Zone 2022 Trainer Session Notes

**How can District Trainers support Rotary’s Action Plan?**

**More impact:**

Share info about Rotary Strategic Plan with clubs.

Idea – district visioning team to facilitate visioning sessions with clubs, upon request or recommendation

**Reach:**

The more people know about Rotary, the more engaged they become. Trainers teach district Rotarians about Rotary, in order to promote it.

One Summit or other district training events curriculum – include DEI

**Engagement:**

Was impacted by COVID, but seems to be improving.

Trainers can make club visits. Could be with DG, or independently.

Goal should not be to return to pre-COVID status, take the best of what we learned to improve engagement.

Important to tap into the WHY of each Rotarian to engage them on a personal level.

Incorporate more than Rotary – professional development training is valuable to many Rotarians – help clubs improve the value proposition.

**Adapt:**

Stay flexible, continue hybrid when it fits, meeting formats and schedules should meet member needs.

Educate clubs on flexible club models.

Teach how to assess member needs and proactively gain input.

Introductions

Takeaway – professional background questions are part of pre-session survey – tons of professional experience in the room

**Part 1: Your Role**

How does district define your role / job?

Big theme of discussion – it varies a LOT from district to district, but YOU can help define the role to meet needs identified

Rotary-prescribed events/ role of trainer

Past district history of the job and events

Direction of District Governor

Communication with clubs is a good idea, but not common

Feedback from attendees after events

Some topics are time-specific such as annual RI theme and goals, others are ever-green training needs that recur every year

Focus group is one way to assess needs and get ideas

Trainers can take initiative to define the role and assess the needs of the clubs

Learning curve for trainers - Length of term can be a challenge – some are 3 years, others are just 1 year at a time

Most in the room have a training team of 1, but a few training teams.

“Team” can include facilitators, some veterans and some ad hoc.

Pros/cons of ad hoc trainers versus committee chairs/topic experts:

* Same team experts are not always great instructors
* Pairing experts with engaging facilitators can help
* District trainer as the primary ad hoc trainer is time-consuming and can cause burn-out

Team idea – team of 5 is good size - tap DG line, committee chairs, AG’s for input on club needs

**Breakout Activity – Handling Event Challenges:**

**Making Tech Cooperate:**

Anticipate tech challenges IN ADVANCE, have a plan to handle

Getting info to participants early, tech prep testing

Any virtual event – have ASSIGNED helpers, example user access tech support, chat monitoring and sharing of resources

For training events with breakout and group discussion, hybrid is challenging, all live or all virtual is better for those events

Good alternative – offer both live and virtual when possible

Dress and tech rehearsals are important

Facilitators for virtual events must be those who are comfortable with the technology

**Facility Challenges:**

Distance for participants

Cost – not just of event space, but rooms for those traveling

Equipment availability

Competing events can create event space shortages

Build staff relationships with venues – very important

Confirm accessibility in advance

Pre-event walk through is important

**Presenter no-show:**

At both club and district level

Options when speakers don’t show:

* teaching clubs about Learning Center could be a program
* club historian or member with special interest or hobby
* youtube videos of RI Pres, theme, or other topic – have saved and ready to show
* emergency speaker videos
* have a Rotary kahoot trivia game ready – also can use to survey club/member interests
* learn about members – have a prompt for sharing such as “what was your first car?”
* speed dating game to learn about others
* TEDx videos

THIS is a curriculum of info you can go out and share with clubs

**Uncooperative class participants:**

Can show up in various ways:

Silent students, talkers, champions and obstructionists of ideas (have people self-identify, then talk about their role in participating)

Ground Rules – very important

Facilitators who are trained and prepared to handle these issues

Idea – this could be adapted to teach clubs how to handle uncooperative members

**One big takeaway from Part 1:**

Challenges can be opportunities

District Trainers build relationships – it’s a big part of the job

We all can learn from each other, and help each other – don’t be a silo

There’s a bigger support system than we realized

There are missed training opportunities, such as District Assembly

Challenge to improve Rotarian engagement with Learning Center

Important to gather club needs, and can be part of the job, even if not in the past

Make sure all voices are heard, set ground rules – especially in virtual events

Plan and prepare, be ready for unexpected to happen

District trainers are the real MVPs!

**Part 2: Training Events**

Multi-district PETS – what role can you play in that? Coordinate trainers across districts to meet and discuss needs, share needs with PETS planners

Broader good idea – leverage connection with trainers from districts at your PETS to share best practices for district training

PETS curriculum – top-down curriculum creation, or bottom-up from district feedback? Where’s the sweet spot?

Get the PETS curriculum ASAP – to plan your district training around it.

Planning is key

District Assembly benefits / challenges

* Roles are different across clubs, hard to delivery consistent training
* Idea – break out training by task rather than roles
* Can include sessions for club members, not just officers, example Rotary Basics, other non-Rotary topics such as stress management/mental health
* Timing – can be a challenge if in the spring, club officers not yet selected – some do Assembly after July 1
* Opportunity to develop emerging leaders
* Plan for sessions that are not just officer sessions to engage members
* Locations to cut costs – schools, community centers

Vibrant Club and One Summit – separate events and curriculum, but overlapping content – some districts alternative each year

Training and education are 2 different things – much of what District Trainers do is education, but can help technical trainers such as Grants trainers to improve delivery

RLI – Rotary Leadership Institute – good opportunity – trainers should learn more about it

**Tips for training Rotary leaders:**

No events, but a process – promotion, value proposition, event itself, follow up – life-long learning concepts

Promo in advance – send links to Learning Center for prep of class

Survey needs in advance, show connection of survey results to what is delivered

Resistant leaders – make them part of the process, give them a job or decision authority, show benefit and value, benefit to the people we serve

**Promoting events:**

Send actual calendar invitations

ClubRunner events can now send calendar invitations

Have DG promote your events in contacts with clubs, also AG’s

7 touches required!

**Using Learning Center:**

Educate clubs about it, send them instructions for how to access, send them links to recommended courses

Hands on demo of Learning Center at other training events

Incentives for member training – donation to TRF for courses completed

Bribery! Gift card drawing of those in district who completed courses

Create cheat sheet of most valuable courses – show them recommendations, LC can be overwhelming

Learning Plans – Club President and Pres Intermediate are strongly recommended (President manual is no longer published – all info is now in Learning Center, can be updated quickly

Learning Center leaderboard – check that out for competition with others

**Other Learning Resources:**

Toastmasters – there are 8 courses in the Learning Center!

YouTube and TEDx – curate for your audience - search for content based on needs, vet content carefully, have others view and give feedback in advance, and ask for recommendations from others

Check learning centers of other schools, organizations – use your professional sources

Use other learning events to spread the work of Rotary!

**Motivating Attendees (Make it Fun!):**

Physical movement, mix up groups for exercises

Scavenger hunt – Goose Chase app – check that out to keep people active and fun, engage competitive nature and introverts – tie the assignments to your objectives, such as making connections or learning about a place or topic

Use your resources for ideas if you aren’t creative in this way

Making purpose clear for all activities, time is valuable

Use facilitators who can engage the crowd and model the learning

Ask questions – people like to talk and share

Tell stories with humor and relating

**Encouraging Follow Through (post event):**

John Maxwell method – specifically make time for class to document their learning and their plans for applying, changing, teaching

Getting commitments – at end, have class write down take-aways that they will apply – AND share it out loud with person next to you, accountability – AND put them on a post-it note with address, mail those out at a later point

Use technology to follow up – text message prompts to follow up

**RI Director Pat Merryweather Arges visit:**

Storytelling is powerful – consider training Rotarians on this

Other good training resources: RLI, Visioning, Learning Center

OneSummit events are good for merging silo’d knowledge

Zoo of Love – stuffed animal fundraiser for PolioPlus – districts/clubs can purchase for $10 and create their own fundraisers

Flight To End Polio .com – 2 Iowans flying around the world to raise awareness and funds for PolioPlus

PolioPlus society – join + $10 and get a stuffed animal

Lincoln on Leadership – easy read about how to be a storyteller

**Breakout Activity – District Training Events:**

**What are different ways to organize training events, and who attends?**

Know your audience – survey them re: time, location, format. Meet them where they are.

Recognize diversity of holidays, time schedules of Rotarians with different family and career situations

Survey thoughts – don’t forget to just ask, don’t assume you know

Many things play into these decisions – can’t satisfy everyone, so must offer variety

Record events for later, can be good for those who can’t attend

Consider meeting times and formats that don’t require a meal for simplicity of planning, time, and cost

These decisions should be guided by the objective for the event/meeting

**Successes and challenges in using online training:**

Successes - Can reach wider audience, meet timing needs of more participants, decreased cost of travel, chat functions can allow concurrent discussion during presentations

Challenges – paying attention, resistance from participants, engagement distractions, right-sizing classes, range of tech expertise of both facilitators and audience

No longer restricted to meeting / training speakers that are local

**Promotion and attendance**

Leverage recurring communications like district newsletters

AG / DG promotion

Club financial assistance

Club champions to promote inside clubs

Use video / photos to show what will happen or who will benefit – and use video in the invitation

**What timing (month, day of week, time of day) works?**

What is purpose of event – structure around that. Example, pre-PETS is short sit-and-get info, online works well. If discussion/sharing is important, in person is better.

Consider geographical limitations

**One big takeaway from Part 2:**

Know your audience

Funding new Rotarians to attend district events

Storytelling is powerful (many resources for this too – corporate trainings, John Maxwell, etc) + practice your personal Rotary story – The Whole Brain Child, book about teaching children through story-telling

Using video for invitations / promotion (keep it short)

Cast broad net when promoting events, use diverse messaging

Find champions to help promote events

Training is a process, not a single event

Training scope is much wider than it appears – plays a part in everything that happens in your district and can make a big difference for members and those we serve

**Part 3: Plan Your Curriculum**

**Assessing Participant Needs:**

Use different methods for maximum coverage – example, Google forms, PDF online, hard copy personally delivered

Evaluations from past events – strive for capturing feedback after every event

Post-event evaluations and surveys – not just valuable for event organizers, but also secures engagement of participants

Lunch event for local leaders to assess needs of community – adapt this concept to conducting focus groups of district leaders, club leaders, etc.

Pre- and post- event surveys to measure results – can conduct AT the event for maximum participation

Don’t forget informal feedback, ask for it, solicit input from “mystery shoppers” who were in position to hear from participants

Listen, listen, listen, observe, observe, observe, with your trainer ears and eyes, to identify recurring needs – be curious

Remember to stop doing things, as you are adding – start, stop, continue decisions

Use the same methods for capturing feedback when deciding what to sunset

**Activity: Changing Existing Event’s Agenda**

When evaluating survey data – don’t get lost in the details, identify the “gut feeling” you get

Consider characteristics of survey participants and how those may have influenced the results

If there are potential conclusions not completely proven by data – seek further input to validate or disprove those

When fairly evaluating effectiveness of expert trainers – your presence is sometimes required

Event agendas can commit short timeframe for “checklist” training items, longer times for content that calls for discussion, exploration

Opening session – dynamic presenter who can establish relevance is important, and connecting event with Rotary areas of focus, action plan, etc.

Storytelling can make a technical session like grants more appealing

Seed experienced Rotarians among beginners when possible

Interactive format is needed for engagement in longer sessions

Have to control for long speakers, storytelling can go too far, prep for those in advance when possible – example, someone who has a good project story that you want to share with the group – rehearse them in advance – consider facilitating their storytelling through questions. Create your own speakers bureau.

Collaborating with other districts and across expertise inside your district can be creative ways to accomplish training needs. Keys are communication, trust, sharing of workload, district representatives who are collaborative in nature, clear objectives and goals, willingness to share outcomes and risk.

**Leader’s Guides:**

Benefits – provides framework, starting point for customization. Consistency and less work for trainer. Same message. Available to all Rotarians.

Amy offered to do Zoom presentation to clubs or districts for Learning Center!

**One big takeaway from Part 3:**

Have Amy participate in PETS

Cast wide net and multiple formats for capturing feedback

Don’t recreate the wheel – use tools from Rotary

Delivery matters! And good delivery even trumps quality of curriculum.

Remember feedback data may indicate more than is obvious – example, poor feedback could be more about facilitator than course content.

Train the Trainer Guide – updated version coming soon on Learning Center – Amy suggests using for your facilitators

**Part 4: Plan Your Training Event**

PETS Plan start – repeatedly talk with DGE

Work with entire DG line as an alternative to just talking to DGE

Use past district trainers on team?

1. Only if past agrees to stay on the team

Succession planning: bring new on early as current trainer is still active

Tools to plan an event from scratch:

* Strategic plan
* Handouts from Zone Houston 2021
* Resources on Zone Web site
* Use own business’s available tools

Budgeting

* Establish hand-down from year-to-year
* Have to go back to pre-pandemic, or start over, as pandemic years were not representative
* Given a “not to exceed” budget from district leaders
* Variability: some districts expect events to be self-supporting, some generate no income, some in-between
* Things that blow up budget
  + Food
  + Hybrid meeting tech.
  + Venue expense increased over past
* Big budget components
  + Facility
  + Food
  + Tech use fees
  + Automatic staff gratuity

Planning

* Planning for unexpected
  + Estimate high (eg 10%)
  + No contract without a refund policy from vendor
  + Lock-in contract with cost as early as possible
  + Research for available facilities (alternate or less expensive)
* Horror stories
  + Building security at a school kept Rotarians out
  + Meetings all over a venue – hard to find.
    - Ambassadors (sgt)
    - Maps
* Other notes
  + Plan far ahead; depends on the nature of the event
  + Advance planning hard when can’t get leadership to commit to a date
* Calendar conflicts
  + Community events (sports, fundraisers, etc.)
  + Holidays
  + School calendars
* Venue selection criteria
  + Convenient location
  + Consider having at a hotel if people don’t want to drive after event
  + Available equipment
  + WiFi
  + Acoustics
  + Obstructed view
  + Cost
  + Is food available on-site; food bring-in OK, catering
  + Parking
  + Accessibility
* When to go virtual
  + Regardless, consider offering multiple sessions of the same content
  + Predominantly when just receiving information
  + When to level the playing field of attendee experience / status
* When not to go virtual
  + Predominantly when conversation is needed
* Implications of inclusivity in training delivery
  + Tech knowledge
* What about hybrid
  + Hard to find someone who can manage both (tech, and how to communicate)
  + Have one to two people beyond the facilitator to make it work
  + Very hard for virtual participants to feel fully a part of the event
  + Trade-off costs of tech, vs cost of in-person
  + May well be best to do one copy live, and another copy virtual-only

Plan your event case 1

* Training Methods
  + Demonstrate online resources
  + Know who needs and who does not need the information
  + Prep a PowerPoint with screen shots
  + Prep a video of the activity – app that captures the screen
  + Have a follow-up incentive to encourage participation
* Resources
  + Send links to learning center

Plan your event case 2

* Pre-event assignments will assure participants ready?
  + Send agenda & topics ahead of time
  + Send to learning center
  + Send questions to do directed research at their club
  + Bring 3 questions
  + Ensure signed-up for My Rotary
  + Send pre-survey
* Specialized post-event training
  + Give a survey; if unsatisfied with anything, provide resources to fill the gaps; personalized! Trainer responsible for coordination with knowledge expert, then response to attendee
  + Re-focus future events based on survey

Day 1 Follow-Up

* Trainer & district conference
  + Different year to year per governor request
  + Manage district assembly in parallel to d. conf.
  + Lead the program committee
* Training committee best practices
  + Little experience in the room with multi-person training team
  + Recruiting is difficult
  + If have a district administrator, involve them
  + Recruiting – easier if recruit for a task than as a “committee member”
* District Web site
  + Dist admin manages
  + Some Zoom recordings are placed on Web site
  + Don’t forget “unlisted link” for YouTube videos you don’t want to be searchable

Prepare the Trainers

How to select facilitators

* Knowledge experts
* Have facilitation skills
* Engage new people, not “good old boys club”
* Also engage those with experience

About the Facilitator

* The audience is the expert
* Consider a panel discussion, when the facilitator is not a subject matter export

Professional experience in recruiting

* Very important

Selection of facilitators

* Number of facilitators varies by group size; esp. if need to monitor/observe breakouts
* Pay attention to past facilitator evaluations
* Do we interview candidates?
* Consider primary bringing along their own “helper”
* Consider co-facilitators; three may be too many
* Personal compatibility
  + Strong communication skills (ability listen; collaborate)
  + Balance detail vs. big picture

Training trainers / facilitators

* RLI has formal facilitator training; look at this model
* Start process based on needs for the session
* Learning Center!
  + Facilitators basics learning plan (multiple courses within) – this should be a baseline
  + Train the Trainer leader guide will be ready early October
  + Ideally have trainers give a dress rehearsal, and evaluate them

What makes an effective facilitator?

* Good structure
* Skills like handling parking lot, etc.
* Reading the room
* Bring in non-contributors
* Limit over-talkers
* Story-telling
* Humor (carefully) – perhaps just energy and levity
* Practicing
* Focus
* Active listening (“witness”)
* Not afraid of silence
* Creates a safe environment
* Acknowledges agreement not required
* Does not have to be the expert
* Confidence to be the leader
* Knowing how sound is used
* Movement in the room
* Time management
* Don’t be afraid to use mic in larger room
* Facilitate – pass the mic
* Can readily accept feedback
* Authenticity

What makes an ineffective facilitator?

* Read the slides
* All about them
* Not sharing with co-facill
* “I” language
* Not being organized
* My club does this…
* Vocal filler (um, ah)
* Unprepared
* Allowing one person to dominate

How to prepare trainers to make them a better facilitator?

* Rehearsal
* Knowing audience
* Have a pool
* Have pre-event training with feedback right away
* Feedback – start by asking them how they did
* “missed opportunity” a good phrase when offering feedback
* Give the survey captured feedback to the facilitators
* Consider asking questions to give feedback
* Offer resources as a piece of feedback (books, etc.)
* Make a plan for what to do with the feedback
* Be purposeful when selecting team-taught
* Remind facilitators who audience is
* Share video recording with facilitator so can self-evaluate

One big thing to take home and act on

* Talk with DG; visit with club presidents – learn district’s needs
* Prepare the presenter with advance information
* Train the trainer
* Better job of promotion for events
* Use Learning Center
* Look for missed opportunities in current educ. Offerings
* Ask current presidents to learn what they would have liked, but don’t have
* PETS – use past-presidents for a “wish I had known”
* Identify all trainer touchpoints in district
* Focus on building relationships between clubs, in order to grow a team
* Finding resources to support a trainer
* Review what learned in this session at Zone
* Be pro-active in introducing training events and activities