

**2020-21 Rotary Opens Opportunities**

**Document 2**

**Organizer Guide**

**One Rotary Summit (ORS) Overview**

This year’s ORS theme is based on the Rotary Theme for the year, **Rotary Opens Opportunities.**

An ORS is all about the synergy among Membership, Public Image, and Humanitarian Service through The Rotary Foundation. Slide 3 in Document 11, the *PowerPoint for Use at the ORS*, illustrates these relationships.

The attendees at the ORS will jointly develop creative ways to achieve and sustain membership growth and engagement/retention, to increase Rotary Foundation giving and project engagement, and to gain enhanced public image in their communities and clubs.

**Documents (Docs) for this year’s ORS.** All are posted at [www.zones25b-29.org](http://www.zones25b-29.org).

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| **Doc #** | **Topic** |
|  |  |
| 1 | Summit Outline and FAQs |
| 2 | Organizer Guide |
| 3 | Promotional Information for Districts |
| 4 | Downloadable ORS Logo |
| 5 | Supplies, Equipment, and Tips for In-Person Meetings |
| 6 | Supplies, Equipment, and Tips for Virtual Meetings |
| 7 | *Setting the Stage*   1. District Governor Remarks 2. Membership Chair Role 3. The Rotary Foundation Chair Role 4. Public Image Chair Role |
| 8 | Breakout Facilitator Guide for *Sharing Ideas* |
| 9 | Discussion Questions for *Sharing Ideas* |
| 10 | *Moving to Action* Outline |
| 11 | PowerPoint for the ORS |
| 12 | Toolkit Contents   1. Personal Action Plan 2. Rotary International President Holger Knaack on Rotary Opens Opportunities 3. District Information |
| 13 | Instructions for the Event Evaluation |

**In-Person or Virtual Meetings**

The materials for this year’s ORS are designed for in-person meetings, virtual meetings, or a hybrid of those two methods.

**Three segments for the ORS**

1. *Setting the Stage (30 minutes)*
2. *Sharing Ideas (75 or more minutes)*
3. *Moving to Action (30 minutes)*

**Segment 1 – *Setting the Stage* (30 minutes)**

The time for each part of this segment shown below in parenthesis. There is no “Gathering Time” factored into the times below. So, you may want to have participants join the meeting a few minutes early to socialize and be ready to go at the announced time for the Summit.

This segment sets the stage for the breakout discussions and processing of ideas. It is an important part of a Summit; however, time will be of the essence and if this segment goes too long, the rest of the Summit will be adversely affected.

Three keys to the success of this segment are

1. to start on time
2. to have presenters stay within the time set for their presentations
3. to follow the suggested outlines for presenters. Outlines for each of the four presenters – District Governor, Rotary Foundation, Public Image, and Membership – are provided in the ORS materials in Docs 7a, 7b, 7c, and 7d.

Please emphasize to the presenters that this ORS is about **Rotary Opens Opportunities** in the context of how Membership, Public Image and doing humanitarian service through The Rotary Foundation are all related and that what is contained in the outline should be covered as those items are foundational for the *Sharing Ideas* segment. Also, note for them that goals with numbers and reports about numbers are not appropriate in these presentations.

Outline of *Setting the Stage* segment:

1. Organizer Overview of the Summit (3)

* Show slide of Outcomes (Slide 2) and note each Outcome, as listed here:

As a participant you will…

* 1. Be inspired and ready to act on Rotary opportunities through the connectedness of Membership, Public Image, and The Rotary Foundation.
  2. Gain a broader view of opportunities that come through Rotary and Rotaract.
  3. Understand how acting on opportunities can help clubs increase membership and result in member retention.
  4. Appreciate how acting on opportunities can lead to increased giving to The Rotary Foundation and Doing Good in the World.
  5. Understand “What’s in it for me” and “What’s in it for others.”
* Note the Toolkits for each attendee and the contents of the Toolkit.
* Review the content of the Personal Action Plan, Doc 12a, and encourage attendees to use it to record ideas throughout the Summit.
* On the screen, show the One Rotary slide – Slide 3 in the PowerPoint Set, Document 11
* Explain how an Event Evaluation (Doc 13) will be done and encourage them to make evaluative notes throughout the Summit.

1. DG Welcome and Remarks (3)
2. Exploring Rotary Opportunities and how the district can help clubs
   1. Membership Chair (6)
   2. The Rotary Foundation Chair (6)
   3. Public Image Chair (6)
3. Rotary International President Holger Knaack on Rotary Opens Opportunities (4) – PowerPoint Slide 12 in Doc 11 and handout in Toolkit, Doc 12b
4. Organizer “What’s next!” (2)

* Explain what is next, that is, the Sharing Ideas segment and the Moving to Action segment and give any instructions that participants and facilitators will need.

**Segment 2 – *Sharing Ideas*** **(75 minutes)**

Small group facilitated *Discussion*

Document 9 for participants and Document 8 for Breakout Facilitators

Breakout facilitators will take the lead in this segment. **Training of facilitators is essential.** See the last page of this Organizer Guide for a checklist for Breakout Facilitator training.

It is suggested that during this segment you or someone you designate periodically announce the remaining time in 15-minute increments, except during the last 15 minutes doing so at the 10, 5, 2, and 1-minute marks.

It is strongly recommended that the District Governor and future District Governors not be used as Breakout Facilitators and that they not be in discussion groups as participants. Rather, they should be in attendance to observe, to listen, and to be resources as needed.

The “Action Board” at the end of the *Sharing Ideas* segment

At the end of the *Sharing Ideas* segment, each attendee will be asked by the small group Breakout Facilitator to share one action item, that is, something the attendee is going to do as a result of having attended the Summit.

* For in-person meetings, This will be done by writing the action item on a Post-it and then putting the Post-it on the “Action Board,” an easel pad sheet (or more than one) provided by you. The facilitator for the *Moving to Action* segment will highlight action items.
* For virtual sessions, the Breakout Facilitator will have each attendee verbally share the action item, make a list of the action items, and will verbally share the action items during the *Moving to Action* Segment.

**Segment 3 – *Moving to Action*** **(30 minutes)**

Plenary – facilitated discussion of the results of breakout discussions. It recommended the Organizer and one other experienced facilitator moderate this segment of the ORS.

Document 10 provides an outline for this segment.

This key part of the ORS affords attendees the opportunity to gain ideas from the “work” that has been done at the Summit thus far, giving them time to process what they have learned, and inspiring them to take action personally and at the club level. In the latter regard, the Personal Action Plan, Doc 12a in the Toolkit, pertains.

**The next page contains a checklist for you as the Organizer and a checklist for conducting Breakout Facilitator Training.**

**Organizer Checklist (you, of course, can delegate!)**

* Ensure that the ORS is publicized (Doc 3).
* Arrange for the meeting facility and logistics or for use of an online webinar account. (See Doc 6 if doing the ORS online.)
* Arrange for all presenters and facilitators.
* Arrange for someone to be responsible for technology during the ORS.
* Download the PowerPoint, Doc 11 and after downloading, tailor it to your ORS.
* Ensure that copies of guides for presenters (Doc 7a-7d) and facilitators (Doc 8 for Breakout Facilitators and Doc 10 for the Moving to Action Facilitators(s) are provided to them.
* Ensure that copies of Doc 9, the Discussion Questions for *Sharing Ideas,* and all items in the Toolkit (Docs 12a-12c) are made for presenters, attendees, and facilitators.
* ***Conduct training*** of Breakout Facilitators for the *Sharing Ideas* segment. See checklist below.
* Keep things moving and on schedule.
* Serve as a co-facilitator and recruit and train a co-facilitator for the discussion of ideas and action commitments in the *Moving to Action* segment.
* Consult Doc 5 for an in-person summit or Doc 6 for a virtual summit. Those documents address, *Supplies, Equipment, and Tips* and contain some items that are on this list and some that are not.

**Checklist for Breakout Facilitator Training**

* Give an overview of the 3 segments for the One Rotary Summit.
* Explain their roles in facilitating discussion during the *Sharing Ideas* segment, including:
  + What questions will be included in this segment and the total time for the segment. Core Questions to be used. Will any of the Optional Questions be used?
* Go over the following instructions to the Breakout Facilitators in Doc 8
  + Your Role
  + Time for the Segment you will lead
  + As you begin the Breakout Session
  + The instructions in parenthesis for each discussion items
  + As you conclude the Breakout Session, noting how the Action Board will be done and how action items will be shared in the *Moving to Action* segment
* How time will be managed so that all discussion items can be covered
* How reports from the Breakout groups will be reported during the *Moving to Action* segment
* If doing an in-person summit, how will breakouts be conducted? At tables in the plenary room? In various rooms?
* If doing a virtual summit, how will breakout rooms be assigned and managed? Do a “live” demonstration of Breakout Rooms to show how they work and how remaining times for discussion items can be displayed.
* How will breaks be handled? At announced times? As personally needed?