



## HOW TO LEAD A YOUNG PROFESSIONALS SUMMIT

Sometimes change happens, other times change is planned. In most cases, both dynamics happen at the same time. Rotary International and the global communities it serves have changed and continue to change. Over more than a century, Rotary has adapted and responded to current needs.

With four generations in the workplace, effectively engaging young professionals is an essential strategy for Rotary. In 2014 Rotary hosted its first Young Professionals Summit as part of its Young Professionals Campaign. The summit gave young leaders in Rotary an opportunity to talk about their Rotary experiences, share ideas, and discuss their hopes for Rotary's future. Participants left the summit feeling energized, optimistic, and more engaged than ever. You can replicate this event in your community... here's how.

### **ASSESS YOUR CLUB'S CULTURE**

Before you think about hosting a summit, take some time to explore your club's culture and dynamics. What makes your club successful? What resonates most positively in your members' experiences? Why are the people in your club members of Rotary? What's the ratio of young professionals to the rest of the club? Why are young professionals active in your club? How would community members who aren't part of your club describe your club? This club snapshot will help you in the process of becoming the club you want to be.

Next, why do you think your club will benefit from having younger members? To successfully integrate younger professionals into your club, you'll need to focus on intergenerational communications and activities that reflect their interests. Keep in mind that bringing in younger members could require a change in your club's culture.

### **PLAN THE SUMMIT**

Now that you have a better understanding of who you are as a club, you can create a quality experience with your club members in which you can share new ideas to help design and implement change. Assemble a summit planning team that will be responsible for imagining, organizing, and executing the event.

Summit objectives should be simple. Don't try to do too much in one meeting. The process should be as iterative, generative, and collaborative as possible, where ideas flow. The themes for the event should be appreciative (the best of what's going on in your club and in others), imaginative (what might be in the club that better engages younger members), and innovative (specific action strategies for the club).

Your goal is to create an environment for your club to learn and grow together, in which you interpret past experiences and integrate new lessons through open and honest dialogue that will move you toward future goals. A key consideration on this day is whether this is an opportunity to make decisions together, consider perspectives and gain wisdom together, or both.

Now that you have your goals and objectives, here's your to-do list.

### **Step 1: Define your audience**

- Spend some time thinking about who you want to attend your summit. Is this an open invitation where members can choose to participate, or do you want to target participants? Do you want to promote some intergenerational reflection, or do you want to focus on the younger members of your clubs? Can you invite non-Rotary members to help you think about ways to better engage those who aren't part of the Rotary family? If they can't attend the entire meeting, can they join a reception or discussion at the end of the day?

### **Step 2: Set the tone**

- How do you want the day to feel? The best meetings energize people and motivate them to maintain that energy to do the work when the meeting is over. There are many ways to energize people. Try to incorporate strategies that work well in your Rotary meetings.
- The key to the success of the Chicago Young Professionals Summit was a commitment to make the day effective but also fun. Keep the meeting upbeat and casual.

### **Step 3: Think about timing**

- Figure out how much time you need. The Chicago Summit was two full days. Whether you need more or less time, allow for periods of uninterrupted discussion so attendees can focus and develop ideas. Think of your summit as equal parts retreat and planning meeting, and consider a full day. Be considerate of attendees' time but don't get paralyzed by trying to manage everyone's schedules. If people believe it's important, they will be there.
- Be flexible with the start time. Ask your participants for their time preference. If there are parents who need to make child care arrangements, can you provide that? Would more people show up on the weekend if the meeting began at 10:00 a.m. instead of 8:00 a.m.? A later start could provide time for a working dinner or reception open to family members and community members.
- Remember breaks are as important as the time allotted to work. The best work comes from brains and bodies that are challenged and rested.

### **Step 4: Find the space**

The meeting place should foster imagination, creativity, brainstorming, and team building. It's a good idea to host it somewhere other than the site of your regular Rotary meetings. Museums, libraries, athletic centers, community centers, breweries, zoos, and other places like these can provide space for different types of activities, and allow you to step away from the work and do a different kind of group activity (i.e., icebreakers, tours, breaks, and presentations from site hosts).

- The space should be comfortable. Pay attention to temperature, lighting, external and internal noise, and accessibility.
- It should be large and flexible enough to spread out. Avoid chairs and tables that don't move, and pick a space that allows for multiple configurations for planning, reflection, and dialogue.
- Make sure the space allows for food and liquid refreshments. Be sure to pick healthy snacks — a mass sugar rush can derail your process!

- Can the space accommodate audiovisual needs like video and/audio? Is there someone who can help with any technical difficulties?
- How will you take notes at the event? Are you allowed to put things on the walls? At the Chicago Summit, organizers captured notes on laptops and on large self-stick easel pads, while attendees were given notebooks and pens.
- Make sure to visit the site before the meeting to walk through all of your activities and confirm that your plans will work. It will also give you a sense of the items you need that you did not consider in the planning stages.

#### **Step 5: Plan the activities**

- The day should include time to work, talk, and get to know others in the room. Icebreakers are a great way for the group to bond, but there are many creative ways to engage participants. The Chicago Summit used improvisational activities led by a professional actor. This was not only effective, but lots of fun!
- Balancing the needs of your participants is important. Consider the multiple ways people learn and try to use a variety of approaches including linguistic, logical, visual, bodily/kinesthetic, musical/rhythmic, interpersonal, intrapersonal, and naturalist.
- There should be time for self-reflection and group work, both large and small. Make every effort to manage the multiple communication styles and personalities in the room. Think about the introverts, extroverts, thinkers, talkers, right-brainers and left-brainers. Consider the ways that gendered, generational, and cultural communication works in the design, implementation, and follow up for your summit.
- Doodling and movement....yes! You want this to happen in your summit. Many people think and make connections visually. Some of our greatest minds doodled (Steve Jobs, Einstein, Nikola Tesla). Give participants something to doodle on and doodle with. Encourage it!
- Give people permission to move when they need to, asking them to be as considerate in the process to minimize interruptions. They will be more engaged in the long run. Think about adding physical activities during the day so everyone gets moving.

#### **Step 6: To facilitate or not to facilitate, that is the question**

- An important aspect of effective meetings is time management. Good facilitators manage time well. They can ensure no one dominates the conversation and derails the process, highlight key points, manage ground rules for dialogue, and watch the room, all while making sure the meeting is on schedule. An outside facilitator can provide more objective observations that can help the process and remain impartial. Using an outside facilitator also ensures that all attendees contribute to the strategies developed during the summit.
- If you choose a Rotary member, it's a good idea to have co-facilitators who can rotate the roles and responsibilities. While one is facilitating, another can observe. This approach allows them to participate as well.
- Some activities can be designed to involve non-Rotary members. Consider a session to obtain the perspective of alumni/prospective members to think about ways to better engage those outside the Rotary family. Invite experts in social media and online presence or PR/marketing to make presentations and

share information.

### **Step 7: Invite your attendees**

- Once you know who they are, decide how you want to reach them — printed invitation? e-invitation? email?

### **Step 8: Capture the work**

- Gather as much information in as many different ways as possible. You can videotape and audiotape the group discussions. Just make sure your recording doesn't interfere with the participation and flow of each session .
- You can designate a wall in the room to hang flip chart paper where participants can write ideas, thoughts, comments, and questions.
- It's also helpful to have an official note taker. Make sure that this person or people can focus on taking notes without a lot of other tasks for the day. Brief them before the day of the event about what you want to capture in terms of key themes, general conversation, new ideas, recurring issues, and action strategies.
- The Chicago Summit used a graphic note taker, who drew visuals in real time. This innovative snapshot of the work can be easily revisited after the summit.
- Take photographs of attendees engaged in discussion, but also of them socializing and having fun. Encourage people to tweet and share on Facebook and Instagram throughout the day.

### **Step 9: Engage participants**

- A few days before your summit, send participants a brief and easy homework assignment. You can ask them to ponder a specific question or article about young professionals, your community, or specific issues that matter to Rotary.
- Share the agenda a few days before the summit begins.
- Midway through the summit take the pulse of participants. How are they feeling about the work of the day? Set aside points that aren't about the day so that they can be considered when and where appropriate.
- In the days after the summit, ask participants for feedback. Use Survey Monkey, host a conference call, or take a moment at a Rotary meeting.
- Share in writing key strategy ideas with deadlines. Avoid the boring report that merely tells them what was done, include quotes from the event and themes that really got the group going.
- Finally, don't forget to thank them for being there! Try to keep up the energy because the work is just beginning!