the day will work, and development of the “Theme” or Breakout topics.

11:00-1:00 2 Breakouts – Discussion Leader

This will be for whomever is in each group to discuss “best practices”. This is NOT TRAINING, rather this is collaborative development. What has worked for your club? What can be done better? Casual Lunch will be available during this time.

1:00-2:00 Group session – Facilitated by Sherry

“Best Practice” items are posted on a wall, participants “Shop the Room” with voting dots. Discussion of the top 5.

2:30-4:30 Social get-together – the Roundup!

“Host” Summerland Rotary Club have organized a BBQ at Saxon Winery.

**Details of Open Space Conference**

***The Goal…***

Collect “Best Practices” & Prioritize.

***The Big Question…***

How can we better engage our Rotary members?

***Group session (10-11, Peter)***

* Introduce the “Open Space Conference” technique, reference Harrison Owen
* Links for info about Open Space Technology are:
	+ <http://www.mindviewinc.com/Conferences/OpenSpaces.html>
	+ <https://en.wikipedia.org/wiki/Open_Space_Technology>
* Starts with a “big question”, self-organizing structure, rule of two feet
* Collect ideas: Use the “big rocks in the jar” metaphor to open discussion of potential breakout sessions. What are the big rocks in creating the best possible engagement in a Rotary Club?
* Facilitators write “Best Practice” or “Action Items” on paper, tape to wall. Facilitated discussion about grouping the suggestions into sessions depending on audience size (range 6-15 participants per breakout).
* Assign spaces: Breakouts will ALL be in the same common area.
* Describe breakouts – there will be 2 sessions with lunch break in the middle. From the topics above pick two.
* Feel free to let discussion wander… just because it is international does not have to stay there!
* Feel free to apply rule of 2 feet
* Facilitators to poll the room for numbers – make decisions about who goes where, try to balance numbers.

***Breakout Sessions in General***

* 2x35 minutes (+ 40 min lunch break), 5 minutes move time.
* Facilitator is scribe (or selects volunteer scribe), keep notes (pass to Peter)
* Facilitator tapes up flip-chart talking points.
* Discuss “talking points” for area of breakout concern, facilitator to guide if required
* After 20 minutes of free discussion15 minutes before end of session, facilitator to ask group for specific “best practices”… What is an action item, a goal, or a procedure that would help a Rotary club to be better at engaging members?
* collect specific goals or action items… one per piece of paper (a few up to however many!)

***Breakout Session 1 (11:05 – 11:40)***

***Lunch (11:40 – 12:20)***

* Gather in main room for quick lunch

***Breakout Session 2 (12:20 – 12:55)***

***Group Session (1-2, Sherry)***

* Facilitators (& volunteers) tape up ALL best practices
* Each participant gets voting dots (5? 10?), invited to “shop the room” and vote for the 5 most important best practices
* Sherry and/or Peter: Wrap, discuss process, invite feedback

**The Results:**

***The Big Question…***

How can we better engage our Rotary members?

**The Chosen Breakout Topics:**

With ~16 topics on the two flip-charts breakouts selected were as follows:

***Session A…***

* A1 – How members fit into a Club. How best to find their passion or value.
* A2 – What can be improved to encourage members to stay in a Club.
* A3 – Younger and/or newer members: How best to attract, entertain, and engage them.

***Session B…***

* B1 – Club culture, including meeting structure and venue.
* B2 – Fellowship techniques.
* B3 – How best to determine the mission & core values for a Club.

Below we list all the posted Best Practices resulting from the breakouts. Consensus was that the prioritizing has large error bars, meaning the BP’s at the bottom of the list are pretty good ideas as well as those at the top!! Make sure you read them all, because your top 5 will certainly be different.

**\*\*\*Note:** Taking on any 1, 2, 3… or 5 of the BP’s below will help an incoming Club President and team to make their club just a little bit better next year than it is right now! All BP’s listed below show the session and the votes in brackets.

***Top 6 “Best Practices” as selected by participants (Breakout topic & votes)…***

* (A2 – 18): New member packages given at induction should include a few pages with:
	+ Club Projects
	+ Club Committees
	+ Mentorship lists and expectations
	+ Meeting procedures
	+ Etc (details depend on Club culture)
* (B1 – 18): Regular social functions outside of the meeting for members (+spouse + families)
* (B2 – 18): More creative fellowship events, such as:
	+ Guess who’s coming to dinner
	+ Open houses
	+ Pub nights / restaurant nights / wine tastings
	+ Rotary “after 5”
	+ BBQ’s, golf, motorcycle events, cooking, etc
* (A1 – 16): Annual meeting with members to review & answer questions, rejuvenate passion.
* (B1 – 16): Joint meeting or social with other clubs.
* (B3 – 16): Club leadership *must* be committed to aligning club actions to club values, and to celebrate achievements.

***The other “Best Practices” prioritized…***

* (A3 – 12): Fun social activities, fellowship *more* relevant to younger people which could include:
	+ Cocktail hour, beach party, pool party, art night
	+ Hikes, biking, axe throwing, other activities
	+ Make birdhouses, fundraiser club work-project
* (A3 – 9): Invite recent retirees to Rotary.
* (A3 – 9): A.C.E. – A program for new members (Attract – Connect – Engage).
* (B2 – 9): Introduce Rotary International Fellowships to your Club (i.e. Food, wine, golf, motorcycle, scotch, travel, etc).
* (A1 – 8): Develop a *working* mentorship program.
* (A3 – 8): Ask younger/newer members to create a fundraiser relevant to them (eg: social media idea, maybe fundraise for their own dues?)
* (A1 – 7): Encourage members to visit other clubs.
* (B1 – 7): Have system where members sit at random or different table every week.
* (B3 – 7): Make sure your club *defines* core values and a mission statement, and that the entire club is part of the process and buys in.
* (B2 – 6): Improving club communication of ALL info will improve fellowship and engagement.
* (B2 – 6): Set up special interest groups within the Club (i.e. book clubs, music, wine, golf, etc).
* (A1 – 5): Have a functioning orientation program.
* (A2 – 5): Help members determine where they fit & how best to use their skills within the Club.
* (A2 – 5): Survey member satisfaction at least every 2 years.
* (A3 – 5): Show new (especially younger) members service projects relevant to them to get them involved.
* (B1 – 4): Have a greeter.
* (B1 – 4): Make sure program is relevant (content, speaker, business).
* (B2 – 4): Classification talks regularly, and re-do long term members.
* (B3 – 4): Keep the Club focus (values, mission, etc) in front of Club members at every meeting.
* (A2 – 3): Acknowledging that mentorship is important, it *must* be consistent. Membership chair should reliably pass on methods to successor.
* (A3 – 3): Invite kids to Rotary meetings, have interactors or other Rotarians to babysit.
* (B2 – 3): Have happy/sad bucks before the meeting to get to know people better. Say things that are more personal, not the same every time.
* (B3 – 3): Keep mission and core values of the Club simple and focussed.
* (B3 – 3): Measure all results and celebrate. Are we on track?
* (A2 – 2): Vetting & fully communicating expectations with new members would improve retention.
* (B1 – 2): Have committee chairs update each meeting.
* (B1 – 2): Find ways of promoting a positive environment.
* (B2 – 2): Rotary Merchant markets. Farmers, wine+beer tasting, food.
* (B2 – 2): Invite spouses to a meeting and have a program that is relevant (i.e. “Plant Expert” gardening show).
* (A3 – 1): Connect better with alumni (RYLA, Youth Exchange, GSE, parents, Interact) – invite to meetings.
* (B1 – 1): Try a different structure for meetings.
* (B1 – 1): Annual survey by membership committee.
* (B1 – 1): Try something new more than once.
* (B1 – 1): Change up the layout of the venue.
* (B2 – 1): Promote networking before meeting + have a social interaction time during the meeting.
* (B2 – 1): Inter-club tournaments.
* (B1 – 0): Training of members, both at meetings and outside (e.g. RLI).