RESOURCE KIT

Connect. Learn. Share. Lead.

Rotary District 9800

RESOURCE KIT

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STEP 1.0

STEP 1. GETTING STARTED – CONNECT, IDENTIFY, ANALYSE, and UNDERSTAND

GETTING STARTED

The very first step is to verify that there is a genuine and serviceable need that you can put your efforts behind. Many of us will have a view on the world that is the result of our interaction with it - and the needs that we believe should be fulfilled within the community may not be those that the community wish to get behind.

Our first step is to test the validity of our assumptions on the community need – as the proverb says, 'the road to hell is paved with good intentions' – the key to success is in fully understanding the need and then properly implementing the solution.

It is important to understand the key issues that necessitated your idea and that will help to better define the problem that you are addressing. Start by asking:

- Why is this important?
- What is the current situation?
- What would it take to do it better?
- Who could play a role?
- What role could Rotarians play if any?
- What would success look like?

By performing this basic 'gap analysis' we will work out the gaps in the current situation and how we can plug these effectively.

CONNECT

How we connect with a project will vary depending on whether you have a club vision day or not and will take the following first steps.

A Club Vision Day	• Will identify the two or three issues to be progressed • These will be verified by the club as key areas of need • The club will commit behind these
No Vision Day	• Consult with the community to determine what community needs you might respond to • If you have an assumption about the community's needs then test these in the community to determine the level of support • Determine whether your club is interested in committing time, effort and members to support your initiative

IDENTIFY …

Rotary can support an idea in a number of ways.

Who should be involved…

- **Key members of your club.** Key members of your club should be willing to engage with the project and support its progress both within Rotary and external to Rotary. These will include:
  - Your president
  - Whoever will sign off on the funding for your club
  - Key influencers in your club
  - Key influencers in your community who might be willing to support your project

- **Identify Stakeholders**. It will be important to identify and engage with the wide group of those who should be consulted before determining to engage in a project. *(How to engage this group will be fully discussed in Step 4.0).*

  Identifying this broad group of stakeholders ensures that their expertise is tapped into and that their support is enlisted as well as setting up appropriate ways to communicate with them. This group should include anyone who is affected or can have input to your project.

  It is also important to use this group to validate that the idea that you have is indeed one that the club should progress. This process also prevents misunderstandings and unfortunate animosities. This group might include:

  - Rotarians working on similar projects across Rotary - some of this can be sourced off the International website.
  - Key Rotarians with interest / expertise in the area of your project both within your club and across other clubs
  - Council and council officers – to ensure that you are not going across similar projects that they have under way. This might also allow you to tap into expertise that they have knowledge of in their community.
  - Councillors and the Mayor of your community to enlist broader interest and support
  - Community leaders who may be able to inform and support your project
  - Local community groups, welfare groups, schools, police and other stakeholders
  - Business leaders who might be interested in your project
  - Those immediately affected by your project - both within and external to Rotary – to ensure the solution actually meets their needs and to get them involved early in the project
  - Key decision-makers and influencers either in the community or outside of it
  - Management in businesses with an interest in the idea
  - Management in other parts of the business that may be (directly or indirectly) impacted
  - Impacted and non-impacted staff in businesses with an interest in the idea
  - Communications, Public Relations or Media companies with an interest in the idea
  - Suppliers of any solution that you might be providing
  - Those customers/clients/communities impacted by the idea

- Government entities and individuals
  - Regulatory bodies
  - Third parties that may be impacted by your idea (eg unions)
  - Other key (internal or external) influencers within your project team as well as outside of it.
- **We're in this together.** Where a real need or aspiration of a community of people has been identified (usually within a geographic area) these partnerships, forged early, will be important to help you to achieve the shared, desired result.

Validation...

A good project attempts to ensure that it has addressed the following and it is:

- **Appropriate:** Uses the correct format and process to support the project depending on the size, complexity and type of investment proposed
- **Concise:** anyone should be able to rapidly understand the background, recommended solution and reasoning
- **Clear:** Structure the idea or proposal so it is coherent and presents the case
- **Complete:** Ensure the idea contains all the relevant information required to make an informed decision
- **Accurate:** Use real information where possible. Identify any assumptions.

In affirming your project you should:

- **Validate your project**. Make sure that your stakeholders and importantly those directly affected by your project believe in it. Sometimes 'Market Testing' their commitment is best done using market research such as a questionnaire. A sample questionnaire is available in Step 1 1.
- **Refine your idea**. Using the information from your questionnaire you can then finesse your idea and fully define the stakeholders that can support and engage in your project.
- **Best practices for a successful project**. The following are predeterminants of a successful project as identified by the *Centre for Project Management Research*.
  - Projects must be owned by the sponsoring Agency.

- Projects must be well-formed through a due diligence process.
- Priorities must be managed systematically.
- Project success criteria are defined early and monitored throughout the project.
- The Sponsor (Rotary) role is understood, accepted, and performed conscientiously.
- An effective project management method must be understood by all.
- Projects must have comprehensive plans, realistic estimates, and viable schedules.
- Project status is systematically, objectively, & honestly reported without bias.

- **Next step**. Once there is an identified genuine need and this is validated you need to determine Rotary's role in the project.

ANALYSE

Validating the need for your idea and setting up a team to work on this project is the first step. The next, is understanding the steps to success

What needs to be done…

The key in analyzing the problem further is to Learn from Others

- Who else is interested or involved? Local council, Police, Welfare agencies, Doctors, Schools etc.
- Meet informally with them and learn from them
- Is there any published research that relates to your issue? What does it say?

Doing some further research will allow the team to identify all those things that need to be done for success to be achieved. This also allows a further validation of the idea and ensures that you are not retracing the steps of others without adding any value.

Once all the tasks have been identified then compile these in a high level plan.

UNDERSTAND

Understanding what needs to be done for success and establishing a high level plan will allow the work ahead to be broken down into achievable pieces. This will be your first step to getting approval from your Rotary Board and which will require completion of the Reporting Template in Step 6.1.

It also clarifies the project and provides the detail to take it forward

High Level Plan…

A high level plan identifies all the activities and tasks that lead to success. Once these are listed they can then be ordered and prioritized so as to make the most of the effort and time of the team. Some tasks will take much longer than others and some will be dependent on others. Assembling this explicitly will help to organize the thoughts of the team and will:

- establish the high level definition of the project and the work effort that is involved.
- provide a ballpark evaluation of the resources and effort needed to deliver on the project.
- provide greater clarity about the likely cost and timing of the project.

Keys to Success – A Quick Check List

- **Is the need a genuine need?** Does the community want to get behind this need?
- **Rotary's role** – do we know what the best role for Rotary is?
- **Champion?** Are there members in your club who can be passionate about this project? Is the club going to get behind it?
- **Stakeholders –** have we engaged with the right stakeholders and understood the context in which this idea is being promoted
- **Team –** do we have the right team to ensure success of the project
- **Plan –** do we have an understanding of the high level plan and answered the following
    - What do we want to achieve?
    - Why is it important?
    - What is the current situation?
    - What would it take to do it better?

    - Who can play a role?
- **Approval -** your final step after setting a high level plan will be to get approval from your Rotary Board which will require completion of the Reporting Template in Step 6.1.

STEP 1.1

1. 1 QUESTIONNAIRE VALIDATING IDEA

METHOD

In developing a questionnaire to test your idea the following steps are helpful:

- Provide a brief outline of the idea
- Direct your respondents to fill in defined questions
- Allow the respondents to provide additional useful advice in the commentary table
- Get an understanding of their demographics so you can identify any age etc. skew

This survey can be done online through Monkey Survey which will also collate the results.

The Idea

Provide a brief outline of the idea that you wish to test in the community along the following lines:

We believe that the community has a need for ....

....

....

This is based on our understanding of the problem in the community being ....

....

....

....

We would very much appreciate your help in providing us with additional information about this problem and validating this need by completing the following questionnaire.

Sample Questionnaire

Statements Please answer each statement with the response that most equates to your feeling about that statement.	*Strongly Agree* 7	*Mostly Agree* 6	*Agree* 5	*Not Sure* 4	*Disagree* 3	*Mostly Disagree* 2	*Strongly Disagree* 1
The idea as outlined in the previous paragraph will improve our community							
The solution outlined has properly understood the needs of our community							
I would support the activity outlined if it was to progress							
I would participate in delivering the idea if I was asked to							
I think the idea is sound but needs more work to shape it more closely to the needs of the community							
I think the idea is valid but requires a better understanding of the problem							

Comments Please Provide any comments that you have in relation to the proposed idea	
Do you believe the idea has merit and could it be improved	
What challenges might the project have	
Any other comments that you would like to add	

Additional information Please circle the statement that most relates to you							
My involvement with this Rotary idea is through	This Rotary club	Council	Other Rotary clubs	Community Interest group	Business	Affected person	OTHER
My age group	Under 20	20-30	30-40	40-50	50-60	60-70	Over 70

STEP 2.0

STEP 2. DECIDE ROTARY'S ROLE

INTRODUCTION

The two key factors that make the Rotary Connects approach successful are

(a) the approach requires Rotarians to collaborate with a range of other people, and

(b) through working together with others, the impact of Rotary's work is enhanced, made truly relevant, and becomes evident to others.

IDENTIFY ROTARY'S ROLE

Rotary can support an idea in a number of ways. Rotary can:

- **Champion and provide the project management** – this will be necessary to ensure the project's success. The champion can come from within Rotary or the wider community. No project can be successful without a strong champion.
- **Connect stakeholders** – Rotary can provide the glue to bring stakeholders together.
- **Seed funding and support**. Rotary can provide the funding model and financial support for the project.
- **Facilitate championing of the project** – Rotary can facilitate engagement in the project through its membership and connections.
- **'Arms and legs'** – Rotary can provide the manpower to deliver the project.

If this is a Rotary project it is important to get approval from your Rotary Board and that will require completion of the form Step 6.1.

Why should Rotary take this Leadership Role?

By and large, Rotarians are living and working in their local communities – and a have a 'right' to take on this leadership role of facilitating and 'making something happen'.

Whilst there are organisations within the community who are working to address a particular issue, often they are not for profits whose resources are stretched, and they are simply focused on getting on with the job – and not necessarily able to see the bigger picture, or how, when a number of people come together, much more can be achieved than simply an organisation working in isolation.

Rotary is well positioned to bring them 'to the table' to share, discuss and to come up with solutions that will gain more traction and bring about more impact.

By taking this leadership role, the profile of the Rotary Club is raised. This visible activity generated through the project leads to expanded business networks and draws people in. Where Rotary is demonstrating that their actions are driven by a sense of purpose and achievement - and are making a difference – prospective new members looking for satisfaction, pride and a sense of belonging to a 'can do' organisation become involved and join.

What Can Rotary Bring to the Table?

It must be said first that being involved in a project following the Rotary Connects approach does **NOT** necessarily mean that Rotary will contribute money (although this may come later, as the Club becomes more involved). A simple donation would indicate your Club has taken a transactional, one-way, or quick fix approach; this is NOT the way Rotary Connects works. Its success will depend on Rotarians bringing much more 'to the table' when they meet with local agencies, organisations, government and individuals.

This approach is about contributing skills and talents, knowledge and abilities, experience and personal attributes, networks and a sense of purpose and a drive for achievement.

Identify The Skills in the club

Rotary can support an idea through the vast array of skills, networks and experience that its Members can contribute.

Check the Wealth that you have Embedded within your Club Members…

- **Talent –** many Rotarians have hidden talents!
- **Experience –** general experience, or perhaps experience of the local area or the 'opinion makers', or around the issue to be explored
- **Passion** for the issue
- **Work Skills –** a range of vocational skills that may be required as part of the project, such as:
  - Facilitation
  - Project management
  - Financial / budgeting
  - Technical – e.g. engineering
  - Sales and marketing
  - Mentoring
  - Teaching / training
  - Advocacy
  - Research
- **Life Skills** – a range of practical, life and other skills ….
  - Communication
  - Collaboration
  - Taking initiative and being proactive
  - Self-direction
  - Networking

    - Leadership
    - Teamwork
    - Time management
- **Interest** – a particular interest in the issue will help drive the project a long way
- **Willingness** to be involved – and a desire to make a difference
- **Contacts and Networks** – contacts are often key to successful relationships, and beyond the reach of local not for profit organisations who are working in a particular field
- **Time**
- **Volunteering**
- **Enthusiasm**

STEP 3.0

STEP 3. APPOINT A CLUB CHAMPION

INTRODUCTION

Rotary Connects is an evidence-based approach that has previously been piloted by six Victorian Clubs; an evaluation of the results of these six projects has also been completed.

From this evaluation, it was evident that a key factor – perhaps even the key deciding factor - in the success of the Rotary Connects approach is to appoint a 'Club Champion' for the project. Where a project is being undertaken by one Rotary Club, this would be a member of that Club. Where a project is being undertaken by a Cluster of Rotary Clubs, one key 'Champion' is required.

The Role…

The Champion, who could also be called the 'Project Advocate', is the person whose main goal is to make the project succeed. He/she will take overall leadership, supporting the team throughout the project to completion. The champion's experience, resources, strength and reputation can guarantee the success of the project

He/she takes a leadership role, providing guidance and stewardship throughout the project.

They provide moral, psychological and physical support to the team, and are able to advocate the project's benefits and advantages to the stakeholders.

What to Look For in a 'Club Champion'…

- **Passion for the Issue.** First and foremost, the Club Champion needs to be passionate about the local issue that is to be addressed - this genuine interest will underpin the honourable and genuine base through which the local organisations, businesses, agencies, and other stakeholders will contribute to the overall success of the project.
- **Inclusive** – able to involve others, delegates effectively, and works collaboratively

- **Committed** – without this commitment, it is difficult to sustain the energy, remain positive and tenacious when needed
- **Time** – simply has the time to commit to the project
- **Enthusiastic**
- **Able to go the distance** – someone who can stay with the project over the long haul (which may be over one year)
- **Has good communication skills** – since the role will require him/her to communicate with a range of stakeholders, overcome objections, and also be a good listener. Uses the word 'we', rather than 'I'.
- **Has a good reputation** – ideally, the Club Champion will be respected within Rotary and beyond. He/she will be a person who is trusted by others and who will follow through on promises. This is someone whose suggestions are listened to – and ideally, a person with 'charisma'.
- **A problem solver** – most stakeholders will not have the time to come up with solutions as the project progresses, but are happy to select a solution that is in harmony with others, and does not conflict with their own agenda. By proposing solutions that take into consideration every stakeholder's individual agenda, the Club Champion is instrumental in keeping the project on track

ONCE YOU HAVE APPOINTED A CHAMPION..

Once there is an understanding of the role that Rotary will play in the project then Rotary or the project champion will need to be clear on the team that will be necessary to deliver the project.

Championing and Establishing the Team ….

The team should include those key stakeholders that were identified at the outset and will be necessary for the success of the project.

There are certain factors that make for a successful team

- Setting clear goals
- Defining individual roles

- Communicating clearly and openly
- Making effective decisions
- Balancing participation
- Valuing diversity
- Managing conflict
- Creating a positive atmosphere
- Developing cooperative relationships
- Utilising participative leadership

The team should make sure that certain roles are allocated across the team.

- **Champion** – this person advocates on behalf of the project whenever it is needed and keeps the passion alive in the team
- **Project Manager** – (may be the Champion) this role sets the project plan in conjunction with other team members and drives the project forward to meet certain timelines. They set the meeting discipline that monitors the delivery of the project and the appropriate communications
- **Expertise** – those with the appropriate expertise should deliver on their discipline
- **Action Register** – someone should be nominated to establish the action register and monitor and follow up on the actions
- **Risk / Issues management** – a risk and issues register should monitor any risks and issues and how they are being addressed
- **Change management** – someone should take care that changes to the project are communicated to all the stakeholders
-
- interested parties involved.
- **Minute taker / recorder** – this role records the outcomes of the meetings and updates the action register.

STEP 4.0

STEP 4. ENGAGE OTHERS - HOW TO RUN A COMMUNITY FORUM

COLLABORATE WITH THE COMMUNITY

The key success factor of the Rotary Connects approach is to collaborate and work with others.

Clubs that have held a Vision Day may already have identified one or perhaps three local issues of interest and where Rotary can assist. By holding a Community Forum the Club can engage others who are knowledgeable and/or working on the issue selected in direct dialogue, and create an atmosphere of 'shared responsibility'. Through this process, the most important issue to be addressed may be decided or confirmed.

Clubs that have **not** held a Vision Day may find that holding a Community Café (see below) will be an ideal way to determine the issues that others feel most strongly about, and from that, determine the most important issue to be addressed.

A. For Clubs where a Vision Day has been held, and Community Issues Identified.

Community Forum

Objectives:

- Encourages members of the public to share perspectives and work together towards results
- Fosters discussion and progress on a specific issue/s and looks for common ground
- Identifies new ideas and creative problem solving
- Connects representatives with various backgrounds and interests, sharing knowledge, and finding any 'gaps' that could be addressed (and not duplicating existing work)
- Gets participants engaged in the project and in finding workable, sustainable solutions to the issue
- Establishes relationships between the club and the community

What is a Community Forum?

A forum at which participants work together on prescribed assignments or exercises to provide specific input to the process

Why use this method?

A Community Forum involves others and assists the collaboration process. Community Forums help participants learn and exchange ideas. They focus participants on providing input that can feed directly into the decision making process.

What results are you looking for?

How will you use these results?

Who should be invited?

Stakeholders may be defined as those with an interest in or who may potentially be impacted.

Who will want to be involved?

Who do we have to 'chase' (i.e. 'hard to reach', or 'hard to engage' people)?

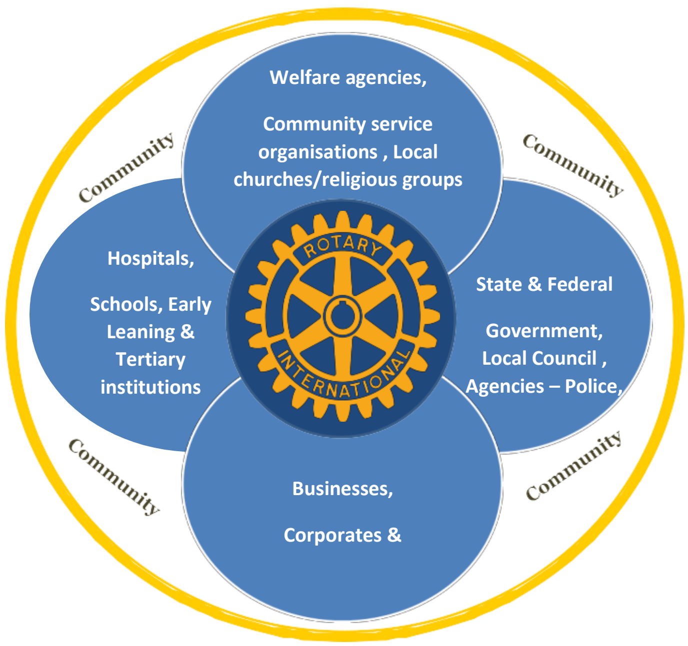
Who is the target group? (e.g. if the issue is homelessness, can you get any people who are experiencing, or have experienced homelessness to be there?

Who benefits? Who might lose out?

Seek out

- Elected officials (federal, state, local government)
- Employees of government agencies (federal, state, local government)
- Media
- Community leaders
- Welfare agencies, community service and not for profit groups
- People living in / nearby where action may take place
- People who have expressed interest in this or similar issues
- Local activists or opinion makers
- Thought leaders
- Educational institutions (early childhood, schools – parents groups, universities, TAFE's and Training Organisations)
- Neighbourhood groups
- Seniors' groups
- Other service clubs
- Cultural groups

- Hospitals, aged care facilities, rehabilitation centres
- Businesses, corporate representatives and farmers
- People in the tourism industry
- Hard to reach people (Indigenous, young people, people who are unlikely to find out about the issues, people who may be specifically affected based on culture, ethnicity or poverty, people with special needs / disability
- Church or religious groups
- Justice – youth detention centres, remand centres, prisons



How many people do you need? (You will need to invite 2 – 3 times the number to achieve the desired number at the Forum).

How will you invite them (a personal phone call may be needed for 'hard to reach' folk)

- Invitations should clarify the Forum purpose and how the results will be used. Make sure that attendees know they are coming to work and interact, and not just listen to presentations and ask questions or make comments (and not be just a 'talk fest').

- RSVP – will help with attendance numbers and catering (some people will RSVP and not show up, others will show up without having sent an RSVP)

Name Tags? Sign in Sheet?

Where to hold the Community Forum?

- Convenient 'neutral' location to attract most participants. Consider the size and acoustics to handle people at several tables talking at once. Public Transport / Parking.

When?

- Select a time that works for most of the participants. Duration: About 1 ½ - 2 hours.

Venue and Set up?

- Perhaps start with a circle of chairs (no tables) for an introductory presentation to provide common information
- Will probably need break-out areas for small groups

Will you have displays around the room?

Chairman / Facilitator/s

- Will you invite a prominent person to Chair it?
- Who will facilitate or moderate discussion?

Who should speak?

- Will you invite experts on the 'issue/s' who may have differing views, to speak?

Equipment

- White Board/s | Overhead Projector and Screen | Flip Charts and pens |Sticky notes | Sticky dots \ 'sticky wall'

Refreshments

- Water, tea, coffee, food

Will you break people into small groups?

- If so, how will you divide the participants into small groups? (A small group ceases to be small when you have more than 10 people)
- Ideally, groups would sit at tables - will you need facilitators at each table, or have others roving the room?
- Will notes be taken at each table? Who will take notes?
- Will / how will they report back?

Will / How will you show the participants how their input contributed to the overall project?

Recording the Day. Photos, article in local paper (or invite Editor), Facebook. Website.

Program – Sample

1. Greet participants as they arrive and invite them to sit as part of the group
2. Start and Welcome – Introductions, 'icebreaker' activity perhaps
3. Presentation and Briefing – Perhaps something about Rotary and the Rotary Connects approach; What has led to this point, Issue/s selected, What is the objective of the Forum
4. Context for the Issue/s – Consider Case Studies, 'experts' to speak to provide points of view, what's needed, what has worked/what has not worked
5. Small Group Discussions – start with easier questions and 'warm up' exercises, especially questions that help the group bond, build respect and find what they may have in common. This helps participants get comfortable before diving into the more challenging parts of the discussion. Construct 3 specific questions that will provide the Club with the input they need for the project objectives
6. Reporting Back – facilitated session, scribe to record (white board/flip charts)

Key Tips

- Design the process to fit the objectives
- Use established meeting process techniques or design your own
- Use graphic tools (diagrams, illustrations, graphics) to help small groups work on their assigned tasks
- Materials - provide equipment – flip charts, markets, post-it notes, sticky dots,
- Take-away information/handouts – one pager, and include Rotary contacts for people to make contact afterwards
- Information recording – consider how you want to capture what happened

B. Alternative: For Clubs Seeking to Identify Relevant, Local Issues
(and who may NOT have held a Vision Day)

Community Café

Where Rotarians responsible for community service activities engage others to discover what are the real issues that people are concerned about, and select a local issue to address

Objectives of the Community Café:

- Engage community stakeholders in meaningful discussions about their community
- Identify the major issues a community faces
- Establish relationships between your club and the community

What is a Community Café?

A Community Café creates the atmosphere of a café in which small groups of people from the community discuss issues raised by facilitators. It can be a unique way to learn about a community by engaging stakeholders in a direct dialogue.

Each table has a 'host' facilitator who guides discussions on a particular topic. Participants move from table to table after 20 minutes. As each issue is discussed major ideas are recorded by the hosts, who report the most common ideas from their discussions to the head facilitator. Clubs can then use these ideas to determine what project/s to undertake in their communities.

Why use this method?

- Foster open and meaningful discussion of a topic
- Surface areas of commonality and draw people into common problem solving
- Remove the formal atmosphere of a traditional meeting, and involve a wide variety of people in a meaningful way
- Gain a high quantity of responses on specific topics in a short time. Provide information from a range of perspectives
- Build community among diverse participants

Who should be invited? *As per 'Community Forum'' above.*

How many people do you need?

At least 20 participants will yield the most productive discussions.

How will you invite them? *As per 'Community Forum'' above.*

Name Tags? Sign in Sheet?

Where to hold the Community Café?

- Convenient 'neutral' location to attract most participants. Consider the size and acoustics to handle people at several tables talking at once, where they can move around easily. Public Transport / Parking.

When?

- Select a time that works for most of the participants. Duration: About 1 ½ - 2 hours.

Venue and Set up?

- Perhaps start with an introductory presentation to provide common information
- Enough tables and chairs to allow for a different discussion topic at each table (it is usual to have 4 people per table, plus the table host)

Will you have displays around the room?

Chairman / Facilitator/s

- Although a Community Café can be run by a single facilitator, it is recommended that clubs choose one lead facilitator and a team of 'assistants' to host each discussion table. Choose table hosts who are able to listen carefully and to guide, rather than dominate, discussions
- Have one participant at each table serve as table host

Equipment

- A bell – or music played – will signal people to move to the next table at 20 minute intervals
- Table cloths (with a centerpiece if possible) will help make the room feel like a café
- Pens/pencils and paper, sticky notes, large 'butchers' paper, to record comments / points of agreement
- Notepads for each table host

Refreshments for the Community Café

Serving food is an important part of this activity. Usually light snacks accompanied by tea, coffee and soft drinks are best because they will not impede conversation and are easy to transport from one table to another. Create an environment in which participants will feel comfortable and free to discuss issues as though they were at a dinner with friends.

Will / How will you show the participants how their input contributed to the overall project?

Recording the Event Photos, article in local paper (or invite Editor), Facebook. Website.

Beforehand.

- Meet with the team of table hosts to clarify the purpose of the Community Café
- Discuss and decide what issues are to be discussed at each table. Phrase the questions to enable the kind of information about your community that you want to obtain to emerge

Community Café Program

1. Greet participants as they arrive, encourage them to get food and drink and seat them at discussion tables (15-30 minutes)
2. Once everyone has arrived, introduce yourself and explain the purpose of the event, and the procedures for the discussions (5 – 10 minutes)
3. Have the table hosts start their discussions, taking notes and facilitating the discussion
4. Every 20 minutes, have participants switch tables to discuss a different issue or topic. Before the discussion begins, have each table host summarise the main points from the previous group's discussion. Continue the process until everyone has discussed each topic
5. To conclude, tables share a common theme with the group at large
6. Consider having groups post summaries along a wall, then request participants on a gallery walk to view the results (15-20 minutes)
7. Thank the participants for attending (5 minutes)
8. Meet briefly with all the hosts to discuss what they learned and observed. Collect the notes from each table and summarise the major themes (10-20 minutes)

9. Send the summary report to participants after the event

Community Café - Evaluation/Debrief

After participants leave, gather the team and reflect on the event. Ask:

- What information did participants share with each other?
- What inferences can we draw from the similarities and differences in the table summaries?
- What do they suggest in terms of next steps?
- From these results, a community issue to address can be decided

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CREATE A TEAM

Establishing the Project Team to carry out the project can be done following the Community Forum / Community Café.

- Getting the 'right people on the bus' is critical to the success of the project that is being created to address the selected issue of local concern.
- The team can comprise a cross-section of people, depending on what they can contribute to the project – this may be knowledge, expertise, connections, skills, etc. There will be Rotarians (as the 'drivers' of the project), participants from the Community Forum / Community Café who have expressed an interest and/or represent organisations that will be involved, or others who could not attend the event.
- However, after consideration, there may be others in the community who are desirable to join the team – and these people will need to be approached individually.

Organisations (not for profit usually) who are already working on this issue will most likely be part of the team, and it may be necessary to form partnerships with these organisations (See Step 5.5).

Also, see Step 4.1 for 'Some Useful Techniques'

Step 4.1

4.1 USEFUL TECHNIQUES TO CONSIDER USING IN THE ROTARY CONNECTS PROCESS…

Ways to Engage Potential Collaborators and Bring People Together

There is no wrong or right way to engage others – consider what will work best for each stage of the project

TECHNIQUE	IN PREPARATION	USEFUL FOR	WATCH OUT FOR
COMMUNITY FORUM			
An informal 'public' meeting that may include presentations and exhibits. May end with interactive working groups to take the project forward	Know how you plan to use public input before the workshop. Conduct training in advance with small group facilitators. Each should receive a list of instructions, especially where procedures involve weighting / ranking of factors or criteria	Excellent for discussions on criteria or analysis of alternatives. Fosters small group or one-to-one communication. Ability to draw on other team members to answer difficult questions. Builds credibility. Maximises feedback obtained from participants. Fosters public ownership in solving the problem.	Hostile participants may resist what they perceive to be the 'divide and conquer' strategy of breaking into small groups. Several small group facilitators are necessary.

Technique	In Preparation	Useful For	Watch Out For
OPEN SPACE MEETINGS			
Participants offer topics and others participate according to interest. More info: H H Owens & Co. www.openspaceworld.com	Important to have a powerful theme or vision statement to generate topics Need flexible facilities to accommodate numerous groups of different sizes Ground rules and procedures must be carefully explained for success	Provides structure for giving people opportunity and responsibility to create valuable product or experience Includes immediate summary of discussion	Most important issues could get lost in the shuffle Can be difficult to get accurate reporting of results
FISHBOWL			
A meeting where decision makers do their work in a 'fishbowl' so that the public/other participants can openly view their deliberation. For more detail: www.kstoolkit.org/Fish+Bowl	The meeting can be designed so that the public/other participants can participate by joining the fishbowl temporarily or moving about the room to indicate preferences	Transparent decision making. Decision makers are able to gauge participant reaction in the course of their deliberations.	The roles and responsibilities of the decision makers and the participants may not be clear.
WORLD CAFE			
A series of simultaneous conversations in response to pre-determined questions. Participants change tables during the process and focus on identifying common ground in response to each question. Allows for people to work in small groups without facilitators Timing: 90 minutes to 2-3 hours. For more detail: www.theworldcafe.com/	Set the context. Create a hospitable space. Explore questions that matter. Encourage everyone's contribution. Listen together for patterns, insights and deeper questions. Collect and share collective discoveries. Think through how to bring closure to the series of conversations.	Participants feel a stronger connection to the full group because they have talked to people at different tables. Good questions help people move from raising concerns to learning new views and co-creating solutions.	Participants resist moving from table to table. Reporting results at the end becomes awkward or tedious for a large group. The questions evoke the same responses.

TECHNIQUE	IN PREPARATION	USEFUL FOR	WATCH OUT FOR
ONGOING ADVISORY GROUPS			
A group of representative stakeholders assembled to provide input to the planning process. May also have members from the 'project team' and experts.	Define roles and responsibilities up front. Be forthcoming with information. Use a consistently credible process. Interview potential committee members in person before selection. Use third-party facilitation.	Provides for detailed analyses for project issues. Participants gain an understanding of other perspectives, leading toward compromise	General public may not embrace committee's recommendations. Members may not achieve consensus. Sponsor must accept need for give-and-take. Time and labour intensive.
Techniques to Share Information, Gain Attention and Engage the Wider Community Ways to publicise the project. Consider which method of communication is most likely to get attention - get opened and get read.			
EXPERT PANELS			
Public meeting designed in a "Q & A" format. Media panel interviews experts from different perspectives. Can also be conducted with a neutral moderator asking questions of panel members.	Provide opportunity for participation by general public following panel discussion. Have a neutral moderator. Agree on ground rules in advance. Possibly encourage local organisations to sponsor rather than challenge	Encourages education of the media Presents opportunity for balanced discussion of key issues. Provides opportunity to dispel scientific misinformation.	Requires substantial preparation and organisation. May enhance public concerns by increasing visibility of issues
FEATURE STORIES			
Focused stories on the project and/or issues around the project	Reporters are always looking for an angle – and to fill their space in the	Can heighten the perceived importance of the project.	Photographers from local papers rarely attend events

TECHNIQUE	IN PREPARATION	USEFUL FOR	WATCH OUT FOR
Rotary is more likely to get published, than a local agency that is 'being paid' to do the work	local newspaper / magazine Write the story and present it to the newspaper/magazine – more likely to be used than the reporters starting from scratch Be clear about the purpose Is there a 'call to action' at the end Add contact people for more information Set up photo shoots or schedule interesting events to help sell the story.	More likely to be read and taken seriously by the public. Good publicity for Rotary	out of hours or on weekends Potential for no control over what information is published
PRINTED PUBLIC INFORMATION MATERIALS			
Press Releases Press Packets (inc. resource and background information plus contact information) Facts Sheets Newsletters Brochures Issue Papers Progress Reports Direct Mail Letters	Email press releases or media kits. Foster a relationship with editorial board and reporters. KISS – Keep It Short and Simple! Make it visually interesting but avoid a slick sales look. Include a postage-paid comment form to encourage two-way communication and to expand mailing list. Be sure to explain role/project and how comments from community have affected project decisions. Q&A format works well.	Informs the media of project milestones. Press release language is often used directly in articles. Opportunity for review by technical or other 'experts' Can reach large target audience. Encourages written responses if comment form enclosed. Facilitates documentation of public involvement process.	Low media response rate. Frequent poor placement of press release within newspapers. Only as good as the mailing list / distribution network. Limited capability to communicate complicated concepts. No guarantee materials will be read

TECHNIQUE	IN PREPARATION	USEFUL FOR	WATCH OUT FOR
NEWSPAPER INSERTS			
A 'Fact Sheet' within the local Newspaper	Design needs to get noticed in the pile of inserts. Try on a day that has few other inserts.	Provides community-wide distribution of information. Presented in the context of local paper, insert is more likely to be read and taken seriously. Provides opportunity to include public comment form.	Could be expensive, especially in urban areas.
INFORMATION KIOSKS / HUBS			
A 'station' where project information is available Libraries, city halls, distribution centres, schools, railway stations, tram stops, other public facilities.	Makre sure the information presented is appropriately tailored to the audience you want to reach. Place in busy locations. Can be temporary or permanent (and updated regularly).	Can reach large numbers of people. Can use technology and make the kiosk interactive and able to gather feedback and comments.	Equipment or materials may 'disappear'. Information needs to be kept up to date.
SOCIAL MEDIA TOOLS			
Emails YouTube Websites Facebook Twitter	Useful to engage a younger audience (and possibly new Rotarians) YouTube videos can be done simply, cheaply and the less 'professional' the better (looks more 'real')	Communicating often and through varying mediums could get to 'hard to reach' audiences. Can reach large target audience and gain quick responses More likely to engage young people through online communications	Only as good as the mailing list / distribution network. No guarantee information will be read

Acknowledgements and further information from: International Association for Public Participation - http://www.iap2.org/

STEP 4.2

4.2 INVITING PEOPLE TO ATTEND A COMMUNITY FORUM | COMMUNITY CAFÉ

HOW TO ENCOURAGE INVOLVEMENT OF POTENTIALLY INTERESTED PARTIES

You will have identified potential stakeholders/groups who will be affected by your project/ initiative or who you wish to engage with your project. It is wise to consider the best communication needs for each of these people/groups.

A single advertisement in one local newspaper will not attract all of the potential people. Others may be typically difficult to reach with traditional communication methods, such as

- People whose first language is not English or who come from different cultures, e.g. Indigenous
- Young people or Older people
- People with disabilities
- Families with young children
- People who do not belong to organised groups

Strategies…

You will need to

(a) Reach them,

(b) Inform them,

(c) Demonstrate to them the benefits of being involved and

(d) Build relationships with them.

Often this will require personal contact (a phone call will usually be the most effective) to get them to attend the Community Forum (or Community Café), then you can start to build a relationship with the person or a person in a target group.

Be prepared to engage with the group. Provide them with appropriate information. Ask them how they would like to receive information. Ask them how they would like to be involved.

Remember:

- Relationships are built, step by step. You can't rush them.
- Trust is built through keeping promises. Don't promise what you can't deliver. If you make a promise, keep it.
- Trust and respect must be earned and, often, with each new part of the project/ initiative.

Invitations by email are the cheapest, easiest and quickest. It could be send as a 'stand-alone', or as an attachment with some wording in the body of the email.

For some, it may be best to send an invitation by 'snail mail' (could be as well as the email if you wished!). Send in a plain envelope (not a window-faced envelope as this looks like an invoice!); adding a 'bulge' in the envelope will ensure it gets opened. You may even think about attaching the invitation to, say, a tea bag, coffee bag or something related to the event or the issue – something that will get the attention of the receiver, and flag to them that you are 'serious' and authentic!

To be courteous allow a 6-week lead up to the event. Follow up again 3 weeks later.

Invitations…

When considering the wording for your invitation, you may wish to include

- What is your purpose (validates the reason for the event).
- Who is intended to be there (people often like to know the sort of 'other' people who may be there)
- What brought you to this point (background and context)
- What is the focus – what is your key message – is it a clear, concise statement of what you wish to say, and cannot easily misunderstood by someone who is reading it 'cold'
- What is the expected role of the person – why do you want them at the event, how they can participate

1. An example of a 'covering email' follows (see attached for the invitation attached to the email). It attempts to use just a few words and short sentences and paragraphs:

Hello xxx

We would like to offer you the opportunity to join us on the 'Beacon School Bus Trip' on the morning of Friday 16 May, 2014.

There are over 58,000 young Australians (aged 15 - 19) who have dropped out of school and are unemployed. More than 1 in 3 unemployed Australians is young – between the ages of 15 and 24. Youth unemployment now features largely on the national agenda – it is of deep concern to policy-makers, jobs services and charitable sectors and the broader community. Why? Because excluded people cannot contribute productively to our society, which adversely affects prospects for national growth and represents an avoidable dollar cost to public services.

At the same time, we have labour shortages driving leading companies to look offshore for workers. There is a great opportunity for business and the broader community to look creatively at this disconnect. We'd love to share our Beacon thinking with you and to learn about your thoughts regarding this complex issue.

Our bus trip will take us into the south east of Melbourne where we'll be privileged to meet the people who are the experts - the young people themselves and their outstanding teachers and Principals.

I hope that, like me, you feel this issue is important, and look forward to the journey with you – don't be late, please arrive 7.45 am sharp!

2. The following emailed invitation is simple, easily read and 'digested'; it is suitable for a group of individuals who are already engaged and know about the project:

pwc

Rotary Youth Homelessness Design Day

We would like to invite you to attend the Preventing Young People Exiting State Care into Homelessness Design Session being held at *the difference* in Melbourne on Friday, 8 August 2014.

For more details and to register your attendance, please proceed to the registration site: www.pwc.com.au/events/rotary-youth-homelessness.

Please register before Monday, 21 July 2014.

We look forward to seeing you all there.

Date
8 August 2014

Time
08:00 to 16:00

Location
PwC - the difference
Level 8
North Bank Place East
525 Flinders Street, Melbourne

Enquiries
Joni Pirovich
joni.pirovich@au.pwc.com
0450 958 749

STEP 5.0

STEP 5. HOW TO DEVELOP A PLAN

HIGH LEVEL UNDERSTANDING

In Step 1 of the Tool Box we pulled together a high level plan that included addressing the following questions?

- What do we want to achieve?
- Why is it important?
- What is the current situation?
- What would it take to do it better?
- Who can play a role?

After getting approval for your project the plan will ensure your success – as the Cheshire Cat said to Alice in Alice's adventures in Wonderland 'If you don't know where you're going then any road will get you there' – a plan makes sure you arrive at the right destination.

High Level Plan…

A high level plan identifies all the activities and tasks that lead to success. Once these are listed they can then be ordered and prioritized so as to make the most of the effort and time of the team. Some tasks will take much longer than others and some will be dependent on others. Assembling this explicitly will help to organize the thoughts of the team and will:

- establish the high level definition of the project and the work effort that is involved.
- provide a ballpark evaluation of the resources and effort needed to deliver on the project.
- provide greater clarity about the likely cost and timing of the project.

We now have to develop this high level plan further.

More Detailed Plan…

Once the idea has been approved then more detailed plans for the project can come together - this will include plans for:

- Communication – how we will communicate with all stakeholders
- Project Schedule – an ordered list of all the deliverables and when
- Quality – this outlines the specifications that ensure the project fulfils its purpose
- Risks / Issues – defining, logging and management of these
- Change – how changes are managed and implemented
- Resources – what resources will be needed and where these will come from
- Knowledge – how to make sure that everyone knows the detail that they need to
- Procurement – dealing with any providers and associated contracts

The project schedule will hold the list of all of the tasks needed to complete the project and it will also identify those that are critical to the project being delivered on time – a sample of this can be found in Step 5.2.

Your partnerships will also be critical to the success of your project and a separate guidance sheet has been provided to help support your partnerships.

Actual plans

A number of templates have been provided in the following sections.

- Step.5 1 Project Management Plan Template
- Step.5 2 Meeting Template
- Step.5 3 Risk Template
- Step.5 4 Issues Template
- Step.5 5 Working with Partners
- Step.5 6 Memorandum of Understanding Template

Managing Risks and Issues

Risks and Issues are distinctly different and are the key challenges for any project. They are best managed when the effort is put in to thinking about them at the outset.

The difference between them is that:

- A risk is a situation that threatens the project success and may become an issue.
- An issue is a situation that is current and impacting a project's development.

Both are managed in a similar vein but they need separate identification.

Often Issues will have been identified as a Risk initially and either the Risk management plan has failed or the Risk has changed in nature.

As projects progress the risks and issues will constantly be changing and they need monitoring.

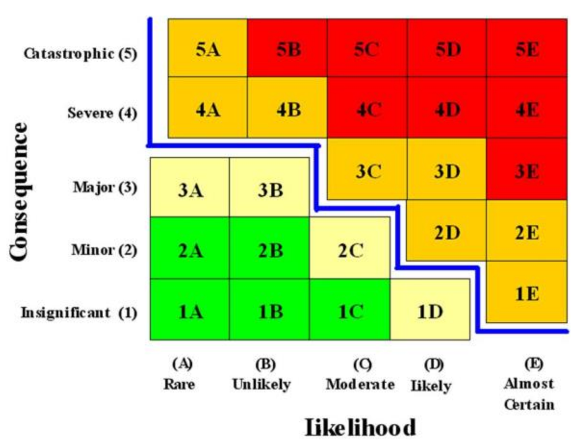
A risk at the outset of the project may no longer be a risk as the project progresses and risks may arise as a result of the detailed development of your project.

Risk Management…

Risk management starts by identifying the risks that may impact on your project. Once you've identified the risk then you can assess how much of a risk it is by considering the two parameters:

- Consequence/severity of the risk (the impact of the risk on the project objectives)
- Likelihood / probability of that risk occurring.

These two factors combine to provide a ranking. This is usually laid out along the following lines.



Depending on the ranking the risk needs to be managed accordingly. Those in the red, in particular, need immediate attention.

Critical Zone	Require responses
High Zone	Require you to plan a possible response
Moderate Zone	Require you to consider a response
Low Zone	Can be left alone

There are three aspects to risk management

- Risk identification – recognizing all the possible risks *(often by brainstorming)*
- Risk categorization and ranking – understanding their likely impact
- An action plan for managing the risk – putting in place actions that lessen or remove the risk depending on its severity.

Risks can never be ignored unless they have already been identified as insignificant. More details on how to manage risks can be found in the Template in Step 5.3

Issue Management…

Issues usually eventuate from risks and should have an action plan to deal with them although some appear during the project unsolicited. The key to managing issues is to fully think through the consequences of any action and have someone responsible for ensuring their management.

More details on the management of issues can be found in the Template in Step 5.4

Partners – the Keys to a Successful Plan

Globally, more and more people are coming to realize that when people from various parts of the community have a common goal – based on the wellbeing of the population – so much more can be achieved when they work together.

More details on developing a partnership can be found in Template Step 5.5

Keys to Success – A Quick Check List

- **The Need has Been determined**
- **A High Level Plan –** do we have an understanding of the high level plan and has it answered the following
    - What do we want to achieve?
    - Why is it important?
    - What is the current situation?
    - What would it take to do it better?
    - Who can play a role?
- **Approval –** we now have approval to move forward
- **A Detailed Plan –** outlines what we have to achieve for the project to be successful and how to engage with everyone
- **A Risk plan –** brainstorming all the possible risks means we are prepared for all of these and have a response should they arise
- **An Issues plan –** has the appropriate response already identified in the risks and ensures effective management of them
- **Managing partnerships** – communications can be the greatest risk and managing our partnerships is critical to a good community outcome.
- **Meetings** – guiding the meetings with effective agendas, actions and minutes is critical to moving the project forward – a template for this is provided in Template Step 5.2

STEP 5.1

5.1 PROJECT MANAGEMENT PLAN TEMPLATE

The following is a sample of what might be included in a project plan:

Purpose • Vision Statement / Statement of Purpose • Intended users • Strategic fit Background • Reason / rationale for Project • Objectives – to be attained by the project • Rationale / Business Case Evaluation *[summary]* Overview • Project Scope • Deliverables *[will include the actual deliverables]* • Inclusions / Exclusions *(what is in and what is not)* • Stakeholder commitments *(what others will do)*	This is the first level of the Project Management Plan It is aimed at providing a high level view of the project and communicating the intent of the project so everyone is on the same page and has: • High level summary information • Is accessible by anyone wanting to understand the essence of the project. • Is brief and succinct with detail at the next level in the plan.
All the Project Activities • Project Schedule / tasks broken down step by step • The time expected on each task Project Organisation • Who is involved in the Project Team • Roles & Responsibilities • Team Capabilities and expertise Project Management • Change Management • Risk Management • Issue Management • Communications Management - Reporting - Meetings - Communications routines	This level of the Project Plan is for all those who are involved in the project to understand a sufficient level of detail to manage all the project activities. It is where: • the day to day documentation of the project is held • the team activities are documented
Appendices • Detailed information on the project • Any additional information Contracts • Detailed documentation relating to specifications • Any contracts.	This is the level of the project plan where all the detail is held. This is specifically used by: • The working team • For detailed analysis.

Project Schedule…

The following is a sample project schedule template ordered around high level tasks:

ID No.	TASK	Sub Task	Details / Action	Start	Finish	Who is responsible	Dependent on
1.	***Stakeholders***	***Rotary***	*As the champion of the project*	*1/1/17*	*30/6/17*	*Graham G.*	*Support from International*
1.1		***Council***				*Peter T.*	
1.2		……					
2.	*Beds*	*Assess*	*Check which are usable*	*6/1/17*	*6/1/17*	*Peter G.*	
2.1		*Pack*	*Collect from hospital & pack in trucks*	*1/4/17*	*1/4/17*	*Malcolm C.*	*Depends on 2.*
2.2		*Dock*	*Check they get on ship (highlight those tasks that have critical timing)*	*2/4/17*	*2/4/17*		*2.1*
2.3		*Arrive*	*Hand over to the in-country Rotary*	*1/5/17*	*1/5/17*		*2.2*
3.							
4.							

STEP 5.2

5.2 MEETING TEMPLATE

A strong meeting agenda supports the meeting and gives clarity to the meeting outcomes.

The following is a sample meeting template:

Agenda – TYPE OF MEETING – Mtg. no.

Venue: **Date**:

Time *[start & duration]:* **Emergency Contact***[name & no.]*:

Meeting Purpose: ....

Chair: .... **Minute Taker:**

Attendees: *(Names specify if they are required for all or part of the meeting)*

Apologies: (*Names)*

	Item	Duration
START 8:30	**1. Welcome & introduction of Any Newcomers / Guests [*Chairperson]***	1 mins.
	2. Apologies [*Chairperson]* -	10 mins.
	3. Action Register & Outstanding Actions [*Chairperson]* -	10 mins.
	4. ……… – ……………………………. [*name of facilitator*] -	10 mins.
	5. ……… – ……………………………. [*name of facilitator*] -	30 mins.
	6. ……… – ……………………………. [*name of facilitator*] -	20 mins.
	7. Other Business [*Chairperson*] -	20 mins.
CLOSE 10:30	**8. Summarise New Actions – [*Chairperson*]** - next Steps & next Meeting	10 mins.

Action Register *(items not on agenda)*

Date started	ITEM	OUTCOME / ACTION REQUIRED	Who
(14/9/15)	**Roadmap of priorities**	Needs clarity of direction & priorities.	**GF**
??	**Risk ?? fix**		
??	**???**		
??	**???**		

Minutes: Mtg. No. 16-12-09 – 046

START: 8:30am

Attendees: ???

No.	Item	Details of key outcomes – actions collected in Action register	Who
4.0	**Marketing Plan Priorities**	… …. ….. ….. … ….	SW / GF

STEP 5.3

5.3 RISK TEMPLATE

The following is a sample risk template:

ID No.	RISK	Severity/ Likelihood Ranking	RISK Mgmnt. Response	Action
1.	***Example**: New Builder on house is significantly cheaper*	***3C***	*Contingency*	*Maintain good relations with 2nd tenderer in case*

STEP 5.4

5.4 ISSUE TEMPLATE

The following is a sample Issue template:

Issue ID	Issue	Severity	Action	Resolved by - Date	Owner	Status
1.	***Example****:* *Renovating the house creates noise on a Sunday that irritates the neighbours*	***Low*** ***Med*** ***High*** ***Severe***	*Ensure all neighbours are aware of the building works and start noisy work after 10 am.*	*10/11/07*	*Builder*	**Open**

STEP 5.5

5.5 WORKING WITH PARTNERS

PARTNERS – THE KEYS TO A SUCCESSFUL PLAN

Globally, more and more people are coming to realize that when people from various part of the community have a common goal – based on the wellbeing of the population – so much more can be achieved when they work together.

Partnerships are built on the premise of….

- Partnerships can mean that 'you can't do it as well when you do it on your own'
- We're in this together. Where a real need or aspiration of a community of people has been identified (usually within a geographic area) the partnership will help to achieve the shared, desired result
- Every partnership is unique – there is no ONE solution; no ONE way of working – and they evolve over time
- 1+1 doesn't always = a partnership. Partnerships may not just be 1+1 such as between a Rotary Club and a local hospital; the best partnerships involve more than two parties
- We're in for the long haul! Partnerships are usually over more than one year – perhaps a 'trial' for a year, but leave room for the partnership to be extended
- Trust – Like – Respect – Belief – in each other. Honour the values and integrity of others – are good bases for partnerships.

Partnerships – the How

- **Agree on your guiding principles**. Early on, decide on the 'rules of engagement' to the partnership. For example: We will
    - Have honest, transparent, open, conscious conversations (and no egos!)
    - Use common language – no big words, no jargon, to confuse or mystify people

  - Apply common sense approach in all that we do
  - Work from a position of common ground – that all parties will work together for the common good
  - Recognise that, like any new relationship, there will be pitfalls, and we will need to re-invent and re-ignite the relationship along the way
  - Keep people at the centre - of conversations, of the project / initiative

- **Need and Purpose**. At the beginning, identify the need you are trying to address – be confident in this – and then communicate widely (internally and externally)

- **Design of the Project / Initiative.** Perhaps the most important aspect of any partnership is the design. To help get it 'right', engage others in the design phase (and perhaps young people – they are fearless and 'social pioneers' and have a lot to add). Have appropriate mechanisms in place.

  Ask the hard questions, such as: What tangibles will the local community see? What skills will be built? How will it build capacity? What is the social investment in the community?

  Avoid duplication or replication, Consider how the project / initiative can be leveraged for improved results.

- **Communications.** Remember – it's not what our message does to the listener but what the listener does with our message that determines our success as communicators.

  Agree on who will do what communications – with whom and how often (both within Rotary, within the local community, with other stakeholders, with the media). Statistically, there are ten factors that contribute to successful authentic communication

  - Truthful – is honest, accurate
  - Fundamental - tells the core story, the real issues
  - Comprehensive – tells the whole story
  - Consistent – matches the partners' words and actions
  - Clear – uses lay language, is logical and well organised, uses clear examples
  - Relevant – addresses interests and issues

    - Accessible – is easily found, is easily understood, people are assigned to provide follow up information when needed
    - Timely – is provided early enough for action and feedback
    - Shows care – is compassionate of the receivers' interests, concerns and emotions
    - Allows feedback – creates opportunities for discussion, feedback and information exchange

- **Success.** Identify together what success will look like – this way, all parties will recognize when this is reached. Even fundamental questions will start the ball rolling as to how you will review success in the future:
    - How much did we do?
    - How well did we do it?
    - Is anyone better off because we did it?
- **Measuring Success**. Agree how you will measure the impact / outcomes. Key measures will be on the results (not simply the 'outputs' – or the number of activities/actions undertaken, i.e. actions does not equate to progress).

  You may wish to think about how you will gather any data to measure the outcomes. This may be: How many 'affected people' were involved. What did they say about it? Did it make a difference to them?
- **Fail!** It's okay to fail. It's even better to fail fast! Failing is the 'mother of innovation' and, as a result of something not going well, a much better outcome will emerge
- **Timing** – Agree on timings. Mismatch of timings can bring a partnership undone.
- **Budget** – Realistic budgeting. Remember "No Margin, No Mission" – spent the money as effectively and efficiently as possible (and it's okay to spend some money on administration!)
- **Long Term Sustainability**. Consider the long term impact and the potential for this work to be carried on beyond the life of the project.
- **Exit Plan**. Decide at the very beginning – gain an understanding from all parties – then sign off on it. The Exit Strategy may depend on any funding you are able to generate from grants etc. for the project.

- **Review**. To keep the partnership healthy, agree on how often the partners will review the Partnership document (annual at least!). The review process will help strengthen the partnership; even though some people may change, the focus areas of the organisations may change, or priorities vary, the project will stay on course.

Keys to Success – A Quick Check List

- **Are you ready to work with others?** How welcoming are you? Do you have a mechanism to gather people's details? Do you have business cards that you can swap?
- **Are you clear on why you are doing this? What is your purpose?** Can you answer the following questions....
    - What do we want to achieve?
    - Why is it important?
    - What is the current situation?
    - What would it take to do it better?
    - Who can play a role?
- **What is your 'elevator pitch'** – a 30 second explanation of your project that will engage the listener
- **Do you know why people would want to work with your Rotary Club / Cluster?** (See Step 2.0)

STEP 5.6

5.6 TEMPLATE MEMORANDUM OF UNDERSTANDING

Memorandum of Understanding

for a

Strategic Partnership

BETWEEN

The Rotary Club of [ ]

AND

[ ]

Date [ ]

Preamble

The Rotary Club of [ ] and [ ] wish to establish a strategic partnership to pursue common interests in addressing [issue] in [geographic area].

This Memorandum of Understanding (MOU) clarifies and formalises the relationship between the Rotary Club of [ ] and [ ] to address issues of issue] in [geographic area].

Joint Commitment

The two organisations share a commitment to:

- Work in partnership to try to end [issue] in [geographic area].
- Working together to raise public awareness of [issue] and what's needed to end it for chronically homeless people
- Promoting shared values with respect to equity and diversity, access, participation, and community engagement
- Increasing the opportunities for people experiencing [issue] to [objectives of the project]

The Partners

Rotary Club of [ ]

c/- [address]

[phone , email]

and

[name of partnering organisation]

[ABN if appropriate]

[address of partnering organisation]

The Rotary Club of [ ]

The Core values which underpin all Rotary activities are Service, Integrity, Leadership and Fellowship. Activities of the Rotary Club of [ ] for the Rotary Year July 20xx to June 20xx are based on [ ]

The Vision Statement developed by the Rotary Club of [ ] for the Strategic Plan [year] is:

To be regarded by recipients of our services, our partners, our financial supporters, and our members as an energetic, dynamic service organization delivering outstanding results in the community.

The Rotary Club of [ ] Mission Statement is to:

- xxxxx
- xxxxxx
- xxxxxx
- xxxxxx
- Support Rotary International and District 9800 projects

[Name of Partnering Organisation]

[Partnering Organisation's] Vision is to [ ].

Partnering Organisation's] Mission is to [ ].

We do this by [includes what the organisation does, where and any other pertinent information]

We work [for example: n partnership with other community organisations and government]. We [what else they do, e.g. research, deliver services, etc.]

Specific Projects and Objectives

The Rotary Club of [ ] and [Partnering Organisation] have agreed to collaborate on activities which centre on addressing [the issue/s] including:

Insert here what you have identified as the results of your partnership:

(An example is as follows:

Advocacy and Representation

- Promote supportive housing, including the Common Ground model, and work to ensure increased and ongoing funding for HomeGround Supportive Housing projects with local, state and federal government
- Work to ensure increased and ongoing funding for Melbourne's Elizabeth Street Common Ground Supportive Housing project ('the Elizabeth Street project') with local, state and federal government

Philanthropic Support

- Promote supportive housing, including the Common Ground model, and work to ensure funding for HomeGround Supportive Housing projects
- Assist HomeGround to access philanthropic funding for support services for the Elizabeth Street project

Corporate Support

- Promote supportive housing, including the Common Ground model, and work to ensure corporate support and funding for HomeGround Supportive Housing projects
- Assist HomeGround to access corporate support and funding for the Elizabeth Street project

Community Engagement

- Promote HomeGround's supportive housing model in the community – particularly around community acceptance
- Engage local authorities, businesses, community organisations and local Rotary Clubs in supporting the project/s.

Volunteer Support

- Involve volunteers in fundraising activities for HomeGround Supportive Housing projects, including the Elizabeth Street project
- Engage volunteers to support Elizabeth Street project residents through individual or group activities focused on daily living skill development, e.g. computer classes, cooking, etc.

- Provide support for Elizabeth Street project residents, including exploring an individual mentoring program
- Explore potential future employment and vocational opportunities for Elizabeth Street project residents

Implementation of Objectives

The parties will appoint a Steering Committee with representation of both parties to oversee the relationship and manage collaborative projects having regard to financial contributions and benefits.

The Steering Committee will appoint members from each party to participate in Working Groups that represent each area of activity. Groups will develop and implement plans to achieve specific objectives and report to the Steering Committee. Each Working Group will, in consultation with the parties, set objectives and reporting requirements. See attached Organisation Chart

The Steering Committee will have responsibility for managing communication between the parties and promoting the objectives, benefits and outcomes of the partnership within each organization and to the wider community.

The Steering Committee will meet not less than bi-monthly to:

- discuss progress on objectives,
- monitor, oversee and review projects arising from the Working Groups and
- develop proposals as appropriate.

Progress reports will be made to the Rotary Club of [ ] Board and to the Partnering Organisation's] Executive Team (or whatever reporting body is agreed.)

Partnership Measures of Success

The success of the partnership can be measured by:

- commitment to the partnership by the key participants (Steering Committee members and Working Group leaders) from each organisation through investment of time, and contribution to the development and implementation of [ ] project

- contacts made, meetings and consultations conducted, and evidence of increased awareness of [the issue], its solutions and the needs of people experiencing [the issue
- demonstrated involvement of Rotary Club of [ ] members, individuals, organisations, community groups and other targeted stakeholders in delivering Working Group projects and outcomes
- demonstrated support from the stakeholders of each organisation for an ongoing relationship
- documentation of progress and achievements

Term

This Memorandum of Understanding (MOU) will be effective for a period of [ ] years, from [start date] to [finish date] and may be extended or varied by mutual agreement of the parties. If during the term of this MOU a party wishes to be no longer bound by its terms, that party may terminate its participation under the MOU by three months' notice in writing to the other party.

Confidentiality

Any and all information relating to the operation of the parties which is not in the public domain is held to be confidential, including (but not exclusively) client information, budgets, advocacy plans, and marketing and fundraising plans. As such this information is not to be used or disclosed by any party without the specific prior approval of the other party. This condition is held to apply both during and after the term of the MOU.

Obligations

- [Partnering Organisation] will acknowledge the Rotary Club of [ ] as an official partner where appropriate, including on its website, in newsletters and at major co-branded events as mutually agreed.

- [Partnering Organisation] and Rotary Club of [ ] will endeavour where possible to include the other party / staff / members in launches, events and other activities including networking opportunities.
- [Partnering Organisation] and Rotary Club of [ ] both hold internal information sessions for staff / members about the other party, including representation from the other party.
- Each party should ensure that no conflict of interest exists and that appropriate levels of confidentiality and probity are observed.
- Each party shares relevant information regularly and informs the other party of approaches to third parties in relation to this partnership agreement.

Statement of Understanding

This document is a statement of understanding and is not intended to create any binding or legal obligations on any party. Each party enters into this MOU as an independent entity.

Acceptance

Signed on behalf of

[PARTNERING ORGANISATION]

____

[NAME OF CEO]

Chief Executive Officer

Signed on behalf of

ROTARY CLUB OF [CLUB]

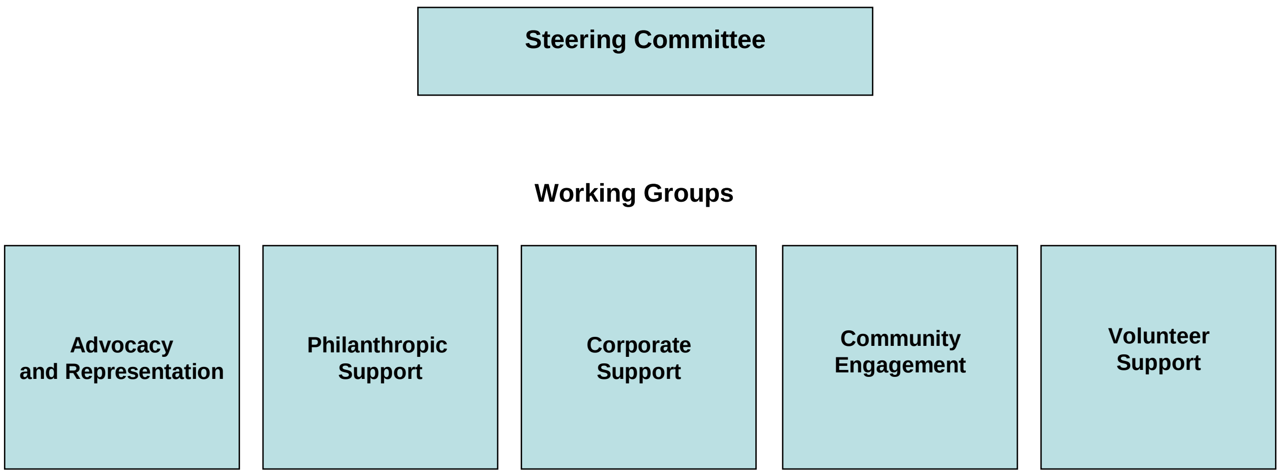
____

[NAME OF PRESIDENT]

President

Date _____________________________

Organisation Chart – the inclusion of a Chart may be useful (but not essential)



STEP 6.0

STEP 6. HOW TO IMPLEMENT YOUR PROJECT

MAKING YOUR PLAN REAL

In Section 5 you worked out the details of your plan and now you have to make it real. You need to ensure you have approval from your Rotary Board to start the project. Once approved you now can use the template Step 6.1 to support you to:

- Ensure action forward
- Allocate people to deliver the tasks in a timely fashion
- Monitor your progress
- Report back to your financiers and key stakeholders
- Ensure success

Maintaining the momentum on your project requires you to develop some processes and habits that are outlined in the following section.

MONITORING AND CONTROLLING YOUR PROJECT

Monitoring and Controlling ensures that the execution of your project happens in accordance with the actual Plans.

This is the step that ensures the quality of your project deliverables and that any changes are appropriately managed into the new Plans.

This is where most of the work of the project takes place and where you will need to monitor that the Project teams deliver on all of the specifications outlined in the contract or in the specifications.

There are a number of tools that can help you do this - these include

- Meeting agendas and minutes
- Action registers
- Reporting

Meetings…

A template for your meetings was provided in Step 5.2 but the essence of a good meeting is to keep it focused on the actions and holding people responsible for delivering on these. This requires good minute taking that focuses on the decisions made and the actions to be delivered.

Action Registers and Reporting…

The action registers outline the immediate actions that will support the delivery of all the tasks on your Project Schedule. Its purpose is to:

- Allocate the responsibility for delivery to someone who can make it happen
- Set deadlines by which the actions need to be completed
- Provide an outline of any risks associated with non-delivery of the task

The project schedule will hold the list of all of the tasks needed to complete the project and it will also identify those that are critical to the project being delivered on time – a sample of this can be found in Step 5.1.

Reporting against these keeps your project on track and keeps all of your stakeholders aware of where the project is tracking. To do this you need to set up a routine of reporting and communicating the status of the project to all these stakeholders. A sample template for this can be found in Step 6.1

All projects will be challenged to deliver on time, within budget and to the specifications that we anticipated at the outset but being aware of a number of techniques that can help support these will lessen the challenges on the project.

Techniques…

There are three techniques that are most important to the proper monitoring of the project and will ensure greater success.

- Configuration Management – document / communication control
- Quality control
- Change Control

Configuration Management - this is the way in which all your versions of the documentation and information is named or numbered. It supports the ongoing changes that are part of any project and ensures that everyone has the same understanding and information to manage the project.

Configuration Management ensures that there is a known process for incorporating changes and the various versions of the documents and product deliverables.

It ensures that documents and details are current and can be identified from their predecessors. Setting this up at the outset means that there can be no confusion about which document you are referring to. A simple routine that works well is to establish a routine on each document heading of putting the date first followed by the number of versions on that day – eg 17-01-10 (1)

(having the date in reverse order ensures that this appears in your files in the correct order)

Quality Control - This means documenting exactly what you expect of your idea/project and ensures that there is a clear understanding of the acceptable quality of all the project deliverables.

It also includes mechanisms for evaluating and ensuring that the quality standards outlined have been met.

Change Control - This identifies the process for managing changes to the plans or project and then ensuring that all team members are informed of any of these changes and can incorporate these changes into their work.

The following outlines some of the things that are part of managing change and a process that will help ensure that it is successfully managed.

- **Log Change Request** – with all the relevant details of date, time and source for discussion with the rest of the team – this ensures that time isn't wasted on continuing down a path if the path has changed
- **Analyse the Impact of the Change** – including the impact across other projects that might be dependent on this one and on the existing risks and issues.
- **Resolve how to Manage the Change** – using input from all the other team members to ensure that there are no unintended consequences.
- **Communicate to Relevant Parties** – everyone needs to be made aware of the change and the appropriate documentation needs to be updated to ensure everyone is delivering on the new changes.
- **Review Periodically** – to ensure that there are no unintended consequences and to collect all new issues and risks.
- **Track and Report the Change**– as part of the new monitoring and controlling of the changes and also to ensure that there are no new problems

In considering any change there are a number of questions that can be used to evaluate it:

- How is it impacting on the purpose of the idea/project?
- How much are they influenced?
- Can you rebalance this without affecting the overall project?
- Will this change exceed your Rotary delegation?
- Do you accept this Change?
- How will Rotary be able to accept it?
- What other factors will you need to change to manage this change?
- Will it impact other stakeholder areas?
- How will you balance this change?
- Does the change affect the scope of the project?

- Who among the stakeholders will need to be consulted with?
- Is it going to impact the contractual obligations?

Keeping the Project on Track…

In monitoring and controlling the project we are concerned with ensuring that the project stays on track. The main tasks that need to be completed during this stage are to:

- Ensure that all deliverables stay on track.
- The broader team is kept informed of all changes and,
- That quality standards are met

In this stage it is important to ensure:

- the project stays on track
- the Project Manager monitors all areas of the project and deals with deviations from the plan
- that quality standards are maintained throughout the project
- that when deviations occur there are various tools available to ensure these are relayed to the various team members and that any issues are overcome

It is essential at this stage to use the expertise of all the stakeholders especially when they need to evaluate changes and monitor quality.

This stage keeps the entire team on the right track.

Keys to Success – A Quick Check List

- **Making your plan real**
- **Proper meetings –** being clear on what the meetings are for and documenting actions
- **Action Plans –** outlines what we have to achieve for the project to be successful, who is responsible and by when
- **Reporting –** documenting who needs to know what and by when and making sure that all stakeholders are receiving the information that they need to be involved or to make decisions. A sample template can be found in Step 6.1
- **Techniques –** identifying the ways in which we will manage
- **Configuration management –** how we ensure everyone is aware of any changes in the documentation
- **Quality control** – ensuring your project delivers what it was intended to deliver.
- **Change control** – ensuring that all changes are clearly communicated.
- **Keeping the project on track** – using monitoring and control methods and lots of communication.

STEP 6.1

6.1 REPORTING TEMPLATE

The following is a sample reporting template with a variety of communication types:

Information/ Communication	Purpose	Frequency	Provider	Medium Format	Send To	Provider Phone
Weekly team meetings	*Updates*	*Thurs. Morning*	*Team Leader / Champion*	*Meet at Rotary office*	*Everyone in the team*	*02 6444 3333*
Weekly Status reports	*Updates*	*By Tues. Morning*		*Email*		
Weekly Highlight reports	*Updates*	*Each Wed. c.o.b.*		*Email*		
Client Meetings	*Keeping client across the project*	*Monthly*		*Face-to-face*		
Policy Meetings	*To ensure compliance*	*'Ad Hoc'*		*Face-to-face*		
Exceptions Reports	*Addressing risks or issues*	*'Ad Hoc'*		*Face-to-face*		
Stakeholder meeting	*To keep stakeholders across the project*	*'Ad Hoc'*		*Email/ face-to-face*		
Rotary Board report	*Required*	*Monthly*				
Rotary International	*Mandated*	*As per their requirement*				