

Educational Session Notes

Dynamic Leadership

Training Leader—Terry Becker

4:45 PM

9:30 AM

1:45 PM

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Training Leader—Tim Mobley

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Training Leader—Cindy Piva

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What makes good leader?

- Listener
- Teacher
- Inspirational
- Facilitator

- Organized
- Delegator
- Communicator
- Catalyst
- Visionary
- Role model

A boss is on top of others, a true leader looks up to others

Explain the importance of “why” What is your purpose, your cause, your belief?

- People don't buy WHAT you do; they buy WHY you do it.
 - You need to lead with WHY
 - You can get caught up in the WHAT and miss WHY you do it.

Importance of a vision

- If you and/or members can't articulate it, you really don't have one.
- Having a CLUB vision helps focus your club. (don't get trapped in just having a personal vision).
- A vision helps get others engaged, inspired and motivated.

Discussion: Ways to engage your members/club.

- Club Foundation vs RI? Use PHF members to acknowledge and invite others to join in RI foundation
- Ask their “why” is
- Encourage members to take Rotary courses and seminars
- Use your club program to highlight the work of RI
- Require new members to DO things. (e.g. specific tasks on committees)
- Engage “early adopters” and allies first. Others will follow
- Have 1:1 discussions with members.
- Have inspiring speakers
- Ask members: what are your interests/skills?
- Call members who haven't been there.
- “Buy in” is critically important to have engaged members.
 - When you ask someone to be involved, explain the commitments of time and resources.
 - It is better to give them an “opportunity” to do something, rather than to direct them to do it.
 - Mentors and co-chairs can be really helpful to engage some more reluctant members.

Strategic Plan – The steps to start:

- Why does your club exist?

- What will you do?
- How will you do it?

SMART Goals

- Specific – (resources, time, etc)
- Measurable
- Attainable – (realistic)
- Relevant – (it needs to mean something to your club)
- Time Bound – (when will it be started, completed and how will we stay on track).

Examples:

1. To develop a team of 3 people to help retain members by following up with a personal phone call if a member's attendance drops below 80%.
2. To increase membership by 2 members and 2 corporate members by June 30.
3. To increase awareness in community of the work Rotary does by submitting 10 press releases to local media in the next 12 months.

Planning for your exit

Mentoring your next PE

Creating a smooth transition

Remaining engaged.

Mentoring

- Start NOW
- Revisit the vision with the next President(s)
- Found out what the next PE's ideas and goals are
- Have PETS start for the President Nominee – or have Nominee training a year earlier

Transition

- Let them run a meeting now
- Meet monthly with Past Pres, Pres, PE and President Nominee

How to Remain Engaged

- Delegate
- Have a plan of what you will do
- Have a specific job (e.g. Foundation chair, Interact advisor, etc)
- Remain on the board

“Don't get caught up in the numbers – engage your club and the numbers will follow”

1:45 PM

“Building a boat isn’t about weaving canvas, forging nails, or reading the sky. It’s about giving a shared taste fore the sea...” –Antoine de Saint-Exupéry

How does it feel to be leading your Club in one of the best organizations in the world?

Excited	Inspired
Anxious	overwhelmed
Amazing	

What Makes a Good Leader?

Someone who listens	Good role model
Delegates	Plans
Sets the tone	Your word is your bond
Organized	Consensus
Strong communicator	Connected within/without Rotary
Handle issues/problem solver	

What’s the Difference Between A Boss and a Leader?

Boss	Leader
Tells people what to do	Empowers other to do
Tells people “how”	Inspires
Criticizes	Mentors Others
“Looking down” on people	Appreciates
	Working “with” the people
	Lead by example

Two Books to Consider

1. “Good Leaders Eat Last” by Simon Sinek @simonsinek
2. “Start with WHY” by Simon Sinek

“people don’t buy what you do, they buy “why” you do it”

What is a Club Vision?

First step in the Strategic Planning process	Articulate OUR vision
Where will you be in 5 years?	Clear and Concise
Challenging and realistic	

My Vision vs Club Vision:	
<i>“By the end of my year as President, my club will have the most Paul Harris Fellows in my district.”</i>	

Why is it important to engage your club?	
They’ll be part of the strategy to implement your vision	The Club is the “HOW”
Passion	Keeps members coming back
More heads are better than one/TEAM	Have FUN!

What are some ways to engage your club?	
Making a point to <i>personally ask</i> people to help instead of just using email.	Buddy (mentor) program. Someone they connect with. Looking after each other
Delegate – assign responsibilities. Have to be careful that folks don’t back off of their responsibilities (gentle nudge). Selectively making them feel “good” about the task/Recognition	Partner with other clubs, businesses, other organizations. Get “buy-in”
Member survey w/a preface to the “why” of the survey and follow-up with membership	

What is Strategic Planning?

- Why does your club exist?*
- What will you do?*
- How will you do it?*
- Why does this matter to my club?*
- Why use Strategic Planning?*

Good examples of amazing vision statements...

Create SMART Goals

Specific	
Measurable	
Attainable	Is it realistic but not too easy
Relevant	Relevancy/if not relevant then it's not going to be achieved by default
Time-Bound	When was it started/completed/stay on track

Examples of SMART goals:

- Increase revenue by 25% each month by catering 2 parties per month
- Gain 2 clients each quarter for my consulting business by participating in a monthly networking group
- Write a fiction novel about my experience helping build houses in Costa Rica in 12 months
- Create a website to sell jewelry from my store by December 31st. Utilize a website development company to create the site and payment interface

Rotary Goals Exercise

Foundation

- Educate Club members about TRF and show them how to use it online monthly
- Encourage every Rotarian to participate in EREY by using a quarterly appeal

Membership

- Gain 10 new members by building a list of 60 people to draw from

Service/Engagement

Preparing for Your Exit

Mentor the next President-Elect

How will you smooth the transition?

How will you remain engaged?

- Joint Meetings with President, President-Elect, President-Nominee
- Support current President and get PE ready for next year
- Get past Presidents involved and helping
- Communication
- Debriefing after each event and keep notes
- Just because you're President doesn't mean that you're done
- Past President chair a committee
- Continue your passion

3:45 PM

What makes a good leader?

- Visionary
- Listener
- Energetic
- Caring
- Decisive
- Goal setter
- Being one step ahead
- Trusting
- Informative
- Leads by example
- Open minded
- Good Communicator
- Funny
- Bullet proof
- Approachable
- Problem Solver
- Critical Thinker

Ways to Engage

- Ask what their why is
 - 1 on 1 conversation
- Finding Commonalities
 - Take survey
- Rotary Moments
 - Get to know members
- Social Activities
- Re-engage Past Presidents
- Educate members on generations

Training Leader—Nelson Maler

4:45 PM

What makes a dynamic leader? P.7

- Listener
- Organizer

- Positive attitude
- Team builder
- Achieves results
- Knows the why
- Has purpose
- Believes in the cause

Understands that the What, How, Why is backwards and should be WHY, then the what and how comes into play.

Discussed some of the companies that are successful with their leadership and marketing technique:

- Apple. Why: Everything we do is different. How: Our computers are simple and elegant. What: We just happen to make great computers.
- Personal reasons to join Rotary. Why: Fellowship and the greater good. We make tangible impacts. How: Raise money, take action. What: Help others.
- Other notes: Rewarding and Fun. Honoring interests of others. Clear visions. Non- Government, Leading people to a better place through Service. Support global, work local, learn, have fun. Leaving the world a better place.

My Vision versus My Club Vision:

- Engage club members for feedback.
- Have S.M.A.R.T. goals: (Specific, measurable, attainable, realistic, timely.)
- Brainstorm and score to set priorities.
- Embrace the visioning process.
- Take plans to the club in advance – invite input – knowing you won't please everyone.
- Open Discussion.
- Beware of the STP (Same ten people.)

Prepare for your leadership exit:

- Mentor next president.
- Create a smooth transition.
- STAY ENGAGED.
- Join the President's Council.
- Help to get the next two presidents into place.
- Build on the momentum of a group that meets regularly – this impacts the entire club.
- Discuss who could be in charge of programs – could be the PE or Vice Chair.
- Consider a two-term presidency – then go out and find your own replacement.

9:30 AM

Dynamic Leadership

- listen
- trust
- inspire
- communicator
- thoughtful
- delegates

Why are you president?

- articulate vision
- GoTo
- “here’s why we’re selling” (Apple)
- remember why you exist
- networking/friendship
- reviewing projects

Club vision:

- serving children
- fellowship
- fun
- nourishing minds of youth
- gateway
- do you eliminate programs for one segment when you start serving a different segment e.g. youth/seniors
- ownership of vision
- update plans
- support us supports the community

How to engage club:

- inspiration
- buy-in
- sell it
- work/fun balance
- shared vision
- personally asking
- understand “why”

Smart goals:

- realistic
- relate to past/president
- continuity
- past presidents valued resource
- keep past presidents engaged
- preparing for exit begins now
- My Rotary
- Rotary Club Central

1:45 PM

What is a good leader?

- Authentic.
- Inspiring.
- A good listener / communicator.
- Emotionally intelligent.
- Knows when to follow.
- Motivated / motivating.
- A learner
- Open minded

Why are you a Rotarian?

- We do great things.
- We do International projects.
- The fellowship.
- I believe in doing good.
- You can leverage the Power of One.
- The connections, the feeling of belonging.
- Reminds us of gratitude.
- It is an effective organization.
- It was expected of me, coming from a Rotary family.

Why does the 'club' structure work?

- It is a forum to organize efforts.
- To address community needs.
- It brings diverse people together.
- It creates the reason to come together.

How do you keep your club coming together?

- Share a vision.
- Show the passion.
- Inspire.
- Utilize a strategic plan.

What is your vision?

- Choose more effective projects.
- Maintain the passion, purpose and fellowship.
- Maintain Rotary values.
- Be sustainable.
- Keep a broad scope - maintain the dynamic.
- Focus your projects.
- Vision vs. Goal?

How are you going to get Vision buy-in?

- Involve the club in the process.
- Communicate.
- CLUB vision.

How do you do this in a large club?

- Connect with members individually.

- Target folks with the necessary skills set and get them on board (this means you need to know your members!)
- Engage the Board in the Visioning process.
- Take feedback repeatedly.

How are you going to activate your plan?

- Leverage the Board's help.
- Communicate the base line (where are you starting from?).
- The Presidential line communication: engage Past Presidents, the Immediate Past President, the President, the President Elect and the President Elect Nominee together.

How are you going to smooth the transition?

- Engage the incoming leadership.
- Create a Playbook!
- Stay involved.
- Make it fun!
- Co-Chair meetings.

How will you stay engaged?

- All Past President's stay involved - on the Board or given some other task.
- Know your Board personally -*become friends!*
- Don't forget to include spouses.
- Put your Past President on the Board.
- Keep Past Presidents meeting together.
- One Past President per month runs a meeting.

3:45 PM

Training Leader—Bob Linz

4:45 PM

9:30 AM

Leadership Qualities:

- Self-awareness
- Open Communication
- Engaged
- Credible
- Vision
- Objectivity
- Flexible
- Preparation

- Delegator
- Accountable
- Passionate
- Inspirational

Five Years Out our Club will: (Big, hairy, audacious goal)

- Unique, comfortable identity
- Community is aware
- Feed the hungry children
- Interact
- Increase donations of every member by 50%
- 35 members from each of top three areas
- Identifiable project (Rotary branded)
- International project
- Increase diversity & demographic in Club
- More Community awareness & partnership

Provocative way to engage members:

- Be Face-to-Face, direct
- “Stale Bread” – this is where we are now, how do we re-bake?
- Split in to groups of three, choose from given objectives
- 2x2 – two people get to know each other, report findings in two minutes
- Throw out a balloon – catcher says the greatest gift Rotary has given them
- Play kids games – musical chairs
- Consolidate projects – join other Clubs
- Classification talks “revisited” – keep it short
- Stirring the pot
- One-on-ones
- Mission Statement on banner

1:45 PM

Qualities of a Good Leader:

- Decisive
- Even Keel
- Humour (or humor for my US friends!)

- Respectful
- Good Listener
- Connector
- Humble
- Empathetic
- Articulate
- Inspiring
- Ethical
- Creative
- Delegate
- Organized

How to Engage Members:

- Past President Annual Retreat
- Collaboration/Buy-In – Ask Members
- Regular Recognitions – Large and Small
- Pair Board Members with Club Members 1 on 1
- Why we are Rotarians
- Start a Board Level to come up with a plan to engage members
- Over-The-Top Fundraiser so everyone wants to join
- RLI available to every Club Member
- New Members – get them involved asap

3:45 PM

Leading by Example

1. Knowledgeable
2. Inspirational
3. Accountable

Qualities of a good leader

1. Relentless visionary
2. Motivator
3. Integrity/flexible
4. Dynamic
5. Communicator
6. Enthusiastic
7. Committed

Engage

1. Relationship BUILDING
2. Rotary moment each week
3. Team building in committees
4. Find a common why
5. Speak 1 on 1 to every member
6. Praise actions you want repeated
7. Show results