



# *Leading Rotary Now*

DGE David Egan

FORGING AHEAD



INTO THE TWENTIES

**What?**

LRN gives you additional knowledge and enhances your skills. It shows you where you can get support for your role in the Club. It introduces you to the RI Theme for the next year and to the incoming DG and his District Team.

**Why?**

LRN is the next step on your path to leading a vibrant club.

LRN will introduce the new District and the part you can play in determining how that District will support its Clubs.

LRN will allow you to share ideas, projects and needs and show you how you access the resources of the District Leadership Team.

April 28, 2018, St Michael's College, Henley Beach

May 6, 2018 UniSA Whyalla

May 26, 2018 Aurora Centre Alice Springs

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# GOOD TO GREAT – Key Elements

(Synopsis of the book “Good to Great - Why some companies make the leap and some don’t”  
by Harvard Professor Jim Collins 2001)

The messages in the book are more than just about businesses, they are about what creates enduring organisations of any type including churches, schools, department’s, clubs and in fact any institution worthy of serving the community in which it operates.

In a changing and competitive world, the concept that “good is the enemy of great” is not just a business problem, it also affects humans. There are many good people as well as institutions that remain comfortably good when they could be great if they adopted a disciplined approach to the key elements discovered in the research.

The research to discover these elements focused on the compelling question “can a good company become a great company and if so how?” The key elements discovered are as follows:

## **Good to Great Organisations have Level 5 Leadership**

Level 5 leaders - channel their ego away from self towards organisation building!  
- their ambition is first and foremost for the institution, not themselves!  
- they have humility plus will - they are modest and wilful, humble and fearless!

## **Their leaders ask firstly Who? then What?**

In good to great transformations people are not the most important asset, the RIGHT people are!  
Level 5 leaders adopt the following key approaches:

- When in doubt they don’t hire, they keep looking
- They **act** when they know people changes are needed
- They put their best people on the biggest problems
- They tend to be ruthless in people decisions

The concept of “asking first who, then what” comes before vision, strategy, structure and tactics – leaders ask first who is needed on the bus and then consider where and how to get to the destination.

## **Their leaders confront the Brutal Facts**

Going from good to great needs the creation of an environment where TRUTH will be heard and Level 5 leaders and organisations deal with this challenge by:

- Leading with questions not answers (seek first to understand)
- Engaging in dialogue and debate, not coercion
- Conducting autopsies without blame
- Building red flag mechanisms

In dealing with the challenges the leader confronts the brutal facts of the situation with **courage** and deals with facts with unwavering **faith** and focus on the **end game**, no matter how difficult the situation (based upon the Stockdale Incident on page 83).

Leadership in dealing with the brutal facts begins with getting people to confront the facts of reality. Not doing so actually de-motivates people, whereas doing so motivates them.

## **They adopt the Hedgehog Concept**

This concept is illustrated by the difference between the fox and the hedgehog, where the former has many cunning ways of achieving what he wants but lacks consistency. The latter focuses on the one big thing that make them the best in the world at what they do.

Hedgehogs consider 3 key questions, plot the answers in three circles and focus especially on the answers that are within the intersection of the circles. The questions are:

- What can they be best in the world at?
- What are they deeply passionate about?
- What drives their economic engine?

In answering the questions and focusing upon possible outcomes, good to great institutions let their abilities not their ego determine what they attempt. Crucially a key is to understand what the organisation can be best in the world at, not necessarily what it “wants” to be best at; it is a more severe standard than a core competence and discovering and developing appropriate capability that makes the difference.

The best companies, institutions and people are more like hedgehogs – they are often dowdy, they know one best thing and they stick to it!

## **They adopt a Culture of Discipline**

By focusing upon the answers to the hedgehog questions and building a culture of discipline around these few crucial things, good to great institutions and leaders create environments which avoid the negatives of bureaucracy.

Sustained good results come from a culture full of self-disciplined people taking disciplined action fanatically consistent with the three circles. In this environment there is a duality of freedom and system which avoids bureaucracy but maintains motivation. “Stop doing” lists are more important than “to do” lists.

## **They adopt Technology Accelerators**

When considering technology they ask the question does it fit with our hedgehog concept rather than rushing in to every new fad - they tend to crawl before they run in this regard.

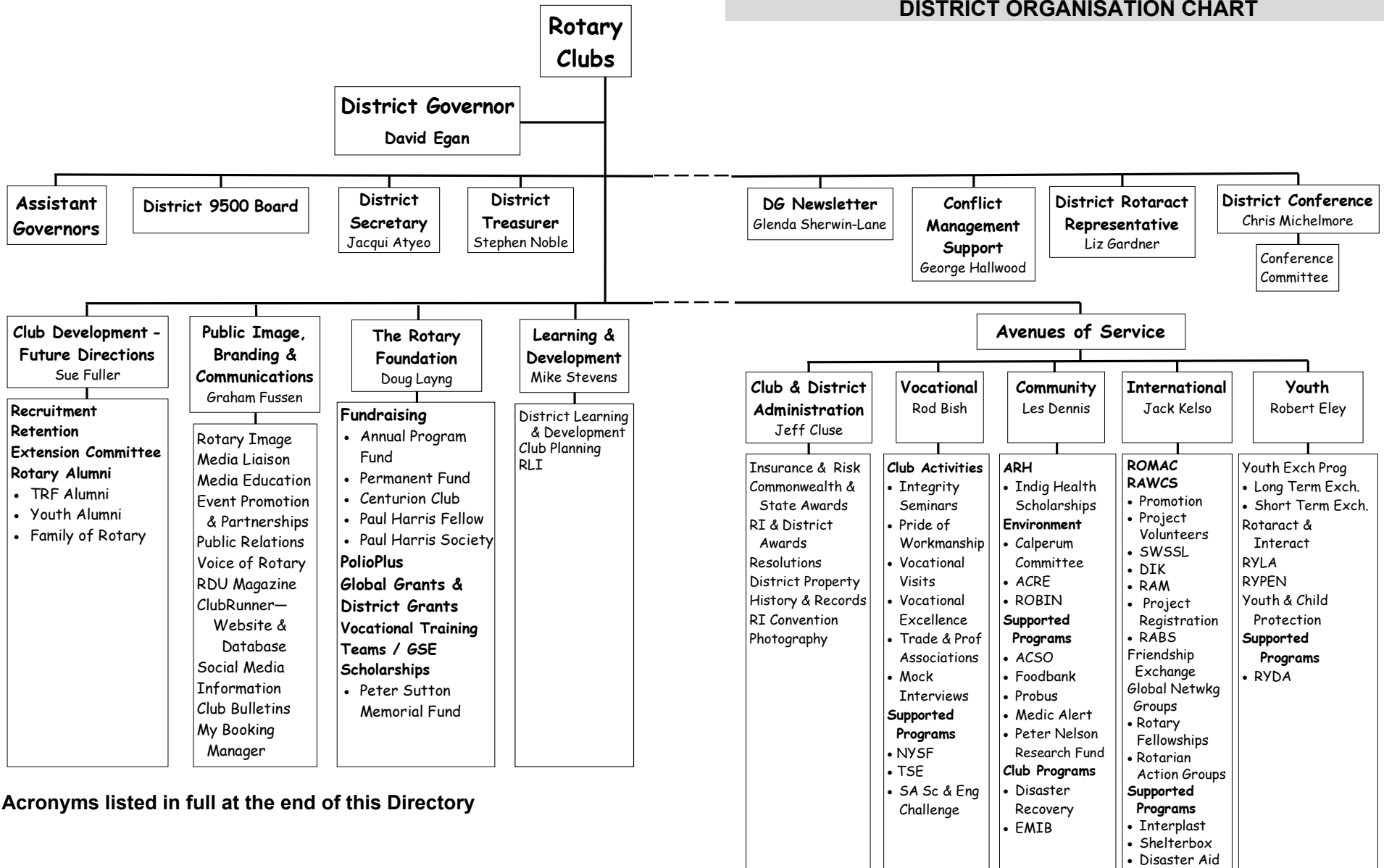
## **They adopt a Flywheel Approach rather than allowing the Doom Loop to take hold**

Good to great institutions and leaders build sustained momentum by building up slowly thereby avoiding the doom that comes from failures brought about by trying to skip proper build up.

By doing change properly it is often slow but when it gets going, just like a fly wheel it really takes off. The mistake made by many is to attempt to jump in and breakthrough quickly which often leads to failures taking the momentum in a direction which leads to a doom loop thereby limiting greatness.

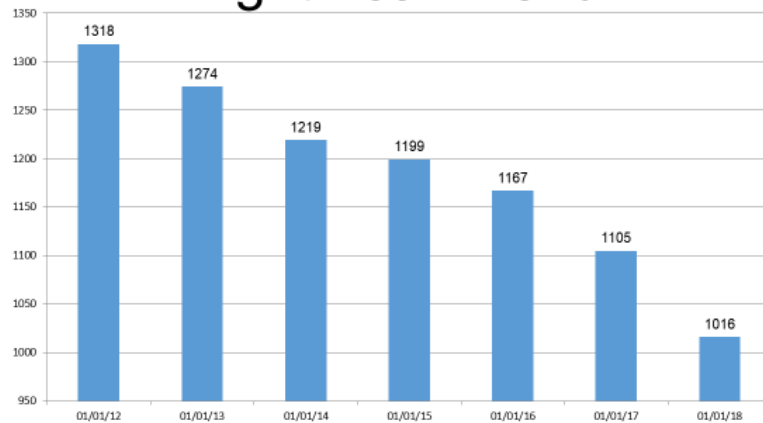
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**DISTRICT ORGANISATION CHART**

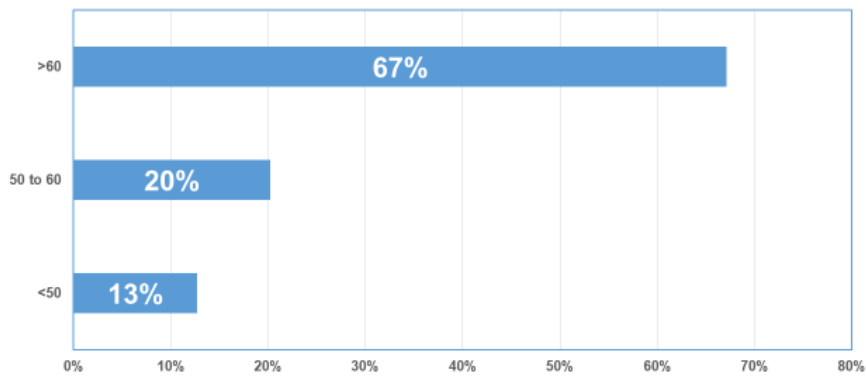


Acronyms listed in full at the end of this Directory

## D9500 Membership Eight Year Trend



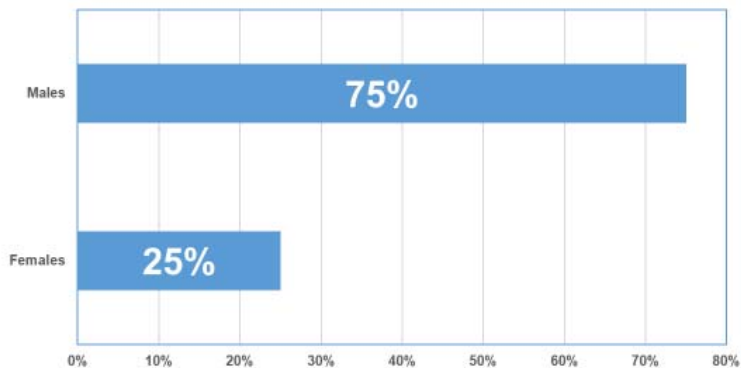
## All Members by Age Range



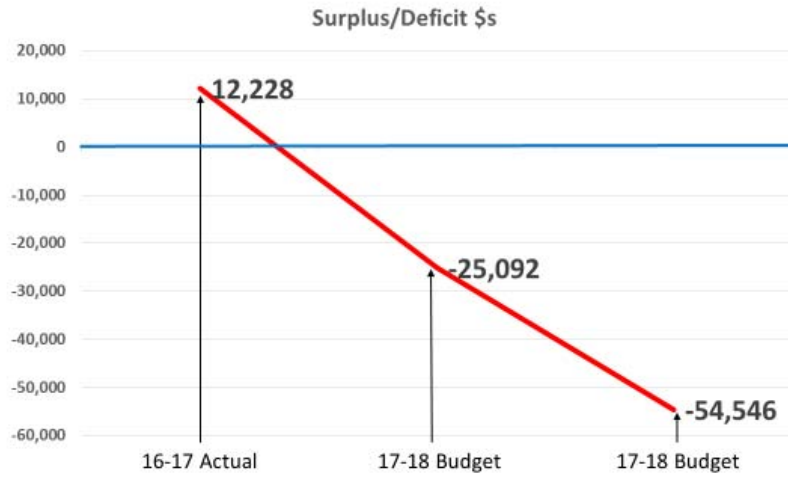
*There are almost three times as many over 70 than under 50*



## Females to Males



# D9500 Budget Trends





Preamble –

District 9500 supports the Rotary International Strategic Plan and Vision: *‘Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.’* It was our guide when developing this strategic plan.

### VISION

We unite and act for lasting change across the globe, in our communities and individually.

### MISSION

To guide, support, inspire, motivate, inform and encourage Clubs to achieve Rotary’s vision, priorities and goals, in our District.

### CORE VALUES

Our values guide and shape the way we interact with the clubs we support:

Service  
Friendship and Fellowship  
Diversity  
Integrity  
Leadership  
Personal Development

## STRATEGIC PRIORITIES AND GOALS

### SUPPORT AND STRENGTHEN CLUBS

1. Encourage existing Clubs to innovate, renew and reinvigorate
2. Start new Clubs
3. Promote member engagement, retention, recruitment and diversity
4. Foster effective personal and leadership development

### FOCUS AND INCREASE HUMANITARIAN SERVICES

1. Encourage Clubs to support the activities of the Rotary Foundation
2. Support and increase sustainable service programs and projects that engage youth and young leaders in Rotary’s six areas of focus
3. Increase collaboration with other organisations

### ENHANCE PUBLIC IMAGE AND AWARENESS

1. Promote core values
2. Publicise action-oriented service
3. Encourage Clubs to promote their networking opportunities and signature activities utilising the Rotary Brand and Image guidelines



## RI PE Barry Rassin's Priorities 2018/19

- **Eradicate Polio** – RI's no. 1 external priority
- **Engage Young Leaders** – Interact, Rotaract, Rotary
- **Improve Environment** – and reduce pollution
- **Improve Membership experience** - RI's no. 1 internal priority



## BRIEFING DOCUMENT

### STEERING COMMITTEE FOR NEW DISTRICT 9510

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#### BACKGROUND

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In 2017, the following discussions with the Rotary International Director (Zone 8) Noel Trevaskis, an in principle agreement was reached. The agreement between the G-Trains of Districts 9500 and 9520 was to proceed with a merger of those Districts to take effect from 1 July 2020. Clubs in both districts have been notified of the change. The new district will be known as District 9510.

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#### PURPOSE OF THE STEERING COMMITTEE

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The Purpose of the Steering committee is to plan, develop and implement a framework for the creation of the new District 9510.

The committee will make recommendations to the two incumbent DG's for acceptance

District 9510 is a new District as the result from the merger of District 9500 and 9520.

The timeline for this process will be continuous until all tasks are completed with milestones set by the steering committee at an early planning meeting and manage all aspects of the transition

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#### MEMBERSHIP OF THE STEERING COMMITTEE







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The steering committee consists of eight members who have been selected through rigorous dialogue and negotiation between both districts of the G Train.

The D9500/D9520 Assistant Coordinator will be an ex officio member of the Steering committee who will act as an advisor and the liaison between the committee and the G Train

A quorum for a meeting of the committee shall be six members of the committee.

The steering committee will be:

-  Strategic in their thinking
  -  Visionary for the future
  -  Knowledgeable in information technology
  -  Change orientated; understanding the process of bringing people together
  -  Experienced in Rotary at higher levels; understanding the essence of Rotary
  -  Experienced in large projects; understanding the importance of good communications for good outcomes
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#### REPORTING RELATIONSHIP

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The Steering Committee reports to the joint G Train.

It is the incumbent District Governors of the day, as representatives of Rotary International (RI), who formally accept any recommendations made by the Steering Committee

The Steering Committee works collaboratively with RI South Pacific and Philippines Office (RISSPO); District committees and District leaders to ensure a timely and progressive transition to the new district.

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## TASKS FOR THE STEERING COMMITTEE

Area of focus	Outcomes
<b>District Administration</b>	<p> Facilitate district chairs to start working together and conduct joint activities</p> <p> Advise team leaders and chairs to prepare and propose a recommendation/s to the steering committee for DG review. These recommendation/s are regarding how they will operate in the New District 9510.</p>
<b>Information Technology/ Communication</b>	<p> Facilitate the creation a central website for joint communications to clubs</p> <p> Provide regular updates to the web masters for publishing on the district website</p> <p> Be transparent in all communications</p> <p> Utilise existing district communication mediums to make announcements and general communication i.e. Horizons and Herald.</p>
<b>Governance / Policy</b>	<p> In consultation with RISPPPO plan, develop and implement new a district Constitution and bylaws to reflect the requirements of the new district</p> <p> Work with both District Finance committees to ensure good financial stewardship. Safeguarding that the new District complies with all applicable laws.</p>
<b>Foundation / Grants</b>	<p> Facilitate a central agreement regarding the foundation process:</p> <p> Foundation</p> <p> Centurion</p> <p> End Polio now</p> <p> Contact the Regional Grant Officer to close out any open grants.</p>
<b>Membership</b>	<p> Facilitate the development of a membership plan for New District 9510</p>
<b>Training / Development</b>	<p> Facilitate the development of a Training and Development plan for New District 9510</p>
<b>Youth</b>	<p> Facilitate the development of a Youth Program plan for New District 9510</p>
<b>Protection / compliance</b>	<p> Facilitate the merging of the RI Policies, State and Territory legislation for the new Districts 9510 to ensure compliance that are compliant to all the aspects of Rotary District management</p>

This document is not exhaustive and is subject to alteration as changes in circumstances require.  
 This document has been prepared by the G Trains of 9500 and 9520. 24 November 2017.

**WHY ARE WE MERGING DISTRICTS 9500 & 9520? - WHAT ARE WE TRYING TO ACHIEVE?**

**VISION** or **GOAL** (the big picture that we contribute to):

For Rotary to remain a vibrant, attractive and highly respected service organisation in Australia for another 100 years.



**PURPOSE** or **MISSION** (our immediate focus – what we are trying to achieve by merging the two Districts):

To merge Rotary Districts 9500 and 9520 into a new, restructured District (9510) that will be open and inclusive and work closely together with all Clubs to help and support them retain existing members, attract new members and to grow their Rotary membership.



**OBJECTIVE 1: STRUCTURE**

To establish a very transparent, supportive and integrated District management structure with meaningful links to all Clubs, opportunities for the involvement of all Rotarians and the mechanisms to provide the support the clubs need.



**OBJECTIVE 2: COMMUNICATIONS**

To develop and implement a Communication Plan which utilises a variety of technologies and not only maximises the effectiveness of our internal and external communications but also enhances the public image of Rotary.



**OBJECTIVE 3: MEMBERSHIP**

To work closely with all Clubs to help and support them innovate and re-invigorate themselves in order to grow their membership by retaining current members and being more attractive and enticing to potential new members.

To enable us to achieve our THREE objectives, we are CONSIDERING the following OPTIONS

Objective 1: STRUCTURE	Objective 2: COMMUNICATION	Objective 3: MEMBERSHIP
<p>With respect to the new <b>District Management Structure</b> we are <b>considering</b> a much flatter more integrated structure that might involve:</p> <ul style="list-style-type: none"> <li>• <b>Changing the DG role</b> to increase the focus on strategic leadership, reduce the workload and emphasis on management, possibly considering a Deputy DG (maybe the DGE), and making it attractive and possible for working Rotarians with young families to nominate for DG.</li> <li>• Possibly changing AGs into <b>Area Governors</b> and the Groups into <b>Areas</b> and <b>decentralise some of the District roles to the Areas</b> (eg. District Grants, some training, nomination/selection processes)</li> <li>• Establishing <b>new support teams and processes</b> at the District level that can be customised to meet the needs of Clubs</li> <li>• Engaging paid external secretarial support</li> <li>• Rethinking District Conferences and consider <b>one day Area conferences</b> open to Rotarians from across the District.</li> <li>• <b>PLEASE FEEL FREE TO ADD MORE</b></li> </ul>	<p>On <b>Communication</b>, we are <b>considering</b>:</p> <ul style="list-style-type: none"> <li>• Making <b>better use of technology</b> to improve communications between Clubs, Areas and the District and allow regular meetings and consultations to occur with minimal travel required</li> <li>• Engaging specialists to produce an <b>external communication program</b> to improve the public image of Rotary in the District and attract new members</li> <li>• Developing <b>media outlets</b> that will allow the District, Areas and Clubs to regularly communicate major projects and achievements to the public</li> <li>• Revisiting and assessing current District communications with a view to enhancing the messaging with all Rotarians</li> <li>• <b>PLEASE FEEL FREE TO ADD MORE</b></li> </ul>	<p>With respect to <b>Membership</b>, <b>consideration</b> is being given to:</p> <ul style="list-style-type: none"> <li>• Tapping the expertise across the District to <b>establish support teams of experts</b> that can help clubs, amongst other things: <ul style="list-style-type: none"> <li>○ evaluate their meetings &amp; processes</li> <li>○ improve their image in the community and involvement with LGUs</li> <li>○ change their focus from fund raising to community support</li> <li>○ resolve conflict within their club</li> <li>○ strengthen involvement in local &amp; international community projects</li> <li>○ implement a variety of strategies to both attract new members and retain older members</li> <li>○ mentor and nurture new members</li> </ul> </li> <li>• <b>Coordinating membership drives</b> across the District that involved all interested Clubs, target specific groups and utilise a variety of media technologies.</li> <li>• <b>PLEASE FEEL FREE TO ADD MORE</b></li> </ul>

These are ideas we are currently CONSIDERING - Share YOUR ideas via Blog & Email Form <http://steeringcom.rotary9510.org/>  
Please email your comments and other suggestions to D’Arcy Walsh at [steeringcom@rotary9510.org](mailto:steeringcom@rotary9510.org)

# Club Assessment Results – Top Needs per Strategic Priority

The following is a list of the overall top needs that Clubs say they would like us to support them on.

## Strengthening Clubs:

Clubs would like us to support them to:-

- o Value and retain older members whilst attracting new ones.
- o Embrace change without changing things that must never change (Objects, Values, Service , Fellowship, 4WayTest).
- o Understand what turns off and on potential new members and how to change whilst retaining older ones.
- o Undertake visioning, then present club in a manner attractive to more diverse groups.

## Developing Service Programs

Clubs would like us to support them to:-

- o Access community funding opportunities (public, private, NGOs, philanthropic organisations)
- o Make better use of Foundation Grants to serve community and enhance member involvement /experience
- o Work and collaborate with other clubs on grants
- o Engage schools in Youth Exchange
- o Reduce regional barriers to all youth programs (RYLA, RYPEN, Youth Exchange, Interact, Rotaract, RYDA, NYSF, SA Engineering and Science Challenge)

## Enhancing Public Image/Communication

Clubs would like us to support them to:-

- o Develop consistent branding through social media, website and partnering.
- o Engage local media to promote Rotary more effectively
- o Establish internal and external partnerships to improve image and promote events and projects
- o Publicise stories and articles in Rotary Newsletters, RDU and local media

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## Assessment Results

Clubs were asked to rate the areas in which they would most like support on a scale 0-5 with 5 being the highest area of need and 0 the least. The questions are listed in descending order with the average of the 3 & 4 & 5 scores shown.

### The Top 5

Question	Score
Value and retain older members in ways that strengthen the club and attract new ones.	<b>4.5</b>
Implement change in a manner that maintains what is most important and must not change, but embraces the future and brings older members along with you.	<b>4.4</b>
Embrace use of social media and develop your website with consistent branding and imagery and develop partnerships to improve publicity.	<b>4.4</b>
Understand what turns off (and on) potential new members and how to make change whilst retaining older member support.	<b>4.3</b>
Undertake Visioning then structure and present the club in a manner attractive to the next generation and wider and more diverse groups of people.	<b>4.1</b>

### Strategic Priority 1 – STRENGTHENING CLUB ENVIRONMENT

Value and retain older members in ways that strengthen the club and attract new ones.	<b>4.5</b>
Implement change in a manner that maintains what is most important and must not change, but embraces the future and brings older members along with you.	<b>4.4</b>
Understand what turns off (and on) potential new members and how to make change whilst retaining older member support.	<b>4.3</b>
Undertake Visioning then structure and present the club in a manner attractive to the next generation and wider and more diverse groups of people.	<b>4.1</b>
Work collaboratively with nearby clubs to share resources, enjoy fellowship and enhance vibrancy and effectiveness.	<b>4.1</b>

### Strategic Priority 2 - DEVELOPING SERVICE PROGRAMS

Access community funding opportunities to enhance club effectiveness – Public, Private, NGO, Philanthropic organisations	<b>4.2</b>
Make better use of Foundation Grants (District and/or Global) to serve community and enhance member involvement and effectiveness	<b>4.1</b>
Work with other clubs, local and international, on District & Global Grants.	<b>4.1</b>
Engage local schools in Rotary's Youth Exchange Programs.	<b>4.0</b>
Reduce regional barriers to Youth programs (RYLA, RYPEN, Youth Exchange, Interact, Rotaract, RYDA, NYSF, SA Engineering & Science Challenge).	<b>3.9</b>

### Strategic Priority 3 - ENHANCING PUBLIC IMAGE & COMMUNICATION

Embrace use of social media (e.g. Facebook etc.) and/or develop your website with consistent branding and imagery.	<b>4.4</b>
Engage local media to more effectively promote Rotary in the community.	<b>4.4</b>
Establish internal and external partnerships to improve publicity, public image and the promotion of Rotary events and projects.	<b>4.3</b>
Publicise stories and articles about club projects and activities - in Rotary Newsletters, RDU and local media.	<b>4.1</b>

# Collaboration: What Does it really mean?



Carlos Dominguez- February 9, 2011

If you type the word “collaboration” into any of the search engines, you’ll get 82 million results. I’m quite sure this won’t surprise you since we hear the word “collaboration” all the time.

I have the privilege of speaking to audiences up to 100 times a year. And can you guess the most popular topic they ask me to address? You got it. Collaboration!

I’ve learned a lot about collaboration in researching for these keynotes, and in discussing it with top business leaders. This has led me to the following five observations:

1. **Definition** – There is a lot of confusion on the very definition of collaboration. If you ask 20 people, you might get 20 answers.
2. **Value of collaboration** – For the most part everyone agrees collaboration is a good thing to do but many haven’t defined what value it brings to their company, or why to do it at all.
3. **How to do it?** – “Effective collaboration” requires a major focus on culture, the deployment and use of technology, the adoption of process/governance for positive results. Few companies focus on all three.
4. **Bad is worse than none** – Morten Hansen points out in his book “*Collaboration*”, that bad collaboration is a waste time and resources and produces no results. Deciding not to collaborate is a better option than bad collaboration.
5. **Used interchangeably with “innovation”** – There is clearly some confusion with the relationship between collaboration and innovation. By being innovative you aren’t necessarily being collaborative and vice versa. There are interdependencies between the two but they are not the same thing.

I believe these five points are worth exploring in greater depth but I’ll focus this blog on #1 – the definition of collaboration. I know this word tends to be overused and lacks meaning for some, but let’s start *collaborating* and see what we can come up with.

## #1 Defining Collaboration

I thought Eric Schmidt, chairman of Google, had a **very interesting — and sarcastic — comment on this topic. He said, “When you say collaboration, the average 45-year-old thinks they know what you’re talking about: teams sitting down, having a nice conversation with nice objectives and a nice attitude.”**

Ok, here’s what I found by searching for collaboration.

Wikipedia – **“Collaboration refers abstractly to all processes wherein people work together.”**

Oxford Dictionary – **“United labour, co-operation; especially in literary, artistic or scientific work.”**

Webster – **“To work jointly with others or together especially in an intellectual endeavour.”**

All of these seem really outdated so I continued to look. Michael Schrage in his book “*No More Teams!*” defines it this way: **“Collaboration describes a process of value creation that our traditional structures of communication and teamwork can’t achieve.”** I like his introduction of the point that collaboration requires a process and the purpose is to create value.

I think we are on the right track but still not there.

So I continued to search and found this by Evan Rosen in his book “*The Culture of Collaboration*”: **“Working together to create value while sharing virtual and physical space.”** Rosen highlights that technology can bring people together and that they don’t need to be in the same location. A very important point since technology, especially video, plays a key role in enabling collaboration across the enterprise.

Another key ingredient in the recipe is the concept of “wisdom of the crowds” or collective intelligence. Mark Granovetter in his 1973 paper, “*The Strength of Weak Ties*”, highlights the importance of diversity in the areas of brainstorming, problem solving and ideation. The more diverse the group, the better they are at these tasks.

It’s now time to throw my own definition into the mix. Collaboration is highly diversified teams working together inside and outside a company with the purpose to create value by improving innovation, customer relationships and efficiency while leveraging technology for effective interactions in the virtual and physical space.

Happy collaborating.



# COLLABORATION AT PETS

**After hearing RI President Elects Priorities and considering Club Survey Summary of Needs, Presidents Elect came up with the following list of broad areas for collaboration between Clubs and Groups and District:**

- **Youth Engagement & Leader Development:**
  - establishing new Rotaract and Interact Clubs utilising District resources to assist
  - starting new and satellite clubs to meet needs of younger members and homogenous groups
  - finding ways to develop young leaders
  
- **Membership Experience & Change :**
  - helping one another introduce change where needed (whilst valuing and retaining longer serving members),
  - collaborating on member information evenings for the purpose of attracting new members,
  - collaborating on processes that better engage and retain existing members
  - sharing club meetings and social events to enhance fun and fellowship
  
- **Projects & Programs:**
  - working together with other clubs and the District on Global Grants and projects
  - collaborating to host exchange student as a group of Clubs where feasible
  - collaborating to assist and guide other clubs in areas where your club has expertise and they a need
  - providing resources for each other's projects in groups
  
- **Public Image & Other Areas:**
  - working together to support each other to enhance our public image locally, drawing on District resources for guidance
  - collaborating to provide support for development in any other areas in which a Club wishes to develop.
  - participating together in providing ideas on how the New District could be organised to better meet Club needs.

# Group Discussion

In each of the four priorities, how can we collaborate to make a real difference at club level?



**Youth Engagement & Leader Development**



**Membership Experience & Change**



**Projects & Programs**



**Public Image & Other Areas**

Please record your group's thoughts on butcher's paper.

A spokesperson from your group will be asked to share your most pertinent comments.

We will collect up the sheets and collate all the comments and circulate them back to you all via your AG.

# Planning Guide

How would you rate your club? Typically, Rotary clubs with a plan are stronger than clubs without one. Research shows that members of clubs with a plan were more satisfied and had a more positive view of their clubs and Rotary overall.

This guide will help

you set long-term priorities and goals, all of which will support your club's vision. It's designed for Rotary clubs, but districts can use it too. As you prepare a plan, consider these tips:

- Build a team of past, present, and incoming club leaders to oversee the plan's development and use.
- Ask an unbiased facilitator to run planning meetings.
- Include a variety of perspectives by involving a diverse range of club members.
- See how your club's goals reflect your District and Rotary's strategic plan.

## **The Planning Model**

Create a vision for your club, with priorities that will help you achieve it. Then set up an action plan and goals for the year ahead for each priority.



# Planning Worksheet

## 1. Where are you now?

List the opportunities and challenges facing your community.

Consider your club's current demographics and any assessments/surveys of what members like and don't like, plus results of your club's current health check.

**Club Strengths** (things you do easily and well and want to keep doing the reasons why)

**Club Weaknesses** (identify things that hold you back and make it hard to be effective and need to be changed)

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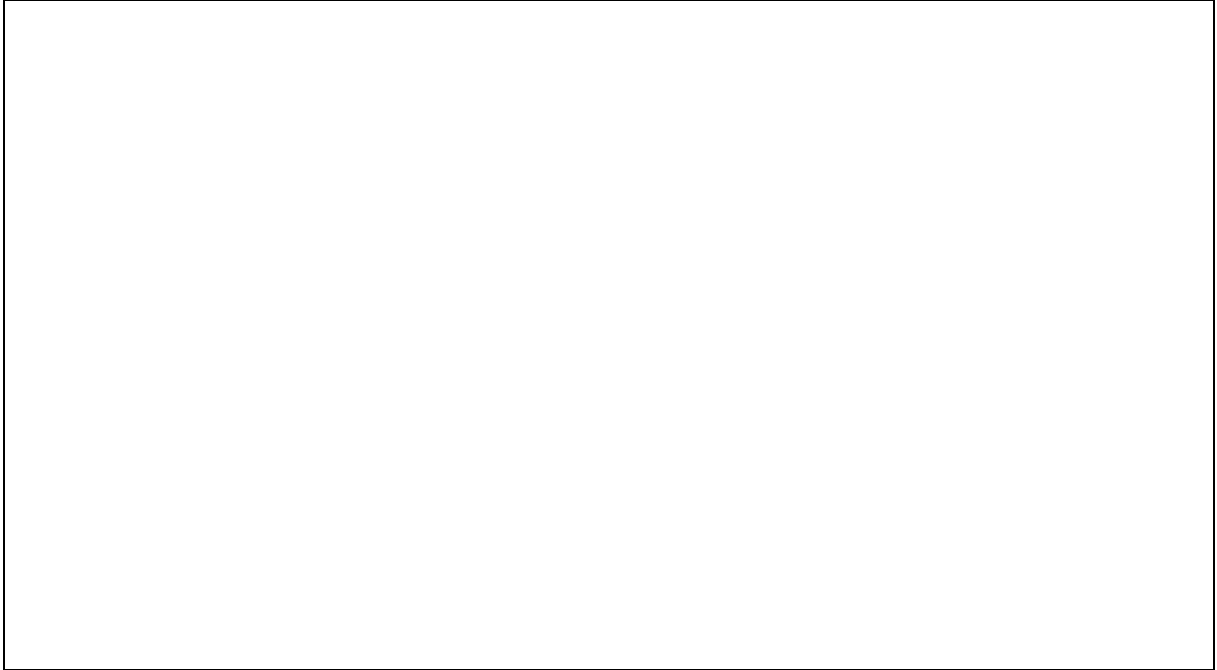
**Opportunities** for the club and community (such as new businesses, growing population, partnerships with other clubs and organisations)

**Challenges** facing the club and community (such as economic decline, competing services, demographic issues/aging population etc.)

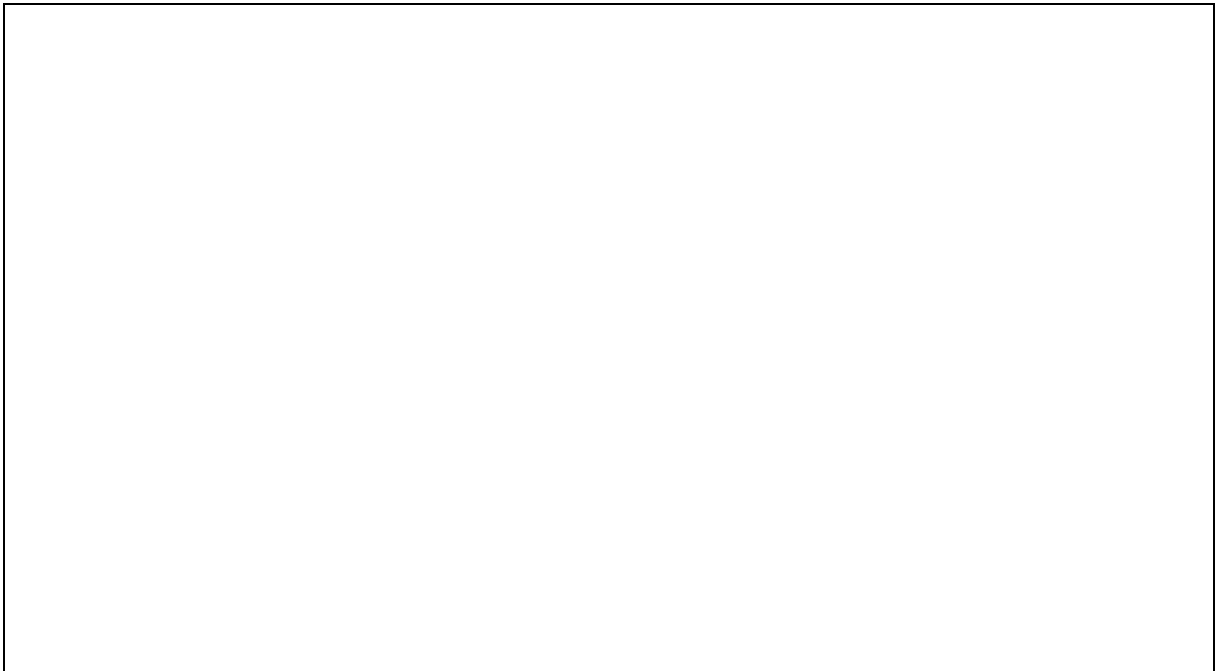
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**2. Where do you want to be?**

List five to 10 characteristics that you would like your club to have three to five years from now.

A large, empty rectangular box with a thin black border, intended for the user to list five to ten characteristics they would like their club to have in three to five years.

Next, prepare a one-sentence vision statement. Revise it with the team as needed, then see whether club members support it. (Include something that will distinguish your club from other service groups in your community — e.g., “Our vision is to be the most internationally diverse service club in our community,” or “Our vision is to be the service club most supportive of youths in our community.”)

A large, empty rectangular box with a thin black border, intended for the user to write a one-sentence vision statement for their club.

**3. How do you get there?**

- Agree priorities that will help your club achieve its vision, considering:
  - Your Club’s strengths and weaknesses
  - The priorities and goals of Rotary International and those of your District.
  - Programs and missions of Rotary International and The Rotary Foundation
  - Your community’s opportunities and challenges
  - Members’ opinions
  - Achievability in three to five years
- Agree the most important priorities – those that will have the biggest impact as your club works toward its vision and agree a “Stop Doing List”.
- Develop/agree an action plan showing goals, tasks and activities, timeline, resources, and people to meet the yearly goals under each of the priorities.
- Use Rotary Club Central to help set goals and track achievements.

**Priority 1:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member/ Committee Assigned

**Priority 2:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member/ Committee Assigned

**Priority 3:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member/ Committee Assigned

#### **4. How are you doing?**

- Have your board regularly monitor progress against the action plan and goals agreed and suggest plan updates as needed.
- Each years review the plan and priorities to see if they would like any revisions.
- Make sure club decisions support the goals of the plan
- Allot enough resources to achieve the plan.
- Commit to transparency and communication so all members feel involved - hold regular Club Assemblies to share progress and revisions as needed.

List steps that your club should take to track its progress and share such with members including a timeline — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.

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# CREATING YOUR CLUB LEADERSHIP PLAN

Use this worksheet to start developing a plan that works for your club.  
Add strategies to meet your club's needs.

**Rotary Club of**

**Rotary Year**

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- Our club has a strategic plan that reflects what we want our club to be like in three to five years
  - Our club has entered its annual goals in Rotary Club Central
  - Our club has a communication plan for members and for the community:
    - We use social media tools like Facebook
    - Our club website is active and current
    - Other:
    - Other:
    - Other:
  - Our club's bylaws are current and reflect our structure and practices
  - Our club is engaging. We use the following meeting formats:
    - Traditional meetings: /month
    - Online meetings: /month
    - Service meetings: /month
    - Social events: /month
    - Other:
    - Other:
  - Our club ensures continuity:
    - Members prepare for leadership positions
    - Past, present, and future leaders participate in making decisions
  - Our club has strategies for keeping all members active in the club:
    - Members are involved in projects
    - New members are assigned mentors
  - Our club has fun social activities planned for the year:
    - Networking and socializing events
    - Events that welcome families
  - Our club has committees that support our needs:
    - Administration
    - Membership
    - Public relations
    - Rotary Foundation
    - Service
    - Other:
    - Other:
    - Other:
  - Our club has a comprehensive training plan that includes:
    - District conference
    - District membership seminar
    - District public image seminar
    - District Rotary Foundation seminar
    - New member orientation
    - Online courses on the Learning Center
      - Club Officers Basics course
      - Membership online course
    - Presidents-elect training seminar



## Program

9.15am	<i>REGISTRATION/TEA/COFFEE</i>
9.30am	<p>Introduction and housekeeping</p> <p>Welcome</p> <p>Introduction of Leadership Team (AGs, TLs, DMC Members)</p> <p>District 9500 strategic plan overview</p> <p>Presentation of District financial and demographic situation</p> <p>RI PEs theme and priorities</p>
10.30am	New District – vision, plans and engagement opportunities
10:45am	<i>MORNING TEA</i>
11.00am	Club Development Survey results and priorities identified at Presidents Elect Training Seminar (PETS)
11:15am	<p>In each of the three priorities, how can we collaborate to make a real difference at club level?</p> <p>[Group Discussion - attendees in groups with their AG, DMC members and Team Leaders]</p>
12.15am	<p>Essential skills for all - making use of Club Runner and My Rotary (demonstration of the how and the benefits).</p> <p>Using Zoom to support collaboration.</p>
1.00pm	<i>LUNCH</i>
1.30pm	District 9500 Business Meeting
1.45pm	<p>Risk assessment and insurance</p> <p>Protection of children &amp; vulnerable people</p> <p>The Rotary Foundation</p>
2:45pm	<i>AFTERNOON TEA</i>
3.00pm	<p>Breakout sessions (your choice)</p> <ol style="list-style-type: none"> <li>1) Information for Secretaries/Admin</li> <li>2) Information for Treasurers</li> <li>3) Information for Presidents</li> <li>4) Information for Community and Vocational</li> <li>5) Foundation and Grants/International</li> <li>6) Youth programs</li> </ol>
3.45pm	Summary

4:00pm	Close & Evaluation (followed by drinks & nibbles)
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