

PRESIDENT-ELECT

Discussion Notes



Ole Man River
Multi-District
President-Elect Training Seminar



March 17 – 18, 2023

LEADERSHIP: Planning an Effective Year

LEADERSHIP

Leading _____

Managing _____

Rotary leadership skills _____

Succession Planning _____

My club needs me to _____

DETAILS

Club governing documents _____

Club reporting duties _____

PLANNING

Vision _____

Mission _____

APPLICATION

What was valuable to you? _____

How will you put it into practice? _____

*Failure to plan is a plan for failure.
(paraphrased)*

— Benjamin Franklin

*If you don't know where you are going,
you might wind up someplace else.*

--- Yogi Berra

Planning an Effective Year

SWOC Analysis

Club strengths _____
Club weaknesses _____
Club opportunities _____
Club challenges _____

Vision Statement

At the end of my year, I see my club: _____

Goals

Club's 3-year goals _____

Your goals this year _____

Leadership

Leadership team positions _____

Committees needed _____

Administration

Review governing documents? _____

Verify Rotary reporting requirements _____
RI _____
District _____
DaCdb _____
Assess tax situation _____
Federal & state? _____
Tax ID? _____
Tax return filed? _____

Annual budget _____

Meetings

Location & food _____
Speakers _____
Technology _____
Other? _____

Membership

Numbers _____
People diversity _____
Vocation diversity _____
Other _____

Public Image

Traditional media _____
Social media _____
Name & logo recognition _____
Other _____

Service Projects

Evaluate _____
Community need _____
Member participation _____
Other _____

Other

MEMBERSHIP: Attract, Engage, & Develop

BEST PRACTICES

Attract _____

Orientation _____

Engage & Retain _____

Develop _____

MEMBERSHIP

Who champions membership? _____

What is your responsibility regarding membership goals? _____

APPLICATION

What was valuable to you? _____
How will you put it into practice? _____

Coming together is a beginning, staying together is progress, and working together is success.
--- Henry Ford

Alone we can do so little; together we can do so much.
--- Helen Keller



MEMBERSHIP

Breakout Questions to Discuss

Note: Your flip chart page should show best practices, not answers to the questions.

ATTRACT (Provide an experience that people want)

- What attracted your recent new members?
- What challenges does your club face to bring in new members?
- What are the values of diversity in industries, work roles, gender, ethnicity, etc. for your club?
- What makes a Rotary club attractive compared to other organizations?
- What does your club offer that people want to experience?

ORIENTATION (Provide club and RI visions, practices, opportunities, history, etc.)

- What is the benefit of Orientation?
- What should be included in orientation?
- How long should orientation(s) last?
- Who should be involved in orientation events?
- Who else can participate?

ENGAGE & RETAIN (Work with and improve what we already have)

- What do members value in your club? What tools are available to find out?
- What are the benefits your club provides to members to be worth their time and resources?
- What keeps people in your club?
- Why do members leave?
- Are the reasons people join and the reason they stay always the same?

GROW & DEVELOP (Develop and grow members & leaders)

- What will grow leaders in your club?
- What could be the benefits of succession planning in growing leaders?
- What benefits are provided by making Rotary education a high priority in your club?
- What resources are available to provide that knowledge to your members?
- How do you provide more leadership opportunities?

PUBLIC IMAGE: It's Who We Are!

PUBLIC IMAGE

Public image is _____

Your club's public image _____

How do people find your club? _____

Tools available for public image _____

Social media best practices _____

PUBLIC IMAGE FIX

Situation in which lack of public image, relations, or marketing prevented your club from gaining recognition, getting community involvement, or obtaining membership interest:

Potential "fixes" for the situation: _____

APPLICATION

What was valuable to you? _____

How will you put it into practice? _____

*People do not buy goods and services.
They buy relations, stories, and magic.*
— Seth Godin

*... If you don't create some type of public
image, it gets created for you.*
--- Tom Verlaine, singer & guitarist

SERVICE PROJECTS: It's What We Do!

PROJECT PROCESS

Idea/Pre-project _____

Approval _____

Planning _____

Debrief/evaluate _____

Outcomes _____

SERVICE PROJECT

What makes projects valuable to members? _____

Benefits of partners _____
Evaluating effectiveness of programs _____

International projects _____

APPLICATION

What was valuable to you? _____
How will you put it into practice? _____

Whatever good things we build end up building us.

--- Jim Rohn

Power is the ability to do good things for others.

--- Brooke Astor