"The Future is Ours" in Kansas City

Photo: Visit KC

**Zones 25B and 29 Institute
September 24-29, 2019
Overland Park Sheraton Hotel, Overland Park, KS**

**District Trainers Training
September 26-27, 2019**

District Trainer Tab Index

DISTRICT TRAINER ZONE LEADERSHIP EDUCATION PROGRAM

Facilitators: **Gretchen Bren, Zone 29, District 5650**

PDG Ed Jacobson, Zone 29, District 5610

Wednesday, September 25, 2019		
8:00 AM – 8:00 PM	Registration	Lobby Pillar
5:30 PM – 6:30 PM	All Rotarian Reception	Cottonwood Pre-function Area (Cash Bar)
6:30 PM – 8:30 PM	Leadership Development and District Trainers Friendship Dinner Host: PDG Dean Ryerson	Hawthorne 1 & 2

Thursday, September 26, 2019		
8:00 AM – 8:00 PM	Registration	Lobby Pillar
8:00 AM – 8:30 AM	Opening Session: **The Future is Ours** Speaker: RI Director Larry Dimmitt	Cottonwood 2 & 3
8:30 AM – 9:00 AM	Transition to Training Room	
9:00 AM – 10:15 AM	**What first time trainers need to know – review of resources**	Linden Room
10:15 AM – 10:30 AM	Break	
10:30 AM – 11:45 AM	**Welcome/ Understand Your Role**	Linden Room
11:45 AM – 12:15 PM	Transition to Lunch	

Thursday, September 26, 2019

12:15 PM – 1:15 PM	Foundation Lunch	Cottonwood 2 & 3
1:30 PM – 2:15 PM	**Rotary Online Learning**	Linden Room
2:15 PM – 2:45 PM	**Webinars & Teleconferences**	
2:45 PM – 3:15 PM	**Understand Rotary Training Events**	
3:15 PM – 3:30 PM	Break	
3:30 PM – 4:15 PM	**Plan your training event**	Linden Room
4:15 PM – 4:45 PM	**Best Practices for events/Prepare the Trainers/ice breakers with purpose**	
4:45 PM – 5:00 PM	**Wrap of/review**	
5:30 PM – 6:30 PM	Major Donor Reception	Leatherwood 1
5:30 PM – 6:30 PM	Paul Harris Society Reception	Leatherwood 2
5:30 PM – 6:30 PM	All Rotarian Reception	Cottonwood Pre-function Area (Cash Bar)
6:30 PM – 9:30 PM	Class Reunion Dinner	Cottonwood 1, 2, 3

Friday, September 27, 2019		
8:00 AM – 8:00 PM	Registration	Lobby Pillar
8:00 AM – 8:15 AM	Gathering/Warm up Questions	Linden Room
8:15 AM – 9:00 AM	Plan your curriculum	Linden Room
9:00 AM – 9:45 AM	Best Practices for Adult learners	
9:45 AM – 10:00 AM	Wrap up/Review/Evaluations	
10:00 AM – 10:30 AM	Break	
10:30 AM – 11:30 AM	*District Specific Caucus	See below
11:30 AM – 12:30 PM	Transition to All Club Luncheon	

* District Caucus Rooms:

Hawthorne 2	Leatherwood 1	Leatherwood 2	Redbud
5790	5580	6220	5610
5810	5650	6250	5630
5840	5950	6270	5680
5870	5960	6420	5710
5890	5970	6440	
5910	6000	6450	
5930			

ROTARY PAIRED ZONES 25 AND 29

Rotary Zone 29

● 5580, 5610, 5630, 5650, 5670, 5690, 5710, 5950, 5960, 5970, 6000, 6220, 6250, 6270, 6420, 6440, 6450

Rotary Zone 25

Ⓑ 5790, 5810, 5840, 5870, 5890, 5910, 5930

Ⓐ 4060, 4100, 4110, 4130, 4140, 4170, 4185, 4195, 4240, 4250, 4271, 4281, 4370, 4380

USA: NORTH DAKOTA
USA: MICHIGAN
USA: MINNESOTA
USA: SOUTH DAKOTA
USA: WISCONSIN
USA: IOWA
USA: ILLINOIS
USA: NEBRASKA
USA: KANSAS
USA: OKLAHOMA
USA: TEXAS
MEXICO
DOMINICAN REPUBLIC
BELIZE
HONDURAS
GUATEMALA
EL SALVADOR
NICARAGUA
COSTA RICA
VENEZUELA
PANAMA
COLOMBIA

PDG Ed Jacobson served as Membership Chair, Assistant Governor, District Trainer, and Foundation Raffle Chair prior to serving as District 5610 Governor in 2016-17. He is a Rotary Leadership Institute facilitator who also served his club as secretary, president, and, for ten years, executive secretary.

Jacobson grew up in Oregon and graduated from Oregon State University. His Rotary journey started when he joined the largest Rotary club in Eugene, OR. He served that club as chairman of ways and means.

He is a retired non-profit executive and professional fund-raising consultant who served clients from coast-to-coast. He served as Press Secretary for an Oregon Congressman, was a country club manager, and was manager of the 1975 USA Men's Volleyball Team. He coached youth, high school, and college volleyball.

He met his wife Sandy while on a fund-raising consulting job in Pierre, SD. They married in the fall of 1992. He and Sandy, a retired hospital pharmacy director, are avid golfers. They are Major Donors to The Rotary Foundation.

PDG Ed Jacobson
District 5610

Gretchen Bren has been a member of the Training Team for District 5650 for the past four years, and a co-facilitator at Zone 28-29 for District Trainers the past two years. She has recently changed Rotary Clubs from a large club (Omaha Downtown) to a small club (Omaha Rotary Night). Gretchen is very involved with District projects including being a facilitator for Rotary Leadership Institute (RLI) and for the District Visioning Program. She is married to Past District Governor (2016-17) Gary Bren with whom she celebrates 30 years of marriage in August. No children, but they have just adopted twin kittens in May.

Gretchen currently works for Turner Technology doing training and project management. She is also a Microsoft Certified Application Specialist Master Instructor and Microsoft Certified Professional.

Gretchen Bren
District 5650

Another area that Gretchen is committed to is Polio Eradication.
She has been the District 5650 Polio Plus chair for the past 6 years and has been on 15 polio immunization trips to Kaduna, Nigeria, India, Mali, Chad, Madagascar and most recently Pakistan. She is currently the chair for the Polio Survivors and Associates Rotarian Action Group (www.rotarypoliosurvivors.org). In 2012, Gretchen received the Citation for Meritorious Service and in 2014 received the International Service Award for a Polio-Free World from the Trustees of the Rotary Foundation.

FIRST TIME TRAINERS

KNOW YOUR ONLINE RESOURCES
https://my.rotary.org/en/learning-reference/learn-role/trainers
To keep up to date on the latest training information, sign up for the Rotary Training Talk newsletter.

Lead Your District: Training
Train the Trainer Seminar Leader's Guide
Learning Center Course Catalog

KNOW YOUR EVENTS
See Rotary.org website – Trainers link above to download standard event information
See page 4-5 PLUS
One Rotary Summit
Rotary Leadership Institute
Visioning

NEW: ROTARY STRATEGIC PRIORITIES AND VISION STATEMENT
"Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.

ROTARY'S VISION STATEMENT

Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.

To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the next five years.

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

INCREASE OUR ABILITY TO ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

ROTARY'S CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:

FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant, but thriving.

Rotary

JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION rotary.org/strategicplan

CREATING A TEAM :

Instead of "Training" consider - LEAD team (Leadership, Education, And Development)

- Who makes up your team?
- Succession Planning
- Qualifications
- Responsibilities
- SMART goals (Specific, Measurable, Achievable, Relevant, Timebound)
- Additional support needed
- Communication Plan

What are your responsibilities? What do you need to know about

Taken from District 5440 Training Plan

- Assemblies and District Conference
- Club Visioning / Strategic Planning
- ClubRunner (or DACdb)
- Membership
- President Elect Training
- Public Relations/Public Image
- Rotary Club Central
- Rotary Leadership Institute
- The Rotary Foundation

What else gets thrown at you?

- Event logistics
- Room setup
- Budgeting
- Catering
- Room teardown
- Printing
- Registration

We need to remember: WHO are our actual customers

TAB 3

UNDERSTAND YOUR ROLE

DISTRICT TRAINING COMMITTEE ROLES WORKSHEET

Here is a list of responsibilities of the district training committee. Discuss in a small group how you will delegate responsibilities to your district training committee members. Use the questions below to guide your conversation.

Task	Who's responsible?
Develop the training program	District trainer and convener
Assess training needs	
Coordinate logistics	
Manage event budgets	
Prepare facilitators	
Prepare and distribute materials	
Manage registration	
Create and analyze evaluation forms	
Support club trainers	
Other:	

What is the role of the district training committee in your district?

If you don't have a formal committee to assist you, who else can support you in coordinating district training events?

What other responsibilities will you assign to your committee?

TAB 4

UNDERSTAND ROTARY TRAINING EVENTS

Institute 2019

ROTARY TRAINING EVENTS CONVENED BY THE DISTRICT

Role-Based Training Events Convened by the Governor-elect

Training Event and Time of Year	Audience and Purpose	Organizer	Links for:
District Team Training Seminar February	Assistant governors and district committee leaders learn about their roles and set goals with the district leadership team.	District training committee	Trainers Assistant governors Committees
Presidents-elect Training Seminar (PETS) February or March	Club presidents-elect learn about their role and work with assistant governors to set goals.	District training committee	Trainers Presidents
District Training Assembly March, April, or May (after PETS)	Club presidents-elect develop leadership skills; other incoming club leaders learn about their roles; together, club leaders set goals.	District training committee	Trainers Presidents Secretaries Treasurers Committees

Topic-Based Training Events Convened by the Governor

Training Event and Time of Year	Audience and Purpose	Organizer	Links for:
District Rotary Foundation Seminar Determined by district	Club Rotary Foundation committee chairs and interested Rotarians learn about the Foundation.	District Rotary Foundation committee, district training committee	Trainers Club Rotary Foundation committee chairs

Training Event and Time of Year	Audience and Purpose	Organizer	Links for:
District Membership Seminar Determined by district	Club presidents, club membership committee chairs, interested Rotarians, and district leaders learn about membership.	District membership committee	[Trainers](#) [Participants](#)
District Public Image Seminar Determined by district	Club and district leaders and interested members learn how to enhance Rotary's public image.	District training committee	Trainers (available July 2016) Participants' materials developed by club or district
Grant Management Seminar Determined by district	Club presidents-elect (or appointees) learn how to manage Rotary grants.	District Rotary Foundation committee, district training committee	[Trainers](#) [Participants](#)
District Leadership Seminar Immediately before or after the district conference	Interested members with club leadership experience continue to develop their leadership skills.	District training committee	[Trainers](#) Participants' materials developed by club or district
Rotaract District Leadership Training After club open elections and before 30 June	Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and non-Rotarians learn about Rotaract.	District Rotaract representative	[Participants](#)

Tell us about the Training Events in your district

	Live Event	Webinar	Do not hold
District Team Training	4	1	4
PETS	9	1	-
District Training Assembly	3	2	4
Foundation Seminar	7	-	1
Membership Seminar	5	-	3
Public Image Seminar	4	1	3
Grant Management Seminar	8	-	-
District Leadership Semimar	5	-	3
Rotaract Leadership Seminar	1	-	7
One Rotary Summit	5	1	3
PrePETs	7	-	1
Rotary Leadership Institute (RLI)	3	-	5
Vision Faciliation/Club Visioning	5	-	3

What other events does your district hold not listed above?

RESPONSES

Pass the Gavel Event. The event varies by year from casual to elegant. Usually current, future, and past district officials attend. This year all of the PEs and Ps will be invited for the largest gavel passing ever.

Monthly Round Table on Saturday morning, from 10 - 12. We host assistant governor training prior to round table as well, 8 am till 9:30 am.

Leadership Development workshop - purpose is to aid each individual leader in formulation of their own personal rotary story and how their story impacts foundation giving, Membership, and the public image of Rotary ; identify their circle of influence and how their passion connects those individuals to opportunities which make them a leader of influence

We are entering our fourth year as a recipient of a Transformation Grant from the Kansas Leadership Center providing Globally recognized leadership training to 40 to 60 members at no charge.

District Midterm held in January of each year. General Rotary information and update on Rotary activities and upcoming plans. not considered a "Training sessions"

TAB 5

PLAN YOUR TRAINING EVENT

Read each scenario and answer the questions that follow.

1. It's July, and you are starting to plan for PETS in March. Your district has 80 clubs, and they are spread out geographically. The one-and-a-half-day seminar will have eight sessions. You have thought about adding an assistant governor training, which would happen concurrently.

    How will you adjust your budget to account for the assistant governors?

    How will you promote this training to assistant governors?

2. You have identified your learning objectives and outlined your curriculum, and now you are choosing between several venues. You would like to have Wi-Fi so you can show participants how to use My Rotary and Rotary Club Central, but providing Wi-Fi in all the meeting rooms would be cost prohibitive.

    How will you adjust your agenda?

    What other training methods could you consider for covering this topic?

3. You are beginning to plan for the district training assembly. You anticipate a large training event with a variety of participants, including club presidents, secretaries, treasurers, and committee chairs. At this one-day training, participants will split into eight groups according to their role for the first three sessions. After that, all participants will come together in a larger group session.

    What pre-event assignment could you give to participants to ensure they are familiar with the topics you will cover?

    What kinds of specialized post-event training could you provide to each group?

EVENT PLANNING SAMPLE

Name of event – what	
Date of event	
Time of event	
Location of event	
Event coordinator/contact person	
Target audience – who	
Attendance Count – How Many? *How many will be attending?* *Expected cost per person to charge?* *Comp'd attendees (special speakers, help, honor guard, etc.)*	
Description of event – what	
Additional Considerations	
Room Layout	
AV Equipment needed? **Wi fi? needed?**	
Food *(See section on catering)*	
Handouts	
Misc Supplies	

EVENT PLANNING COMMITTEE

Primary Responsible	
Final decision maker	
Cost approval	
Venue Contact *Who on the committee will be the main contact for the venue personnel*	
Catering Contact *Who on the committee will arrange the caterer?* *Who should be the contact on the day of event?*	

Rotary
Institute 2019

Other Committee members & responsibilities	
Facilitators	

Estimated Revenue	Actual	Prior Year
Paid Registration		
Comp'd Registration		
Attendance		
Registration Fees		
Budget from District (per capita or per club)		
Additional Sponsorships (corporate or business)		
Other		
TOTAL ESTIMATED REVENUE		

Anticipated Expenses	Costs per person	Event Cost	Extended Cost	Prior Year
Facilities Rental				
Food (include gratuities and taxes)				
Handouts				
Publicity (postage, printing, supplies)				
Registration costs				
Banners / Decorations				
Speaker Fees / Honorariums				
AV				
Technical Support				
Travel				
Other				
TOTAL ESTIMATED EXPENSES				

DAY OF

Room name/Location:	

General Setup

- ☐ Is the room setup correctly?
- ☐ Are there enough chairs for participants?
- ☐ Has the agenda been placed on the wall?
- ☐ Is the meeting or session title placed in a prominent position?
- ☐ Is water available for participants and training leader?
- ☐ Are electrical cords out of the way or taped to avoid accidents?

Training Materials

- ☐ Are flip charts on easels?
- ☐ Are flip charts visible to all participants?
- ☐ Are markers available for flip charts?
- ☐ Are sight lines unobstructed for flip charts and screens?
- ☐ Are handouts ready?
- ☐ Are tent cards placed?
- ☐ Is a clock/watch available?

A/V

- ☐ Is the projector focused?
- ☐ Computer working?
- ☐ Presentation/slide fil cued?
- ☐ Sound check from computer?
- ☐ Remote to forward slides available?
- ☐ Microphone on and at the appropriate volume?
- ☐ Who to call if problems: ___

After the meeting

- ☐ Evaluation forms returned
- ☐ Room cleaned up

THE FIRST STEPS IN YOUR EVENT CHECKLIST:
4-6 MONTHS AHEAD OF EVENT

The further in advance you can start planning, the better — but I've noticed that most organizations we work with start planning their big events like galas and fundraisers about 6 months in advance. Here's what you need to do to get started.

- **Establish your event goals and objectives.** Did you want to raise money or awareness? How many attendees are you hoping to get? Establishing it upfront will make it easier to gauge the success of your event.

- **Benefit** – What will the guests/delegates gain from participating?

- **Select the date.** And make sure it doesn't conflict with any other events taking place in your area, or any major holidays.

- **Identify venue and negotiate details.** What kind of insurance does the venue require? Can you serve alcohol? Determine the requirements before committing.

- **Develop an event master plan.** Ironing out every detail will help ensure you don't miss a thing.

- **Get cost estimates.** Some costs you might need to consider are:

  - Room rental
  - Food and beverages
  - Equipment
  - Speaker fees
  - Travel for staff
  - Insurance

- **Create an event budget.** Based on the costs above, you'll be able to determine how much your event will cost — and if you'll need to reduce any of them!

- **Recruit an event committee.** This includes selecting an event manager or chair, and establishing sub-committee chairs. Define who will be the decision maker(s).

- **Create and launch publicity plan.** This includes ensuring staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design & printing coordination, signage, online /social media, etc.

- **Identify and confirm speakers/presenters/entertainers.** Who will you need on hand during the event?

- **Identify and contact sponsors/partners.**

- **Determine registration process.** There are a variety of different software tools that can help streamline the event process.

o   Ensure registration forms are accessible and allow space for preferred pronouns and preferred names.

3-4 MONTHS AHEAD OF EVENT: STARTING TO RAMP UP

Now that you have some of the foundational parts of your event figured out, it's time to start executing on the rest. If your event is coming up in a few months, you'll need to start communicating with all the stakeholders outside your organization and continue coordinating with them. Some points you'll need to remember include:

- **Build out required documents for your team.**

- **Speaker/presenter/entertainer liaison:**

  o   Finalize presentation/speech topics

  o   Get bio information, photo

  o   Travel & accommodation arrangements

  o   Have contracts signed if appropriate

  o   Ask speakers to start promoting and sharing it with their network

- **Financial/Administration:**

  o   Determine registration fees

  o   Set up and enable online registration

  o   Finalize sponsor levels and amounts

  o   Identify items to be underwritten and accounting tracking details

- **Venue and logistics planning:**

  o   Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc.

  o   Review security needs/plan for the event with venue manager

  o   Investigate need for any special permits, licenses, insurance, etc.

  o   Assess accessibility requirements (e.g. all-gender restrooms, wheelchair accessibility, etc).

  o   Communicate accessibility requirements to staff.

- **Follow publicity plan:**

  o   Develop draft program

o Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)

o Develop publicity pieces -- *e.g., newsletter articles and/or ads, radio spots, print blog posts articles for submission to other publications and/or ads, etc.*

o Request logos from corporate sponsors for online and printed materials

o Develop and produce invitations, programs, posters, tickets, etc.

o Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials (e.g., speaker info, photos, etc.)

o Create event page on your website

o Enable/create email event notifications

o Create a Facebook event page

o Develop a promo video and post on YouTube and your Facebook page

o Register your event on a variety of online event calendars

o Create some buzz on your blog or member forums

o Determine VIPs and create invitation & tracking document (e.g., spreadsheet)

o Order any desired event swag

1-2 MONTHS PRIOR TO EVENT: KEEP ON GOING

You're getting there! At this point, you're probably spending more and more time focusing on the event and finalizing some details.

- **Choose and confirm catering and menus**

- **Send reminders to your contact list regarding registration and participation.**

- **Reach out again to presenters/speakers regarding:**

  o Confirming travel and accommodation details

  o Request copy of speeches and/or presentations

  o Any other technical requirements (projector, mic, sound, light)

- **Sponsorship finalization:**

  o Follow up to confirm sponsorships and underwriting

  o Get any promotional materials you'll be sharing at the event

  o Ask sponsors to share event on their promotional channels

- **Continue executing on your publicity plan:**
  - Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc.
  - Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.
  - Post more details about your event on social media
- **Finalize and proofread printed materials.**
- **Hold a pre-event meeting** with your venue contact and go through the program.
- **Review registration list** with committee. *Remind them to CALL REQUIRED ATTENDEES not just send emails.*

1 WEEK PRIOR TO THE EVENT: THE HOME STRETCH

You're getting so close! By this point, the majority of the event details should be confirmed and all that's left will be final touches, such as:

- **Have all committee chairs meet and confirm all details against Master Plan.** You should also ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc). Backup plans for weather or other issues
- **Finalize event script.**
  - Assign practice sessions for anyone who has a speaking slot.
- **Brief any/all hosts, greeters, volunteers about their event duties and timelines.**
- **Finalize your seating plan.**
  - Ensure it includes wheelchair-accessible areas and has clear paths through the venue.
- **Provide final registration numbers to caterer.**
- **Make print and online copies of any speeches, videos, and presentations.**
- **Do a final registration check, including name badges & registration list.** Depending on when your registration closes, this may not be possible until a few days in advance, but try to finish it as early as possible.
- **Confirm details with media attendees.**

1 DAY BEFORE THE EVENT: ALMOST THERE

Here are a few last-minute details you might want to remember:

- **Confirm media attendance.**
- **Ensure all signage is in place** — both around the venue and any other areas in which it's needed.
- **Ensure registration and media tables are prepared** and stocked with necessary items (such as blank name badges, paper, pens, tape, stapler, etc.)
  - o Ensure there are enough outlets. If not, consider bringing power bars for attendees and your team.
- **Ensure all promo items, gifts, plaques, trophies, etc. are on-site.**
- **Ensure all A/V equipment is set up and working properly.**
- **Get a good night's sleep!** You'll need the rest before the exciting day to come.

EVENT DAY: YOUR TIME TO SHINE

The big day has arrived! Here's what you have to remember:

- **Take a few deep breaths — you got this!**
- **Ensure you have copies of all instructions**, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- **Check in with each Committee Chair** to ensure their team is on track.
  - o Also check in with catering and any sponsor teams that are attending.
- **Assist sponsors, speakers, and other teams as needed.**
- **Greet new attendees.**

IMMEDIATELY FOLLOWING EVENT: POST-EVENT FOLLOW-UP

Here are some of the activities you might consider once the event is over:

- **Check in with venue.** Ensure nothing important was left behind.
- **Financial status:**

- o Gather all receipts and documentation, final registration data, etc. and

- o Update budget

- **Send thank-you's and acknowledgement letters to:**

  - o Sponsors
  - o Volunteers
  - o Donors
  - o Speakers/presenters

  In your thank-you notes, be sure to remind the recipients of the event's success – and how they contributed (e.g., dollars raised, awareness - number of participants, etc.

- **Post-event publicity:**

  - o Send out an email to your subscriber base with highlights from the event

  - o Make a publicity reel video to share how it went (and as a bonus, you can use it as publicity next year!)

  - o Share highlights on social media

  - o Update website page to reflect that it's a past event.

- **Conduct a post-event survey**. Learn what people enjoyed about your event and where you have room to improve.

- **Conduct a team debrief to learn their thoughts.**

- **Conduct a thorough evaluation of the event.** What went well and what could you do better next time?

(checklist from https://www.wildapricot.com/articles/event-checklist with some edits)

TAB 6

PLAN YOUR CURRICULUM

DRAFT

PLAN YOUR CURRICULUM

Activity

1

ADAPTING THE ROTARY TRAINING MATERIALS

- Assess participants' needs
- Use past evaluations, surveys, etc.
- Effective room setup

2

DRAFT

DISTRICT TRAINING – ZONE MATERIALS

DAY 1: District Trainer Seminar

08:00-09:00	Breakfast, registration, and opening general session
09:00-10:00	Understand your role (idea exchange)
10:00-10:05	BREAK
10:05-11:05	Understand Rotary training events (panel)
11:10-12:10	Plan your curriculum (workshop)
12:10-13:30	LUNCH
13:30-14:30	Plan your training event (idea exchange)
14:30-14:35	BREAK
14:35-15:35	Prepare the trainers (idea exchange)
15:40-16:10	Closing general session

DAY 2: Train the Trainer Event (optional)

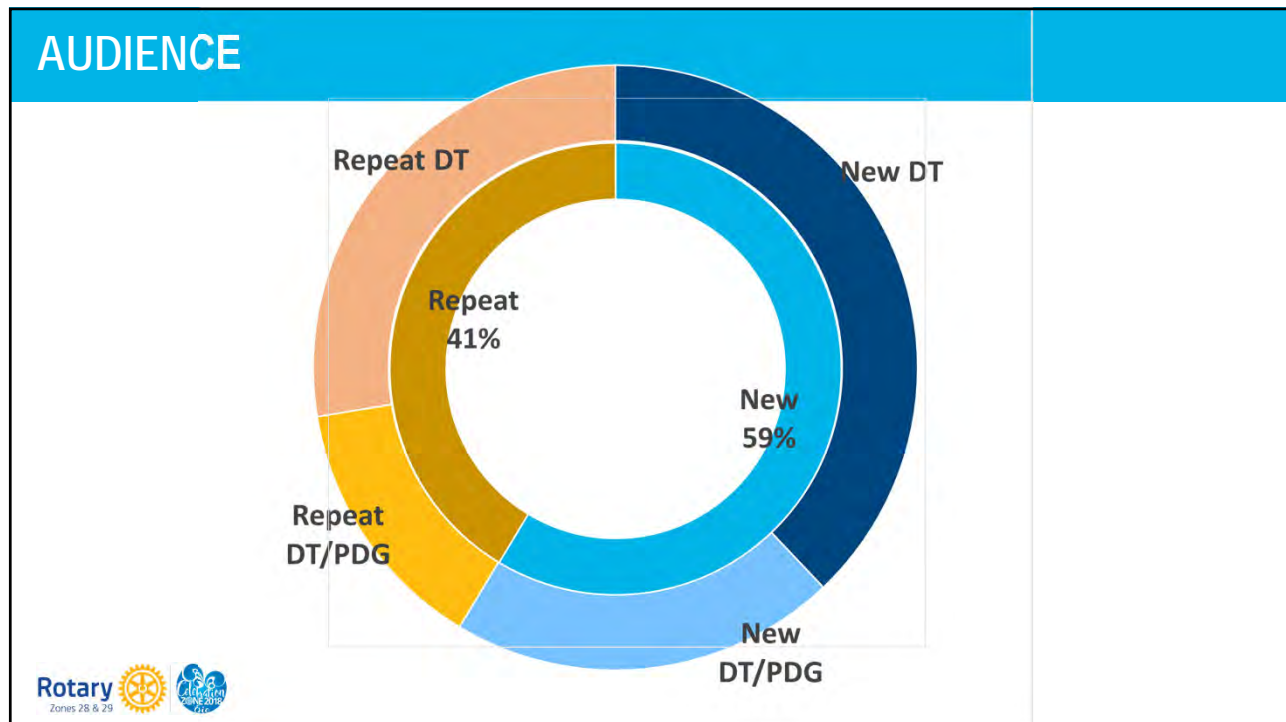|	
08:30-09:15	Rotary training events (district calendar)
09:15-09:30	BREAK
09:30-11:30	Facilitator practice sessions
11:30-12:30	LUNCH
12:30-13:00	Closing general session

3

POST EVENT SURVEY – LAST YEAR'S RESULTS

- Wish we had covered
  - Half day intro session for those who are new
  - Checklists
  - Resources

4

AUDIENCE

5

NEEDS ASSESSMENT SURVEY – HOW FAMILIAR WITH TOPIC

Subject	Extremely Familiar	Very Familiar	Somewhat Familiar	Not so Familiar	Not at all
Your Role as District Trainer	5	4	4	0	2
Understanding Rotary training events	2	10	3	0	0
Planning your curriculum	0	7	7	1	0
Event Planning	5	7	3	0	0
Preparing the trainers	1	5	6	1	2
Troubleshooting – what to do when something goes wrong	2	4	4	4	1

6

DRAFT

NEEDS ASSESSMENT – HOW IMPORTANT

Subject	Must Have	Good	Meh	Do not include
Your Role as District Trainer	14	1	0	0
Understanding Rotary training events	13	1	0	0
Planning your curriculum	11	4	0	0
Event Planning	8	4	3	0
Preparing the trainers	12	3	0	0
Troubleshooting – what to do when something goes wrong	11	2	2	0

Rotary Zones 28 & 29

7

NEEDS ASSESSMENT - OTHER TOPICS TO COVER

- Webinars and webinar best practices
- Best practices for doing Leadership training webinars
- Common pitfalls and how to avoid
- District Budget Preparation
- Essential & Optional district committees

Rotary Zones 28 & 29

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DRAFT

OTHER CONSTRAINTS

- Visitors:
    - RPICs, RID/RIDE
- Requested Visitors:
    - Club & District Support (extra time!)
    - RIPE Dan Maloney (maybe?)
- New Features:
    - Revamped Rotary Training Center
- Facility
    - Will there be wi-fi? Will there be a projector?

Rotary Zones 28 & 29

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SO, HOW DID WE DO?

What would you do differently?

Rotary Zones 28 & 29

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Consider how you would modify the agenda for the Zone District Trainer Event based on the results of the needs assessments below.

Audience:

- 28 District Trainers possible / 21 registrations
- 12 repeats
    - 3 PDGs that were previous DT
- 11 New DT (not here last year/ not PDG)
- 6 PDGs that were not DT last year

Subject	Extremely Familiar	Very Familiar	Somewhat Familiar	Not so Familiar	Not at all	Must Have	Good	Meh	Do not include	Suggested duration
Your Role as District Trainer	5	4	4	0	2	14	1	0	0	60 min
Understanding Rotary training events	2	10	3	0	0	13	1	0	0	60 min
Planning your curriculum	0	7	7	1	0	11	4	0	0	60 min
Event Planning/Plan your training event	5	7	3	0	0	8	4	3	0	60 min
Preparing the trainers	1	5	6	1	2	12	3	0	0	60 min
Troubleshooting	2	4	4	4	1	11	2	2	0	N/A
Rotary Training Calendar										45 min
Facilitator practice sessions										120 min

BLANK SCHEDULE WITH CONSTRAINTS

Thursday	
8:00	
8:15	
8:30	
8:45	
9:00	
9:15	
9:30	
9:45	
10:00	BREAK
10:15	
10:30	
10:45	
11:00	
11:15	
11:30	
11:45	
Noon	LUNCH
1:00	Rob Knuepfer Stephanie Urchick
1:15	RPIC's
1:30	RI Club and District Support
1:45	
2:00	
2:15	
2:30	BREAK
2:45	
3:00	
3:15	
3:30	
3:45	
4:00	
4:15	
4:30	END DAY 1
4:45	
5:00	
6:00	Dinner

Friday	
8:00	
8:15	
8:30	RIPE Mark Malone - maybe
8:45	
9:00	
9:15	
9:30	
9:45	
10:00	BREAK
10:15	
10:30	
10:45	
11:00	Dist Team Mtgs
11:15	
11:30	
11:45	
Noon	LUNCH

PREPARE THE TRAINERS

Key learning points from "Train the Trainers"

ADULTS AND FACILITATED LEARNING

- Adult learners need to know how the information presented applies to their lives. They will integrate new ideas with their existing knowledge.

- Adults have different learning styles (visual, auditory, or tactile). Effective facilitators offer activities that support a variety of styles.

- Adults learn best by doing. Interactive activities that reinforce the material help them better retain the information.

- Effective facilitators:
  - Set classroom expectations early
  - Provide a positive and safe learning environment
  - Maintain a "learner-centered" approach
  - Keep participants focused and on schedule
  - Use a variety of training methods

- Facilitators should note how participants respond to their nonverbal cues. Nonverbal communication accounts for more than 70 percent of a message's effectiveness.

- Open-ended questions can start a discussion. Clarifying questions can help delve deeper into a subject ("Can you explain more?") or guide a conversation back to the topic.

- A summary of participants' viewpoints can serve as a good conclusion.

MANAGING THE CLASSROOM

- Strategies for managing time during the session include:
  - Starting on time
  - Giving clear instructions for activities
  - Deciding how to address additional questions or topics not mentioned during the session (e.g., by creating a discussion "parking lot" or setting up a post-session discussion group)
- Facilitators should arrive at least 30 minutes before the training to make sure their room is ready. They can use the trainer preparation checklist to assess the classroom and materials.
- Outlining guidelines for behavior from the start, and otherwise setting the tone early, can help create a safe, inviting learning environment.
- Asking clarifying questions, using conflict constructively, and summarizing the conversation before moving forward can help with managing the discussion.
- Nonverbal communication accounts for more than 70 percent of a message's effectiveness. Nonverbal elements include:
  - Voice
  - Facial expressions
  - Gestures
  - Eye contact
  - Body movement/use of space
- Facilitators should respond to nonverbal cues from participants to keep them engaged.
- Difficult participants can present a challenge for facilitators. Here are some common characteristics and strategies that may help:
  - **Controlling** — Some participants may dominate the conversation. Tell them their comments are valuable, but you'd like to hear from others in the room.
  - **Quiet** — Some participants may not talk in the larger group. Switch to a small-group activity to make them feel comfortable.
  - **Off-topic** — Some participants may misunderstand the topic or change the subject. Ask them how their response fits into the discussion.
  - **Challenging** — Some participants may challenge facilitators. When they are experts on the topic, acknowledge their comments or have them help with the session.

INTERACTIVE TRAINING

- Interactive training is the best method for ensuring adults learn and retain information.
- An icebreaker activity is a good way to start a training session because it allows participants to get to know one another before delving into the topic.
- Interactive learning activities include:
  - Case study
  - Pair and share
  - Role-playing
  - Roundtable discussion
  - Speedmeet
  - Workshop
  - Question and answer
  - Brainstorm
- Interactive learning activities can:
  - Energize participants after lunch or long periods of sitting
  - Engage participants when energy is low
  - Give participants a break during a complex discussion

ELEMENTS OF INSTRUCTION WORKSHEET

Review your training session guide, and identify where it uses the following elements of instructional design. In the "In Your Session" column below, record how your session guide applies each element.

Element	Sample Applications	In Your Session
1. Gain participants' attention.	*Use an icebreaker, show a video, or incorporate another activity to begin training.*	
2. Inform participants of training objectives.	*Set expectations, and explain why training is important.*	
3. Provide context for learning the topic.	*Offer real-world stories and examples.* *Review previous experiences with the topic.*	
4. Offer variety to appeal to all participants.	*Accommodate several learning styles while delivering information.* *Use different methods to reinforce learning.*	
5. Ensure participants are involved in learning.	*Enhance and apply learning by using activities such as role-playing, workshops, and idea exchanges.*	
6. Provide a positive, collaborative learning environment.	*Work with the group to establish rules for participation.* *Include activities that allow participants to interact with their peers.*	
7. Enhance information retention and transfer.	*Provide opportunities to practice and retain new skills.* *Develop an action plan to follow after the training.*	

FACILITATOR COACHING FORM

Facilitator Name: _____ Date: _____

PREPARATION
- ❑ Organized materials
- ❑ Prepared flip charts

FACILITATION
- ❑ Delivered an effective introduction
- ❑ Demonstrated facilitation techniques
- ❑ Used flip chart skillfully
- ❑ Used workbook
- ❑ Used an appropriate pace
- ❑ Stayed focused on the topic
- ❑ Used appropriate nonverbal skills
- ❑ Spoke clearly

LEARNING ENVIRONMENT
- ❑ Made learning interesting
- ❑ Used relevant examples
- ❑ Addressed disruptive behaviors
- ❑ Handled incorrect answers
- ❑ Reinforced positive behavior

CREDIBILITY
- ❑ Demonstrated understanding of and comfort with the content
- ❑ Displayed confidence
- ❑ Maintained composure

CONTENT AND PROCESS
- ❑ Organized the presentation effectively
- ❑ Summarized key learning points clearly
- ❑ Listened well
- ❑ Checked for understanding
- ❑ Made smooth transitions
- ❑ Managed group effectively

UNEXPECTED CHALLENGES
- ❑ Handled unexpected events effectively
- ❑ Managed difficult participants
- ❑ Displayed flexibility
- ❑ Managed time and topics

LEARNING OUTCOMES
- ❑ Reviewed learning objectives
- ❑ Explained why the topic is important

PARTICIPATION
- ❑ Made eye contact
- ❑ Appeared relaxed and pleasant
- ❑ Encouraged everyone to share ideas
- ❑ Used encouraging body language
- ❑ Provided reinforcement for participation
- ❑ Exhibited nonjudgmental behavior

Strengths	Opportunities	General Comments

TAB 8

WEBINARS AND TELECONFERENCES

Features	Zoom		GoToMeeting		GoToWebinar	WebEx	
	Basic	Pro	Starter	Pro2	Starter3	Starter4	Plus
Monthly price	free	$15.00	$14.00	$29.00	$89.00	$13.50	$17.95
# of participants	100	100	10	150	100	50	100
video	yes	yes			yes	yes	yes
Recording	local only	yes		yes	yes	yes	yes
screen share	yes	yes	yes	yes	yes	yes	yes
raise hand	yes	yes			yes		
whiteboard	yes	yes	no	yes	no	yes	yes
polls/surveys					yes		
reporting		yes			yes		
Telephone call-in	yes	yes	Yes	yes	yes	yes	yes

WEBINAR BEST PRACTICES

Webinars (short for "web-based seminars") allow people in different locations to meet using the Internet. Webinars can save time and money. Trainers can use webinars to present new information, poll participants, and edit documents in real time. Participants can pose questions, share ideas on screen, and chat.

Webinars range from small, highly interactive meetings to large presentations with many participants.

- When to use a webinar
- Preparation
- Audience
- Visual aids
- Presentation
- Evaluation and debrief

WHEN TO USE A WEBINAR

In order to effectively use a webinar to train participants, consider these questions:

- Do you need to be face-to-face with participants?
- Are participants willing and able to travel?
- Are participants willing to participate in a webinar?
- Will the visual aids and interactive features of a webinar enhance the training content?
- Do all participants have the appropriate equipment (computer, phone or speakers/microphone, and a reliable Internet connection)?
- Will you need to plan for multiple sessions to accommodate different time zones?

PREPARATION

Even if you know the material well, the more you practice, the more confident you'll feel during the training event. It's also a good idea to anticipate challenges that may arise during your webinar. Consider these tips:

- Be sure you have clearly defined goals and objectives for the webinar.
- Allow plenty of time for planning and rehearsals.

2010

- Know your material and speak naturally. Avoid reading your outline word for word.
- Practice aloud under the same conditions as the live training event. Getting feedback from others will help you to improve.
- Choose a location that is quiet and free of distractions. Excess noise can be distracting to participants.
- Promote the event using a variety of methods (e-mail, social networking, and advertisements).
- Determine if you will send the visuals or speaking points to your audience before the training activity.
- Plan to use facilitated discussion if the audience is small enough in order to keep participants engaged.
- Prepare a survey for the end of the webinar.

AUDIENCE

By conducting a needs assessment far in advance, you'll have a feel for the knowledge and experience of your participants and be able to tailor your content accordingly.

- Send invitations at least one month in advance and a reminder one week before the webinar. Include login instructions.
- Break the content into segments, providing opportunities for interaction every 5-10 minutes to help your participants stay focused and engaged.
- Vary opportunities for interaction by offering group discussion, polls, and question-and-answer periods.
- Clarify guidelines and etiquette for online interaction (such as not typing in all caps, being respectful of others, and putting the phone on mute when not speaking).

VISUAL AIDS

Keep visual aids simple and professional. Many webinar software applications allow you to import PowerPoint presentations for use in your webinar and allow participants to see your computer desktop.

Use these tips to maximize your visual aids during a webinar:

- Develop the audio script first, then create visuals to support the script.
- Provide photos or live video of the speakers.
- Provide visual aids to participants before and/or after the webinar for reference.

PRESENTATION

Presenting a webinar is similar to presenting face to face. It's important to establish a positive rapport with participants and create an inviting environment. Consider these presentation tips:

- Practice running the webinar application while speaking. Become comfortable doing both at once.
- When sharing your desktop, close any programs you do not immediately need.
- Encourage participants to use the mute button to minimize background noise.
- Understand the demographic of your participants, and tailor your content accordingly. Determine if translation or interpretation is needed.

EVALUATION AND DEBRIEF

Through evaluation, trainers can identify how to improve the content of their training and their skills. Develop an online questionnaire or conduct a webinar focus group to get feedback. Include questions on:

- The webinar experience, including ease of joining the webinar, the audio portion, the level of interactivity, and the duration
- The value of the content and whether it met the objectives of the training
- Suggestions for future topics and guest speakers

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TAB 9

RESOURCES

PRACTICE LAB
Guide for Trainers

You've been given access to the Practice Lab, a tool to allow Rotarian trainers to become familiar with using Rotary's online tools – like Rotary Club Central – in a risk-free environment with fictitious data. The Practice Lab is available in the same languages as My Rotary.

Your account

- You will be provided access to the Practice Lab for a pre-determined time frame (access will end when the site is refreshed).
- You will be the primary account owner. If you choose to share your credentials with others, you are responsible for their use of your account. They have full access to your account until the site is refreshed and can edit data. If two or more people are using the account at the same time, data can be overwritten.

Data

- Each account represents one fictitious district (District 8010, District 8011, etc.). Within that district are district leaders, club leaders, clubs (Test Club001, TestClub002, etc.) and club members.
- You'll have a choice of logging in as a club leader or a district leader.
    - The club leader role has access to functionality that a club president and club president-elect have.
    - The district leader role has access to functionality that a district governor has.
- Actions you take within your account will change the fictitious data. Any changes you (or anyone you've shared your account with) make to the data will remain until the Practice Lab is refreshed and access to your current account terminates.
- Data you change within the Club and District Administration section will impact only your Practice Lab account.
- Any discussions you contribute to within Discussion Groups, projects you add to Showcase and projects you add to Ideas will be viewable to **all** Practice Lab account users. Please post appropriate content only.
- **Be careful not to delete your role** as district leader or club leader, **or terminate the membership of Test Club Leader or Test District Leader**. It will end your ability to perform tasks delegated to those roles and may remove access to your account.

Best practices for using Practice Lab
Practice Lab is best used to conduct training via webinar, in one-on-one sessions, for capturing images of screens for training resources or decks, or demonstrating the functionality to a small group.

👍 **What you can do in Practice Lab**

The list of Rotary tools and online functions is endless, so the project team had to strategically select which to include in the Practice Lab. The focus is on transactional functions that impact Rotary business, for example:

- Updating the My Rotary profile
- Adding a delegation
- Adding goals in Rotary Club Central
- Reporting achievements in Rotary Club Central
- Adding new projects in Showcase
- Participating in Discussion Groups

Some functions can only be done by club officers, for example:

- Adding, editing or removing members
- Updating club contact information
- Adding, editing, or removing club officers
- Viewing club invoice
- Managing Membership Leads
- Adding new projects to Ideas

Some functions can only be done by district officers, for example:

- Making district appointments
- Managing AGs and club groupings
- Rating clubs in Rotary Club Central
- Managing membership referrals from Membership Leads

👎 **What you cannot do in Practice Lab**

There are a number of limitations to Practice Lab. Please be familiar with the activities you cannot do within Practice Lab, including:

- Registering for a new My Rotary account
- Applying for or managing a grant within the Grants Center
- Accessing reports via Rotary Club Central or the Member Access pages.
- Registering for an event, such as International Convention or International Assembly
- Navigating or downloading materials in the Brand Center
- Finding a club through Club Finder
- Contributing to The Rotary Foundation with a credit card
- Contributing financially to a project within Ideas
- Setting up a project within Ideas to receive online contributions through PayPal
- Navigating to or registering for a class in the Learning Center
- Managing subscriptions
- Searching the Official Directory
- Accessing the Peace Fellows application form
- Claiming an offer on Rotary Global Rewards
- Accessing Rotary Images, Rotary Videos, Rotary Voices blog, Rotary Workgroups
- Clicking on links generated by Search
- Accessing Shop.rotary.org

Questions

For questions or feedback, email practicelab@rotary.org.

GENERAL ONLINE RESOURCES

My Rotary — Browse Rotary's website to learn more about Rotary and how you can make an impact. You'll also find Rotary images to use in presentations and promotional materials and inspirational Rotary videos to show at events.

Discussion groups — This area of My Rotary makes it easier for Rotarians to connect with others who share their interests. Share ideas with other district trainers in a secure space, such as the District Trainers group.

Rotary Brand Center — Source for visual identity items including Rotary logos, marketing materials, and templates for business cards, newsletters, and fliers.

CLUB, DISTRICT, AND SECRETARIAT SUPPORT

- Regional Rotary Foundation coordinators (RRFCs and assistant RRFCs) — Knowledgeable on all Foundation-related topics, including Rotary grants, fundraising, PolioPlus, and Rotary Peace Centers
- Endowment/major gifts advisers (E/MGAs) — Resource for major gifts ($10,000 or more) and endowment matters in your region
- Rotary coordinators (RCs and assistant RCs) — Knowledgeable about the best membership strategies to use in your region
- Rotary public image coordinators (RPICs and assistant RPICs) — Experts in public relations, journalism, or communications
- Rotary International Assembly training leaders — Training experts who prepare incoming governors to lead their districts and potential trainers for district events
- Club and District Support representative — Source of information on club and district administration and operations
- Rotary Learning and Development staff — Resource for club and district training information and publications
- Rotary Support Center — Available to answer questions

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the Official Directory and on My Rotary.

TAB 10

BRAINSTORM

BRAINSTORMING — add it to your bag of leadership tricks!

Brainstorming is an organized attempt to generate ideas — LOTS OF IDEAS — quickly from a group of people.

Academics have dumped on the technique over the years, saying it isn't nearly as effective as it was built up to be.

Bottom line, for me: Brainstorming has helped me get over some very big hurdles and has proved to be an important tool in my bag of consulting tools.

Brainstorm with volunteers to solve a community problem — and you will have immediate buy-in from those who participated. Even better, the volunteers will sell the plan to their friends!

> **"Brainstorming is a powerful strategy that taps into important characteristics of group dynamics."**
>
> *– Jordan Ayan*

A successful brainstorming can be a very important event in the life of an organization. As Jordan Ayan notes in the quote above, the technique taps into *group dynamics* and exciting things happen.

The group dynamics Ayan sees at work in brainstorming and outlined in his book, *Aha! 10 Ways to Free Your Creative Spirit and Find Your Great Ideas,* are the following:

- ☑ **Collective energy** — everyone's energy level goes up.
- ☑ **Collective confidence** — individuals gain confidence.
- ☑ **Divergent thinking** — unique, distinctive ideas offered.
- ☑ **Associative thinking** — ideas get piggybacked.
- ☑ **Delayed judgement** — no criticism of ideas. *(Continued inside.)*

Rotary
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ROTARY CONNECTS THE WORLD
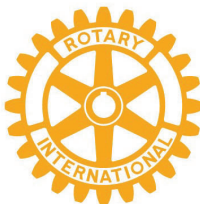
Successful brainstorming sessions enjoy all of the dynamics Ayan outlines — and more. Shared satisfaction and buy-in from brainstorming participants can be vital to your organization's progress.

Are all brainstorming sessions successful? Absolutely not. In most cases it takes careful planning and preparation to assure success. *(One BIG caveat: I've also participated in spur-of-the-moment decisions to start group brainstorming that have paid huge dividends.)*

What brings brainstorming success? The four most important factors to assure success are (1) an experienced facilitator, (2) group memory, (3) a proper venue, and (4) well-formed questions.

The experienced brainstorming facilitator is someone who has done it before — a lot. The facilitator must be able to introduce the session, outline the parameters to be in play, encourage participation, and be strong enough to intervene if one person begins to dominate.

The facilitator should assure the other factors — group memory, proper venue, and good questions — are set for your session.

Group memory for me is a simple flip chart. White boards can be used and I've seen a session or two where ideas were recorded on a projected computer screen by a very good typist. If white boards are used, make sure every thought is captured before the board is erased.

Each and every idea expressed <u>must be recorded immediately where every participant can see it</u>. There is an important individual and group dynamic in play. Once the author's idea is "on the record," he or she can relax and think of other ideas. At the same time, other participants may take a cue and add an associated idea.
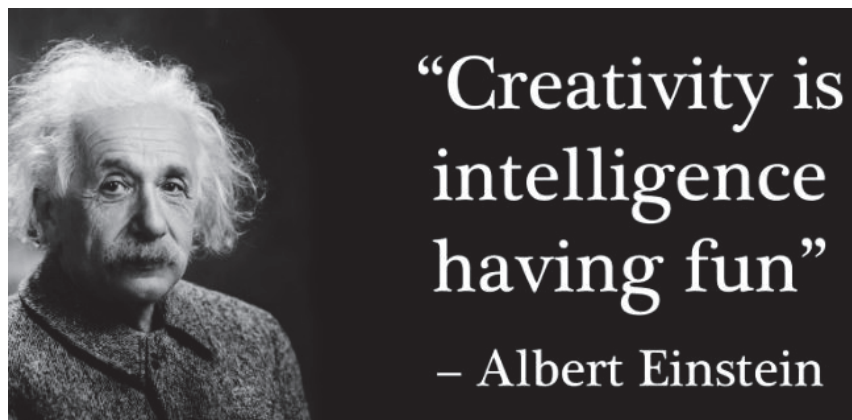
The location for your brainstorming should be comfortable for both your facilitator and for your participants.

The work you give your participants should be carefully framed. Let's say you are a membership organization and you've dropped some members. Your brainstorming challenge for staff/board might be:

"25 ways to attract new members"

OR

"15 strategies to retain members"

Do not stop until you have recorded *at least* the number of ideas sought. Often the last one or two ideas will be the most valuable!

Once you've recorded your ideas, there is still work to be done. Have your group discuss the ideas and rate them. Is there an obvious path to success, or will you need to develop a strategy? Who will be responsible for the next step? *(If lucky, you'll get volunteers!)*

"None of us is as smart as all of us."
— *Ken Blanchard*

"The way to get good ideas is to get lots of ideas and throw the bad ones away."
— *Linus Pauling*

Guidelines for Breakouts

1.) Goal is most ideas

2.) No evaluation

3.) Wild ideas are great

4.) Combinations work

5.) Leaders: ask questions
              alert focus

Group Process Ground Rules

(To be mutually agreed upon before starting session.)

1.) Room is a safe zone — demonstrate respect & caring.

2.) There is no rank in the room — everybody equal.

3.) Everyone participates; no one dominates; speak only for yourself.

4.) Give freely of your experience.

5.) One speaker at a time — be open, honest, & direct.

6.) Be an active listener.

7.) Keep an open mind — separate the idea from the person.

8.) Help us stay on track, on topic, on time.

9.) Everyone helps enforce these rules.

10.) Look for ways to support one another, celebrate successes! Have FUN!

Does Everyone Agree?

Never doubt that a small group of thoughtful, committed people can change the world.

Indeed, it is the only thing that ever has.

– Margaret Mead