

WORKSHEET 5: NEEDS ASSESSMENT QUESTIONNAIRE



Please complete this questionnaire about the _____ seminar. Your responses are vital to the development of this upcoming seminar.

Meeting name: _____

Have you attended this meeting before? Yes No

If yes, how many times? _____

When did you last attend this meeting? _____

How would you rate the last meeting you attended? (*check one*)

- Good. The training sufficiently prepared me for my position.
- Fair. My understanding of my office increased, but I was still somewhat unprepared.
- Poor. The training did not adequately prepare me for my responsibilities.

For the topic of this seminar, what are the greatest challenges you will face in the coming year?

For the topic of this seminar, what are the greatest challenges facing your club/district?

How prepared are you to assume the responsibilities of your position? (*check one*)

- Well prepared. I'm confident that I have the skills and knowledge to succeed in my position.
- Adequately prepared. I still have information to learn, but I expect to do well and learn through experience.
- Unprepared. I'm not sure what to expect/I lack the knowledge and skills needed to succeed.

The following subjects are typically included for the _____ seminar. Please rate your familiarity with the subjects (insert topics from agenda).

- | | | | |
|-------|---------------------------------|---------------------------------------|---------------------------------|
| _____ | <input type="checkbox"/> Expert | <input type="checkbox"/> Intermediate | <input type="checkbox"/> Novice |
| _____ | <input type="checkbox"/> Expert | <input type="checkbox"/> Intermediate | <input type="checkbox"/> Novice |
| _____ | <input type="checkbox"/> Expert | <input type="checkbox"/> Intermediate | <input type="checkbox"/> Novice |

_____ Expert Intermediate Novice

_____ Expert Intermediate Novice

What additional topics should be included at the upcoming seminar?

What essential skills or information related to your position do you feel you need?

What is your past Rotary leadership experience? List each position and Rotary year served.

| Position | Year |
|----------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

What leadership position will you hold in the coming Rotary year?

Club president

Club secretary

Have you held this position before? Yes No

If yes, for how long? _____

How many members are in your club?

25 or fewer

26-50

51-100

101-150

More than 150

How many years have you been a Rotarian?

Less than 1

1-2

3-5

6-10

More than 10

Thank you for your time and attention!

WORKSHEET 6: MODIFYING THE AGENDA



Refer to the table below and answer the questions about how you would modify an agenda based on the results from a needs assessment questionnaire. Think about the agenda for the district membership seminar.

Needs Assessment Questionnaire Data

- Of club members who said they plan to attend the membership seminar, 25% have attended at least once and 75% have never attended.
- Of those who attended last year's seminar, 40% rated the seminar fair and 50% rated it poor.
- Several participants felt adequately prepared after leaving the seminar, but most felt unprepared.
- The following roundtable discussions are included in the membership seminar. Rotarians rated their familiarity with each subject as follows:

| Subject | Expert (%) | Intermediate (%) | Novice (%) |
|-------------------------|------------|------------------|------------|
| Alumni | 89 | 10 | 1 |
| Continuing Education | 20 | 45 | 35 |
| Diversifying Membership | 20 | 25 | 55 |
| New Member Orientation | 2 | 23 | 75 |
| Younger Generations | 20 | 26 | 54 |
| Service Projects | 38 | 32 | 30 |
| Sponsoring a New Club | 21 | 15 | 64 |

- Over half of the participants are membership club committee members.
- 57% of participants have a club size of 25 or fewer.
- 45% of participants have been a Rotarian for 3-5 years.

Based on the data above, what general statements can you make about the potential attendees for the membership seminar?

Using the agenda below, how will you modify the agenda for next year?

District Membership Seminar Agenda

| Start | Finish | Suggested duration | Program component |
|-------|--------|--------------------|---|
| | | 30 min. | Registration |
| | | 30 min. | Opening Plenary Session |
| | | 90 min. | Discussion Session 1: Membership Plan for the Year |
| | | 30 min. | Discussion Session 2: Public Image and Membership |
| | | 30 min. | Roundtable Discussions: Alumni Continuing Education Diversifying Membership New Member Orientation Younger Generations Service Projects Sponsoring a New Club |
| | | 30 min. | Roundtable Discussions: Same topics |
| | | 30 min. | Closing Plenary Session |

WORKSHEET 7: BUDGET



Meeting name:

Estimated Revenue

1. Registration revenue

| | | | | |
|-------------------------|-----------|----------------------|--------|----------------------|
| a. Registration fee | Rotarians | <input type="text"/> | Guests | <input type="text"/> |
| b. Estimated attendance | Rotarians | <input type="text"/> | Guests | <input type="text"/> |

Total registration revenue (estimated attendance multiplied by fees)

| | |
|---------------------|-----------------|
| Total Rotarian fees | <u>0</u> |
| Total Guest fees | <u>0</u> |
| Grand total | <u><u>0</u></u> |

2. Additional per capita/per club contributions

3. Sponsorship (corporate or local business)

4. Subsidy from district fund or other sources

Total estimated revenue 0

Estimated Expenses

1. Promotion

| | |
|-------------|----------------------|
| a. Postage | <input type="text"/> |
| b. Printing | <input type="text"/> |
| c. Supplies | <input type="text"/> |
| d. Other | <input type="text"/> |

Promotion total 0

2. Decorations (signs, flowers, etc.)

3. Meeting site

| | |
|---------------------------|----------------------|
| a. Meeting rooms | <input type="text"/> |
| b. Meals and gratuities | <input type="text"/> |
| c. AV/technical equipment | <input type="text"/> |
| d. Other | <input type="text"/> |

Meeting site total 0

4. Materials

- a. Printing
- b. Binders
- c. Tabs
- d. Other

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Materials total 0

5. Reception (cash bar, music, etc.)

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6. Transportation

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7. Miscellaneous expenses

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|--|
| |
|--|

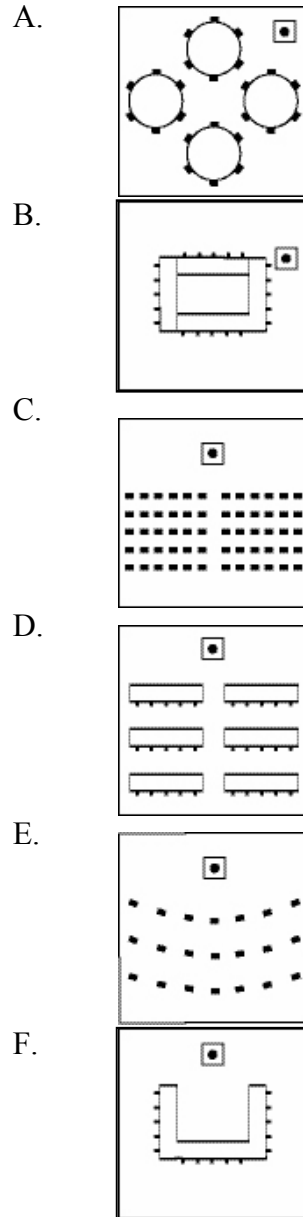
Total estimated expenses 0

WORKSHEET 8: TRAINING ROOM SETUPS



The way a room is arranged can encourage group discussion or foster team building. Match the room setup that best corresponds to the meeting's training goals, number of participants, program content and visuals, and instructional aids or materials. Write the letter of the image on the line provided after each description.

1. You are planning a presentation for 10-150 participants and would like participants to be able to take notes. _____
2. You need to fit 20 club presidents-elect comfortably. The setup should encourage participation and have enough space for the training leader to facilitate discussion. _____
3. You have organized several breakout sessions for group interaction at the district assembly. Sessions will include small group discussion. _____
4. Your district leadership team is meeting to discuss goals for the year. _____
5. Your district governor and district governor-elect will be speaking to over 150 participants for a plenary session. _____
6. You are speaking to a club of about 50 people, and you want each participant to be able to see you clearly. _____



Training Room Checklist

Use this checklist on the day of the training to help ensure that rooms are properly arranged and all equipment is functioning.

Final walk-through before the meeting

Room name and location: _____

General setup

- Is the room setup correct?
- Are there enough chairs for participants?
- Is there adequate lighting for participants?
- Has the agenda been placed on the wall?
- Is the meeting or session title placed in a prominent position?
- Is water available for participants and the training leader?
- Are electrical cords out of the way or taped to avoid accidents?

Training materials

- Are flip charts on easels?
- Are flip charts visible to all participants (letters/figures at least 2 inches/5 centimeters tall)?
- Are markers available for flip charts?
- Are sight lines unobstructed for flip charts and screens?
- Are handouts ready?
- Are tent cards placed?
- Is a clock/watch available?

A/V

- Is the projector focused?
- Is the computer working?
- Is the presentation/slide file cued?
- Is a remote to forward slides available?
- Is the microphone on and at the appropriate volume?

After the meeting

- Have all evaluation forms been submitted?
- Have extra materials been returned?

For any problems, contact _____

1. After reading the Train the Trainer Session Guide in the *District Training Manual*, you are interested in holding a train-the-trainer seminar for all the club trainers in your district. This one-day training has six sessions. You are thinking about offering this training two times.

How many sessions will you have?

How many trainers will you need?

What are the qualities you want for a trainer at this meeting?

2. You are beginning to plan for the district assembly. You anticipate a large training seminar with several audiences, including club presidents, secretaries, treasurers, and committee chairs. At this one-day training, eight different groups of participants will meet separately and concurrently for the first three sessions, and all participants will come together in one group session.

How many sessions will you have?

How many trainers will you need?

What are the qualities you want for a trainer at this meeting?

WORKSHEET 13: WEB CONFERENCE PREPARATION CHECKLIST



2 months before

- Determine the purpose of the conference, level of interactivity desired, topics to be covered, presenters and moderators, appropriate length, and a time that works for participants in different time zones.
- Determine whether conference presenters will be in one location or multiple, remote locations.
- For conferences conducted in more than one language: Meet with interpreters to discuss: whether interpretation will be simultaneous or consecutive, what equipment will be needed, and any requests the interpreters may have.

1-2 months before

- Reserve quiet room(s) with minimal background noise for presenters and interpreters, if needed.
- Determine audio and visual equipment needs:
 - Consider having two computer monitors in the room — a large one to view the presentation and a small one to view what participants are seeing.
 - If using a teleconferencing service, consider using phone headsets or the phone receiver instead of the speakerphone, which can impair sound quality.
 - If using VoIP (voice over Internet protocol), obtain headsets with microphone.
 - If using both teleconference and computer audio, ensure presenters and moderator use both a computer microphone or headset and a phone.
 - For simultaneous interpretation: Arrange a separate conference call for each language. Interpreters will need two phones — one with a speakerphone and one with a headset.
- Determine support needed to conduct the web conference, and assign people to the following roles (as appropriate):
 - *To conduct the meeting:*
 - Moderator (welcomes attendees, instructs on features of the web conference software, introduces presenters, concludes the meeting)
 - Presenter (speaks on content, and answers questions verbally from attendees)
 - Q&A moderator (monitors questions that come through Q&A window, directs questions to appropriate presenters)

- *To provide logistical support at a different computer:*
 - Sound quality monitor (sends a message to presenters directing them to slow down/speak louder or alerting them to any background noise)
 - Technical support (assists attendees who have trouble logging in)
 - Interpreter assistant (supports interpreters needs, monitors conference-call logistics)

Draft content

- Develop outline that accomplishes the goal of the conference.
- Determine whether you will use slides, screen sharing, white board, etc.
- Incorporate polls and other interactive activities throughout to keep attendees engaged.
- Have each presenter draft speaking points.
- Consider placing photos of presenters on the appropriate slides so attendees can see who is speaking. Or use a webcam for live video of presenters.
- Build-in time for questions and answers from participants.

Send invitations to participants with login instructions for the web conference and teleconference, if applicable.

- Include a link to check whether their system is ready for web conferencing software.
- If using a teleconferencing service, include a list of phone numbers for each country from which participants are calling (provided by the teleconferencing service).
- Include the phone number and e-mail address of the technical support person.
- Translate invitation, if needed.

Translate PowerPoint slides, if needed

1-2 weeks before

Conduct at least two rehearsals with everyone who has a speaking or support role:

- Set up a mock web conference to use for your rehearsal.
- Rehearse the entire presentation with mock participants to test interactive software features and to look for areas that need improvement.
- Monitor the following components during the rehearsal:
 - Voice quality
 - Flow of presentation
 - Transition between presenters and moderator
 - Question and answer process
 - Timing

Send a reminder to participants the week of the meeting, either through web conferencing software or e-mail.

Load the presentation the day before (or the day of) to incorporate any last minute changes. Insert polls as needed.

Schedule a debriefing session with presenters and interpreters.

- Send PowerPoint slides to participants in languages, if appropriate.

15-30 minutes before conference begins

- Log in to the conference call at least 15 minutes before the scheduled start time for the conference, and announce every minute to callers that the conference will begin shortly.
- Mute attendees' phone if not allowing attendees to ask questions over the phone.
- Place audio instructions on the first slide. If using a teleconferencing service, include phone numbers and pass code that participants have to call.
- Consider spending the time before the training (about 15 minutes) providing oral instructions on how to log in online, in case attendees are having trouble.

During the conference

- Use the first few minutes of the conference to explain the features of the phone (how to mute, unmute, etc.) and of web conferencing software (how to raise hand, or ask a question).
- Consider polling participants at the start of the meeting to see whether they can hear the presenter.
- Explain how participants can ask a question, and then have participants practice by asking them to type a question or statement (about the weather, their expectations of the training, etc.).
- Eliminate background noise, especially if using a teleconferencing service.
- Speak slowly for participants who may not be using their primary language.

After the conference

- Save a record of the comments and questions, and e-mail answers to any questions that were not addressed during the meeting.
- Survey participants immediately following the conference to get their feedback.
- Send a copy of the presentation to participants.
- Debrief with presenters and interpreters (as appropriate).