

## **West Coast Young Professionals Summit Report**

### **Summary:**

The West Coast Young Professionals Summit commenced on Friday and Saturday August 28 and 29<sup>th</sup>, 2015. The event was held at various buildings at the University of California, Berkeley campus and included Rotary Districts in Zones 25 and 26.

Over the course of 2 days, two facilitators from the Innovation and Design Thinking Program at Haas School of Business engaged both young professional Rotarians and District Leaders in a series of work groups and innovation sessions. The objective was to bring the two groups of Rotarians together to brainstorm ideas, develop tools, and create a network of people to inspire change, revitalize growth, and engage young professionals in their areas.

### **General:**

The idea and general concept of the event was created last year after the ending of the Young Professionals Summit in Chicago. Initially, the thought was to repeat a summit similar to the Chicago event, but that idea changed from a lot of the feedback from other summits.

The breakdown and timeline of the initiation of the summit is as follows:

- Program structure created, and collaboration with Brad Howard, the incoming Rotary International Director
- Collaboration and inclusion of facilitator, Jennifer Caleshu and Clark Kellogg, Innovation and Design lecturers at Haas School of Business, UC Berkeley
- Website and Facebook page created and committee formed
- Application created through the website for both young professionals and district leaders – the summit allowed for 3 young professionals and 3 district leaders to attend

- Emails and other communications sent to all 23 Rotary Districts from Zones 25 and 26, inviting all young professionals to apply. The district leaders that were invited from each district included the District Governors, District Governor Elects, and District Membership Chairs.
- Invitations and outreach commenced, and District Governors were asked to also nominate young professionals in their district to apply
- Social media/Facebook marketing used to boost the event
- Once the application process closed, a selection committee was formed to select 3 young professionals from each district.
- Participants received their notification of acceptance on July 1<sup>st</sup>, 2015

### **Summit specifics:**

Out of the 23 districts in our two zones, 22 of those districts were represented. We had 120 participants attend the event, roughly 60 young professionals and 60 District Leaders.

On Friday of the event, the young professionals worked with facilitator, Jennifer Caeshu, at the Clark Kerr Center. The District Leaders worked with facilitator, Clark Kellogg, at the Haas School of Business. Both groups working simultaneously to discuss and address orthodoxies of the organization and potential growth strategies.

The idea of separating the two groups was to allow them the space to verbalize and share their experiences and feelings and collaborate as a group. We wanted each group to have time to 'air' any issues they may have in a safe environment amongst their peers. We asked each group to come up with a limited amount of orthodoxies that would be discussed the following day.

The orthodoxies from both groups were brought forward in a series of sketches from a graphic recorder at our dinner event Friday night. The results were orthodoxies that were very similar, indicating that both YP's and district leaders had a common thought process and issues

identified within the organization surrounding membership/growth concerns.

The Saturday portion of the summit was inclusionary of all attendees with Jennifer Caleshu as facilitator. The morning sessions focused on the group as a whole and intermixed work groups to discuss the orthodoxies and areas for improvement. The afternoon session, we brought districts together specifically, YP's and district leaders to formalize action plans for their districts. We asked them to develop strategies on revitalizing growth and engagement of young professionals in their districts.

A pre and post survey were also given to each participant for the event, as we wanted to capture any data relating to the summit itself, and on their general view of Rotary itself.

## **Next Steps**

All districts have created their own action plans for their specific districts and were given follow up expectations for the year. Our plan is to follow up with the districts during the year about their visions, goals, challenges, successes, and ultimately, their progress in membership/young professional engagement in the organization.

Currently, we have a Facebook group that we created for the summit attendees, and we are using that for motivation, expression, and an area that we can promote ideas. We have also identified and tested a program that we are going to use for the year for each district to report out and display their progress. We have already emailed the participants the materials from the summit, and we will have the "Slack" program ready to run the week of 10/12/15.

To date, two districts have already reported that they have either completed one portion of their action items or have advertised for their event in October.

The pre and post survey results will also be posted to a spreadsheet and given to our International Director and our Regional Membership

Officer, as we want to use the data in creating or replicating any future summits.

## **Issues**

In general, we did not encounter many issues for the event. We had some climate control issues in two of the rooms used for the summit which created some unhappiness, but overall the space worked well for the event.

We did have feedback regarding the second day of the summit, and some of the attendees recommended more time to work with their districts would have been welcome. For future summits, I would recommend a few changes to our structure based on the comments from our participants, and include more time with the district work groups.

## **Conclusion**

The West Coast Young Professionals Summit was a great success. Our idea of bringing the young professionals and district leaders together created much more collaboration and excitement than we had anticipated. We had hoped that the summit would generate ideas and potential tools for revitalization/growth in our organization, focusing on young professional engagement. And the results have thus far confirmed our idea.

Because of the findings from one day to the next, our participants realized that all of the Rotarians/participants had a common thought as far as orthodoxies and challenges in the organization. This clearly demonstrated that 'age' is irrelevant, as both age groups had similar ideas/thoughts. As our facilitator stated to us, it is about "psychographics not demographics", meaning that our age is not the factor in this discussion, but it is about our values, similarities, visions, and relevance as an organization.



**Rotary**

## **Young Professionals Summit**

The first YP summit held in Chicago was an amazing experience and expression for young professionals to collaborate and become more engaged in the organization. But, what we realized is that to effectively change a culture and create more relevance, we needed the cooperation and help from both young professionals and leaders in our organization. The West Coast YP Summit structure was created to support this idea, and the results thus far, are promising.