Plan your event series

You can present Leadership in Action, a series of training events, in many ways during your regular program. Talk to club members and community leaders about their preferences, and do what works best for your club.

Benefits

Adding this training series to your regular program can:

- Enhance membership by supporting personal growth and career advancement
- Equip members with new skills and new chances for community interaction
- Establish your club as a center for professional development
- Attract new members who seek professional growth and networking
- Develop leaders who can shape the future of your club and community

Rotary’s core values include exchanging ideas and seeking diverse perspectives. Leadership in Action offers clubs a way to act on these values, so encourage both club members and the community to get involved. The more people you have contributing expertise and ideas, the better your training series will be.

Participants

Your club should extend this training to all members, but you could also invite nonmembers, potentially for a small fee. It’s a good way to promote Rotary’s relevance to professionals. Consider inviting:

- Prospective members
- Younger professionals
- Member spouses, family, and friends
- Professional colleagues and contacts
- Rotaractors
- RYLA participants
- Rotary program alumni

Once your club has decided on the goals of the training sessions, you can pick participants more easily.
Format

Next, decide how you want to present the training. You could use several formats, such as:

- A session once a month during a club meeting
- One-day workshops outside the club program
- A multiday conference or seminar
- A webinar series that you can record and reuse

If you feel your club is too small to offer this training series, consider working with other local clubs. You could even work with district leaders to present it districtwide.

Topics

Ask potential participants about their interests, then choose topics that reflect their responses. Leadership in Action has sessions about:

- Communication
- Leadership Styles
- Mentoring
- Time Management
- Goal Setting
- Living Our Values
- Building Consensus
- Teamwork
- Your Professional Image
- Innovation

You can cover all of these topics, combine topics, or choose other topics that interest members more. These 10 sessions consist of documents that you can customize.

Tips on using session guides

The sessions are flexible for organizers, trainers, and participants. You should review the sessions in advance to allow time for planning and rehearsal. They are written for you to adjust to your participants’ needs. Most sessions include all of these sections:
• **Relevance statement** to clarify why the session is important for your audience

• **Learning objectives** the intended outcomes of the session

• **Before the session** offers suggestions on preparation; you should review all content and make a schedule for speaking points, discussion questions, and activities that you find relevant for your audience

• **During the session** describes recommended information to include; the facilitator will decide the flow of the session

• **Activities** either separate or integrated into the discussion; adjust the activities to meet participant needs.

**Expert facilitators**

For each session topic you cover, find a knowledgeable facilitator who can give insights from work experience. Involve your members, using the expertise that they already have. Look within your club and district leadership. Consider inviting experts and leadership speakers from your community.

Have facilitators design their sessions well beforehand to allow for rehearsing and revising. These sessions are intentionally unstructured so you can make them fun, interactive learning experiences. Try to add segments that encourage active participation — let your audience have fun.

If some of your facilitators are new to training, advise them to explore the Trainer’s Toolkit course in the Learning Center for an overview of techniques. Schedule time with them to coordinate their sessions and tell facilitators about such details as room arrangement and prepared materials.

**Promote your training event**

Use Rotary’s template to customize a brochure to promote your sessions. Go to Rotary’s Brand Center and select the Materials tab, then select Create Your Own. Then, choose the Professional Skills Development Program brochure, and edit it for your club by adding:

• Your club’s information

• Registration for the event

• Planned sessions
• Date and time details
• Images that best represent your club

Give this brochure to your target audience, encouraging people to take advantage of this professional growth opportunity.

Talk to your club and district public relations committees and form a strategy to promote your training. Make sure your message reaches not only your members, but also your community. Whether or not you offer the training event to nonmembers, the sessions are good publicity for your club and Rotary.

If nonmembers can attend the training event, ask your club members to invite colleagues and business contacts from professional associations and other groups. You also can ask club members to post promotional posters at their business or office — and on social networks like Facebook and LinkedIn.

Add event details to your club’s website. This club benefit could attract prospective members if they can easily learn about it.

Put your professional skills event in your club’s membership brochure as an added value. The club brochure template is in the Create Your Own section of the Brand Center.

Ask a participant who has finished the training to write an opinion article for a local newspaper or even LinkedIn. Such participants can discuss their experience with the training event and how their Rotary involvement has helped them grow personally and professionally.

**After training**

Once the training event ends, recognize members who participated. Give them opportunities to use their new skills. Send evaluations to get their comments on your event and learn how they apply these skills in their professions. Use that information to evolve and improve the training.

**Questions?**

If you have questions or comments about this guide, contact Rotary’s Learning and Development staff at learn@rotary.org or +1-847-866-3000.
Relevance
Effective communication improves your conversations and presentations, raises participation at meetings you lead, and lets you express ideas clearly.

Learning objectives
By the end of the session, participants should be able to:
- Identify different communication styles
- Discuss ways to communicate more effectively

Before the session
- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

During the session
- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Club leaders are responsible for organizing and giving information to club members, other club leaders, and the community.
  - Storytelling can be a powerful tool to convey your message.
  - Skilled communicators can quickly shift their style to suit any situation.
  - Communication styles include:
    - Analytical: Uses unemotional, logical arguments based on facts and data
    - Intuitive: Refers to the overall topic and avoids detail
    - Functional: Focuses on process, detail, and planning
    - Personal: Values emotional connections and listens well
  - Effective communication also includes active listening, constructive criticism, and recognizing barriers to understanding.
  - No matter what communication style you use, saying “yes, and ...” instead of “yes, but ...” when you disagree can help you stay open to
others’ ideas and perspectives.

- Use discussion questions to boost conversation:
  - Which communication styles do you identify as your own?
  - How do you use storytelling to communicate?
  - How do your spoken and written communication styles differ?
  - What interferes with good communication in your club and in your work? How can it be improved?
  - What are barriers to effective communication? Think of a situation when you communicated poorly and that affected the outcome. What could have improved the interaction?
  - What are some tips for reacting to a quickly changing situation? How do you adapt your interaction based on the person who’s speaking with you?

- Lead one of the activities below.
- At the end of the session:
  - Take questions from participants.
  - Review the learning objectives to make sure they’ve been achieved.
  - Ask participants to write down one idea they’ll use from the session.

**Activities**

1. Purpose: Identifying communication styles
   - Allow 20 minutes for this activity.
   - Write the four communication styles mentioned above on a flip chart.
   - Explain that you will pair participants, and that one partner, then the other will discuss why they should get more involved in Rotary (3-5 minutes for each person).
   - Ask participants to notice their partners’ communication styles during the discussion.
   - Tell pairs that they will assess each partner’s communication styles when finished.
   - Divide participants into pairs.
   - Start a discussion with the group after 10 minutes:
     - Which communication styles did you observe?
     - What nonverbal communication did you notice?
     - Which communication styles were most effective?
     - How can you use communication styles personally, professionally, or to help your community?

2. Purpose: Practice impromptu speaking
   - Allow 20 minutes for this activity.
   - Start by saying, “Once upon a time there was ...” and continue the story using your imagination.
• Explain the next steps: Groups of participants will gather in circles, then begin a story and try to keep it going. The first member of each group will start by saying a sentence on any topic. Then, one after another, around the circle, members will say, “Yes and ...,” adding to what the previous member said.

• Encourage participants to speak their first thought and avoid hesitating. Stories can go in any direction.

• Participants should not question or deny any story additions.

• Divide participants into groups of five or more.

• Allow the groups to begin the storytelling, which will last 10 minutes.

• Let groups know when only a couple of minutes are left to finish their stories.

• After 10 minutes, start a discussion with the groups:
  o What was hard about this activity?
  o What did and didn’t work?
  o How did “Yes and ...” help you contribute to the story?
  o How could “Yes and ...” improve your everyday conversations?
Relevance
Your leadership style affects the motivation and performance of those around you.

Learning objectives
By the end of the session, participants should be able to:
- Identify different leadership styles
- Adapt leadership styles to fit situations

Before the session
- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

During the session
- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Effective leaders inspire and motivate club members and employees to reach their goals and stay engaged in the organization.
  - Different situations require different leadership styles. Some leadership styles include:
    - Transformational: Inspires people toward a new set of shared dreams
    - Servant: Emphasizes a leader’s duty to serve followers
    - Coaching: Focuses on developing people and helping them improve performance
    - Affiliative: Highlights cooperation and harmony in a group
    - Participative: Draws on people’s knowledge and skills and creates a group commitment to goals
    - Pace-setting: Sets a high standard for performance and focuses on doing things better and faster
  - Effective leaders switch between these styles based on the situation.
- Use discussion questions to boost conversation:
How do you like to be led?
Which leadership style do you most identify as your own?
What leadership style do you use in Rotary versus your profession?
What other types of leadership styles have you experienced?
How does leading differ from managing?
Have you experienced ineffective leadership? What happened?

- Lead one of the activities below.
- At the end of the session:
  - Take questions from participants.
  - Review the learning objectives to make sure they’ve been achieved.
  - Ask participants to write down one idea they’ll use from the session.

Activities

1. Purpose: Identifying leadership qualities
   - Allow 20 minutes for this activity.
   - Explain that you will divide participants into pairs. Each pair will describe exceptional leaders they have worked with or know about. Then, each pair will list the top five qualities that made the leaders effective.
   - Divide participants into pairs to start the discussions.
   - Once discussions end, ask pairs for their top two traits of effective leaders and write them on a flip chart.
   - After the list is complete, ask the group if any traits are missing.

2. Purpose: Adapting leadership styles
   - Allow 20 minutes for this activity.
   - Use these sample scenarios or consider your own:
     - Scenario 1: The company you help lead is growing faster than expected and plans to restructure. As a member of the executive committee, you will influence the outcome. But you don’t know yet how the restructuring will affect your team members, who are worried about the changes.
     - Scenario 2: You volunteer to be the lead organizer of a service project for your club. Several other members volunteer to help, but you still need more volunteers to finish the job.
   - Explain that each group of participants will have a different scenario and ask:
     - How would you handle the situation?
     - Which leadership style would you use and why?
   - Divide participants into groups of three or four.
   - Ask each group to present its scenario and outcome.
Relevance
Innovation is crucial for solving problems in your career and for helping your Rotary club solve its challenges in a changing world.

Learning objectives
By the end of the session, participants should be able to:
- Understand the steps that lead to innovation
- Apply those innovation steps in their Rotary clubs

Before the session
- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

During the session
- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Innovation is important in a changing workplace and is a value that Rotary promotes to strengthen clubs.
  - To be innovative, people need to take risks, explore ideas freely, and avoid fear of failure.
  - Although innovation is not limited to a process, it often involves understanding a problem and creating a solution through:
    - Identifying the challenge you want to resolve
    - Immersing yourself in the situation and having empathy for those affected by the problem
    - Reframing your question to focus on a part of the challenge that you can affect
    - Brainstorming, or freely and quickly thinking of many possible solutions to your reframed challenge
Developing your top idea
Testing solutions by getting user opinions
  o Club members need to be open to change for innovation to happen.

Use discussion questions to boost conversation:
  o What does innovation mean to you?
  o Have you worked on something innovative? Explain.
  o How can you contribute to a culture where innovation is the norm?
  o What happens when innovation is stifled?
  o How can your club be innovative and open to change?

Lead one of the activities below.
At the end of the session:
  o Take questions from participants.
  o Review the learning objectives to make sure they’ve been achieved.
  o Ask participants to write down one idea they’ll use from the session.

Activities

1. Purpose: Developing innovative ideas for Rotary clubs
   • Allow 20 minutes for this activity.
   • Explain that each group of participants will think of an innovative way
to draw new Rotary members to their club.
   • Divide participants into groups of three or four to begin discussions.
   • Afterward, give each group 5 minutes to present its idea as part of a
larger discussion.

2. Purpose: Innovation workshop
   • Allow 20 minutes for this activity.
   • Ask each participant to think about a challenge in their Rotary club or
profession, then write it down in one sentence. Let participants know
that they will describe the challenge to their designated group.
   • Explain that groups of participants will decide on which ideas they will
use in the activity.
   • Guide the groups through the stages in the Innovation Worksheet (at
the end of this document), giving them time to understand each stage.
   • Divide participants into groups of three or four to begin the activity.
   • Ask for volunteers to talk about their solutions with the larger group.
   • Encourage participants to try the solutions in their Rotary club.
In the larger group, ask participants to state one way they will apply what they learned to their job or Rotary club. Use this worksheet to address one challenge in a Rotary club.

**IDENTIFY:** What challenges do you face? Where do they come from? What are they preventing you from doing?

**IMMERSE:** What do others affected by the challenge feel or say about it and the role they might have in it? How might they react to the challenge and their role? Consider the perspectives of everyone involved.

**REFRAME:** Consider how you might address the challenge from a new direction. In 2 minutes, write as many “How can we ... ?” questions — that relate to the challenge — as possible. They don’t have to be perfect. For the next 5 minutes, read them to other group members and choose one that resonates most with them.

**BRAINSTORM:** Using that “How can we ... ?” question, think of as many potential solutions as you can. Do this silently for a few minutes, then repeat it as a group. Respond to one another’s suggestions with “Yes and” and “What about ... ?” Write ideas on a flip chart.

**DEVELOP:** Choose the top potential solution, then explain the details to help others understand it. What would it look like? Write, draw, or act out the potential solution.

**TEST:** Partner with another group. Share your solutions with the other group and get feedback.
YOUR PROFESSIONAL IMAGE

Relevance
A good professional image can strengthen your reputation and influence. It helps you build relationships and get results.

Learning objectives
By the end of the session, participants should be able to:
- Understand what affects their professional image
- Apply strategies to manage their professional image

Before the session
- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

During the session
- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Every interaction, whether it’s a conversation, meeting, or email, is a chance to shape your professional image.
  - Your image is a combination of your competence, values, behavior, and appearance.
  - Part of managing your professional image is building credibility and maintaining authenticity.
  - Balancing your professional, personal, and Rotary identities online is crucial to maintaining a positive image.
- Use discussion questions to boost conversation:
  - How do you want colleagues to see you?
  - How can you be aware of what others think of you?
  - Can you describe a time when you failed to present the best image of yourself? How did you try to fix that?
Why are credibility and authenticity important? How can you demonstrate them?
What image do your social media profiles project professionally and personally?
Does this fit with the professional image you want to portray?

- Lead one of the activities below.
- At the end of the session:
  - Take questions from participants.
  - Review the learning objectives to make sure they’ve been achieved.
  - Ask participants to write down at least one idea they’ll use from the session.

**Activities**

1. Purpose: Managing your online presence
   - Allow 20 minutes for this activity.
   - Explain that groups of participants will suggest strategies for deciding what to post on their social media profiles in their professional, personal, and Rotary lives — then the groups will each pick their top five strategies.
   - Divide participants into groups of four to begin discussions.
   - After a set time, bring the groups together again and have them each present their five best strategies.
   - Write the responses on a flip chart.
   - Ask group members if they missed any top strategies and add new ones to the chart.

2. Purpose: Maintaining a professional image in difficult situations
   - Allow 20 minutes for this activity.
   - Ask participants to think about a difficult situation and consider how they would remain professional. Give a scenario such as:
     - Replying to an emotional email
     - Having a difficult conversation with a colleague
     - Interviewing for a new position
   - Divide participants into pairs.
   - Ask each pair to act out or talk about how they would respond. Have each pair discuss the traits that help maintain a professional image during difficult times.
   - Ask the pairs to each report on one trait they discussed to help maintain a professional image.
**Relevance**

Teamwork leads to better results because members combine their skills and ideas to reach a goal.

**Learning objectives**

By the end of the session, participants should be able to:

- Understand how to build teams
- Apply strategies to foster team building

**Before the session**

- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

**During the session**

- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Good teams take time to develop. Team building stages include:
    - Forming: Group members learn one another’s behaviors and begin to set rules and guidelines.
    - Storming: The group is actively deciding how to reach goals.
    - Norming: Group members gain confidence, begin to make other decisions, and take responsibility for their actions.
    - Performing: The group transforms from a collection of participants into a true team.
  - Team building strategies can help groups improve more quickly. Strategies for teams include:
    - Interaction: Provide activities to help group members develop familiarity and positive communication.
    - Effective meetings: Actively involve all team members in
planning and making decisions.

- **Conflict intervention:** Choose constructive communication rather than destructive criticism.

- **Use discussion questions to boost conversation:**
  - What does teamwork mean to you?
  - What are the traits of a successful team?
  - What are the benefits of working as a team?
  - What are some effective teams that you have been part of at work or in Rotary?
  - What made those teams so successful?
  - What team building strategies have worked for you?

- **Lead one of the activities below.**

- **At the end of the session:**
  - Take questions from participants.
  - Review the learning objectives to make sure they’ve been achieved.
  - Ask participants to write down one idea they’ll use from the session.

### Activities

1. **Purpose: Teamwork in action**
   - Allow 20 minutes for this activity.
   - Explain that each group of participants will put a puzzle together as a team. Adjust the difficulty, either by asking participants to remain silent or by hiding the image of the puzzle.
   - Divide participants into groups of three or four.
   - Give a puzzle to each group. The image can vary, but the number of pieces should be the same.
   - After a set time, gather the groups together and ask them:
     - What steps did you take before starting?
     - What challenges did you encounter?
     - Did your group go through any of the team building stages?

2. **Purpose: Planning in a team**
   - Allow 20 minutes for this activity.
   - Use this sample scenario or consider your own: Groups of participants will each plan the club’s annual fundraiser, happening in three months.
   - Explain that a member of each group will be the chair, and the rest will be committee members. Members of each group will freely exchange as many ideas as possible over the event’s theme, what the event requires, who will plan it, what they will do, and anything else the team suggests.
- Divide participants into groups of three of four to begin the planning.
- Each group should have a member who writes down all the ideas.
- After a set time, ask each group to report on how it made decisions and whether it entered any of the team building stages.
Relevance

Building consensus means collaborating to find a solution that satisfies everyone’s needs without compromising. Leaders aim to reach a consensus that is workable and sustainable.

Learning objectives

By the end of the session, participants should be able to:

- Understand consensus and its value
- Find strategies to build a consensus

Before the session

- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

During the session

- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Consensus allows everyone to offer opinions on decisions that affect them.
  - When people are involved in decision making, they are more likely to support the solutions and have higher morale and trust.
  - Building consensus often includes:
    - Forming a method and timeline for finding a solution
    - Listing what each person wants from the situation
    - Reviewing what is and isn’t crucial for each person
    - Getting people together and having them freely suggest to one another as many new solutions as possible
    - Discussing the outcomes of those solutions
• Reworking the solutions and other decisions to meet key needs

• Use discussion questions to boost conversation:
  o How would you describe a consensus?
  o When did you need to build consensus?
  o What are its benefits in decision making?
  o How can openness build consensus and improve morale?
  o What are some tips for building consensus?
  o How can you work toward building consensus at work? In Rotary?

• Lead one of the activities below.

• At the end of the session:
  o Take questions from participants.
  o Review the learning objectives to make sure they’ve been achieved.
  o Ask participants to write down one idea they’ll use from the session.

Activities

1. Purpose: Building a consensus in Rotary
   • Allow 20 minutes for this activity.
   • Tell participants that their Rotary club membership is falling.
   • Explain that groups of participants will discuss solutions and reach a consensus on how to change their club to attract new members and engage current ones.
   • Divide participants into small groups to begin discussions.
   • Afterward, have a volunteer from each group present its solutions to the larger group and explain how group members reached a consensus.

2. Purpose: Building a consensus in a group
   • Allow 20 minutes for this activity.
   • Describe this scenario to the group: A plane carrying their team has crashed on a desert island.
   • Ask each participant to choose only three items that the participant thinks would be most useful for survival, ranking each item in order of importance.
   • Explain that groups of participants will discuss their choices and reach a consensus on a master list of only three items, listed in order of importance.
   • Divide participants into groups of four or five to begin discussions.
   • Afterward, have each group present its list and tell how it reached a consensus.
Relevance
Rotary’s core values and guiding principles give members a common purpose and direction.

Learning objectives
By the end of the session, participants should be able to:
- Understand Rotary’s core values and guiding principles
- Apply Rotary’s values to their club’s activities

Before the session
- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.
- Review Rotary’s guiding principles and the core values in Rotary’s strategic plan.

During the session
- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Guiding principles and core values define what’s important to us, and we demonstrate them through actions and policies.
  - Rotary’s guiding principles and core values are key to planning the organization’s future.
  - They are a blueprint to guide districts, clubs, and even members to develop their own principles and values.
- Use discussion questions to boost conversation:
  - What are Rotary’s guiding principles?
  - What are Rotary’s core values?
  - Why are they important for leadership and decision making?
o What actions and policies demonstrate our guiding principles and core values?
o What are your personal guiding principles and core values?
o How do they factor into your everyday lives?

• Lead one of the activities below.
• At the end of the session:
  o Take questions from participants.
  o Review the learning objectives to make sure they’ve been achieved.
  o Ask participants to write down one idea they’ll use from the session.

Activities

1. Purpose: Putting principles into action
   • Allow 20 minutes for this activity.
   • Explain that each group of participants will discuss a hypothetical unethical scenario that could occur in a Rotary club or professional setting. Ask participants to use their own guiding principles to decide how they would handle the situation.
   • Scenarios:
     o You learn that a member of your club has been taking money from grant funds.
     o You overhear an inappropriate conversation that visibly bothers someone else who overhears the discussion.
     o You are on a project team, and one of the members is missing meetings and deadlines, and is not adding to the project.
   • Divide participants into groups of three or four to begin discussions.
   • Afterward, gather the groups together again and ask for volunteers to talk about their scenarios.

2. Purpose: Identifying guiding principles
   • Allow 20 minutes for this activity.
   • Ask participants to think about their involvement in their Rotary club, and everything their club is accomplishing.
   • As a group, have them tell which guiding principles define their club.
   • Record their answers on a flip chart and see if any responses overlap.
   • Continue the discussion by asking:
     o Do the club’s accomplishments exemplify its guiding principles?
     o What future activities will best help the club embody its guiding principles?
     o How can this help with your club’s membership and public image?
Relevance
Goal setting provides direction and purpose to help you achieve your vision for the future.

Learning objectives
By the end of the session, participants should be able to:

- Apply strategies for setting effective goals
- Develop a plan for achieving goals

Before the session

- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

During the session

- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Goal setting ensures the strategic use of time, effort, and resources to accomplish what’s important.
  - Setting and achieving goals involves:
    - Assessing strengths and weaknesses
    - Setting long- and short-term goals
    - Developing an action plan
    - Evaluating and measuring success
  - It’s important to set realistic, achievable goals.
  - Keep yourself accountable for reaching goals.
  - Remember to celebrate success and recognize those who helped.
- Use discussion questions to boost conversation:
  - How do short- and long-term goals work together?
  - What are the traits of an achievable goal?
• How can an action plan help you stay focused?
• How do you keep yourself, employees, or members of your club motivated to achieve goals?
• How often will you re-evaluate your goals as a leader?

• Lead one of the activities below.
• At the end of the session:
  o Take questions from participants.
  o Review the learning objectives to make sure they’ve been achieved.
  o Ask participants to write down one idea they’ll use from the session.

Activities

1. Purpose: Developing an action plan
   • Allow 20 minutes for this activity.
   • Ask participants to think of a long-term professional or Rotary goal they have.
   • Have participants pick one short-term goal they want to achieve to realize that long-term success.
   • Next, ask participants to personalize an action plan to help achieve the goal. Plans should include (list them on a flip chart):
     o The tasks needed to reach the goal
     o Timeline for achievement
     o Milestones within the tasks
     o Measures to track achievements
   • Ask for volunteers to share their plans to the group.

2. Purpose: Analyzing goals
   • Allow 20 minutes for this activity.
   • Divide participants into small groups.
   • Ask each group to do a SWOT analysis of their club regarding one of the club’s annual goals. SWOT, which stands for strengths, weaknesses, opportunities, and threats, is a structured way to study goals.
   • Have groups divide a paper into four parts and list the club’s:
     o Strengths — internal capabilities (experience, skills, talents)
     o Weaknesses — internal liabilities (limits, missing resources)
     o Opportunities — external resources (support, tools)
     o Threats — external factors and events (risks, obstacles)
Next, ask the groups to decide whether to keep the goal, change it, or set a new one based on their SWOT analysis. Ask groups to describe the goal if they change it or set a new one.

Gather the groups again to discuss their SWOT analyses and goals.
Relevance
Managing time effectively helps balance work, Rotary, and personal commitments.

Learning objectives
By the end of the session, participants should be able to:
- Apply strategies for time management
- Find ways to maximize their time to reach their goals

Before the session
- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

During the session
- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Time management aims to improve productivity so you can do more in less time.
  - It involves strategies and tools to help you get organized, stay focused, prioritize tasks, and set limits on your commitments.
  - At work and in Rotary, you might handle papers, email, voice mail, and spoken requests, along with work you would like to do.
  - You have five options for acting on the items you receive:
    - Discard or recycle
    - Delegate
    - Act immediately
    - File for later
    - Place in a reference folder
Consider whether your approach to each item is effective.
Controlling distractions and developing your concentration skills will help you manage your work or involvement in Rotary.

- Use discussion questions to boost conversation:
  - What aspects of time management do you struggle with?
  - What strategies or tools have improved your time management?
  - How do you approach tasks or activities?
  - How do you minimize distractions and interruptions?
  - What do you consider when you prioritize tasks?
  - How can you limit activities, tasks, and requests to make sure you finish your work and reach your goals?
  - How do you prioritize your Rotary, work, and personal duties?

- Lead one of the activities below.
- At the end of the session:
  - Take questions from participants.
  - Review the learning objectives to make sure they’ve been achieved.
  - Ask participants to write down one idea they’ll use from the session.

### Activities

1. **Purpose:** Finding time to achieve personal goals
   - Allow 20 minutes for this activity.
   - Have participants choose either a personal goal or one they would like to reach in Rotary, such as becoming a club leader, getting more involved in service projects.
   - Divide participants into small groups.
   - Ask group members to discuss:
     - Why haven’t they reached their goal?
     - What do they need to start toward their goal?
     - How can they schedule the extra time needed to reach that goal?
   - Next, have participants think about what they did on a recent day.
   - Ask them to rearrange their schedule for that day and include time for working toward their goal.
   - Ask for volunteers to talk to the whole group. Ask them:
     - How did you rearrange your time?
     - Did you remove something from your schedule?
     - How do you think you will find time in the future?
2. Purpose: Setting priorities
   - Allow 20 minutes for this activity.
   - Ask participants to complete the Setting Priorities Worksheet on the next page.
   - Ask various participants to describe their responses.
This time management chart separates situations and tasks into four categories: important and urgent (priority 1), important but not urgent (priority 2), urgent but not important (priority 3), and trivial tasks (priority 4). Answer the questions below the chart to learn how you can prioritize activities effectively.

<table>
<thead>
<tr>
<th>Important</th>
<th>Priority 1</th>
<th>Priority 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Crises</td>
<td>• Preparation</td>
<td>• Prevention</td>
</tr>
<tr>
<td>• Pressing problems</td>
<td>• Prevention</td>
<td>• Planning</td>
</tr>
<tr>
<td>• Projects, meeting preparation, etc., that must be completed by a specified date</td>
<td>• Relationship building</td>
<td>• Empowerment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Not important</th>
<th>Priority 3</th>
<th>Priority 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Interruptions</td>
<td>• Trivial tasks</td>
<td>• Trivial tasks</td>
</tr>
<tr>
<td>• Some telephone calls</td>
<td>• Some telephone calls</td>
<td>• Some telephone calls</td>
</tr>
<tr>
<td>• Some emails and reports</td>
<td>• Time wasters</td>
<td>• Time wasters</td>
</tr>
<tr>
<td>• Some meetings</td>
<td>• Irrelevant mail</td>
<td>• Irrelevant mail</td>
</tr>
<tr>
<td>• Many pressing matters</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Urgent                        | Not urgent                                                               |

1. Estimate the percentage of your time that you spend on each priority. Where do you spend most of your time?

2. How can you cut or reduce activities in priorities 3 and 4? How will it affect your work or your Rotary club if you drop or postpone such activities?

3. Choose a priority 4 task or situation that seems to arise repeatedly at work or in Rotary. Decide what you will say or do when it recurs so you don’t overreact to it, given its lack of urgency.

   Task or situation ________________________________________________________________
   What will you do differently? __________________________________________________

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Relevance
Mentoring is an important leadership skill that can help others learn, grow, and become more effective and engaged in Rotary or their careers.

Learning objectives
By the end of the session, participants should be able to:

- Find opportunities for a mentoring relationship
- Develop a mentoring program for their clubs

Before the session
- Ask participants what they would like to gain from the session and use their comments to customize its content.
- Consider how you will facilitate the session and adjust it for your audience.
- Think of an opening activity that will grab participants’ attention and other ways to keep the session interactive.
- Prepare any materials you will need for the session.

During the session
- Welcome participants and introduce yourself.
- Review learning objectives.
- Highlight these key messages:
  - Mentoring is a supportive relationship involving an experienced person guiding another person’s development.
  - Both sides should commit to the mentoring for it to succeed.
  - Different kinds of mentoring relationships have different values for participants. Some examples are:
    - Formal: Structured programs match mentors with the people they will guide, often including specific goals and formal contracts to measure progress.
    - Natural: Informal relationships often involve people who know each other and have something in common.
    - Peer: People in similar situations exchange support, empathy, and advice on reaching their goals.
    - Situational: Short-term mentoring transfers knowledge of a specific skill.
  - Mentoring can work well as part of new member orientation, club committee team building, officer succession planning, or with young leaders in the community.
When starting a formal mentorship, it's important to know:

- The needs and motives of your target audience
- The goals of the program
- How you will connect both participants in a mentorship
- The structure, direction, and plan for mentorships
- The duration of the program

Use discussion questions to boost conversation:

- What type of impact can mentoring have on participants?
- What types of mentoring have you experienced?
- How can your club use a mentoring program?
- How can you inspire others to participate?
- What are the traits of a successful mentorship?
- How can both participants in a mentorship benefit?
- What are both participants’ responsibilities in a mentorship? How do you know when a mentorship should end?

Lead one of the activities below.

At the end of the session:

- Take questions from participants.
- Review the learning objectives to make sure they’ve been achieved.
- Ask participants to write down one idea they’ll use from the session.

Activities

1. Purpose: Designing a mentoring program
   - Allow 20 minutes for this activity.
   - Explain that each group will design a formal mentoring program for their Rotary club or workplace. Each group’s plans should include:
     - The program’s goals
     - The type of mentoring relationship
     - How it will match participants
     - The program’s duration and meeting frequency
   - Divide participants into groups of three or four to begin discussions.
   - Afterward, ask each group to present its ideas on a mentoring program.

2. Purpose: Finding opportunities for mentoring
   - Allow 20 minutes for this activity.
   - Explain that pairs of participants will talk about their work and life, then find examples where they could use a mentor or where they could mentor someone else. In either case, they should also explain the type of mentoring that they might favor.
   - Divide participants into pairs to start discussions.
   - After discussions, ask for volunteers to describe their mentoring ideas.