



ROTARY CLUB OF WALNUT CREEK

"He Profits Most Who Serves Best"

Team Leader Guide

Introduction

Welcome to the position of Team Leader for the Rotary Club of Walnut Creek. It has been the long standing policy of our club to divide our membership up into six teams, attempting to balance, as well as possible, both the numbers on each team as well as to distribute the more active of our members equitably between these teams.

The purpose of this team approach is to organize our club and to develop our meetings and programs.

- It gives each member the opportunity to contribute at our programs throughout the year and to have a direct influence on the guest speakers we use; something that would not occur if speakers were only chosen by a small committee as is done in some clubs.
- It helps develop camaraderie amongst members, again in a group smaller than the total club where more personal person-to-person contact is possible.
- It encourages participation in the club's programs and helps develop members who may desire to take a more active role in future club leadership.
- It also divides the workload of organizing our meeting up so no one person or group of persons has too much to do.

The Board of Directors.

There are six members of the club's board of directors. These along with the Club President and several other positions comprise the full board that sets the tone for the club, makes management decisions and oversees the club's progress in meeting the goals the board sets for the year.

The Team Leaders.

Each of the six board members is assigned to a team and picks with the advice and consent of the Club President, a team leader for that team. That Team Leader is in charge of his or her team and reports to the board through the board member who appoints them. The board member, although a member of the team is, at that point, just that, a member of the team and is not in charge of it although he is always available to encourage, assist or advise the team leader.

How the Team program works.

Each team is assigned responsibility for two months during the rotary year (July through June); each 6 months apart. The team has full responsibility for planning and implementing the programs for the Tuesday meetings and other programs during the months they have been assigned.

The Team Leader is the person responsible to insure that the team completes the planning necessary for these meetings and then monitors the implementation of those plans to insure a smooth meeting and to support the Club President.

Getting Started.

One of the first things a Team Leader should do is contact the members on his or her team. Go up to them at a Rotary meeting and introduce yourself. Let them know that you have volunteered for this important job for the coming year and that you look forward to working with them and the other members of the team. Some of the long time members of the club who have graduated to the group of members that no longer have to attend every meeting may require a phone call or an invitation to a meeting to meet you. With Rotary, as in business, personal contact is a good first step.

When to have a Team Meeting.

The team leader should schedule a meeting of their team at least one and a half months before the start of their assigned “duty” month. This allows time to organize their month, confirm the speakers and post the assignments online. More on this later.

Schedule a Team planning meeting.

The first step in organizing a month's worth of meeting for the club is to contact each member of the team and set up a time and date as well as location for a team meeting. An attempt should be made to accommodate as many team members as possible while keeping in mind that it is often impossible with a group, even a small one such as a team, to find a date and time that will suite everyone. Individuals who cannot attend should be asked their preferences for jobs they would like to undertake during the month and these can then be worked in to the schedule. **All members of the team should be included when making job assignments.**

These meetings should be designed as a "social gathering" of fellow Rotarians, not as a quick "do it and get it over" meeting. Under no circumstances should a team meeting be scheduled as part of a regular Rotary meeting or as an "add on" at the beginning or end of a Rotary meeting.

Suggested venues for Team meetings might include

- A meeting at the home of one of the team members where dinner or a light snack is available (or pot luck)
- A lunch meeting at a local restaurant that offers a small meeting room and quick, reasonably priced meals.
- A meeting in a park with everyone brown bagging it.

The bottom line is to be creative; find ways that are interesting and will motivate the team members to want to attend and participate. To support Team Leaders in doing this, each team leader is given an annual budget that they can use in support of whatever team activities they and/or their team desire.

What needs to be done.

There are nine assignments that we make for a weekly meeting. Seven of these tasks must be filled each meeting; two must be done once during the month.

For each meeting you must have someone to:

1. Manage set-up and take down, i.e. setting up the club's podium, the flags, making sure the speaker system is working, name badges are out, etc. If the person doing this is not familiar with everything they should plan to accompany a person fulfilling these duties prior to their responsibility or consult with the Club President.
2. A greeter: this person needs to be one of the first persons to a meeting. They should sport the club greeter button along with

their nametag and greet everyone who enters, Club members, visiting Rotarians and non-Rotarian guests. If appropriate, they should introduce a guest to the Club President or membership chairperson.

When a team has red badge members they should be given preference for this position to give them an opportunity to meet as many club members as possible.

3. Someone to manage raffle ticket sales.
4. Someone to give the thought for the day and lead the club in our pledge to the flag.
5. Someone to manage the roving microphone, going around to each table as guests are introduced and getting the microphone to any person addressed by the Club President during the meeting.
6. Introduction of the speaker
7. Selection of a speaker and their topic.

This is probably the most demanding of these assignments. It is recommended that, in preparation for your team meeting, you ask each member to come prepared to suggest a speaker. This is each member's opportunity to obtain speakers that may want to talk on a subject "dear to their hearts" before the club. The final selection should, however, reflect a consensus of the team on what they think would be interesting and timely for the club. Some meetings during a month will be pre-empted in order to conduct required meeting such as the District Governor visit, the required foundation report, etc. The Team Leader should check the Club calendar prior to their team meeting for these events and consult with the person putting on these special events should one be scheduled. The team retains the responsibility for organizing and supporting these special meetings.

The Two activities that occur only once each month.

1. Recognition of members' birthdays.
2. Recognition of members' wedding anniversaries.

The team should make some effort to insure that the person responsible for these two activities is motivated and will make something special out of the occasion.

(You will find Birthdays and Anniversaries on the right side of the club database. <http://www.directory-online.com/Rotary/SecLogin3.cfm> .

You can also email the club secretary.)

At the middle of this pamphlet you will find an example of a suggested form to use when making the weekly assignments.

Be Creative.

Teams are encouraged to be creative with their meeting planning. If a meeting falls upon a special day, develop the meeting and speaker around it. If appropriate, contact the caterer and arrange a meal that supports the “theme”. Some suggestions...

October - an Oktoberfest	May - Cinco de Mayo	Summer
- a picnic	October - Halloween	
April - mardi gras	February - Presidents Day	

Follow up

Once the team has met and assignments made the team leader has a number of responsibilities.

- Insure each member of the team (especially members who were not present at the team meeting) gets a copy of the final assignment sheet
- Contact each of the scheduled speakers and confirm their program.
- Post your team assignments on the club’s web page.
 - o Go to www.rotarywc.org.
 - o Log in using your name and password
 - o Click on *members only*
 - o Click on *team leader tools*
 - o Select *Enter/View/Edit your month’s team assignments.*
- Be sure to give a list of those to be recognized for an anniversary or birthday during your month to the Sergeant at Arms.
- At least one week before the meeting provide the editor of *The Leaf* with a written bio of the speaker for the upcoming meeting for inclusion in our bulletin.

This information needs to be posted on the web page at least one month in advance of the assigned program month!

As we get closer to your month, remind all members of the team of their responsibility to perform their duties. Those with e-mail will get an e-mail reminder from the web site the weekend before their assignments but this should not take the place of follow up by the team leader. Should something arise that will prevent them from attending a meeting and doing their job it will be their responsibility to find a replacement and notify you of that change. Should a member not be present at the

meeting to perform their assigned task you or the Club President should chose any member (not necessarily from your team) to assume the responsibilities. **When this happens the person who was unable to fulfill their assignment should be prepared at the next meeting to make a \$25 contribution to the Paul Harris fund of the member who had to fill in for them!**

Report to the Board.

Each team leader is expected to attend at least 4 meetings of the board of directors. These are the meeting held the month before their assigned months and the meeting of their assigned months.

At the meeting before their month they should present their program and review the list of speakers for the board.

During the month of their program they need to attend in case there are any problems or adjustments that need to be made to the schedule.

Other Team Functions.

In addition to planning out the club program for two months during the Rotary year, we use the team concept to motivate and encourage our members to participate in Club events other than the weekly meeting.

Therefore, Team Leaders are our primary contact with the team members. Team Leaders will be asked to encourage their fellow team members to participate in district events, support our annual fundraiser, and to attend club meetings outside of the normal Tuesday noon time frame.

This also gives team leaders the opportunity to develop better camaraderie amongst their team. Although it will be necessary to have at least two team meetings each year to plan your assigned months' events consider having other meetings just to "get together". Again, be creative.

- Perhaps have a meeting after your assigned month to review what you did and pat yourselves on the back for a job well done.
- When the district conference comes up, organize a team car pool to attend; not only will more club members go but you will have more fun doing it!
- Develop a team contest to recruit new members.

New Members

Throughout the year we lose members as well as add new ones. One of the president's goals is to keep the teams balanced in number of members as well as in participation. Consequently a new member joining the club will be assigned to a team prior to their formal

induction. If the teams are balanced at the time this occurs the new individual will be assigned to the team that recruited him. If not, i.e. some team is in need of new members because of attrition, the new member will be assigned to the team in need.

The leader of the team receiving a new member is expected to be part of the “welcoming committee” for the new member along with the Club President and the individual’s sponsor and will participate in the new member induction.

The team leader should then take special care through the remainder of the year to include these new members in team and club activities.

Have Fun

Being a team leader is your opportunity to contribute to the management of our club. If you are having difficulty in any aspect of your assignment let the board member you work with know. Help is always available both within (look to the past presidents on your team) and from without.

Good luck and remember... the Family of Rotary is about *service and having fun!*