

2023 Rotary Multi District Training Institute District Trainers Agenda – Saturday, August 5, 2023

Coordinators: PDG Dian Edwards, D5870, and PDG Mary Ann McDuff, D5790

			PDG Dian Edwards
1.	9:30 - 9:40 am	Welcome, Opening Remarks, Plan for the Day	PDG Mary Ann McDuff
		Ice Breaker: Standing in Your Own Power	
2.	9:40 - 10:00 am	Name, Club, District, Office	PDG Mary Ann McDuff
		Strengths You Bring to Role of District Trainer	
		and Training Team Member	
3.	10:00 - 10:10 am	Facilitated Learning Focus	RID Pat Merryweather-Arges
4.	10:10 - 10:30 am	We Need to Talk Training	PDG Lisa Herring
5.	10:30 - 11:30 am	Building Your District Training Plan: Introduction	PDG Mary Ann McDuff
		1. Training Framework/Learning Center	PDG Gary Gillen
		2. Training Curriculum	PDG Lisa Herring
		3. Training Calendar	DT Arden Riley
		4. Training/Special/Supplemental Events	PDG Mary Ann McDuff
		5. Training Plan Elements and Design	PDG Mary Ann McDuff
6.	11:30 am - 12:00 pm	Morning Wrap-Up and Transition to Lunch	
7.	12:00 - 1:30 pm	Lunch	
8.	1:30 - 2:00 pm	Hands On Learning Plan Design – Small Groups	PDG Mary Ann McDuff
9.	2:00 - 2:20 pm	Online and Hybrid Training/Learning	PDG Dian Edwards
10.	2:20 - 2:50 pm	Effective Facilitation Techniques – Best Practices	PDG Lisa Herring
11.	2:50 – 3:05 pm	Break	
		Table Talk: Introduction	
12.	3:05 - 3:25 pm	Making Your Training Topics Come To Life	PDG Dian Edwards
		1. Raising TRF Awareness	PDG Gary Gillen
		Inspiring International Service	
		2. Attracting and Engaging Members	PDG Lisa Herring
		Enhancing Public Image	
		3. Advocating for Community	PDG Dian Edwards
		Focusing on Vocational Service/Ethics	
		4. Building Service to Youth	DT Arden Riley
		Highlighting Rotary Basics	
13.	3:25 - 3:40 pm	Idea Exchange from Table Talk Topics	PDG Dian Edwards
			PDG Mary Ann McDuff
14.	3:40 - 3:55 pm	Outcomes and Impacts Shared from the Day	PDG Dian Edwards
15.	3:55 - 4:00 pm	Evaluations and Adjournment	PDG Dian Edwards



Dian Edwards, PDG 2012-2013 (District 5630) District 5870 – Central Texas, Austin N. Metro Passport Rotary Club



Dian Edwards is a native Texan who returned "home to Central Texas" in 2018. She is a graduate of St. Mary's Academy in Austin, Texas and received her Bachelor of Liberal Studies Degree in Public Administration from St. Edward's University in Austin, Texas. She is retired from two professional careers (Texas Department of Transportation and the Nebraska Community College System).

Dian has been active Rotarian for twenty-six years. Her Rotary service includes Rotary Club President (twice); District Assistant Governor; District Trainer; District Governor (2012-2013); Assistant Rotary Coordinator (2017-2019); Rotary Coordinator for Region 36 (2019-2022). She chaired the 2014 Multi-district High Country President Elect Training Seminar (PETS), served as General Chair of the 2016 Rotary Zones 21B-27 Institute, and represented District 5630 as a delegate to the 2016 Council on Legislation. After returning to Central Texas, Dian was instrumental in chartering the Austin North Metro Passport Rotary Club.

Dian currently serves as District 5870's representative to the Rotary Multi District Training Institute (RMDTI) and supports the Lone Star Division of the Rotary Leadership Institute (LSRLI) as its Education Coordinator. She is currently chairing the 2024 Lone Star PETS Subcommittee on Curriculum and Facilitators.

Dian achieved Major Donor status through her sustaining membership in the Paul Harris Society.

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Mary Ann McDuff, PDG 2016-2017 District 5790, Rotary Club of Denton



Mary Ann McDuff, is a member of the Denton Rotary Club. Since her retirement from Texas Woman's University, she devotes her time to the goal of expanding community engagement and service, as well as advocacy and activism, in the North Central Texas area through Rotary.

Mary Ann was first introduced to Rotary and Rotary service when she

participated as a member of a Group Study Exchange (GSE) to Africa. She is a multiple Paul Harris Fellow and Major Donor. She received Rotary's Service Above Self Award in 2021-2022.

A proud member of the Rotary Club of Denton for almost 30 years, McDuff's classification is Higher Education. She served as the Denton Rotary Club's first female president in 1998-1999. With long held interest in youth service, she was the Denton Club's Rotary Youth Leadership Awards (RYLA) Committee Chair and led efforts to partner with educational, civic, and community groups to build a university centered program. The City of Denton was the home of RYLA for District 5790 for almost two decades. This outstanding youth leadership program is now held at Tarleton State University in the City of Stephenville.

Mary Ann served as District Governor for District 5790 in 2016-2017. She continues to serve District 5790 in many ways. These include Assistant Governor; District Trainer; Chair of Membership Development and Retention, RYLA, and Women's Issues Committees; and Lone Star PETS Discussion Leader and Facilitator, Strategic Planning Committee member; Curriculum Chair; and Curriculum/Training Chair. During her Governor's preparation, year, and years following, she served on the District Foundation; The Rotary Foundation; Strategic Planning; Leadership Plan; Visioning; Awards; and Finance Committees. Most recently McDuff served on and led the District Governor's Council and District Governor Selection Committees. She continues to serve as a PDG Advisor and as a member of the Rotary Youth Leadership Award Steering Committee.

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Gary Gillen, PDG 2019-2020 (District 5630) District 5890 – Rotary Club of Richmond



Gary Gillen is married to Janice Gillen and they have two married daughters and three granddaughters. They own Gillen Pest Control in Richmond, Texas where he is a member of the Rotary Club of Richmond.

After joining Rotary in 2001, Gary held many offices in his club including club President from 2010-2011. He was Rotarian of the year in 2002-2003. At the District level, he served on many committees and held the position of

Assistant Governor from 2013 – 2016. He was Assistant Governor of the year in 2014-2015. Gary was District 5890 Governor in 2019-2020. Janice and their two daughters are Paul Harris Fellows, and Gary is a multiple Paul Harris Fellow, Major Donor, White Hat Society member and a Paul Harris Society Member.

Gary, who calls himself the luckiest man you will ever meet, is a dedicated Texas Aggie. He and Janice have raised funds for Texas A&M University, particularly for veterans attending college there. He has served our citizens at the local level as a City Councilman in two cities and a political party chairman in his county; at the state level as vice-chair of a state regulatory agency and on the state Pest Control association board; and at the national level having been appointed by both the George W. Bush and Barack Obama administrations to the Good Neighbor Environmental Board-the only independent Presidential Advisory board in the federal government. He currently serves on the Wharton County Junior College Foundation Board.

In his spare time, he likes to read, travel, collect books and miniature buildings, create jobs and, of course, volunteer.

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Lisa Herring, PDG 2012-2013 District 5840 – Combat Human Trafficking Rotary Club



Lisa Herring is a member of the Combat Human Trafficking Rotary Club. She served as District Governor for Rotary District 5840 during the 2012-2013 Rotary Year.

Lisa has served as Rotary Zone Institute Trainer for Governor's Nominee and Emerging District along with serving as a Rotary Leadership Institute Facilitator, Lone Star Presidents-Elect Seminar (PETS) Facilitator, District 5840 Public Relations Chair, and previously served as the

Rotary Public Image Coordinator for Zone 21b and part of Zone 27.

Aside from her Rotary career, Lisa is an accomplished facilitator and trainer with over 15 years of engagement and involvement leadership within the university educational structure, as well as within the Mental Health field. Lisa also has tremendous experience in institutional rebranding.

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Arden Riley, District Trainer 2021- Present District 5840, North Central Rotary Club of San Antonio



Arden Riley joined the North Central Rotary Club of San Antonio in October 2014. She served as the Membership Chair, Vice President, and was President of her club in 2018-2019.

Her passion is serving the community she lives in with service projects and helping to eliminate food insecurities.

Arden has served as Assistant Governor for the District 5840 for three years supporting 1 - 3 clubs each Rotary year. In 2021 she became the District Trainer and still serves in this role.

Arden is in commercial sales for one of the world's largest logistics companies, DHL. She has had several roles with DHL in her career: Operations Manager; District Manager; Manager of International Sales; and, Major Account Executive.

Arden is married to Tom Riley. They enjoy playing golf and traveling.

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1. Perspective

Developing an understanding of the group's purpose, mission, vision, goals, and context is critical. Questions you might ask as you think about gaining perspective for facilitating a group or team:

- What is the purpose and mission of the group or organization?
- What is the organizational structure?
- How are decisions made?
- What does the leadership look like?

2. Purpose

It is essential to understand what the group or organization views as a successful meeting or event before determining the detailed requirements, specific deliverables, and how to measure results. Questions you might ask as you determine your group's needs and expectations:

- What are their ideal desired results or outcomes?
- What do we need to achieve in this meeting or during this event to meet their needs?
- What type of atmosphere do we need to create in order to accomplish the results they want?

3. People

It is common not to fully identify and include the important people who need to participate in an event or meeting. Once you have mapped out who and why people need to be in attendance, here are some additional questions to ask:

- What are the conflicts?
- What are the biases, preconceived ideas, and other potential barriers to success?

4. Product

While this may appear to be similar to purpose, it is more specific. Purpose is why we are having the meeting, product is what is produced as a result of the meeting. Questions to consider:

- What will be delivered?
- What is the most important thing we need to accomplish?
- What documentation do we want to walk out of the room with?

5. Place

This step is probably most overlooked by inexperienced facilitators. Thinking that a room or space will do is simply not true or effective. Don't leave the identification and selection of the physical space to someone else. This is an important step in virtual meetings as well, even though the space will be different. Questions to help determine your space needs are:

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- How many participants will be attending?
- Are there any special needs for those participating?
- What special equipment is needed, such as computers, internet access, flipcharts, and wall space?

6. Process

Once you have considered the above five Ps, you are in a solid position to design a process that fits your group or organization's unique situation and needs. There are numerous processes that can be designed for different results, such as decision-making, improvement, problem-solving, strategic planning, etc.

We usually start with a clear facilitation agenda that provides clear guidance on the individual items needing attention, time allocations, and expected outcome. Then, select tools such as activities, questions, and exercises for each agenda item. Questions I consider when designing a process:

- Does the agenda item need dissemination, discussion, or decision (this three Ds approach helps me determine what type of tool to use)?
- What is the best flow for the agenda?
- How much time is needed for each item and what tools can be used effectively for the allocated time?

7. Practice

Visualizing and rehearsing the training/meeting, anticipating potential problems, and preparing appropriate contingency plans is essential.

On the day of the meeting or training, arrive before the participants. Test your equipment and make sure all your materials are ready. Finally, take a few minutes for yourself to check your appearance and visualize yourself facilitating a successful meeting.

8. Personal preparation

If you are not personally ready to perform, your participants will know it. This encompasses being mentally, emotionally, and physically ready to perform. Something I try to do before large facilitation events is to create a quiet moment the morning of the event. I visualize the event and the different parts of the agenda. The quiet also prepares me mentally and physically. I find that when I facilitate, I am standing and walking almost the entire time.

***Effective facilitation planning and preparation make all the difference between a poor and unproductive training/meeting and one that is inspiring, motivating, fun and productive.



2023-24 THEME ADDRESS

R. Gordon R. McInally Rotary International President-elect 9 January 2023

Isn't this a great time to be a member of Rotary? We are in the midst of a wonderful, historic year in Rotary. One that, in all honesty, no one is in any great hurry to end.

So instead of an ending, let's create a new beginning. Instead of closing the door on one year, let's build a bridge to the next one, because as long as a river flows, people will appreciate a way across.

I used to see an example of that every day as I drove to my dental practice in Edinburgh, past some of Scotland's most prominent landmarks, the bridges over the River Forth. Some of you will be aware of them. They are iconic pieces of engineering.

The Forth Bridge — the rail bridge — was opened in 1890.

The Forth Road Bridge was opened in 1964. And more recently, the Queensferry Crossing Bridge was opened in 2017. The thing that always strikes me about the Forth Bridges, rail and road, every time I see them is that they were built by people who had vision. Vision for people they might never meet. Vision for people they would never know. Vision for people whose lives would be improved. That vision — even, as in the case of the Forth Bridge, 133 years after it was built — is appreciated by those who use them. Just as our vision in Rotary is appreciated by those whom we serve.

Now, for anyone rushing to create their own bridge logos, thinking that image has something to do with our theme, let me stop you right there. Not every metaphor is a theme. By the same token, not everything you will do over the next year will be related to advancing and supporting the theme that I will soon introduce.

We have been handed the reins of leadership at a very opportune moment, a historic time, when Rotary has a chance to capture the world's attention and point the way to possibilities way beyond our current expectations. Yet some of our best work may be supporting the continuing efforts of others. So, let's build upon what President Jennifer and other Rotary leaders have started and make it possible for even greater achievements ahead. So much of the work that I will do — and that everyone in Rotary leadership should do — is all about continuity.

Continuity means advancing the good ideas of leaders who came before you.

We should take inspiration from the words of poet Maya Angelou: "*Continue* / To be who and how you are / To astonish a mean world / With your acts of kindness."

Over the past several years, we have seen this commitment to continuity in action as one Rotary president after another has made, kept, and built on promises to empower Rotaract. The results have been astonishing — and Rotaractors continue to encourage us with their eagerness to be not just full partners in Rotary, but leaders. Now it's up to us to make sure that Rotary and Rotaract clubs continue to find new ways to collaborate and support each other.

Another great example of continuity is Empowering Girls. President Jennifer set a wonderful example of this when she decided to continue President Shekhar's program, a commitment that in many respects Rotary has been building upon for years. It just took Shekhar to name and expand it. And I have made clear that I will build upon what both of these presidents have done to help girls, like my two granddaughters, Ivy and Florence, across the world grow into strong and fully empowered women.

I am also keen to fully support all of the progress our organization has made to advance diversity, equity, and inclusion in everything we do. Fully supporting DEI doesn't just mean increasing numbers — although those numbers are very important. The most important aspect of DEI is making Rotary an open, inclusive organization that embraces the best people, the best ideas, and the best partnerships, no matter where they come from. People need to be able to look at Rotary and see themselves, and it is up to us to ensure that they do so.

There are two other aspects of continuity that will be vitally important to the work you do. The first involves polio. I'm sure you know that eradicating polio remains Rotary's top corporate priority. And there is so much we have done over the past 35 years of which we can be proud, as we have followed our dream of a polio-free world.

I also know that it can be a little fatiguing to be reminded each year just how close we are to finishing the job and how important it is that we raise at least \$50 million each year to receive the full Bill & Melinda Gates Foundation match. Maybe we need an extra level of challenge right now. Only about one in 12 members of Rotary currently gives to the polio campaign, with fewer than one in five clubs donating each year.

With recent polio outbreaks in major metropolitan areas around the world, attention has once again shifted toward eradicating this terrible disease once and for all. And when that happens, Rotary will deserve enormous historical credit.

So, this is the time for us to go beyond what's necessary year to year and make sure we provide every resource necessary to succeed as quickly as possible. I need your help in creating a new sense of urgency, to create hope that we will finish the job on polio before even more outbreaks threaten the children of the world. I need your help to bring Rotary's dream to life.

We need to heed the insightful words of Jonas Salk, the creator of the polio vaccine, who said, "Hope lies in dreams, in imagination and in the courage of those who dare to [make] dreams into reality." These words are meaningful for all the work we do. They apply just as well to every aspect of the Rotary Action Plan. This plan is all about creating hope — and providing our members with the knowledge and courage they need to change. To accomplish this, we need to:

- Talk to our members about how to design service projects with known outcomes, grounded in evidence
- Engage with each other and everyone we serve with open, inclusive, and compassionate minds
- Look for every opportunity in the work we do and the relationships we form to transcend generations and borders
- And eagerly embrace new ideas and perspectives that can create lasting change in the world

To accomplish this, I hope you engage with fellow Rotarians on the goals of our Action Plan, because this is the best example of continuity in leadership — building off the best of Rotary's past to create something even greater.

One part of the Action Plan that I hope all of you have memorized by now is the 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. Embracing the Action Plan and giving clubs practical ways that they can implement it is the best way that you create lasting change in our communities.

I want to turn my focus now to the two other elements of the vision statement, creating lasting change across the globe and in ourselves. To do this, I want to focus on two specific, hopeful ways that we can bring these visions to life.

The first is putting a greater focus on peace. I have no doubt that the founders and builders of this organization would be proud of the hard work we have done in the past year to support the people of Ukraine as they have faced the brutal and unprovoked war with Russia.

As we have done many times in the past, Rotary has answered history's call and put humanitarian relief first. We have donated generously, supported our fellow members whole-heartedly, and earned the respect of the Ukrainian people, who continue to join us in greater numbers. And doesn't that tell us something about attracting and engaging members? But we know that true relief will not come for either the Ukrainian or, for that matter, the Russian people until there is peace. The same is true in Yemen, Afghanistan, Syria, and dozens of other places of conflict across the globe.

Peace is the soil where hope takes root.

We till this soil every time we create new connections between people and find new opportunities for commonality. Over the next year, we will be introducing virtual international exchanges, and you will be hearing more about them later this week.

In Rotary, we know that peace is not a passive dream. It is an outcome of hard work, earned trust, and often difficult conversations. We know that peace must be waged persistently and bravely. The bravest goal a human being can set is the pursuit of peace, and in Rotary, everything we do, across all of our areas of focus, helps build the hope that, in turn, makes peace and redemption possible.

In 2006, I visited the village of Ban Taling Chan in Thailand, where Rotary members had provided new houses, a meeting hall, and a child care and a health care facility

following the tsunami of late 2004. There, I was approached by a woman who looked as worn as you'd expect of someone who'd faced what she had. The woman offered me a beautiful seashell — this beautiful seashell.

She explained that the shell had been in her possession for more than 30 years. It was one of her very few remaining possessions, and initially I was reluctant to accept it, but she insisted on giving it to me as a token of her gratitude for what Rotary had done for her. Later on the tour, I saw the woman again and learned that she had lost her husband, daughter, and son in the tsunami. She told me that that disaster had taken everything. She lost her family, her home, her livelihood. And worst of all, she lost hope and all reason to continue living. But she went on to tell me that Rotary, thanks to all we had done to rebuild her community, had restored her optimism. She told me we had given her hope.

This is a beautiful shell. As I was planning the theme for our year and what it would mean, I was drawn not only to the shell but also to the colors of the world around us, which are used to great effect by one of Scotland's greatest living artists, John Lowrie Morrison OBE, also known as Jolomo, whose paintings I have admired and collected for years. As we were selecting the colors for our ties and scarves, as you can see on the screen behind me, I wanted them to reflect the world's colors and more importantly what Rotary should focus upon in our year ahead.

The memory of the lady from Thailand and these colors made me realize what we should be seeking to do at this time, made me realize what our call to action is, made me realize what our theme should be, and so, I am delighted to tell you that our theme for 2023-24 will be *Create Hope in the World*.

Create hope in the world. This is how Rotary brings lasting change to the world: one newly created hope at a time. And the theme also begins to explain how we help create a similar kind of change within ourselves. Because for many people on this planet, lost hope is not just a function of material poverty. All of us face challenges that threaten our well-being. Just as it takes tremendous courage to wage peace, so too it is brave to reach out and admit that you need help.

In the wake of the pandemic, more people than ever are hurting. Many have lost the people closest to them. Others have seen their social networks uprooted. Divisions have grown wider. Opportunities for connection have been lost. Some of those hurting the most are the children and young adults whose education and social skill building has been so interrupted. To make matters worse, in many parts of the world, asking for help — especially in mental health — is considered a weakness. But nothing could be further from the truth. It is brave to be vulnerable and to admit you don't have all the answers.

Reaching out for help is courageous — and continuing on a path toward wellness is even more so.

Later this week, I will explain why I feel so strongly about the topic of mental health, and you will be hearing about some of the steps we will be taking over the next year and hopefully beyond to help improve the mental health system, not only for all Rotary members but for our communities as well. I want Rotary to become known as an organization that takes care of its members as well as the people we serve. Any mental health professional will tell you that, by helping others, we essentially help ourselves.

The evidence overwhelmingly shows that helping others benefits our mental health and well-being by reducing stress and improving our mood. The friendships developed along the way foster an incredible sense of community and camaraderie, themselves essential ingredients to mental health and wellness.

So, these are our plans for the year ahead: that we help bring peace to the world and soothe those afflicted by conflict, and that we help each other and our communities deal with our own internal struggles, and that we end the stigma associated with asking for help.

In all these actions, the goal is to create hope — to help the world heal from destructive conflicts, and, in turn, to help us achieve lasting change for ourselves. Rotary helps create the conditions for peace, opportunity, and a future worth living. By continuing what we do best, by remaining open and willing to change, and by keeping our focus on building peace in the world and within ourselves, Rotary helps create a more peaceful world, a more hopeful world. As Rotary's leaders from all the regions, I urge you to *Create Hope in the World*.

CITATION GOALS AND INSTRUCTIONS



The Rotary Citation is an award that recognizes the hard work clubs do throughout the year. Taking action toward achieving the citation goals helps clubs engage their members, stay relevant in their communities, and run more efficiently. A welcoming and engaging club also reflects the values of Rotary. When clubs work to achieve these goals, they also contribute to the overall health and culture of Rotary for generations to come.

To be eligible for the Rotary Citation, clubs need to begin the year as active clubs in good standing – or having paid each invoice balance in full upon receipt. To verify that your club is in good standing, check your daily club balance report under Club Administration > Club Finances. You should have an outstanding balance of \$0.00. Invoices are due when they are posted, in mid-January and mid-July.

Rotary club leaders can go into Rotary Club Central and select at least half of the goals they wish to apply toward citation achievement. This flexibility allows clubs to choose the goals that are most relevant and achievable. In addition, many goals will be self-reported by marking "achieved" in Rotary Club Central.

To achieve the citation:

- Go to Rotary Club Central
- Review the available goals
- Set at least half of the available goals
- Achieve those goals
- Report achievement in Rotary Club Central by 30 June.

Once you are in Rotary Club Central, navigate to the **Goal Center**, select the **year**, and click on the **All tab** to see the goals.

Goal	Goal Detail
Club membership	How many total members does your club want by the end of the Rotary year?
Members and Engagement	Do your club bylaws reflect your members and other participants needs? ¹
Service participation	How many members will participate in club service activities during the Rotary year?
New member sponsorship	How many members will sponsor a new club member during the Rotary year?
Rotary Action Group participation	How many club members will be members of at least one Rotarian Action Group (RAG) during the Rotary year?
Leadership development participation	How many members will participate in leadership development programs or activities during the Rotary year?

¹ New goal beginning in the 2023-2024 Rotary year

CITATION GOALS AND INSTRUCTIONS



Goal	Goal Detail
District conference attendance	How many members will attend your district conference?
Rotary Fellowship participation	How many club members will be members of a Rotary Fellowship during the Rotary year?
District training participation	How many of your club's committee chairs will attend the district training assembly?
Annual Fund contributions	How much money will be contributed to The Rotary Foundation Annual Fund by your club and its members during the Rotary year?
PolioPlus Fund contributions	How much money will be contributed to The Rotary Foundation PolioPlus Fund by your club and its members during the Rotary year?
Major gifts	How many single outright donations of US\$10,000 or more will be made by individuals associated with your club during the Rotary year?
Bequest Society members	How many individuals or couples will inform The Rotary Foundation of their plans to leave US\$10,000 or more to The Rotary Foundation through their estate?
Benefactors	How many individuals or couples will inform The Rotary Foundation of their estate plans to include the Endowment Fund as a beneficiary or will make an outright gift of US\$1,000 or more to the Endowment Fund?
Service projects	How many service projects will your club complete during the Rotary year?
Rotaract clubs	How many new and existing Rotaract clubs will your club sponsor during the Rotary year?
Interact clubs	How many new and existing Interact clubs will your club sponsor during the Rotary year?
Inbound Youth Exchange students	How many Rotary Youth Exchange students will your club host virtually or in person during the Rotary year?
Outbound Youth Exchange students	How many Rotary Youth Exchange students will your club sponsor virtually or in person during the Rotary year?
RYLA participation	How many individuals will your club sponsor to participate in Rotary Youth Leadership Awards (RYLA) events during the Rotary year either in person or virtual?
Strategic plan	Does your club have an up-to-date strategic plan?
Online presence	Does your club's online presence accurately reflect its current activities?
Social activities	How many social activities will your club hold outside of regular meetings during the Rotary year?
Update website and social media	During the Rotary year, how many times per month will your club's website or social media accounts be updated?

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CITATION GOALS AND INSTRUCTIONS



Goal	Goal Detail
Media stories about club projects	How many media stories will cover your club's projects during the Rotary year?
Use of official Rotary promotional materials	Did your club use Rotary International's advertising and public service materials, such as broadcast videos, print ads, and other official materials available in the Brand Center, to promote Rotary in your community during the Rotary year?

February 2023



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.org/actionplan



WHAT CLUBS CAN D **ROTARY'S ACTION PLAP**

to ensure that we continue to grow, unite people, and make a lasting impact. Rotary's Action Plan builds on our past successes and sets our future direction

club and district goals, and find meaningful ways to align those goals with our district about the new priorities and objectives, then use those talks to shape We encourage all members to review the Action Plan, think about your own plan. Have open and ongoing discussions in your club and throughout your your own strategies.

you can put that goal into practice. Think about how you can bring Rotary's For each of the four priorities that will direct our work, we've listed ways Action Plan to life.

ROTARY'S ACTION PLAN

INCREASE OUR IMPACT



DEVELOP A STRATEGY for educating members about the importance of impactful service projects. Research shows that measurable, data-driven results offer proof of the impactful service that is attractive to the next generation of leaders. **CONDUCT A COMMUNITY ASSESSMENT** to determine which issues are top concerns in the area. Learn about needs and strengths and identify the key decision-makers. Try conducting evaluations both before and after you implement projects to get a better sense of where and how you can create measurable, lasting change that truly helps the communities you serve.

FOCUS YOUR EFFORTS. Review your club's activities and determine which ones can be streamlined or eliminated so your club can spend more time on activities that make a real impact.

ENCOURAGE YOUR CLUB OR DISTRICT TO CELEBRATE THE

LONG-TERM SUCCESSES of service and program offerings, but to be open to new projects or opportunities to prove that your club or district's impact has only begun. Apply for a global or district grant to fund a project that will have sustainable, measurable outcomes.

EXPAND OUR REACH



SET A GOAL to collaborate with new groups in your community, either through service projects or social events, to introduce more people to Rotary. As our vision statement says, we want to unite people — not just Rotarians — to create lasting change.

USE ROTARY'S MEMBERSHIP TOOLS and resources to assess your club and learn how to make it more diverse, open, and attractive to everyone in your community.

Districts should **CONSIDER FORMING NEW CLUBS**. Take advantage of our flexible club models to create clubs that are welcoming to people with diverse interests, backgrounds, and needs. As always, these new clubs should embrace our core values and deliver value to members. **BE SURE TO TELL COMPELLING STORIES** about how your club or district is making a difference. Use the People of Action materials and other resources in the Brand Center to learn how to show your club or district's impact through the media, on social media, and in the community. Strengthening your public image can help you attract likeminded people to your club, form new partnerships for service, and build a stronger and more diverse network of collaborators.

ENHANCE PARTICIPANT ENGAGEMENT



FOCUS NOT ONLY ON GAINING NEW MEMBERS BUT ALSO ON

what's important to them in their club experience and how they want to members. Hold a brainstorming session or use a survey to ask members **DELIVERING VALUE** — both personal and professional — to current grow and develop through Rotary.

Consider everyone who encounters Rotary a participant. Invite them to **OFFER NEW IDEAS AND SHARE THEIR THOUGHTS.** Encourage them to stay involved (whether or not they join the club) so they feel valued and are inspired to support Rotary activities.

USE OUR CURRICULUM in the Learning Center, to develop leadership and other skills in members and participants.

INCREASE OUR ABILITY TO ADAPT



HOLD INNOVATION FORUMS AND BRAINSTORMING SESSIONS

with club members and other participants to gather ideas for activities and service projects in the community. Contact other organizations or clubs that have a strong record of innovation or reinvention and look for ways to apply what they did to your own club.

SET ASIDE A SMALL FUND to try new ideas. Expand initiatives that succeed and document what you learn from those that don't. REVIEW YOUR CLUB ROLES, PROCESSES, AND TASKS and look for ways to be more efficient — whether it's by reducing, combining, or eliminating responsibilities or using different technology.

governors, and other officers to work with the incoming leaders chosen ESTABLISH A CONTINUITY PLAN. Encourage club presidents, district for the next few years so that their efforts will be cohesive and all will be invested in a joint success.





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rotary.org/actionplan

2023 RMDTI District Trainer

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CONNECT WITH A ROTARY CLUB TODAY

Aotary members join clubs by invitation. Let us help /ou connect with a club that may be right for you. With 35,000 clubs around the world, and others tha' neet online, Rotary makes it easy to get involved ar start making a difference today.

Be a part of the Rotary difference. Bring your passi your perspective, and your purpose to Rotary. To connect with a club in your area and learn more, visit us at www.rotary.org/join.



1560 Sherman Avenue 1560 Sherman Avenue Evanston, IL 60201–3698 USA www.rotary.org

001-NA-(316)

CONNECT WITH US:





ROTARY DIFFERENCE

Rotary is more than a service organization that's making a difference in your community. We're an international membership organization made up of people who share a passion for and commitment to enhancing communities and improving lives across the world. The difference we make starts with our members.

WORLD 2023 RMDT



international projects that address today's most of Rotary, you'll have opportunities to change lives fighting disease, providing clean water, supporting locally and to connect with other clubs to work on communities around the globe. As a membe **pressing humanitarian challenges**, including WAn more than **1.2 million members** in clubs in almost every country, we are improving education, and promoting peace.

work to eradicate polio. We initiated the audacious o eradication campaign in 1979, by vaccinating Our largest and proudest effort to date is our chedren in the Philippines. With the help of our pertners, we have since reduced polio cases werddwide by 99.9 percent.



WE SEE DIFFERENTLY:

resources, and networking opportunities needed to strategize communities in which they live and serve, affording them better world. Our members are deeply ingrained in the We are problem solvers working together to achieve a insight into local challenges and access to the leaders, and take action to make lasting change.

WE THINK DIFFERENTLY:

varied professional and personal experiences. For more than 100 years, we have been applying different perspectives to Rotary clubs reflect the diversity of our communities and the breadth of viewpoints that comes from our members' create innovative, sustainable solutions that address the needs and challenges affecting our communities.

HOW ARE WE DIFFEREN



WE LEAD DIFFERENTLY:

other organizations seek us out because they know they can trust us to be effective partners and deliver on our promises. As Rotary members we hold ourselves to the highest ethical standards. Community members, community leaders, and

OUR ACTIONS MAKE A DIFFERENCE:

skills as a way to get the job done and bring to life the changes with local partners and businesses, and apply our leadership We roll up our sleeves, leverage our personal relationships Harnessing our unique perspectives and ideas gives us a shared purpose - one that compels us to take action. we envision.



TH OUR

/ou to join other passionate, visionary women and mer dub meetings and activities. These gatherings allow regularly to discuss and act upon community needs. Rotary club meetings are also a place to strength connections to friends and neighbors and form meaningful relationships that last a lifetime.

The impact our members make takes shape at Rotary

broad range of workshops, conferences, guest speakers And just as Rotary helps you invest in your community and more — all aimed at helping you grow personally it gives you an opportunity to invest in yourself. Many clubs offer continuous learning opportunities, with a and professionally

BEAVIBRANT CLUB

Rotary

NORTH AMERICA

710-1

YOUR CLUB LEADERSHIP PLAN

2023 RMDTI District Trainer



MEET OUR VIBRANT CLUB

Like many Rotary clubs in the United States, the Rotary Club of Rochester, Minnesota, struggled with a decline in meeting attendance and member engagement. Many of our younger working members struggled to balance the demands of career and family with a desire to serve. In addition, businesses and corporations are no longer as eager to pay membership costs, so expenses associated with Rotary have become personal expenses.

We started with a strategic planning session to improve our club's public image, increase membership, and boost member participation and attendance. As a result, we made several changes to become more innovative and flexible while maintaining our values of service, global reach, community, fun, and friendship.

HOW WE DID IT

We rewrote our values statement.

The updated language — which calls us "a service club of inspired individuals whose contributions improve lives in communities locally and worldwide" — unified our members, inspired prospective members, and generated interest in our community work.

We introduced creative meeting formats.

Our club provides innovative and flexible, cost-free meeting options:

Speed networking. This helps our members build relationships and rapport.

Service first Thursdays. On the first Thursday of each month, we meet at the public library to clean books and prepare and inventory multimedia materials.

1905 meetings. Our 1905 meetings honor the early days of Rotary tradition. Like the first Rotarians, we meet in small groups. Members can participate remotely by meeting at designated locations closer to their workplaces. We use Facebook Live to tune in simultaneously to our club president for the first half of the meeting. For the second half, we break into small groups to discuss a video presentation on the theme of the month.

The varied formats increased member engagement in a way that wasn't possible with traditional meetings alone. Even former Rotarians started to re-engage. While our weekly attendance may be around 60 members per meeting, our real-time Facebook Live videos that broadcast our 1905 meetings and traditional meetings have generated over a thousand views.

Our experience has taught us that it is possible to make changes in the spirit of innovation and flexibility yet maintain Rotary values. We discovered that there are many fun ways to serve and promote fellowship with Rotarians.

We relaxed attendance guidelines.

While we are committed to making our meetings more accessible to working members, we also wanted to continue regular meetings, because they foster the fellowship and camaraderie that our members enjoy. We revised guidelines to require only 50 percent attendance at the weekly meetings. Missed meetings can be made up at other Rotary meetings or by participating in a service activity.



2023 RMDTI Dist

START YOUR CLUB ON A PATH TO VIBRANCY

Vibrant clubs engage their members, conduct meaningful projects, and try new ideas. List the new ideas your club wants to try, and create a plan to increase community interest and attract more members.

As you develop your plan, use these tips and ideas, and let your club evolve.

Decide what you'd like your club to be like in three to five years.

- Plan an annual visioning session, and use the Rotary Club Health Check to identify your club's strengths and areas that need improvement.
- Use the Strategic Planning Guide to set long-term goals.

Hold club meetings that keep members engaged and informed.

- Conduct the **Member Satisfaction Survey** to find out what your members like and don't like about your club, and create a plan for implementing changes.
- Vary your meeting format to include a mix of traditional and online meetings, service projects, and social gatherings.

Prepare members for future roles to smooth leadership transitions.

- Ensure continuity by making appointments for multiple years, having a current, incoming, and past chair on each committee.
- Conduct on-the-job training for incoming club officers, and have job descriptions for each officer.

Develop strong relationships within your club.

- Find suggestions in Introducing New Members to Rotary.
- Sit with different people at each meeting.

Coach new and continuing members in leading.

- Appoint a club training committee to oversee training for members.
- Use the Leadership in Action guide on starting a program to develop members' leadership skills.

Decide on your annual goals, and enter them into **Rotary Club Central**.

- Focus on something your club is good at, and make it something your club is great at.
- Update committees once a month on your goal progress.

Communicate openly in your club.

- Share information at club meetings, on your club website, and through social media, and check regularly to see how members are feeling.
- Use the templates and resources in the Rotary **Brand Center** to create your club brochures and newsletters.

Adapt your club's bylaws to reflect the way the club works.

- Involve your members when you review your club's bylaws every year.
- Edit the **Recommended Rotary Club Bylaws** template to reflect new practices and procedures.

Make sure all members are involved in activities that genuinely interest them.

- Conduct a member-interest survey, and use the results to plan projects, activities, and engaging meetings.
- Get new members involved early by learning their interests and giving them a role in the club.

Create practical committees for your club.

- Small clubs: Consider how you can combine the work of committees.
- Large clubs: Create additional committees to get all members involved.

HOW TO TALK ABOUT OUR ACTION PLAN

Like the People of Action who inspired it, Rotary's plan for the future is bold.

This glossary will help all of us at Rotary speak about our goals with one voice and one vocabulary so we can move forward and act as one.

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."

ACTION PLAN

The name for our five-year strategic plan, including four strategic priorities and 14 objectives.

PARTICIPANTS

All Rotary members and other individuals who engage in Rotary activities.

INCREASE OUR IMPACT

Define, measure, track, and capture data from service projects to measure our impact, improve project quality, and create lasting change.

STRATEGIC PRIORITIES

EXPAND OUR REACH

Develop new models of engagement to attract diverse Rotary participants and unite them in taking action.

ENHANCE PARTICIPANT ENGAGEMENT

Create new ways to inspire participants and provide valuable experiences that make them want to stay.

INCREASE OUR ABILITY TO ADAPT

Make Rotary's operating and governance structures more efficient, representative, flexible, and effective.

OBJECTIVES

The specific things we want the Action Plan to accomplish.

INITIATIVES

The actionable steps to achieve each objective. The Secretariat, with oversight from the Strategic Planning Committee, is responsible for accomplishing them.

INPUTS

The resources invested in a program. Example: The materials used in a literacy program.

Be part of the plan:

OUTPUTS

The immediate results of a program. Example: The number of people who complete a literacy program.

OUTCOMES

The short-term or intermediate results of a program. Example: The number of people who gain reading proficiency in a literacy program.

IMPACT

The long-term effects or end results of a program. Example: The changes in education outcomes for the community.



myrotary.org/strategicplan

New Rotary International Learning Model Effective July 1, 2023

Content-Centered-Training to Participant-Centered-Learning



ROTARY LEARNING CENTER COURSES



Rotary under the Learning & Reference tab. Courses are grouped by topic. You can filter by topic to find courses when you community, and track your progress. Sign in with your My Rotary account at rotary.org/learn, or find the link on My Learn everywhere and anytime with Rotary's Learning Center. Take courses, find resources, connect with an online are in the Learning Center.

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ROTARY TRAINING EVENTS

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	<u>Trainers</u> 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	<u>Trainers</u> <u>Presidents</u> (<u>Basics)</u>
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 (Intermediate) Secretaries Treasurers Committees



TOPIC-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
District Vibrant Club Workshop Determined by district	Club presidents, club membership committee chairs, club Rotary Foundation committee chairs, and interested Rotarians learn how membership, the Foundation, and public image work together to help fulfill Rotary's Action Plan.	District Rotary Foundation committee District membership committee District public image committee District training committee	<u>Trainers</u>
Grant Management Seminar Determined by district	Club presidents-elect (or appointees) learn how to manage Rotary grants.	District Rotary Foundation committee District training committee	<u>Trainers</u> (for in-person seminars) <u>Trainers</u> (for virtual seminars) <u>Participants</u>
Rotaract Club Officer Training Anytime 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	<u>Trainers</u> <u>Participants</u>



2023 Rotary Multi District Training Institute District Trainers Agenda – Module Worksheet

8.	1:30 - 2:00 pm	Hands Group	On Learning Plan Design – Small s	PDG Mary Ann McDuff
	Learning Outcome:	The Rotary Leader will <i>assess</i> District training plan frameworks and models, along with learning principles, to formulate training/learning plans for specific District events.		
	Course Description:		tion of basic learning plan elements and des red, special, and supplemental.	ign principles for District events
	Exercise:		small groups, and for each required RI traini ate a brief training/learning plan. Include logi	•
		1.	District Team Training Seminar - District Leadership Training (DLT)	PDG Gary Gillen
			Presidents-elect Training Seminar - LSPETS (District Day)	PDG Lisa Herring
		3.	District Training Assembly - District Assembly (DA)	DT Arden Riley
		4.	District Vibrant Club Workshop (VCW)	PDG Dian Edwards
		~	Date, Location, Rooms	
		~	Budget	
		~	Food	
	Logistics -	~	Registration/Communication	
		~	Staffing – Paid/Rotarians – Host Club	
		~	Equipment and Supplies	
		✓	Team Meetings	

8.	1:30 - 2:00 pm	Hands On Learning Plan Design – Small Groups	continued
		✓ Program Agenda/Modules	
		✓ Keynotes/Facilitators	
		 ✓ Learning Outcomes 	
	Curriculum -	✓ Course Descriptions	
		✓ Methods/Techniques	
		✓ Discussion Questions	
		✓ Resources and Materials	
	Other Considerations -		
	Discussion Questions:	 Assess the last District training yo What was the most impactful elem 	
			it, formulate a brief training/learning plan. most critical <i>logistics</i> element. Why? <i>riculum</i> element. Why?
	Outcomes/ Impacts:		
	Additional Comments:		



RMDTI Trainers—Effective Facilitation Techniques–Best Practices PDG Lisa Herring

What are facilitation techniques? Trainers, facilitators and moderators use facilitation techniques to engage participants, understand group dynamics and ensure a meeting or training achieves its goal.

16 facilitation tools and techniques

1. Brainstorm

Brainstorming creates a creative group atmosphere that can often bring about fresh and unconventional ideas.

2. Set meeting/training agendas

While team members generally receive agendas before the meeting starts, review the schedule and objectives again at the beginning of the meeting so everyone in the group understands its direction. This step is particularly important at the start of unplanned or spontaneous meetings.

3. Break the ice

After the introduction, perform an ice breaker exercise so everyone gets comfortable in the group.

4. Delegate roles

Assign roles to the group members, such as asking someone to record the meeting's details or giving someone responsibility for checking the time. Rotate duties from meeting to meeting so everyone feels involved.

5. Set ground rules

Ensure the meeting stays calm and organized by setting rules such as raising your hand if you want to share an idea.

6. Take breaks

Long meetings can cause attendees to lose focus and become fatigued. Take regular breaks, ideally every 90 minutes during long meetings, to let the group get a drink or walk around. If you pause a meeting for lunch or a food break, provide healthy refreshments that stimulate the mind.

7. Provide a toolkit

The facilitator should provide the team with tools such as notepads, pens or pencils so they can take notes and record the meeting's details. Provide markers and a whiteboard if you or other attendees are giving a presentation.

8. Use a flip chart

Flip charts can provide a visual element to a meeting, particularly when brainstorming creative ideas. Place the flip chart at the front of the room and stand to the side while writing or discussing a topic so everyone can see. Write in clear and bold font, preferably in capital letters. Use different-colored markers or bullet points to break the content into smaller ideas.

9. Perform meta-planning

To engage all attendees, ask them to each share a keyword about the meeting's topic or main issue. Collect their ideas and share them with all participants. This is a simple way to come to quick conclusions.

10. Engage and manage group dynamics

If a meeting involves lots of conversation, separate into smaller discussion groups so the quietest participants can contribute to the decision-making process. Give the dominant personalities jobs to keep them focused and to encourage them to contribute their energy toward productive tasks.

11. Keep the group's mood upbeat

Break up serious discussions with fun, low-stress team-building or trust-building exercises. These games help keep attendees positive and productive.

12. Monitor group politics

If you notice power imbalances and hierarchies developing within a group, bring the focus back to the discussion through questions, solutions to problems, summaries and reflections. Keep positively energizing the panel.

13. Be alert

By being attentive, you can ensure the proceedings stay on track and the meeting progresses as planned.

14. Pause and think

Once you have established the main theme of the meeting, ask all the attendees to pause and think about it. Ask them to write down a few thoughts or ideas before the group begins discussing the topic together.

15. Group review

Get the group's perspective and feedback on the meeting's proceedings. This 10minute exercise can help the facilitator understand what went well and what they can change for future meetings.

16. Make closing notes

Clearly document the training/meeting's proceedings and outcome, so everyone understands the concluding details. Summarize the training/meeting verbally as well as in writing.



2023 Rotary Multi District Training Institute District Trainers Agenda – Module Worksheet

12.	3:05 - 3:25 pm	Table Talk: IntroductionMaking Your Training Topics Come To Life	PDG Dian Edwards	
	Learning Outcome:	The Rotary leader will <i>assess</i> curricula plans with innovative strategies for Rotary high-level training topics.		
	Course Description:	In-depth discussion and point of view sharing on inn and strategies to bring basic Rotary curricula areas/		
	Exercise:	In four small groups, and for each training/learning to innovative strategy to include in your own training/le	· · · · · · · · · · · · · · · · · · ·	
		1. Raising TRF Awareness Inspiring International Service	PDG Gary Gillen	
		2. Attracting and Engaging Members Enhancing Public Image	PDG Lisa Herring	
		3. Advocating for Community Focusing on Vocational Service/Ethics	PDG Dian Edwards	
		4. Building Service to Youth Highlighting Rotary Basics	DT Arden Riley	
	Discussion Questions:	 First, give a brief content overview of each training/learning topic. Then, for each training/learning topic, formulate three strategies for bring the topic to life. Finally, for each training/learning topic, formulate your own <i>"big rock"</i> strategy and assess how you would bring it to life at <i>your own</i> training et the topic to life. 		
	Outcomes/ Impacts:			
	Additional Comments:			




