**Spring Roundup!**

*An “Open Space” Workshop*

*For Rotary*

**What?**

Spring Roundup is our first trial of a new way to improve our Rotary Clubs while having fun at the same time! We engaged a new (to us!) way of training based on “Open Space Technology”, described below. In this trial, we had 32 participants including 6 as part of the Facilitation team (who were also full participants).

**When & Where?**

Saturday 27 May, Summerland Secondary School (Meeting 10:00am – 2:00pm) followed by BBQ & social at Saxon Winery, Summerland BC.

**What is an “Open Space” Conference or Workshop??**

Open Space conferences started with a paper published by Harrison Own in 1982 titled “Organizational Transformation”. Over the next 3 years he refined his ideas, conducting the first annual “Open Space Symposium” in 1983. Open Space Technology (OST) has numerous applications, but always they are focused on a specific and important purpose or task, and always they begin without any formal agenda. General information can be found at the links below, but the main features are:

***Key Benefits:***

* They are self-organized. This means minimal preparation for the facilitators and enhanced buy-in from the participants.
* They are scalable. Open space events have been successfully conducted with as few as 5 up to more than 2000 participants!

***Principles:***

* Whoever comes are the right people.
* Whatever happens is the only thing that could have.
* Whenever it starts is the right time.
* Whenever it is over it is over.

***The Law of 2 Feet:***

* If you are neither learning or contributing it is your responsibility to respectfully use your own 2 feet to find some place you are learning or contributing.

Links for info about Open Space Technology are:

* + What is an OpenSpace Conference? <http://www.mindviewinc.com/Conferences/OpenSpaces.html>
  + Open Space Technology:

<https://en.wikipedia.org/wiki/Open_Space_Technology>

* + Planning an Open Space Technology Meeting:

<http://www.chriscorrigan.com/parkinglot/planning-an-open-space-technology-meeting/>

**How “Spring Roundup!” 2017 was Setup**

This event was meant to be one of 4 spread throughout the district to give Clubs some momentum going into the next Rotary year. The 4 were spread out so that each covered 14-15 clubs that could all easily get to the meeting and the social and home again on the same day. The goal is to attract a wide range of leaders from each club, from 5-15 participants per club covering executive, admin, and other enthusiastic members from a broad spectrum. With an “ideal” attendance of 200 (ish) per event, schools or churches were selected with enough room for common opening meeting and multiple breakout areas. The IDEAL setting is a large room where ALL breakouts are in the same space, with chairs pulled into circles or around tables. The common buzz of multiple disjointed discussions is part of what makes it work so well!

Our “test” run this year had only 32 participants, primarily because of late organization. More than ½ the clubs in the target area had spring events already planned for the same weekend, and to be successful this type of operation needs early planning and marketing (start promoting in the early fall for Spring event).

The first hour was a guided introduction to the day (see “Roundup 2017 Presentation” PPT file), followed by facilitated organization of topics. The day was introduced with the Goal and “The Big Question” as the underlying theme:

***The Goal…***

Collect “Best Practices” & Prioritize.

***The Big Question…***

What best practices, techniques or action items will help our Rotary Club to become better in 2017-2018 than it is right now?

With 2 recording on flipcharts (because we had 2 breakout periods scheduled) a facilitator guided the group into suggesting good topics for breakout discussions. The goal was 4 topics per breakout session, this number determined only that morning when final attendance was known (with 100 participants we may have picked 10 breakout topics). When each list had ~double (i.e. 8) suggestions the facilitator called a hand-vote… each participant could vote for 4 on each list. That defined the breakout sessions for each period (breakout A and B). The room already had the numbers 1-4 posted in different areas, and chairs/tables were quickly assembled into the 4 zones.

From 11:00-1:00 that day we ran the 2 breakouts for ~35 minutes each… longer takes some of the urgency and momentum out of the day. In between we had a light lunch (see “$100 Challenge” notes below), and in each breakout the facilitator would guide the group into discussing their topic (allowing that it was OK to digress into other useful topics!) and collect “Best Practices” by writing each on a separate piece of paper. After each breakout all Best Practices were taped up on a blank wall, and our experience was an average of 5-6 per session resulted (just over 40 total for 2 breakout periods of 4 topics each).

The final session (from 1:00-2:00pm) was for participants to “Shop the Room”… each were given a number of voting dots (we chose 18 per), and instructed to vote for their favorite Best Practices. They could vote for almost ½ of all shown, or could emphasize a few of their favorites with multiple dots… no rules.

***The “$100 Challenge”…***

The Summerland Rotary Club was the local host, organizing the venue, the lunch, and the social following the OST. Participants were encouraged to invite spouses and children to join for the social, and a few did. Past President Roch Fortin took the lead in organization, and offered a local group of high-school students whom they had sponsored with a “$100 Challenge”. The club has given these students $100 to help create fund-raising programs that they can apply to their chosen needs. This group (of 4 students) has challenged themselves to raise $3000, they provided lunch (with donated food they arranged from local businesses), they ran a car-wash for folks during the breaks, and they organized a “by donation” BBQ at the Saxon Winery where we gathered after the OST. I believe the raised close to $2000 on the day!

**The Chosen Breakout Topics:**

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

***Session A…***

* A1 – Multi-Club Collaborations.
* A2 – Programs & Guest Speakers.
* A3 – Club Demographics.
* A4 – Social Media.

***Session B…***

* B1 – Fund Raising.
* B2 – Membership Attraction.
* B3 – Mentorship.
* B4 – Community Service.

**The Results:**

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 5 “Best Practices” as selected by participants…***

* (A4 – 30): Establish a Rotary “Crowd Funding” account. Raises funds for projects and programs through social media channels.
* (A1 – 29): Create a joint website (either for each Area or for full District) where clubs can highlight projects and a calendar (speakers, events), with links to the Club’s own website.
* (B1 – 28): Showcase & share best fundraising projects or ideas between clubs using ClubRunner and reports to All-President’s meetings. Seek partner opportunities (something like a District-based Rotary Showcase).
* (B3 – 28): EVERYONE should have a mentor, and the mentor should be carefully matched.
* (A1 – 25): Rotary Roundup! What is going on, what is down the road, end with pot luck. Get more clubs working together for fellowship and future collaborative projects.

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

* (B2 – 21): Use a guest card for ALL visitors & get contact info. Follow up with a thank you & invitation.
* (B4 – 21): To select a community service project create an application form, with criteria that may include: money, participation, sustainability, CLUB areas of focus, recognition of Rotary, expected impact, and beneficiary “skin in the game”.
* (B3 – 20): A good mentorship guide should be generally available. With the guide ANY member can mentor a new member, since they just need to help them through the self-study guide and don’t need to be the Rotary expert! (\*\*\*Editor’s note: The mentorship guide produced a few years ago by Steve Goddard of Kelowna Sunrise R/C is downloadable from the home page of the District website for use by all clubs).
* (A4 – 19): Educate members about social media. Hold seminars in club meetings, help all members to engage, get them to “Like” and “Share”, and review the importance of SM.
* (A3 – 18): For clubs to reach broader membership consider adjusting traditions to remove barriers. Examples include make 1 meeting per month a “Service Project” meeting, where club (& friends) meet AT the project to work together, or form a “Satellite Club” with different meeting time and no meal-purchase expectation.
* (B2 – 18): Have your Rotary Club partner with a local business to host a Chamber “After Hours” monthly event, showcase what your club does.
* (A2 – 17): Share speakers locally, and throughout the District (see Database recommendation in this list).
* (B1 – 15): Partnering with key non-profits and a visible local cause has many benefits including:
* Supports local businesses.
* Promote business health & wellness
* Promotes both Rotary & the charity partner
* Brings money and/or people from outside the club
* (B2 – 14): Add all guests and guest-speakers to a “Friends of Rotary” group in ClubRunner.
* (A2 – 13): Make MORE effort to put FUN into programs.
* (B1 – 12): Make sure fundraising projects are NOT just about the dollar amount but about impact (PR, Fellowship, Member Engagement, Community Engagement).
* (A3 – 11): Add 1 social per month (regular, predictable time) that is open to friends & family, with NO Rotary pressure or agenda.
* (A1 – 10): Form a committee with 1 member from each club to discuss long-term goals with respect to club projects. Members should have “Project Passion”, not focussed on their own clubs.
* (B1 – 10): Don’t put all your fundraising efforts in one event.
* (A3 – 9): Subsidize club dues (and/or meal costs) to attract younger members, make up the funds through specific targeted activities (happy-sad donations, or social activities with donation to the club fund).
* (A4 – 9): Create a dashboard for social media, that brings all varieties together and manages them.
* (B2 – 9): Use more Rotary branding when not at Rotary (pins, shirts, hats, license plates).
* (A4 – 8): Setup a club YouTube account, post videos (expands reach 25:1).
* (B2 – 8): Make sure new members understand that they are the most important recruiters.
* (B3 – 8): Once per month have random assigned table numbers (could hand out a number card as they come in).
* (B3 – 8): Business mentorship within the club can help encourage new young business people to seek out the support and expertise that more senior Rotarians in similar businesses may be able to offer.
* (B4 – 8): Club support is essential for all service projects, so make sure that is done before going too far.
* (A2 – 7): Advertise & promote guest speakers on social media, website, email lists.
* (B4 – 7): Make sure all service projects are properly researched. What, where, when, why & how, just like a press release. Find the “person with the passion” to lead, and start with a basic business plan.
* (A2 – 5): Programs should have a good balance between member and non-member speakers.
* (A2 – 5): Form a speaker-recruitment committee.
* (A2 – 5): Form a database on the District website for sharing good speakers (list and review them). Two lists… Rotarians & non?
* (A3 – 5): Clubs want more youth, result is diverse age group. Make sure activities organized respect diversity of age and gender (gentle sports that all can enjoy, guess-whose-coming-to-dinner, etc).
* (A3 – 5): Consider alternate times for club meetings.
* (B2 – 5): Have more club social events that count as makeups.
* (A2 – 4): Have Civic Award recipients as your guest speakers, partner with Chamber and promote to local news agencies.
* (A2 – 3): Have joint meetings with good speakers.
* (A2 – 3): Have regular programs devoted to social, as well as to club info.
* (A3 – 3): Club consciousness could have more respect for women in clubs by addressing bad jokes or stereotypical job assignments (like “secretary”).
* (A4 – 3): Club should have a social media team or committee, take pictures and regularly post.
* (A4 – 3): Have a club Instagram account for sharing specific Rotary club videos and pictures.
* (B3 – 3): Mentorship opportunities to connect better with Rotaract and Interact can go BOTH ways: Young mentor club members on websites or social media, Members mentor the young on Rotary and/or business.
* (B4 – 3): Local community service projects can overlap with international service (for example the Gleaners).
* (A1 – 2): District Governor cluster visits, even when all clubs are individually visited do more regional multi-club events.
* (A2 – 2): Have members speak for vocation and classification, and RE-classification for benefit of newer members to learn about long-term members.
* (A2 – 2): Use PETS keynote speaker videos as club programs.
* (B3 – 2): District Membership Chair should be aware of Mentorship resources (e.g. Mentorship Manual) and promote to all clubs every year.
* (A3 – 1): Could have MORE family-inclusive meetings (not just the Christmas Party!), especially all inductions and socials.
* (B2 – 1): Conduct B.A.G. Events (Bring-a-Guest), casual lunch, wine-and-cheese, something. Organize a fun and informative program to tell visitors what Rotary is all about.
* (B2 – 1): Pay for the first couple of visits for guests to your club.
* (B2 – 0): Use social media to attract new members.