

President Elect Learning

March 22, 2025

ENCORE PRESIDENTS

With Joanne Serkeyn (District Governor Nominee Elect)
& Anne Bermingham (Past District Governor)

Morning Session Objectives

- Opportunity to reflect on insights gained as Rotary Club President
- Explore insights into how to build teams and engagement
- Learn techniques for defusing conflict - within the Board / Club
- Reflect on best self-care strategies you can put in place to prevent burnout

Introductions



Objective #1: Reflect / Insights on Being
President in the Past

Introductions - Small Groups (Exercise for Workbook)

- Name
- Rotary Club
- What is one Rotary initiative or project you are most proud of from a previous time you were President of a Rotary club?
- If you could give your past self one piece of advice before starting as President again, what would it be?
- What is one thing you are hoping to do different in this encore term?

Objective #2 - Building Effective Teams

Great Teams...

Are hard work

Does not come naturally

Take deliberate effort



Groups Versus Teams

A group is a number of individuals who share similar skills or interests

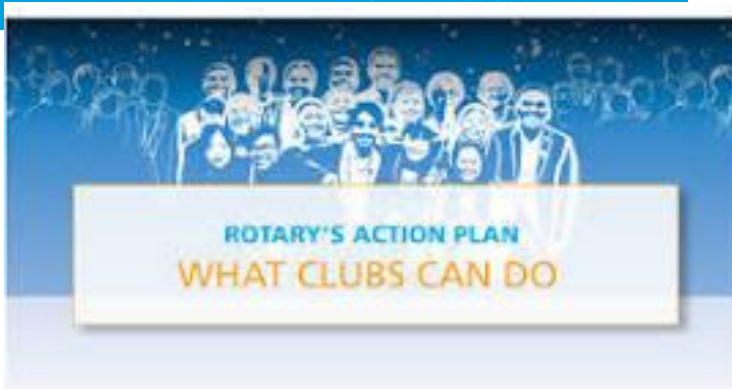


A team is two or more people who need to work interdependently to achieve a common goal



Importance of Goals to create Teams

ROTARY CLUB CENTRAL
PLAN TOGETHER
TRACK PROGRESS
ACHIEVE GOALS



Board



How To Create Engagement / Ignite Collaboration

- **Reconnect with the “why”** - get members talking about why they joined and how their involvement makes a difference at the podium / in social media
- **Personalized engagement** - take the club goals and get everyone to sign up to work on at least one goal in this year. Have your Board members each lead one of those goals.

Celebrate Contributions - recognize a club member for his / her contributions to a project, event or club in general at meetings or in club newsletter, or in social media

Bring more interaction and less formality - by having pods; more club socials; more speed networking; trivia; input activities

Paired Activity On Goals and Engagement - For Workbook

On Goals - What are 3 goals you are considering for next year?

What might you do again to ignite collaboration and engagement of club members?

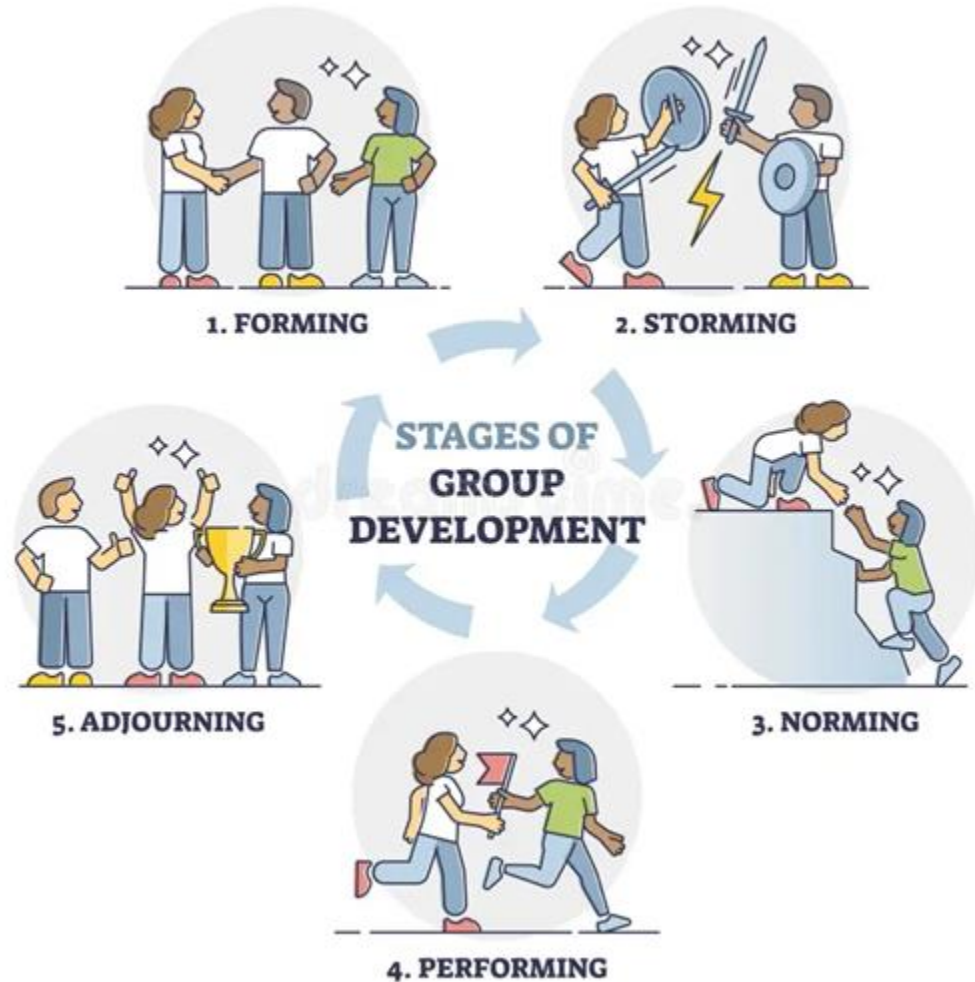
How will you get input from the Board / Club before finalizing these goals?

What might you do differently to ensure there is a high level of engagement / collaboration?

Objective #3 - Techniques to Diffuse Conflict -

Conflict is...

- Natural and inevitable
- It comes from differences of opinions or values or viewpoints
- Often poorly managed or left unresolved
- Unresolved conflict festers - i leads to resentment



Become Highly Effective at Giving Feedback

Reinforcement: When a person does something that is appropriate in a particular situation, positive feedback

- Reinforces the person's behaviour for similar situation
- Motivates the individual as they know repeating action will be appreciated
- Improves people's confidence that they are doing the right things

Correction: When a person does something that is inappropriate or not 100% ideal, corrective feedback

- Clarifies expectations by reinforcing what is desired in a particular situation
- Improves ability to perform by correcting
- Adds to people's confidence cause they know that if they are "off base" - you will say something

Utilize the Formula to Give Effective Feedback

Step 1

Describe a Specific (Not General) Behaviour - without judgement

Step 2

Describe Its Impact on You

Step 3

Describe Its Impact on the team, task & organization

Step 4

State what you want the person to KEEP, STOP or START doing.

Lead knowing the Difference between Circle and Triangle Time



Circle versus Triangle Time

- All ideas are accepted
 - The focus is on personal relationships & processes
 - It is more important to consult and hear all ideas than to find the one right idea
 - Can be very creative & time consuming
 - Best used for gaining input & not as decision making technique
- Hierarchy or person with greatest expertise is the one who has the right to decide which ideas will be used
 - If leader says we will do “x”, it is time to accept the decision and begin to implement. Everyone is not equal.
 - Once decision is made, focus shifts to how best to implement



Mistakes Leaders Make

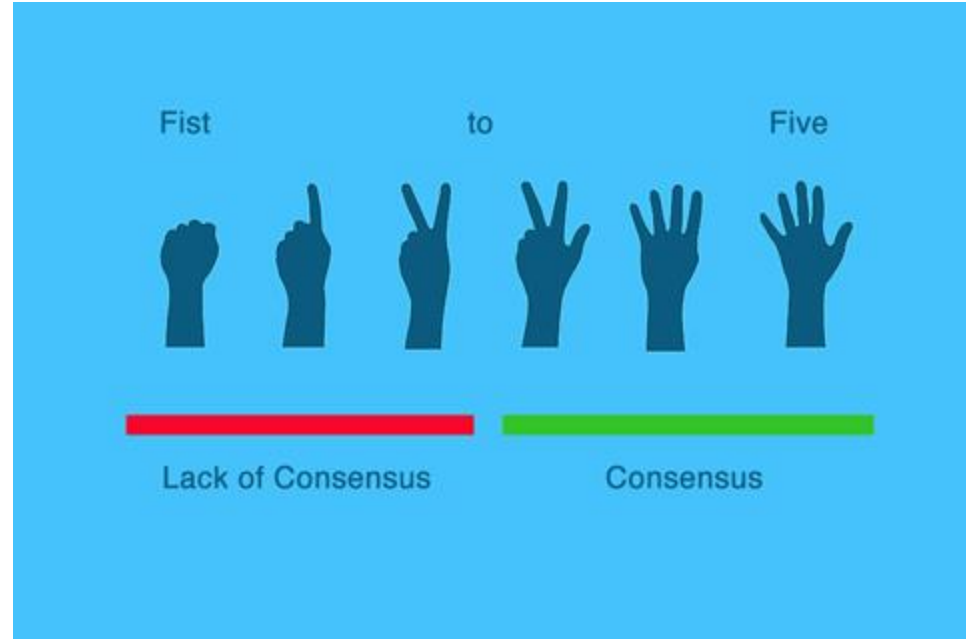
1. Have meetings or conversations where it is unclear if we are in circle or triangle time
2. Offer ideas as “circle time” but due to place in hierarchy, people assume you are giving direction or stating how it will be
3. Say it is “for your input / consultation” but not being clear what is the question to which you seek input as not everything will be up for discussion
4. Not making it clear to those that circle time means input and diverse ideas - not veto.
5. Use fake circle time - asking for input but having already made decision - aiming more for “buy-in” than diverse ideas
6. Not circling back and letting people know how their input and that of others influenced the final decision



Have Ways to Make Decisions

- Coin Toss
- Vote with 75% support
- Vote with majority support

- Yellow, Red and Green Flag
 - I can support this if...
 - I can not support this..
 - I do support this



Yellow flags must complete that sentence "I can support this if"
Red must work with green outside of meeting and return with new solution they both agree to...

Conflict Resolution Tips for Presidents

- Allow for a safe space to communicate with members
- Maintain open communication
- Be sensitive, understanding and compassionate
- Avoid gossip or disclosing confidential information
- Check for your own bias

Feedback Exercise - exercise for workbook

Your committee chair for Foundation agreed at the start of the Rotary year that she would engage the members to learn more about the Foundation, its programs and the various ways you can give to the Foundation. She said she would organize a club meeting around this topic as well as put some articles in the club newsletter. Six months have now gone by and you see no action. You have asked her three different times for an update - and she has said “it is coming but nothing happens”. How would you give her feedback using the feedback formula to start to address this situation?

- What is the behaviour
- Its impact on you
- Its impact on the club, board, etc..
- What you want this person to do differently

Objective #4 - Practice Self Care

Wellness Check- Work Book Exercise

When do you know you are stressed?

How do you cope with stress?

Why is there such a focus on
Wellness?

What might you notice?



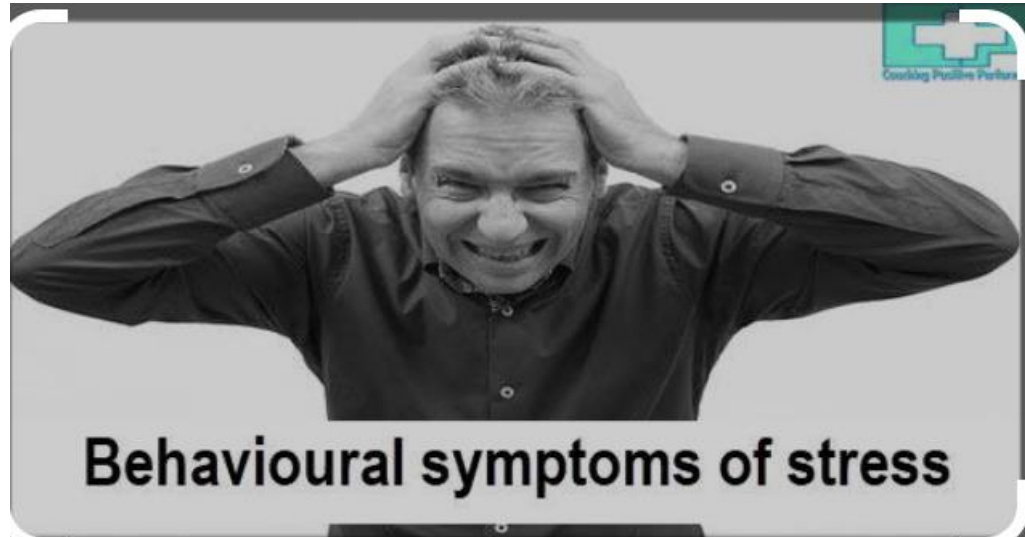
Health and wellness indicators

- In yourself
- In others

Physical indicators of stress



Behavioral indicators of stress



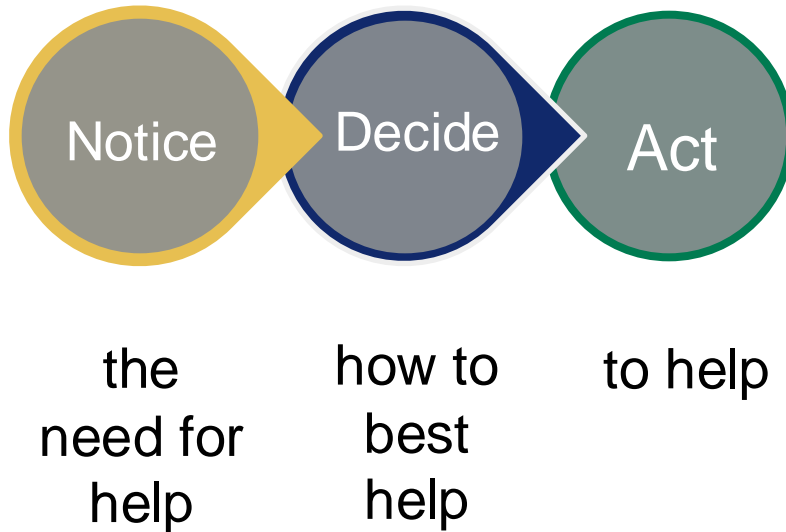
Unhealthy coping

- Passive avoidance
- Emotional Response
- Self-destructive behaviour

Factors to consider

- Who is the best person to have the conversation?
- What is the best way to intervene?
- When is the best time to intervene?
- Where is the best place to intervene?
- What might the consequences be for not intervening?

... provide opportunities to intervene for ourselves and others.



Prevention strategies

- Healthy coping strategies
- Best practices for managing stress?



Tool: Personal wellness check-in

Sleep and
Relaxation

Healthy Body

Connectedness

Building a resilient mind

Strategies to Practice

- Self-awareness
- Reflecting on daily practices
- Taking time to reset and recharge

Are you taking on too much?

Wellness Check- Workbook Exercise

- Write down 5 things you are grateful for today
- Write down 5 things you like about yourself

Questions to ask yourself

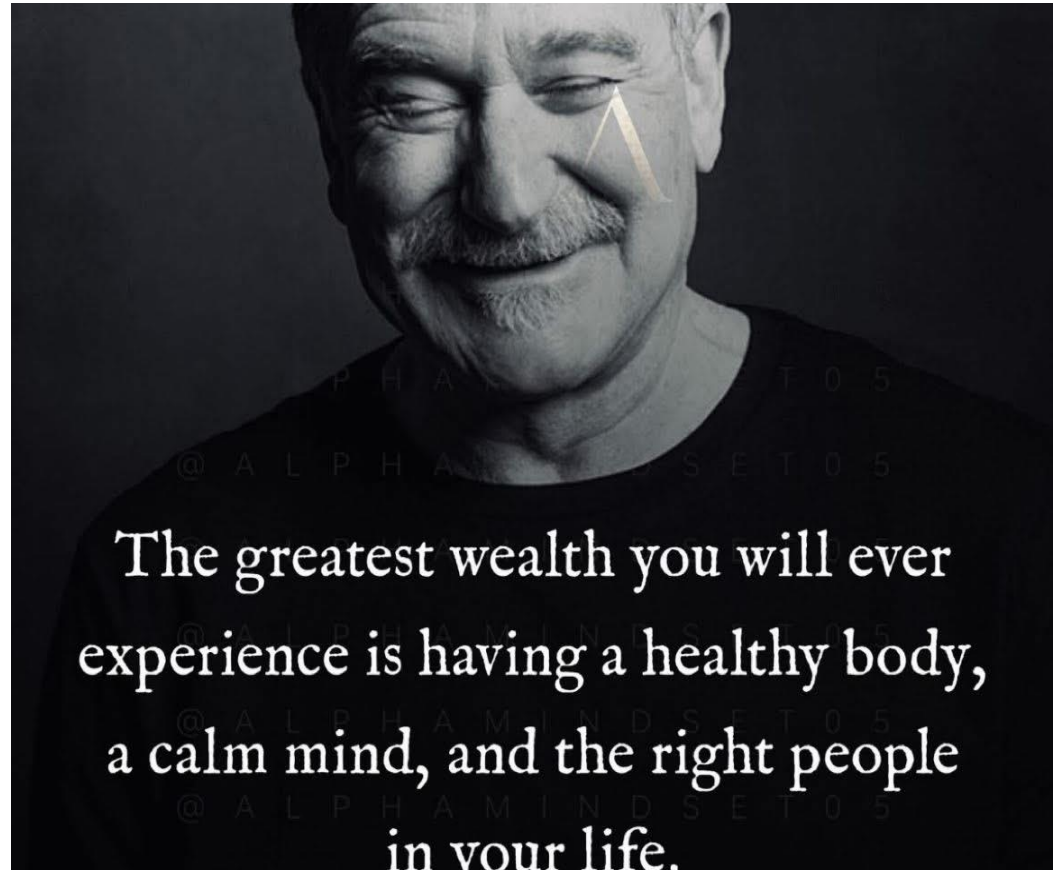
- Are you taking on too much?
- Do you feel obligated to say yes all the time?
- Do you have a hard time saying no?

Building connectedness



Caring for each other

- Let the person know you care
- Stress that they are not alone
- Practice active listening
- Offer help developing coping strategies
- Involve others if appropriate
- Know when to contact a professional



Building a resilient body



- Quality Sleep
- Diet/hydration
- Exercise
- Stretching / yoga
- Work/life balance
- Meditation

Meditation Exercise and Body Scan

- <https://www.cipsrt-icrtsp.ca/en/knowledge-for-you/downloadable-materials>
- <https://bit.ly/focusonwellness>

Ways to Re-Energize / Self-Care

- Nature
- Laugh
- Relationships
- Spa
- Low impact activity

- Meditation / mindfulness
- Breathing
- Yoga
- Walks
- Affection

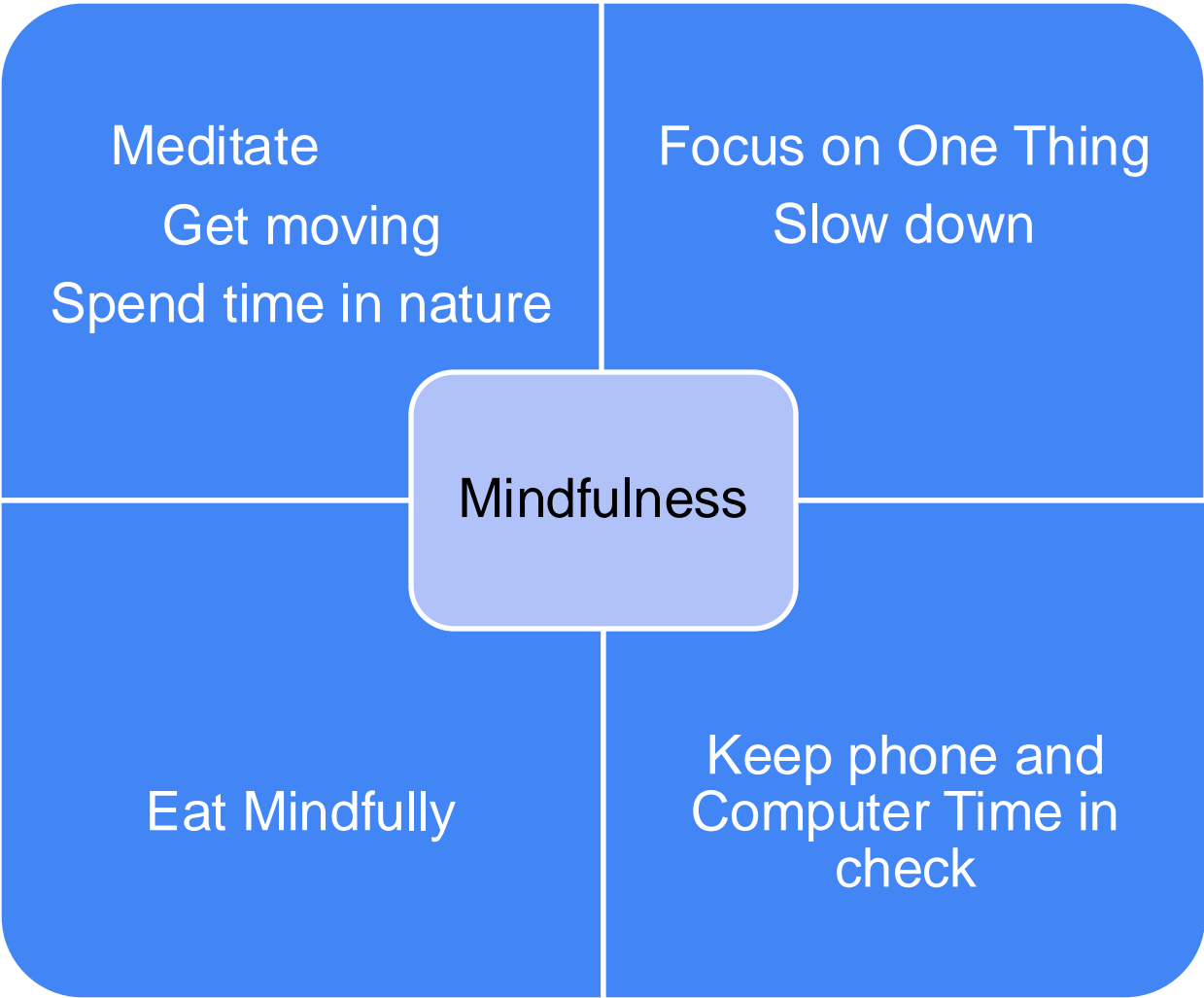
Leader Brings the Weather



Small Group Exercise on Self Care - Workbook Exercise

What can you do to practice good self-care while being President?

What have you done or can do to ensure you bring positive forms of weather during your next tenure as President?



Meditate

Get moving

Spend time in nature

Focus on One Thing

Slow down

Mindfulness

Eat Mindfully

Keep phone and
Computer Time in
check

Caring for yourself

- Start small.
- Aim to create a **positive habit**, not just a result.
- Change your environment.
- When you slip, be kind to yourself.
- Schedule new habits into your life.
- Small changes add up.



Afternoon Session Objectives

- Explore good governance - actions for your Board / Club to take in the coming year
- Uncover some new ideas you could consider for club programming
- Uncover some of the secrets of effective delegation
- Reflect on your leadership style and some changes you want to make in the coming year

Objective #1: Good Governance

Good Governance Means

- Having by-laws - reviewed regularly
- Also having governance policies that guide Boards from year to year. Good ones include:
 - Decision making of Board versus Club
 - Outlines committees
 - Defines gift donation policies
- Annual General Meetings where financial audit and nominations for Board presented

Having a Strategic Plan or Plan of Action

- Involves getting input from all members using survey or club assembly
- Define where you want your club to be in 3 years time - what to stay the same and what to be different
- Develop goals and agreed upon strategies / tactics - unite the club so you are just implementing their will

Good Governance Means

Regularly held Board meetings ...

- Where financial health of club is reviewed
- Committee goals and actions come for input (or approval)
- Issues and club challenges are discussed

Ideally there is a report to the whole club following each board meeting - with highlights so everyone informed.

Other:

Promote Four-Way test when committees and Board are making decisions

Have clear and true circle time discussions at Board and Club - with a well-defined question to which you seek input

Have a budget developed and approved by summer of your Rotary year to guide club

Have old and new boards meet for a good hand-off - including lessons learned

Celebrate wins from committees and encourage all clubs to have succession plans

Use Resources on 7090 Website
Including good governance checklist

Paired Discussion on Governance - Workbook Exercise:

What are two things you believe your Board did well in your last term when it comes to good governance?

What question would you like to ask your partner about how they govern and run their club?

What are 1-2 things you want to do differently this year - when it comes to good governance?

Club Programming - Club Assemblies, Meeting Styles, Program Development



Objective #3 - Be an Effective Delegator

Delegating

Why delegating is difficult to do?

- I don't trust the employees that report to me
- It takes too long to delegate than to do it myself
- I enjoy doing it myself
- I'm afraid they might do it better than I can





Delegating

Steps to Effective Delegation

1 Identify the task to be delegated

2 Make sure you are clear about the desired outcome of the task

3 Identify the right employee. You may want to select a veteran who is highly skilled or an employee who is less skilled but willing to learn the task



What to do
before you
approach the
individual

Delegating Steps to Effective Delegation

4 Explain the assignment and the desired outcome

5 Explain the benefits

6 Specify your standards

7 Identify the deadlines

8 Establish a reporting method



What to do
when you
actually give
the task to an
individual

Delegating Steps to Effective Delegation

9

Evaluate the results

10

Recognize the
achievement

What to do
upon
completion
of the task

Objective #4:
Reflect on Your Leadership Style

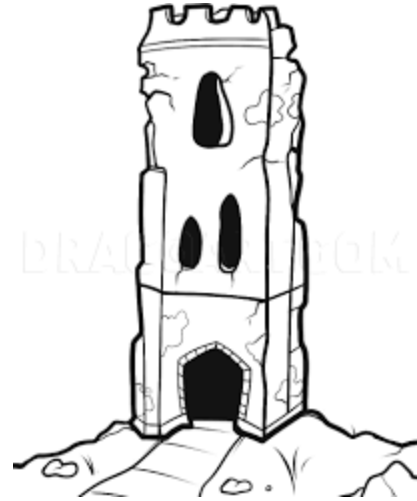
Tower Build Exercise

Given: Each team is provided with 3 sheets of plain, 8.5 x 11" card stock.

Task: Construct a free standing tower that is greater than 33" (84 cm) in height.

Conditions: The tower must remain standing for at least 10 seconds, touching nothing but the tabletop.

No other material may be used.



Exercise - Leadership Reflection - Workbook Exercise

What did you appreciate about the person on your left - when it came to providing leadership in this exercise?

What is one thing you want to try to do more of or less of in order to be as effective as possible when leading the club in the coming year?

What do you appreciate the most about your own leadership style that will serve you well in the year ahead as President?