# LONE STAR
# P.E.T.S. 2019



**ROTARY
CONNECTS
THE WORLD**

Goal: To prepare incoming club presidents to become leaders of Vibrant Rotary clubs

Dear Presidents Elect:

Congratulations on your selection as the 2019-2020 President of your Rotary club. You have the increasing efforts in needed areas.

Our goal at Lone Star P.E.T.S. is to assist you in the preparation for your presidential year. You are already off to a good start by attending as a president elect. Please note we cannot, and should not, be your only training to be president. Know that you have former presidents in your club who can assist as mentors. We encourage you to reach out to them.

We also encourage you to develop a good relationship with your president nominee. Likewise your districts have training sessions that should be utilized. I highly encourage you to visit other clubs and see how they operate. Every Rotary club is different.

This work book is the product of many volunteer hours. After numerous planning sessions with your district governor elects, and Curriculum Chair Sharron Miles, have put together an outstanding program from which to learn and plan. Please thank them when you see them. It was truly a labor of love.

I encourage you to take full advantage of this learning experience; develop relationships with your fellow president nominees; ask question of your facilitators; visit the vendors in the House of Friendship and be inspired by our speakers. Since we are always trying to improve our learning process, please take time to complete the evaluations.

May the next two years be your best years in Rotary yet.

More importantly: HAVE FUN!!!!

It will be a great ride.

Yours in Rotary
Ean Sullivan
Lone Star P.E.T.S.
2019 Operating Chair

# Table of Contents

# Lone Star P.E.T.S. 2019

**PRESIDENTS-NOMINEE WORKBOOK**

**FRIDAY, MARCH 1, 2019**

**SESSION A-1**    **BECOMING A VIBRANT CLUB LEADER**

> **GOAL**
> **Club Presidents and Presidents-elect will have an enhanced view of their role and function as club key leaders of Vibrant Rotary Clubs.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1.    Identify district and RI resources available to help the Club President identify and manage risk factors affecting a club
2.    Explain how the Club President can support the structure of a Vibrant Rotary club including collaborative efforts with the Club President-elect
3.    List specific responsibilities of the Club President and Club President-elect
4.    Discuss the importance of a strong leadership team and committee structure in building a Vibrant and impactful Rotary Club.
5.    List specific elements of an engaging and successful Club experience at a Vibrant and impactful Rotary Club.

REFERENCE MATERIALS

Lead Your Club: President -- "Your Job As Club President"
Lead Your Club:  President -- Chapter 2:  Leading Rotarians Lead Your Club:
Lead Your Club President --- Chapter 3:  Running Your Meetings

# CREATING YOUR CLUB LEADERSHIP PLAN

Use this worksheet to start developing a plan that works for your club.
Add strategies to meet your club's needs.

**Rotary Club of** _____  **Rotary Year** _____

☐ Our club has a strategic plan that reflects what we want our club to be like in three to five years

☐ Our club is engaging. We use the following meeting formats:
- ☐ Traditional meetings: _____ /month
- ☐ Online meetings: _____ /month
- ☐ Service meetings: _____ /month
- ☐ Social events: _____ /month
- ☐ Other: _____
- ☐ Other: _____

☐ Our club ensures continuity:
- ☐ Members prepare for leadership positions
- ☐ Past, present, and future leaders participate in making decisions

☐ Our club has fun social activities planned for the year:
- ☐ Networking and socializing events
- ☐ Events that welcome families

☐ Our club has a comprehensive training plan that includes:
- ☐ District conference
- ☐ District membership seminar
- ☐ District public image seminar
- ☐ District Rotary Foundation seminar
- ☐ New member orientation
- ☐ Online courses on the Learning Center
  - ☐ Club Officers Basics course
  - ☐ Membership online course ☐
- ☐ Presidents-elect training seminar

☐ Our club has entered its annual goals in Rotary Club Central

☐ Our club has a communication plan for members and for the community:
- ☐ We use social media tools like Facebook
- ☐ Our club website is active and current
- ☐ Other: _____
- ☐ Other: _____
- ☐ Other: _____

☐ Our club's bylaws are current and reflect our structure and practices

☐ Our club has strategies for keeping all members active in the club:
- ☐ Members are involved in projects
- ☐ New members are assigned mentors

☐ Our club has committees that support our needs:
- ☐ Administration
- ☐ Membership
- ☐ Public relations
- ☐ Rotary Foundation
- ☐ Service
- ☐ Other: _____
- ☐ Other: _____
- ☐ Other: _____

**2018**

# Newsletters

Our newsletters help you stay current on the topics that interest you most. Anyone can subscribe once they create an account and sign in. To get started as a new subscriber, or to make changes to your existing subscriptions, click the button below.

**MANAGE SUBSCRIPTIONS**

**End Polio Now**

An update about Rotary's polio eradication efforts that includes inspiring stories and the latest statistics.

**Giving & Grants**

Information to help you support Rotary's work through contributions and grant-funded activities.

**Membership Minute**

Rotary stories and the latest membership development ideas, strategies, and resources.

**Peace in Action**

A forum for the Rotary Peace Centers community.

**Reconnect**

News about Rotary alumni.

**Rotary Convention**

News, updates, and deadline information about Rotary's annual convention.

**Rotary Leader**

Practical information to help club and district leaders achieve success.

**Rotary Service**

Information to help Rotary members plan effective and inspired service projects.

**Rotary Weekly**

An update on news and information for Rotary members, as well as developments from around the Rotary world.

**Rotary Youth Exchange**

Information and updates on current Youth Exchange events and resources.

**The Rotarian Newsletter**

Highlights from this month's issue of The Rotarian magazine.

**Training Talk**

The latest RI training news, including RI mailings, RI Board decisions that affect training, and training tips.

## Vocational Service

News and resources related to vocational service.

## Young Leaders in Action

News and developments about Rotary's youth and young adult programs: Interact, Rotaract, and RYLA.

# Notes

# Lone Star P.E.T.S. 2019

**PRESIDENTS-NOMINEE WORKBOOK**

**FRIDAY, MARCH 1, 2019**

**SESSION A-2        STRIVING TO BE A VIBRANT ROTARY CLUB**

> **GOAL**
> **Club Presidents and Presidents-elect will have tools to develop plans for building multiple-year momentum.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1.      Outline the goal planning process for setting goals and developing action plans for the club

2.      Explain the benefits of strategic planning and sound fiscal management in maintaining a vibrant club

3.      Describe how to use the PETS planning worksheet in preparation for using Rotary Club Central

REFERENCE MATERIALS

Lead Your Club: President – Chapter 1: Planning Your Year
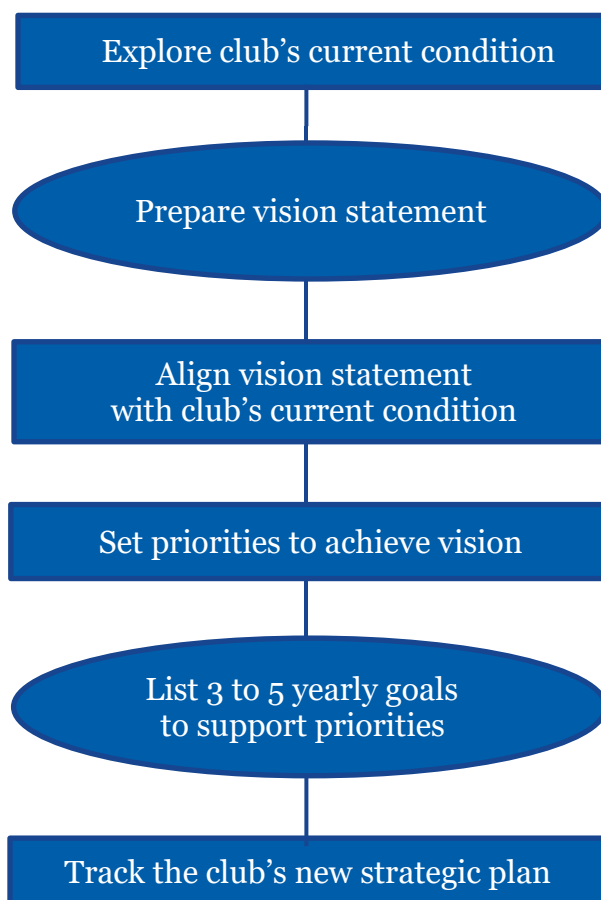
# STRATEGIC PLANNING GUIDE
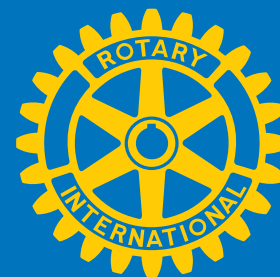
How would you rate your club? Typically, Rotary clubs with a strategic plan are stronger than clubs without one. Research shows that members of clubs with a plan were more satisfied and had a more positive view of their clubs and Rotary overall.

This guide will help you set long-term priorities and goals, all of which will support your club's vision. It's designed for Rotary clubs, but districts can use it too. As you prepare a strategic plan, consider these tips:

- Build a team of past, present, and incoming club leaders to oversee the plan's development and use.
- Ask an unbiased facilitator to run strategic planning meetings.
- Include a variety of perspectives by involving a diverse range of club members.
- See how your club's goals reflect those of your district and Rotary's strategic plan.

**The Strategic Planning Model**
Create a vision for your club, with strategic priorities that will help you achieve it. Then set yearly goals that support each strategic priority.

Explore club's current condition

Prepare vision statement

Align vision statement with club's current condition

Set priorities to achieve vision

List 3 to 5 yearly goals to support priorities

Track the club's new strategic plan

# Strategic Planning Worksheet

## 1. Where are you now?

List the opportunities and challenges facing your community.

When checking your club's current state, use [Rotary Club Central](), [Rotary Club Health Check](), [Membership Assessment Tools](), and your region's version of [Be a Vibrant Club]() to see what your club is doing well and what it could improve.

| Club strengths | Club weaknesses |
| --- | --- |
|  |  |

| Opportunities for the community (such as new businesses, growing population) | Challenges facing the community (such as economic decline, competing services) |
| --- | --- |
|  |  |

## 2. Where do you want to be?

List five to 10 characteristics that you would like your club to have three to five years from now.

<br><br><br><br><br><br><br><br>

Next, prepare a one-sentence vision statement. Revise it with the team as needed, then see whether club members support it. (Include something that will distinguish your club from other service groups in your community — e.g., "Our vision is to be the most internationally diverse service club in our community," or "Our vision is to be the service club most supportive of youths in our community.")

<br><br><br><br><br><br>

### 3. How do you get there?

- Set strategic priorities that will help your club achieve its vision, considering:
  - The club's strengths and weaknesses
  - The goals of the Rotary strategic plan, those of your district, and those of your regional membership
  - Programs and missions of Rotary International and The Rotary Foundation
  - Your community's opportunities and challenges
  - Members' opinions
  - Achievability in three to five years
- Get the team to choose the most important strategic priorities — those that will have the biggest impact as your club works toward its vision.
- Identify yearly goals that support each of the top strategic priorities.
- List the tasks and activities, timeline, resources, and people necessary to meet the yearly goals under each of the strategic priorities.
- Use Rotary Club Central to help set goals and track achievements.

**Strategic priority 1: _____**

| Annual Goals | Tasks/Activities | Timeline | Resources Needed | Member Assigned |
|---|---|---|---|---|
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Strategic priority 2: _____**

| Annual Goals | Tasks/Activities | Timeline | Resources Needed | Member Assigned |
|---|---|---|---|---|
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Strategic priority 3: _____**

| Annual Goals | Tasks/Activities | Timeline | Resources Needed | Member Assigned |
|---|---|---|---|---|
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

### 4. How are you doing?

- Have your strategic planning team regularly monitor progress on reaching its goals and suggest plan updates as needed.
- Review your strategic plan, including its vision statement and priorities, each year with club members to see if they would like any revisions.
- Make sure club decisions support the goals of the plan, and discuss observations with the strategic planning team.
- Allot enough resources to achieve the plan.
- Repeat the strategic planning steps every three to five years to produce a new plan or keep the current one.

List steps that your club should take to track its strategic plan, including a timeline — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.

This is a listing of goals that are found in Rotary Club Central, and is meant to serve as a worksheet. This document will not be collected and your club is encouraged to log on to RCC.Rotary.org to enter them in to Rotary Club Central.

**MEMBERS & ENGAGEMENT** | Goals and Achievements are set as a #
Club membership
Service participation
New member sponsorship
Rotarian Action Group participation
Leadership development participation
District conference attendance
Rotary Fellowship participation
District training participation

**ROTARY FOUNDATION GIVING** | Goals are set as a #, Achievements come from Rotary
Annual Fund contributions
PolioPlus Fund contributions
Major gifts
Bequest Society members
Benefactors

**SERVICE** | Goal and Achievement is set as a #
Service projects

**YOUNG LEADERS** | Goals and Achievements are set as a #
Rotaract clubs (Achievement comes from Rotary)
Interact clubs (Achievement comes from Rotary)
Inbound Youth Exchange students
Outbound Youth Exchange students
RYLA participation

**PUBLIC IMAGE** | Goals are set as a #, Achievements are set as a # or no/yes
Strategic plan (yes/no)
Online presence (yes/no)
Social activities (#)
Update website and social media (#)
Media stories about club projects (#)
Use of official Rotary promotional materials (no/yes)

**ROTARY CITATION** | Goals are set as a #, Achievement are set as a # or no/yes
Alumni networking events (no/yes)
Conduct a Member Classification Study (no/yes)
Club Members Talking with Media (no/yes)
Development Program for Members (no/yes)
Collaboration with a non-Rotary partner (no/yes)

# Rotary

# STRATEGIC PLAN

## OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

## OUR STRATEGIC GOALS

### Support and strengthen clubs

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels

### Focus and increase humanitarian service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally

### Enhance public image and awareness

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities

**SUPPORT AND STRENGTHEN CLUBS**

**FOCUS AND INCREASE HUMANITARIAN SERVICE**

**ENHANCE PUBLIC IMAGE AND AWARENESS**

**FELLOWSHIP**
**INTEGRITY**
**DIVERSITY**
**SERVICE**
**LEADERSHIP**

We are leaders who act responsibly and take action to tackle some of the world's most pressing challenges.

**Rotary**

JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION  www.rotary.org/strategicplan

# REPORT TO THE 2018 CONVENTION

## FROM JOHN HEWKO, GENERAL SECRETARY
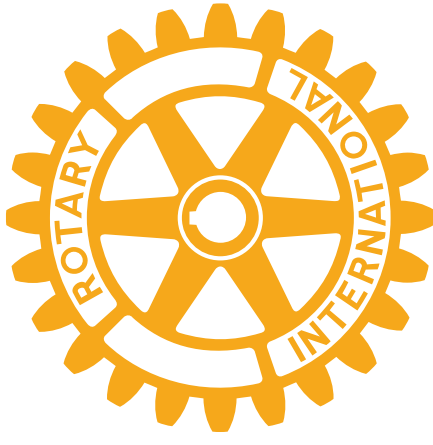
At the Secretariat, we support Rotarians and all that you do to connect and take action to transform and inspire communities around the globe. As we join together for the 2018 Rotary Convention, here is an overview of the productive and eventful 2017-18 year.

## SUPPORT AND STRENGTHEN CLUBS

This year, we added value to your Rotary experience by enhancing services and online tools that support clubs' efforts to grow and to increase Rotary's impact, locally and globally.

- Membership in our organization exceeds 1.2 million. As part of a long-term membership strategy, we've found ways to revitalize the traditional Rotary club experience and created online materials, including new membership courses and the Engaging Younger Professionals toolkit to help you attract, retain, and engage new generations of Rotarians and alumni.



Engaging Younger Professionals

- The Manage Membership Leads pages of My Rotary for clubs and districts help Rotarians connect with prospective members, relocating members, and those referred to Rotary by current Rotarians. In 2017-18, we received more than 20,000 membership inquiries, which resulted in, on average, a gain of four new members a day.

- We emphasized the increased flexibility clubs now have to explore new meeting formats, offer alternate meeting times, or adjust their meeting frequency, all strategies that help meet the needs of current members and attract new ones. We have collected numerous examples of how clubs create new models to engage members, and we're always looking for more. Please share yours.

- To help Rotary attract more alumni, women, young professionals, and recent retirees, we provided new and updated resources for clubs. We're also targeting outreach to club leaders to make sure they know about available resources to address the challenges they face.

- Rotary's network of alumni reflects the vast connections that people have formed through our many programs. Of the 428,862 known program alumni, 51,480 have created My Rotary accounts to join our online community, and 15,689 alumni are already Rotary club members.

- In October, we celebrated the third annual Rotary Alumni Reconnect Week. More than 1,400 alumni and Rotarians shared stories and photos during the digital event. Overall, Reconnect Week posts reached more than 188,600 people on various social media platforms, highlighting the connection between program alumni and Rotary service.

- This year, on 13 March, Rotaract celebrated 50 years of service, friendship, and fun. Over 10,000 Rotaract clubs in 184 countries celebrated this milestone at events during World Rotaract Week. From planting trees to feeding the homeless, from promoting access to education to fundraising for The Rotary Foundation, Rotaractors showed how they are people of action. And these dedicated young leaders are redefining what it means to be a Rotarian. Many who are members of both Rotary and Rotaract are helping start flexible Rotary clubs.

- In July 2017, we launched a streamlined Rotary Club Central to make setting and tracking club goals quicker and easier than before. About 20,000 Rotary clubs are using it, tracking more than 80,000 service projects.

- Building on the successful relaunches of Rotary.org and Rotary Club Central, we are working on an ambitious project to completely revamp our member site, My Rotary. Using a research-driven, user-focused approach, we are retooling the site to make it faster and more personalized. It will contain all the tools and data that members need to connect with one another.

- At the 2017 Rotary International Convention, global leaders came together to pledge $1.2 billion in additional financial resources for polio eradication, and to reaffirm their commitment to achieving a polio-free world. As part of this historic moment, Rotary announced an increased funding commitment of $50 million per year over the next three years, and the Bill & Melinda Gates Foundation committed to a 2-to-1 match. Thanks to the Gates Foundation's match, Rotary's contribution will triple, making for an additional $450 million in resources for polio eradication efforts.

- On 24 October, Rotary clubs around the world celebrated World Polio Day, using it as an opportunity to raise awareness and funds and to advocate in their communities. In 2017, 3,671 Rotary clubs registered World Polio Day events in 102 countries — up 151 percent from 2016.

- Rotary documented the lessons learned from our polio eradication efforts in an extensive report. As we get closer to realizing the dream of a polio-free world, we have reviewed what we learned along the way in order to benefit future Rotary priorities and initiatives.

## FOCUS AND INCREASE HUMANITARIAN SERVICE

Polio eradication remains our top organizational priority. Rotary's work to end polio is a perfect example of what people of action can accomplish together. Working with our partners, we made great strides this year in fighting this disease. We also increased Rotary's ability to provide humanitarian services by enhancing tools clubs can use, such as the Grant Center, to develop more sustainable projects that will continue to make a positive impact on communities.

### POLIO ERADICATION

- Fewer children were paralyzed by polio in 2017 than in any other year in history, with 22 cases reported in just two countries: Pakistan and Afghanistan. Rotary and its partners increased efforts to vaccinate children in the countries where polio remains endemic, with a focus on reaching nomadic communities in Pakistan and internally displaced people in Nigeria.

- As we continue our efforts to vaccinate children in these last enclaves of polio in the year ahead, we also remain focused on protecting hundreds of millions of children from the disease in polio-free countries.

## THE ROTARY FOUNDATION

- To launch The Rotary Foundation into its second century of service, a $360 million comprehensive fundraising goal was set for this year. As of 30 April, Rotarians and friends of the Foundation have contributed $328 million toward this goal.

- For the 10th consecutive year, the Foundation received a four-star rating from Charity Navigator, the leading independent charity evaluator in the U.S. This rating placed the Foundation among the top 1 percent of charities evaluated by Charity Navigator.

- Rotary's vision for a more peaceful world is becoming a reality thanks to the Rotary Peace Centers program. Since the peace centers launched in 2002, 1,161 program alumni are working in more than 100 countries. Currently there are 109 fellows studying (86 students are working on their master's degree and 23 are enrolled in our certificate program). As of 30 April, $7 million has been raised for the program this Rotary year.



## ROTARY GRANTS

- In January, we unveiled changes to the global grant reporting section of the Grant Center, streamlining and simplifying the content and layout so clubs can more easily report on the tremendous work they accomplish through global grants. As a result of this effort, the time it takes to process a grant application has already dropped by 11 percent.

- Starting 1 July 2018, any club or district that applies for a global grant to support a humanitarian project or a vocational training team must first conduct a community assessment and include the results in their grant application. We have been working with club members to prepare them for this global grant community assessment requirement.

- Global grants' popularity continues to grow. As of May, 1,000 global grant applications were approved. Over 85 percent of districts and more than 10 percent of clubs worldwide are participating in global grants.

- As of May, 458 district grant applications were approved — representing nearly 85 percent of districts worldwide — that support more than 12,000 activities.

Invigorating our brand strengthens Rotary's image as we spread the word about the work we do. This year, we continued to invest in strengthening our brand by launching our People of Action messaging and public image campaign and by promoting our humanitarian efforts, The Rotary Foundation, and our ongoing fight to end polio.

- The People of Action campaign is gaining momentum as clubs and districts feature how Rotarians are leaders who work together in communities to inspire, transform, connect, and celebrate what's possible. By using the new suite of assets available on the Brand Center — including print ads, social media graphics, outdoor ads, video public service announcements, and digital web banners — clubs all over the world have shown their community how Rotarians are people of action.

- The Rotary Brand Center is a key online tool that helps clubs create their own visual and digital materials. As of 1 May, the Brand Center had 792,892 visits and 619,760 asset downloads, including a new social media guide for clubs.
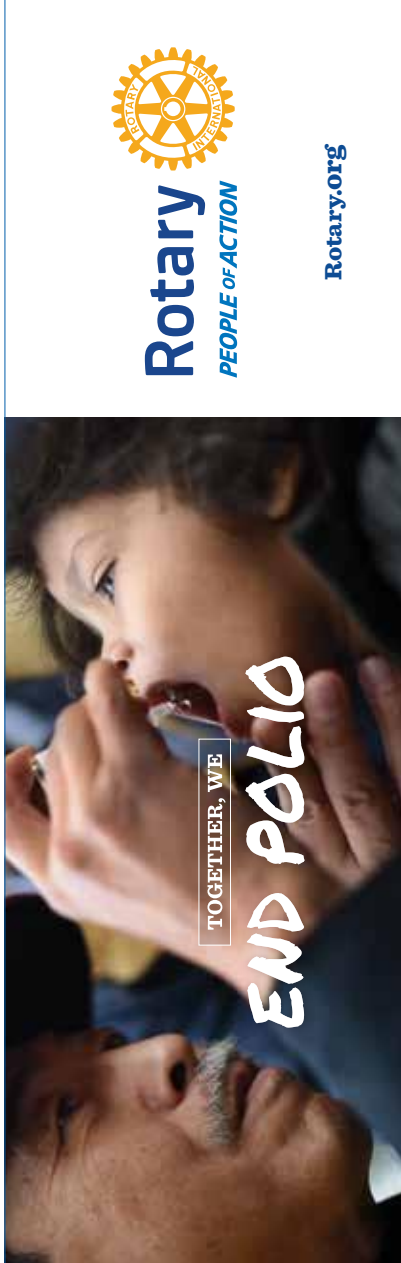
- Rotary's role in the fight to end polio was featured in more than 150 leading media outlets, such as Time, CNBC, Radio SABC, the Guardian, Forbes India, Scientific American, and Pakistan Today.

- World Polio Day content was shared through social media by celebrities, Rotary polio ambassadors, organizations and Global Polio Eradication Initiative partners for a combined cumulative reach of more than 16 million viewers. This helped us increase our social media reach significantly.

- Rotary was also featured positively during the 2017 Rotary International Convention, with 150 news stories appearing in several top-tier media channels.

- Rotary's global social media presence grew significantly to more than 2.2 million fans and followers overall, including a 22 percent combined increase across Rotary's Facebook and Twitter accounts. Rotary's Instagram following increased by 44 percent this year.

- Rotary.org, one of our most prominent communications channels, was recognized as one of 20 Best Nonprofit Websites by the industry site Top Nonprofits. Rotary.org also won the prestigious Webby People's Voice Award for best association website.

## A NEW GUIDING VISION

As we close this Rotary year and look forward to what's next, we must not lose sight of where Rotary is headed in the long term. Rotary's new strategic plan, which will be developed over the next two years, will serve as the framework for our future, ensuring that we continue to be known as a respected, dynamic organization that advances communities worldwide. This year, as a first step in this effort, Rotary's Board of Directors and Trustees approved a new vision statement:

**Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.**

We are excited to help you and your club realize this vision as we set a course for Rotary to thrive and grow in the years ahead.



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# Notes
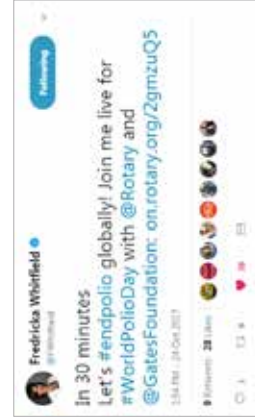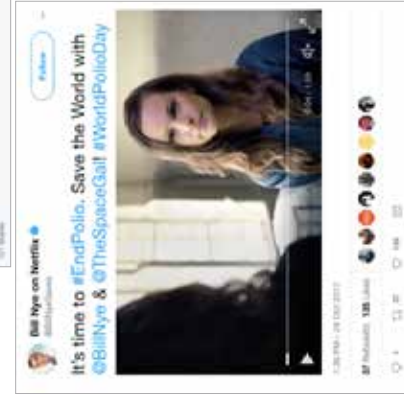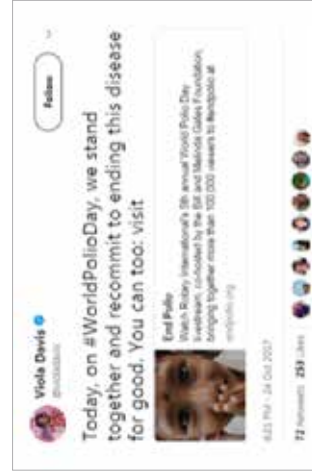
# Lone Star P.E.T.S.  2019

SESSION A-3                    GROWING AND ENGAGING YOUR CLUB MEMBERSHIP

**FRIDAY MARCH 1, 2019**

> **GOAL**
> **Club Presidents and Presidents-elect will possess tools needed to champion effective membership development plans for their respective clubs.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1.      Share strategies and best practices to attract and engage members to improve retention

2.      State how a club President can help ensure a club atmosphere that welcomes members of all ages and backgrounds

3.      List key elements of club membership health

REFERENCE MATERIALS

Lead Your Club: President -- Chapter 5:  Strengthening Your Membership

## THE ROTARY DIFFERENCE

Rotary is more than a service organization that's making a difference in your community. We're an international membership organization made up of people who share a passion for and commitment to enhancing communities and improving lives across the world. The difference we make starts with our members.

**Rotary**

## IMPACT BEGINS WITH YOU

## CONNECT WITH A ROTARY CLUB TODAY

Rotary members join clubs by invitation. Let us help you connect with a club that may be right for you. With 35,000 clubs around the world, and others that meet online, Rotary makes it easy to get involved and start making a difference today.

Be a part of the Rotary difference. Bring your passion, your perspective, and your purpose to Rotary.

**To connect with a club in your area and learn more, visit us at www.rotary.org/join.**

**CONNECT WITH US:**

**Rotary**

One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
www.rotary.org

001-NA—(316)

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# IMPACT ACROSS THE WORLD



With more than **1.2 million members** in clubs in almost every country, **we are improving communities around the globe**. As a member of Rotary, you'll have opportunities to change lives locally *and* to connect with other clubs to work on **international projects that address today's most pressing humanitarian challenges,** including fighting disease, providing clean water, supporting education, and promoting peace.

**Our largest and proudest effort to date is our work to eradicate polio.** We initiated the audacious polio eradication campaign in 1979, by vaccinating children in the Philippines. **With the help of our partners, we have since reduced polio cases worldwide by 99.9 percent.**

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## WE SEE DIFFERENTLY:

We are problem solvers working together to achieve a better world. Our members are deeply ingrained in the communities in which they live and serve, affording them insight into local challenges and access to the leaders, resources, and networking opportunities needed to strategize and take action to make lasting change.

## WE THINK DIFFERENTLY:

Rotary clubs reflect the diversity of our communities and the breadth of viewpoints that comes from our members' varied professional and personal experiences. For more than 100 years, we have been applying different perspectives to create innovative, sustainable solutions that address the needs and challenges affecting our communities.

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# HOW ARE WE DIFFERENT?





## WE LEAD DIFFERENTLY:

As Rotary members we hold ourselves to the highest ethical standards. Community members, community leaders, and other organizations seek us out because they know they can trust us to be effective partners and deliver on our promises.

## OUR ACTIONS MAKE A DIFFERENCE:

Harnessing our unique perspectives and ideas gives us a shared purpose — one that compels us to take action. We roll up our sleeves, leverage our personal relationships with local partners and businesses, and apply our leadership skills as a way to get the job done and bring to life the changes we envision.

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# IMPACT BEGINS WITH OUR LOCAL CLUBS

The impact our members make takes shape at Rotary club meetings and activities. These gatherings allow you to join other passionate, visionary women and men regularly to discuss and act upon community needs. Rotary club meetings are also a place to strengthen connections to friends and neighbors and form meaningful relationships that last a lifetime.

And just as Rotary helps you invest in your community, it gives you an opportunity to invest in yourself. Many clubs offer continuous learning opportunities, with a broad range of workshops, conferences, guest speakers, and more — all aimed at helping you grow personally and professionally.

# MEMBERSHIP RESOURCE GUIDE

The names of hyperlinked resources appear with an underline and usually in a blue font and can be downloaded on www.rotary.org by clicking on the hyperlink, or ordered on shop.rotary.org with the SKU number provided. If you experience any trouble when placing your order, please email membershipdevelopment@rotary.org or shop.rotary@rotary.org.

| PUBLICATIONS | | | |
|---|---|---|---|
| **Name** | **Description** | **Audience** | **Available** |
| Strengthening Your Membership | This guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members. | Club presidents and membership committees, and district membership chairs | http://shop.rotary.org/ (**SKU: 417**) |
| Starting a Rotary Club | This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond. | District governors | N/A |
| Introducing New Members to Rotary | Utilize this guide to develop a process for engaging new members from the start by helping them get involved, connecting them with a mentor, and by pacing the learning over time. | Club leadership | http://shop.rotary.org/ (**SKU: 414**) |
| Be A Vibrant Club | A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture. | Club leadership | http://shop.rotary.org/ (**SKU: 245A**) |
| Connect for Good | Eight-page guide shows how to get involved and connect with Rotary. | Current members | http://shop.rotary.org/ (**SKU: 595**) |
| Rotary Basics | This comprehensive guide to all things Rotary covers everything from how Rotary began to how you can optimize your membership experience. | New members | http://shop.rotary.org/ (**SKU: 699**) |
| Impact Begins With You | This prospective member brochure explains who we are and what sets us apart from other organizations. | Prospective members | http://shop.rotary.org/ (**SKU: 001**) |

| LEARNING CENTER: ONLINE COURSES | | | |
|---|---|---|---|
| **Name** | **Description** | **Audience** | **Available** |
| Your Membership Plan | Create a step-by-step plan to strengthen your membership and keep your club vibrant and relevant. | Rotary members | http://rotary.org/learn (log in My Rotary account required) |
| Best Practices for Engaging Members | Is your club losing more members than it's gaining? It's time to get serious about engaging members. | Rotary members | http://rotary.org/learn (log in My Rotary account required) |
| Kick-start Your New Member Orientation | Are new members leaving within a year or two? Learn how to better connect with | Rotary members | http://rotary.org/learn (log in My Rotary account required) (log |

| | | | |
|---|---|---|---|
| | them and help them get involved from the start. | | in My Rotary account required) |
| Practicing Flexibility and Innovation | If you find that your club's rules are preventing members from getting the experience they want from Rotary, try changing them. | Rotary members | http://rotary.org/learn (log in My Rotary account required) (log in My Rotary account required) |
| Building a Diverse Club | A diverse club reflects the make-up of its community, has a greater impact, and is more attractive to prospective members. | Rotary members | http://rotary.org/learn (log in My Rotary account required) |
| Online Membership Leads | What's all this talk about membership leads? This course will clear up the mystery behind these online leads. | Rotary members | http://rotary.org/learn (log in My Rotary account required) |
| Is Your Club Healthy? | Take this course to help your club stay valuable to your members and your community. | Rotary members | http://rotary.org/learn (log in My Rotary account required) |
| Strategies for Attracting New Members | Are guests of your club not interested in joining? Learn how to improve the club experience to make it attractive to visitors. | Rotary members | http://rotary.org/learn (log in My Rotary account required) |
| Alumni Report Guide | Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members. | District and zone leadership | https://my.rotary.org/en/document/how-use-program-participants-and-alumni-report |

| TOOLS | | | |
|---|---|---|---|
| **Name** | **Description** | **Audience** | **Available** |
| Membership Best Practices Discussion Group | This discussion group provides a forum for leaders at all levels to share best practices for recruiting, attracting, engaging, and retaining current and prospective members. | Rotary members | https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices |
| Rotary Club Health Check | This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas. | Club leaders | http://shop.rotary.org/ (**SKU: 2540**) |
| Membership Assessment Tools | Learn how to evaluate and improve your membership development plan with these tools, complete with sample surveys and information on organizing new clubs, recruiting and retaining members. | Current members | http://shop.rotary.org/ (**SKU: 801**) |
| Customizable Rotary Club Brochure | In this template, clubs can upload their own photos, edit text, list dates of upcoming events, and share member testimonials. | Prospective members | N/A |

| RESOURCES | | | |
|---|---|---|---|
| **Name** | **Description** | **Audience** | **Available** |
| New! Club Membership Committee Checklist | Keep your membership committee on track with this checklist covering assessments, attraction, and engagement initiatives. | Rotary Members | N/A |
| Engaging Young Professionals Toolkit | This online toolkit can help clubs connect with Young Professionals by first understanding them. Topics included are characteristics of your audience, your club's culture, ideas for outreach and engagement, and the long-term benefits of becoming a Rotarian. | Rotary Members | N/A |

| | | | |
|---|---|---|---|
| Updated! State of Rotary's Membership power point | Understand the current State of Rotary's Membership: how we got here, who is joining, who is leaving — and the opportunities that exist to strengthen membership. | Rotary Members | N/A |
| Club Flexibility web page | This web page offers ways clubs can implement the new flexible options Council decisions granted them. Includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats. | Rotary members | N/A |
| "Discover Rotary" Power Point | Show this presentation at prospective member or other events to introduce Rotary to the public. It covers Rotary's values, history, and the benefits of membership. | Prospective members | N/A |
| Understanding Membership Reports: Getting Started | This guide lists each membership report available, explains the information it provides, and steps on how to find them. | Rotary members | N/A |
| Creating a Positive Experience for Prospective Members | Find tips and ideas for connecting with prospective members, and what you can do to ensure they have a positive experience. | Rotary members | N/A |
| Proposing New Members | Best practices for proposing new members to your club. | Rotary members | N/A |
| How to Manage Membership Leads (Clubs) | Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level. | Club leaders | https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs |
| How to Manage Membership Leads (Districts) | Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level. | District leaders | https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts |
| New Member Welcome Kit | Welcome new members to your club with pre-packaged Rotary essentials: Connect for Good brochure, What's Rotary? card, RI/TRF Annual Report, and Proud Member window cling. | New members | http://shop.rotary.org/ (**SKU: 426**) |
| Membership Minute e-newsletter | Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources. | Club and district leaders | www.rotary.org/en/news-features/newsletters |
| Strategic Planning Guide | Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan. | Club and district leaders | https://www.rotary.org/myrotary/en/document/strategic-planning-guide |

| WEBINARS | | | |
|---|---|---|---|
| **Name** | **Description** | **Audience** | **Available** |
| Hot, Warm, and Cold Leads: Engaging Your Prospective Members (Club Level) | Rotary volunteers and staff share best practices in communicating with prospective members, ensuring their Rotary experience is positive, and managing and admitting them through the Membership Leads platform. | Club leaders | https://vimeo.com/240685013 |

| First Impressions Matter webinar: The Membership Experience | Find out what happens when Rotarians use every interaction to engage, educate, and inspire fellow Rotarians and the community. Moderated by Jennifer Jones, Past Rotary Vice President. | Rotary members | https://vimeo.com/232717098 |
| How to Manage Membership Leads for District Leaders | This webinar shows district leaders how to effectively utilize the Membership Leads platform, provides best practices for encouraging clubs to take action with leads, and includes a Q&A section with attendees. | District leaders | https://vimeo.com/214073740 |
| Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience | Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members. | Rotary members | https://vimeo.com/180066536 |
| Understanding Young Professionals | Led by Rotary staff and a market research professional, this webinar is intended to help members better understand the perceptions and needs of young professionals. Password: **YPC** | Rotary members | https://vimeo.com/8936946 |

| TRAINING MANUALS | | | |
|---|---|---|---|
| **Name** | **Description** | **Audience** | **Available** |
| District Membership Seminar Leader's Guide | This guide provides you with speaking points, PowerPoint templates, and exercises to ensure your attendees participate and are engaged in each breakout session for club leaders or members. | District leaders | N/A |
| Lead Your Club: Membership Committee | Describes the responsibilities of the chair and committee, and identifies resources that may be helpful relating to increasing the club's membership. | Club leaders | http://shop.rotary.org/ (**SKU: 226**) |

# Questions? Please contact your Regional Membership Officer:

| **Emily Tucker** | **Julie Aubry** | **Haris Sofradzija** |
|---|---|---|
| emily.tucker@rotary.org | julie.aubry@rotary.org | haris.sofradzija@rotary.org |
| +1-847-866-3258 | +1-847-866-4480 | +1-847-866-3105 |
| **Districts: 5610, 5630, 5670, 5690, 5710, 5790, 5810, 5840, 5870, 5890, 5910, 5930** | **Districts: 5390, 5400, 5420, 5440, 5450, 5470, 5520, 5730** | **Districts: 5750, 5770** |

# ROTARY CLUB
## HEALTH CHECK

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.

**Rotary**

# YOUR CLUB EXPERIENCE

Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary experience for others, because their enthusiasm is contagious. If your club's members genuinely enjoy being a part of the club, you're on the right path. Your experience includes not just your club meetings and other activities, but also the connections you've made and your pride in Rotary's work.

- ☐ I look forward to attending club meetings.

- ☐ Our club meeting programs are relevant, interesting, and varied.

- ☐ We have a greeter who welcomes members to meetings.

- ☐ Our meetings are organized and run professionally.

- ☐ Members sit at different tables each week to meet and talk to different people.

- ☐ Some of the members of my club are my close friends.

- ☐ Members other than club leaders participate in Rotary events at the district or international level.

- ☐ Most members are aware of Rotary's progress toward polio eradication and feel proud to be a part of it.

- ☐ Our members contribute to The Rotary Foundation.

- ☐ We raise funds in a way that allows members to contribute what they wish.

- ☐ We recognize members of the club or community at least monthly.

- ☐ I have made international connections through Rotary.

- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.

## ☑ PROGNOSIS

While some members leave for logistical reasons, many leave because of a lack of engagement, an inflexible club culture or other unmet expectations, all of which affect a member's experience. If members are not having a good experience, your club is at risk of losing them. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|---|---|
| Club meetings | ⊕ Change the meeting format or style. For ideas, see **Lead Your Club: President**, chapter 2, and **Be a Vibrant Club's** "Ideas to try." <br><br> ⊕ Find out what your members want using the **Member Satisfaction Survey** and then give them that experience. <br><br> ⊕ Develop leadership skills among club leaders and members by holding a **leadership skills training**. |
| Rotary experience beyond the club | ⊕ Sponsor an **Interact** or **Rotaract** club, **organize a RYLA event**, **create a scholarship**, or **start an exchange**. <br><br> ⊕ Join a **Rotary Fellowship** or **Rotarian Action Group**. <br><br> ⊕ Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience. <br><br> ⊕ Promote the work that Rotary does globally, including polio eradication, by showing a short **Rotary video** or projects on **Rotary Showcase** during a club meeting. |

# SERVICE AND SOCIALS

Participating in service and having fun with fellow members are the primary reasons Rotarians join and stay in Rotary. The healthiest clubs vary their activities and offer multiple ways to get involved. Try a new kind of social event or a different service experience and watch the impact it has on your club.

☐ Our club holds regular get-togethers (aside from club meetings) for socializing and networking.

☐ Our club encourages members to bring partners, spouses, and family members to club meetings and events.

☐ Our club offers members leadership opportunities and professional development.

☐ Our club invites Rotaractors, Interactors, and Youth Exchange students to participate in meetings and is active in Interact and Rotaract clubs and mentors their members.

☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Youth Exchange student, or sponsors a RYLA participant.

☐ We consult community leaders and community members to determine needs before choosing a project.

☐ We visit Rotary Ideas, an online project idea starter, before choosing a new project.

☐ Our club has a service project in progress.

☐ All members can give input on service and social activities.

☐ Our club service projects are aligned with Rotary's areas of focus and Avenues of Service.

☐ Our club has applied for or used Rotary grant funds for a service project.

## ✅ PROGNOSIS

Clubs that have inadequate social or service opportunities are at risk of losing members who don't feel connected or empowered. The good news is that these deficiencies can be remedied in fun and rewarding ways. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|---|---|
| Opportunities for service | ➕ Sponsor an **Interact** or **Rotaract** club, **organize a RYLA event**, **create a scholarship**, **start an exchange**, join a **Rotarian Action Group**, or **support the Rotary Peace Centers**. |
| Quality of projects | ➕ Use **Community Assessment Tools**, **Guide to Global Grants**, and **Rotary Ideas** to improve the quality of your projects. |
| Social activities | ➕ Put one or two members in charge of organizing socials throughout the year. <br><br> ➕ Join a **Rotary Fellowship**. |
| Leadership | ➕ Hold a **leadership training**. |

## MEMBERS

A healthy club is one that is growing and changing. Having members with diverse perspectives and backgrounds will fuel innovation and give your club a broader understanding of your community's needs. Pay attention to how your members are feeling about the club. Research shows that one of the most common reasons members leave is that club leaders are not open to new ideas. Involving members and giving them a voice in their club's future will strengthen both the club and members' commitment to Rotary.

☐ Our club has had a net increase in members in the past year.

☐ Our club has had a net increase in female members in the past year.

☐ Our club has had a net increase in members under age 40.

☐ Our club seeks to recruit members from professions in the community that are underrepresented in the club.

☐ Our club keeps in touch with Rotary alumni (former Rotaractors, Youth Exchange students, peace fellows, and participants of other Rotary programs).

☐ Our club actively recruits Rotary alumni.

☐ Our club actively recruits recently retired professionals.

☐ Our club retains at least 90 percent of its members each year.

☐ At least 75 percent of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.

☐ Our club has a process for soliciting feedback from members.

☐ A designated person checks and follows up on membership leads assigned to the club.

☐ Guests are asked to introduce themselves and are invited back.

☐ Member benefits are explained and promoted to new and continuing members.

☐ New members are provided with an orientation and opportunities to get involved.

☐ Newer and seasoned members are paired for mentoring relationships.

☐ We ask members to speak at meetings about their vocations or other topics of interest.

Clubs that have deficiencies in membership are at risk of becoming outdated, dull, and less valuable to their members and community. Fortunately, there are many tools available that are proven to give results. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|---|---|
| Member diversity | ⊕ Take action to diversify your club using **Diversifying Your Club: A Member Diversity Assessment**. |
| Professional diversity | ⊕ Make your club a microcosm of your community with **Representing Your Community's Professions: A Classification Assessment**. |
| Stagnant or declining membership | ⊕ Create a membership development plan with **Strengthening Your Membership**. <br><br> ⊕ **Connect to Membership Leads** assigned to your club using **How to Manage Membership Leads (For Clubs)** and **resources for prospective members**. <br><br> ⊕ Target prospective members using this **exercise**. <br><br> ⊕ Show members how to **propose new members** to their own club and explain that they can **refer** qualified prospects to other clubs. |
| Members leaving | ⊕ Start with the **Member Satisfaction Survey** to enhance current members' experience. <br><br> ⊕ Learn and act on trends using the **Retention Assessment and Analysis**. <br><br> ⊕ Use the **Exit Survey** to understand why members resign. <br><br> ⊕ Let resigning members know they can **rejoin or change clubs** when they are ready. |
| Orientation and Rotary knowledge | ⊕ Offer **new member orientation**, **leadership development**, and ongoing learning opportunities with Rotary's **Learning Center**. |

## IMAGE

Clubs that have fun and make an impact are attractive to those who see that. A positive public image improves your club's relationship with your community and prospective members. Make sure your club is getting the credit for the service you provide. Demonstrating that your club meets real needs confirms your value to your community.

☐ We have an online presence, including a public-facing, visually appealing club website, Facebook page, or other social media page that explains what the club does, who its members are, and the benefits of membership.

☐ Our club has members dedicated to public image and outreach.

☐ Our club appeared in the local media multiple times last year.

☐ We promote our club and Rotary through various media in the community.

☐ Our club invites members of the media to cover our service work.

☐ Our club materials follow Rotary's updated branding guidelines.

☐ We use branded materials and templates from Rotary's Brand Center.

☐ We use marketing materials provided by Rotary International, such as public service announcements, videos, images, and logos.

☐ We display Rotary signs and banners at our meeting place.

☐ Our club's presence is known in our community.

☐ We have a customized brochure that we give to community members and prospects.

☐ We use Rotary Showcase to promote our finished projects.

# ✓ PROGNOSIS

Clubs that don't have a visible presence in their community are at risk of minimizing their impact or being perceived as irrelevant. Rotary has resources that can help. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
| --- | --- |
| Community awareness | ⊕ Use the resources in Rotary's **Media Center** and use them in your community's media.<br><br>⊕ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's **Brand Center**. |
| Outdated materials | ⊕ Find customizable club brochures and membership materials on Rotary's **Brand Center**.<br><br>⊕ Follow the **Voice and Visual Identity Guidelines** in any materials your club creates.<br><br>⊕ Use **Rotary Images** and **Rotary videos**, as well as images of your members, in your materials. |
| Online presence | ⊕ Find a tech-savvy member to create and manage your club website and social media pages.<br><br>⊕ Take the social media course in the **Learning Center**.<br><br>⊕ Use **Rotary Images** and **Rotary videos**, as well as images and videos of your own members.<br><br>⊕ Share your projects on **Rotary Showcase**. |
| Marketing expertise | ⊕ Find tips in **Lead Your Club: Public Relations Committee** and put members with public relations expertise on the committee.<br><br>⊕ Recruit professionals with marketing expertise using ideas from **Finding New Club Members: A Prospective Member Exercise**.<br><br>⊕ Build your own social media expertise using the Social Media Toolkit in Rotary's **Brand Center**. |

# BUSINESS AND OPERATIONS

When your club runs smoothly, you likely have good leaders who are looking toward the club's future. The leaders shape the club as a whole, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development is also a way to fortify your club.

☐ We have a strategic plan for our club that we update regularly.

☐ We have annual goals and enter them in Rotary Club Central.

☐ Our club has committees that support the activities and regularly report to the club board on progress toward goals.

☐ Our club board changes what isn't working well and updates club bylaws accordingly.

☐ We have a process for ensuring continuity that includes preparing members for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.

☐ Our club president attends PETS, and club leaders attend the district training assembly.

☐ Members attend district events and seminars on Rotary topics that interest them.

☐ New members are officially inducted and are presented with appropriate materials.

☐ At least half of our club's members have a My Rotary account.

☐ Club officers conduct Rotary business using My Rotary or integrated club software.

☐ Our club sets and approves a budget for the upcoming Rotary year, designates a treasurer, and keeps separate bank accounts for administration and fundraising or project funds.

☐ Our club sets and achieves fundraising goals using a variety of fundraising activities.

☐ We ask our members to complete a member satisfaction survey each year.

☐ We offer ongoing learning opportunities for our members.

## ✓ PROGNOSIS

Clubs that don't have skilled members in leadership roles or that neglect member needs are at risk of becoming ineffective and obsolete, and losing their members as a result. There are plenty of remedies for clubs that want to thrive. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|---|---|
| Planning and goal setting | ⊕ Create a vision for your club and set long-range and annual goals using the **Strategic Planning Guide**.<br><br>⊕ Track your annual goals in **Rotary Club Central**.<br><br>⊕ Use **Strengthening Your Membership** to make a membership development plan. |
| Innovation | ⊕ Ask members for input using the **Member Satisfaction Survey**, and try their ideas. If they're successful, edit your club bylaws accordingly.<br><br>⊕ Use templates in the **Brand Center** to create your own materials. |
| Processes | ⊕ Develop standard processes for **new members**, **prospective member follow-up**, **proposing a new member**, leadership continuity, etc. |
| Leadership | ⊕ Find tips and resources in Lead Your Club: **President**, **Secretary**, and **Treasurer**.<br><br>⊕ Offer leadership development opportunities and promote self-paced learning with Rotary's **Learning Center**. |
| Managing funds | ⊕ Use **The Rotary Foundation Reference Guide** to learn about giving options.<br><br>⊕ Find best practices in **Lead Your Club: Treasurer**. |
| Managing your club on MyRotary | ⊕ Use the **Club Administration** section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads. |

Using the Rotary Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most check marks and which had the fewest. Look at the suggested remedies and take action. When you visit your doctor, you may get advice about maintaining your good health or possibly a prescription or two to combat an ailment. If you don't follow the advice or take the prescriptions, you aren't making the most of your visit. Similarly, to make the most of your club health check, use the suggested resources to treat your problem areas. Paul Harris said, "May our happiness increase with our usefulness." As our communities and their needs change over time, Rotary clubs must adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

## FEATURED RESOURCES

**Membership Assessment Tools**

**Membership resources**

**Brand Center**

**Learning Center**

**Rotary videos**

# YOUR MEMBERSHIP PLAN WORKSHEET

Use this worksheet to make a membership plan for your club. After evaluating your club, focus on the particular steps that address your club's toughest challenges. The steps will direct you to resources that can help. When you've completed the steps, you will have identified challenges and opportunities, developed a vision, and generated strategies for prospective, new, and established members.

During club meetings, talk to members about the steps you're taking to strengthen membership, and encourage those members to get involved in the process.

## Step 1: Evaluating Your Club

☐ We identified areas for improvement after using the Rotary Club Health Check, and we took the course Is Your Club Healthy? in the Learning Center to review the modules that address the areas of our club that need attention. Based on what we learned, we will try the following:

Area for improvement      Remedy we plan to try

_____

_____

_____

☐ We found ideas or best practices in Be a Vibrant Club that we will use to make our club innovative and flexible:

_____

_____

_____

☐ We completed the membership diversity assessment, have taken the course Building a Diverse Club in the Learning Center, and plan to do the following to increase and celebrate new ideas and perspectives:

_____

_____

_____

☐ Our club completed the classification assessment and plans to do the following to better represent our community's professional diversity:

_____

_____

_____

## Step 2: Creating a Vision for Your Club

☐ Our club completed the club visioning process and developed the following vision:

In 3-5 years, our club will:

_____

_____

☐ Our club has a membership committee with a leader and at least five members to guide the implementation of our vision and membership plan.

☐ Long-term goals that will help us achieve our vision include:

_____

_____

_____

☐ We reviewed our club's strategic plan to ensure that our membership plan aligns with it.

## Step 3: Attracting New Members

☐ Our club completed the course **Strategies for Attracting New Members** in the Learning Center and plans to make itself more attractive to prospective members in the following ways:

_____

_____

_____

☐ Our club completed the Finding New Club Members exercise and will take these actions to find prospective members:

_____

_____

_____

☐ Our club selected the following membership benefits to highlight when speaking to prospective members:

_____

_____

_____

☐ Our club took the course **Practicing Flexibility and Innovation** in the Learning Center to understand the flexible options now available to clubs, and we plan to try the following to better accommodate members:

_____

_____

_____

☐ Our club took the **Online Membership Leads** course in the Learning Center, and we understand how membership leads can benefit our club.

    ☐ Our club leaders have determined who will manage membership leads assigned to our club.

    ☐ Our club has a process for following up with prospective members assigned to us through the membership leads program.

☐ Our club has read Creating a Positive Experience for Prospective Members, understands how that experience can influence prospective members' perceptions of Rotary, and has a plan to ensure we create a good experience for prospects whether or not they join.

## Step 4: Engaging Your Club's Members

☐ Our club has asked members to complete the member satisfaction survey and decided to implement the following changes based on the results:

_____

_____

_____

☐ Our membership committee members have taken the course **Kick-start Your New Member Orientation** in the Learning Center, have read Introducing New Members to Rotary, and are developing an orientation process that educates new members and involves them in the club. Our orientation process will include the following:

_____

_____

_____

☐ Our club completed the retention assessment and analysis, discussed the results, and will take these steps to improve our engagement and retention:

_____

_____

_____

☐ Our club has taken the course **Best Practices for Engaging Members** in the Learning Center and will take these actions to engage our members:

_____

_____

_____

☐ Our club has looked at the many ways members can get involved through Rotary, as outlined in Connect for Good, and will encourage members to get involved in these new ways:

_____

_____

_____

☐ Our club asked members who've left recently to complete the exit survey to better understand why members leave the club. We've discussed the results and will take these steps to engage the member groups we've identified as the most vulnerable to termination:

| Member groups | Strategy |
| --- | --- |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

## Step 5: Improving Your Public Image

☐ We have selected a club member to manage our social media content.

☐ We have selected a member to manage and update our club website using materials from Rotary's Brand Center.

☐ We have selected a member to update our customizable club brochure using the template on Rotary's Brand Center.

☐ We visited the Brand Center on My Rotary and will use these additional tools to promote awareness in our community:

_____

_____

_____

☐ Our club hosted a focus group in our community. The group yielded these findings:

_____

_____

_____

## Step 6: Supporting New Clubs

☐ Our club membership committee chair has told our district governor that we're willing to serve as a sponsor club.

☐ Our club members have discussed the responsibilities of serving as a sponsor club and agree to commit to this relationship.

☐ Our club leaders are open to supporting a satellite club and consider it as an option for accommodating differing needs among members.

## Step 7: Supporting Your Club: Rotary Resources and Tools

☐ Our club membership committee communicates regularly with our district membership committee.

☐ Our club leaders regularly communicate with our district governor or assistant governor and ask for help when we need it.

☐ Our club membership committee members have visited rotary.org/membership within the past month and know where to find Rotary materials to help our club.

# Notes

# Lone Star P.E.T.S. 2019

## PRESIDENTS-NOMINEE WORKBOOK

**FRIDAY, MARCH 1, 2019**

**SESSION A-4  INCREASING HUMANITARIAN SERVICE BY SUPPORTING "OUR" FOUNDATION**

> **GOAL**
> **Club Presidents and Presidents-elect will possess tools necessary to increase humanitarian service accomplished by their clubs by developing club member support for The Rotary Foundation.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1. Explain how support for the Rotary Foundation can help increase humanitarian service

2. Explain how participation in programs of the Rotary Foundation helps attract and retain members

3. Identify the good works accomplished through our Foundation

REFERENCE MATERIALS

Lead Your Club: President - Chapter 7: The Rotary Foundation

# ROTARY'S AREAS OF FOCUS

**Rotary**

**TAKE ACTION:** www.rotary.org

The work of Rotary begins in the community, and every community has its own unique needs and concerns. While we serve in countless ways, we've focused our efforts in six key areas to maximize our impact. These areas encompass some of the world's most critical and widespread humanitarian needs, and we have a proven record of success in addressing them:

• Peace and conflict prevention/resolution
• Disease prevention and treatment
• Water and sanitation
• Maternal and child health
• Basic education and literacy
• Economic and community development

Rotary members planning new service projects are encouraged to consider these areas and the many opportunities for innovative projects within them. This publication introduces each area and suggests how Rotary clubs and districts and their service partners can address these needs both locally and internationally.

## ROTARY FOUNDATION GLOBAL GRANTS AND THE AREAS OF FOCUS

All Rotary clubs and districts are eligible to apply for global grants from The Rotary Foundation to support sustainable activities with high-impact outcomes in one or more of the six areas of focus. These activities may include humanitarian projects, scholarships, and vocational training teams. Prospective global grant-funded projects should include a plan for monitoring and evaluation using the measures established by the Foundation for each area. Learn about the criteria for global grants in each area by consulting the Areas of Focus Policy Statements at Rotary.org.

## ROTARY SHOWCASE

Interested in seeing how other clubs are making an impact in Rotary's areas of focus? Check out Rotary Showcase (www.rotary.org /showcase), a tool that lets you view, share, and publicize Rotary service projects. Find inspiration from other clubs' success stories and add your own project to show the world how your club is making a difference.

# RESPONDING TO CONFLICT

## 20,000 people
are maimed or killed by land mines each year.

**TAKE ACTION**

**Identify triggering or accelerating factors** in the conflict and work to mitigate them.
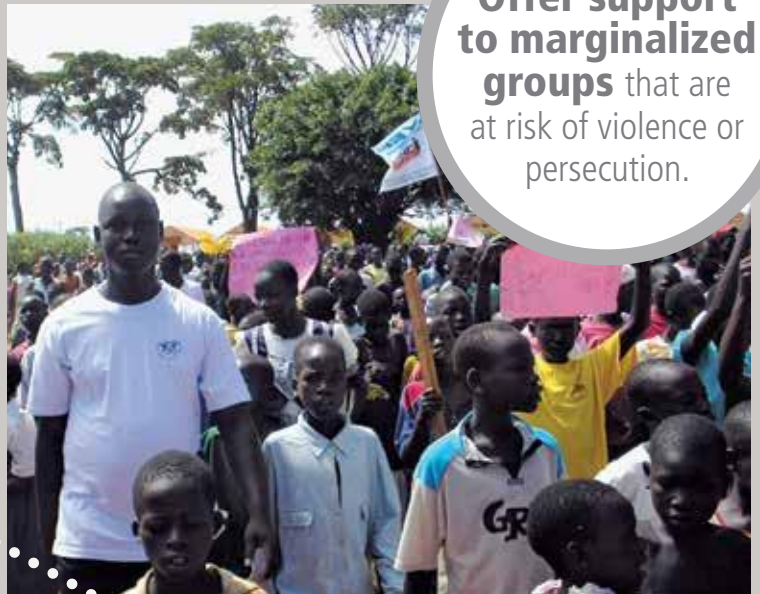
**TAKE ACTION**

**Offer support to marginalized groups** that are at risk of violence or persecution.

## 51 million people
are currently displaced by armed conflict or persecution.

**TAKE ACTION**

**Provide relief** to those who have fled areas of conflict.

### TIPS FOR SUCCESS

1. Plan projects to engage all community stakeholders, including women, marginalized populations such as ethnic or religious minorities, and opposing sides in conflicts.

2. Understand and respect the laws and customs of all the communities you serve.

**TAKE ACTION**

**Help children** who have been orphaned, injured, or traumatized by conflict.

## 90% of casualties
in armed conflicts are civilians, at least half are children.

# 300,000 child soldiers

**(boys and girls under age 18) are believed to be involved in conflicts around the world.**

## TIPS FOR SUCCESS

**(1)** Use role-playing and sports to teach children and young adults socially appropriate ways of dealing with conflict.

**(2)** As a component of service projects, train community leaders in strategies to prevent and mediate conflict, such as facilitating community dialogue and initiating alternative dispute resolution.

**(3)** Partner with Rotary Peace Fellows and other conflict-prevention experts and organizations.

### TAKE ACTION

**Incorporate conflict resolution and mediation strategies into service projects** involving local schools, orphanages, workplaces, and community centers.

### TAKE ACTION

**Recruit candidates for a Rotary Peace Fellowship**. Up to 100 peace fellowships are offered annually at Rotary Peace Centers at universities around the world.

### TAKE ACTION

**Participate in fellowship and service activities** with Rotary clubs in other parts of the world to promote understanding and peace.

### TAKE ACTION

Pursue projects that **address the underlying causes of conflict**, including poverty, inequality, ethnic tensions, lack of access to education, and unequal distribution of resources.

# DISEASE PREVENTION

## 1 billion people

**suffer from neglected tropical diseases such as dengue fever and leprosy each year.**

### TIPS FOR SUCCESS

**1** Consult with Rotary members who have medical or public health expertise.

**2** Communicate with local and regional hospitals, clinics, universities, and ministries of health to avoid duplicating efforts and to take advantage of local resources.

**3** Enlist community workers and health and medical volunteers to perform immunizations.

**4** Partner with successful community-based health care organizations to strengthen and expand existing services.

*TAKE ACTION*

**Support health education programs** that explain how diseases are spread, and promote ways to reduce the risk of transmission.

*TAKE ACTION*

**Help immunize people** against infectious diseases.

# 2.4 million doctors,

**nurses, midwives, and other skilled caregivers are needed worldwide.**

# 57 countries

**have fewer than 23 health workers for every 10,000 people.**

## TIPS FOR SUCCESS

**1** Work with local health centers to develop programs that attract health workers with a variety of skills. A shortage in a particular skill area can burden health center staff and limit the care available.

**2** Ensure that training facilities are located where the workforce lives and works in order to improve retention rates.

### TAKE ACTION

**Support continuing education and training** for health workers through scholarships, stipends, and public recognition.

# 100 million people

**are pushed into poverty each year by medical costs.**

# 1 in 6 people

**worldwide cannot pay for health care.**

### TAKE ACTION

**Improve and expand access** to low-cost and free health care in underserved areas.

## TIPS FOR SUCCESS

**1** Focus on providing long-term support for community health centers.

**2** Partner with global health systems to increase access to equipment, facilities, and the latest health care programs.

**3** Incorporate innovative technologies such as mHealth, which can be accessed on mobile wireless devices, to extend the reach of health centers.

# SANITATION AND HYGIENE

## 2.5 billion people
**lack access to improved sanitation.**

### TAKE ACTION

**Improve sanitation facilities** by providing toilets and latrines that flush into a sewer or safe enclosure.

## 1,400 children
**die each day from diseases caused by lack of sanitation and unsafe water.**

**TIPS FOR SUCCESS**

1. Avoid prescribing a solution for a community. Instead, work with the community to determine what is most appropriate.

2. Remember sanitation and hygiene: Very few people die from thirst; millions die from preventable waterborne diseases.

### TAKE ACTION

**Promote good hygiene habits** through education. Proper hand washing with soap and water can reduce diarrhea cases by up to 35 percent.

# IMPROVE WATER QUALITY AND ACCESS TO WATER
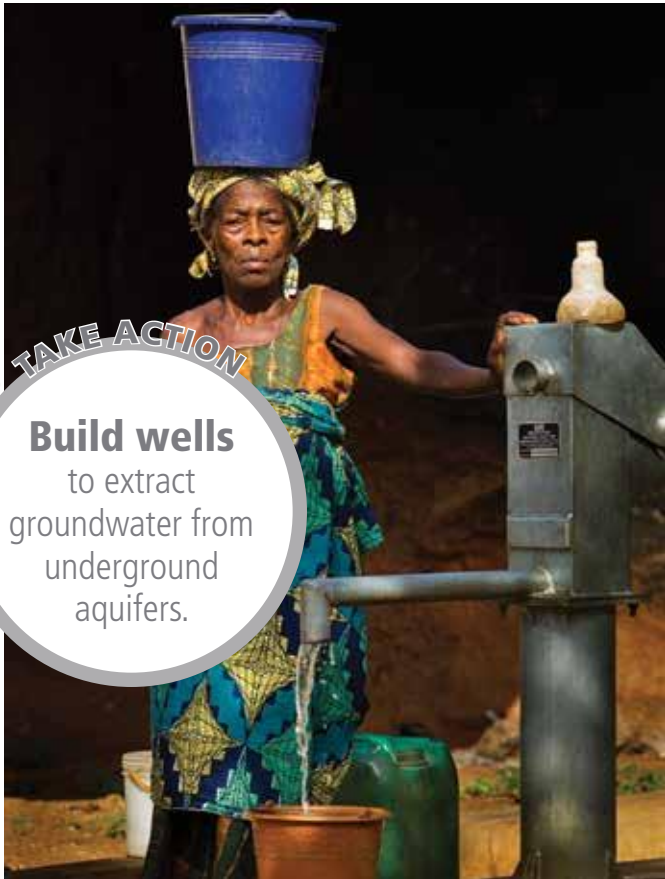
**Build wells** to extract groundwater from underground aquifers.

## TIPS FOR SUCCESS

1. Work with the community to establish a water committee and a fee system to allow for ongoing operation and maintenance of the water system.

2. Before digging or drilling a new well, plan carefully to ensure that the water will be safe and the well is environmentally sustainable.

3. Utilize government-approved technology and equipment so that spare parts and repair work will be readily available.

**Implement rainwater harvesting** systems to collect and store rainwater for drinking or recharging underground aquifers.

## 6 hours

**per day is what women in some rural parts of Africa spend collecting water from a remote source.**

**Provide home water treatment capability**, through the use of filters, solar disinfection, or flocculants, to make drinking water safe.

**Promote low-cost solutions**, such as chlorine tablets or plastic bottles that can be exposed to sunlight, to improve water quality.

## 748 million people

**don't have clean drinking water.**

# CHILD HEALTH CARE

**TAKE ACTION**

Develop or support programs that **provide immunizations and antibiotics**. Measles, malaria, pneumonia, AIDS, and diarrheal diseases are the leading causes of death in children under five.

## 6.3 million children

under the age of five die each year from diseases, malnutrition, poor health care, and inadequate sanitation.

**TAKE ACTION**

**Prevent mother-to-infant HIV transmission** by encouraging the use of antiretroviral drugs and formula feeding.

**TAKE ACTION**

**Promote good nutrition**, including encouraging breastfeeding for most infants.
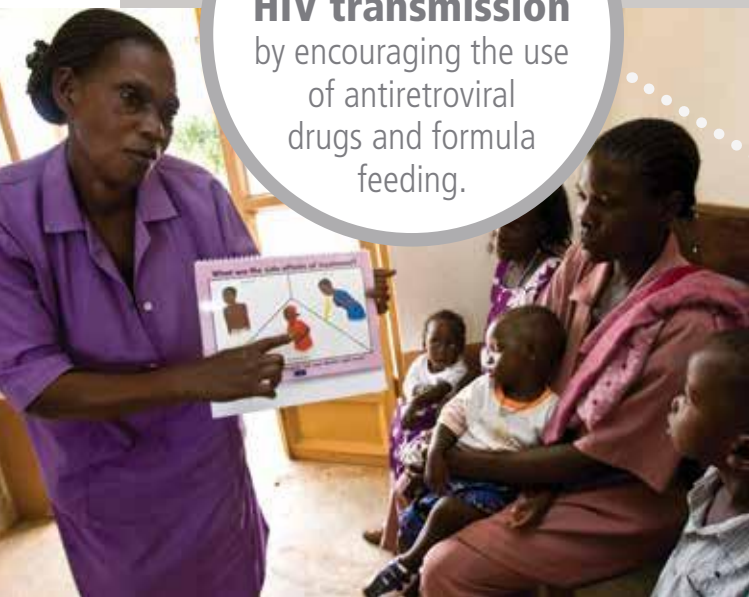
**TAKE ACTION**

**Include water, sanitation, and hygiene efforts** to maximize child nutrition. Diarrheal diseases caused by contaminated water exacerbate malnutrition in children.

## REPRODUCTIVE HEALTH

### 222 million women

**who would prefer to delay or avoid childbearing lack access to safe and effective contraception.**

**TAKE ACTION**

**Provide information about — and access to — contraceptives**. Just filling the unmet need for contraception could reduce the number of maternal deaths by nearly one-third.

#### TIP FOR SUCCESS

Take time to understand prospective beneficiaries' beliefs surrounding contraception and foster an environment of open, nonjudgmental communication to build good working relationships in the community.

**TAKE ACTION**

**Provide birthing kits** to health professionals.

Women in sub-Saharan Africa face a

### 1 in 39 lifetime risk

of dying of pregnancy- or childbirth-related complications.

### 80% of maternal deaths

**could be prevented with access to reproductive health services and trained health care workers.**

**TAKE ACTION**

**Support accredited training programs** for health professionals.

#### TIPS FOR SUCCESS

1. Ensure sustainability by empowering the local community to take ownership of health training programs.

2. Consult Rotary members who are trained in maternal and newborn health care, such as midwives, obstetricians, and gynecologists.

3. Partner with local organizations that have expertise in maternal and child health.

60

# TEACHER TRAINING

## 1.7 million additional teachers

are needed worldwide to meet the goal of universal primary education.

### TIPS FOR SUCCESS

**1** Develop long-term relationships with teachers to ensure that they have access to the latest training and materials.

**2** Consult with education officials to design teacher training programs and curriculums.

*TAKE ACTION*

**Provide teacher training** and needed classroom supplies.

*TAKE ACTION*

**Send a vocational training team** to offer curriculum development training in rural communities.

61

**Volunteer** in a classroom or after-school program.

# 57 million children
worldwide are not in school.

**Support concentrated language encounter** (CLE) literacy programs. These low-cost text- or activity-based immersion programs can be effective with adults as well as children.

Develop an **adult literacy program**.

# 781 million people
over the age of 15 — 60 percent of them women — are illiterate.

**Serve as a mentor** to students in your community.

**Promote student enrollment** and prevent health-related absences by sponsoring school meal programs and providing safe drinking water and sanitation facilities.

## TIPS FOR SUCCESS

1. Remove barriers to girls' education caused by cultural attitudes, safety concerns, and the need for girls to contribute to the household economy. Gender equality is vital to sustainable community development.

2. Involve students, parents, teachers, and administrators to gain support for your endeavors.

3. Partner with local organizations that can offer advice and resources to help you organize a CLE program.

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# INCOME GENERATION AND SAVINGS

## 190 million people
are funding their business endeavors through microfinance.

**TAKE ACTION**

### Partner with a local microlender
to improve access to financial services and provide financial infrastructure in the community.

**TAKE ACTION**

### Develop mobile banking resources
in partnership with a microlender. Cell phones, which can be used to make deposits and transfer funds, can increase access to banking systems in developing communities.

### TIPS FOR SUCCESS

1. When supporting service projects in a developing community, purchase goods and supplies locally to stimulate the economy and avoid unnecessary shipping fees.

2. Establish a Rotary Community Corps (RCC) and empower members to take action. RCC members are in a unique position to identify barriers to the community's economic progress and develop sustainable solutions.

# JOB CREATION AND ENTREPRENEURSHIP

## 1.4 billion people
— nearly half of them employed — live on less than $1.25 a day.

**TAKE ACTION**

**Send a vocational training team** to teach business leaders in developing communities how to create a business plan and maintain accurate financial accounting.

**TAKE ACTION**

**Expand vocational training** opportunities, including job placement programming, at local nonprofit organizations.

## TIP FOR SUCCESS

Support entrepreneurs and small businesses in developing communities. The success of local business leaders can multiply employment opportunities in the community.

**TAKE ACTION**

**Provide equipment or supplies** to a cooperative to increase production and sales in the local market.

**TAKE ACTION**

**Partner with a cooperative** that provides training, joint economic ventures, and ownership of assets to its members through a democratic structure.

"[Eradicating polio] in India was a monumental task, demanding an extraordinary effort by all levels of government and partners involved. Backed by more than 100,000 Rotarians across the country, we helped to ensure maximum support for everything from National Immunization Days to mop-up immunization rounds."

— Deepak Kapur, chair
India PolioPlus Committee

# ERADICATING POLIO

From helping achieve milestone victories to rapidly quelling outbreaks, Rotary enabled the Global Polio Eradication Initiative (GPEI) to gain crucial ground in the fight to finish the disease. Rotary is a leading partner in the GPEI, along with the World Health Organization, UNICEF, the U.S. Centers for Disease Control and Prevention, and the Bill & Melinda Gates Foundation.

Besides placing two drops of vaccine into children's mouths, Rotarians, along with health workers, helped change the hearts and minds of community leaders and parents opposed to immunization to allow children to be vaccinated. And our advocacy with government and business leaders, along with Rotarians' generous contributions, pushed forward the polio endgame plan, aimed at certifying global eradication of the disease by 2018.

# Notes

This concludes the four Friday sessions within your District.

Saturday morning you will go to your assigned breakout room.

The breakout groups are organized by similar clubs, so you will be with peers from throughout the ten Districts attending Lone Star P.E.T.S.

You will be in that same room for the day.

# Lone Star PETS 2019

**SATURDAY, MARCH  2, 2019**

**SESSION B-5                ENERGIZING MY ROTARY CLUB**

> **GOAL**
> **Club Presidents-elect will recogni e RI strengths, club fle ibility options, and the need to develop a strong club leadership team.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1.  Understand the importance of connecting the local club to RI vision and engaging the leadership team to explore flexibility options.

2.  Identify club members of each respective club who would serve to form a strong club leadership team

3.  Explain the importance of a strong club leadership team

REFERENCE MATERIALS

Lead Your Club:  President -- Chapter 2:  Leading Rotarians

## Membership Growth Rate
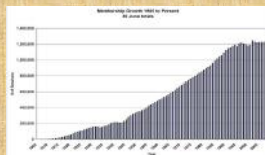
**1st 90 Years:**     **1996 - 2018:**

**15% /yr**       **Flatlining**

1

## Innovation is the Key to Healthy Organizations

"You can change without improving, but you cannot improve without changing."

Pat Haggarty, former TI Leader

"This is a changing world; we must be prepared to change with it. The story of Rotary will have to be written again and again!"

Paul Harris – Founder of Rotary "This Rotarian Age", 1935

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## What Time is It?

Service Projects

People

Programs

**Time to Rethink Rotary**
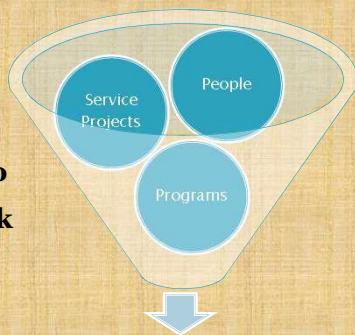
Engaging

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Rotary Vision Statement:

"Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves."

4

## RI Messages: Rotary.org

### People of Action

*"Rotary is where neighbors, friends, and problem-solvers share ideas, join leaders, and take action to create lasting change".*

- WE CONNECT PEOPLE
- WE TRANSFORM COMMUNITIES
- WE SOLVE PROBLEMS

**5**

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**1945**
- **49 Rotarians help draft the United Nations Charter.**
- **Rotary International is granted adviser status at the UN Charter Conference.**
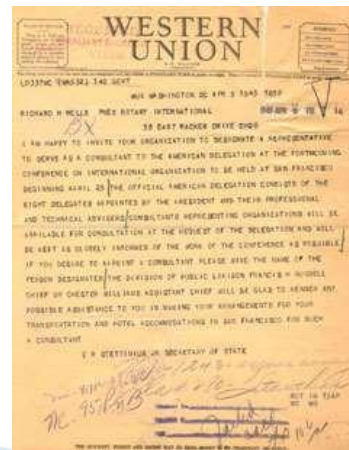


**6**

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## Areas of Focus

Rotary is dedicated to six areas of focus to build international relationships, improve lives, and create a better world to support our peace efforts and end polio forever.

Promoting Peace

Fighting Disease

Providing Clean Water, Sanitation & Hygiene

Saving Mothers and Children

Supporting Education

Growing Local Economies

**7**

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## Continuing to Learn

- **Go to the Rotary E-Learning Center for resources you can explore independently.**
- **RI Catalog**
- **RI publications order form**
- **Shop online**
- **Rotary Basics , a thorough introduction to RI and Rotary Foundation programs and membership benefits and responsibilities.**

**8**

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# Club flexibility - 5 ways to use the new flexibility

Since the 2016 Council on Legislation, Rotary clubs have had the flexibility to choose when, where, and how clubs meet and the types of membership they offer.

It's up to your club to decide how — and if — you want to make it more flexible. Look at the examples below to see what changes may benefit your club. After you settle on a change, remember to update your bylaws. Here are some examples of how your club can apply the new flexible options:

1. **Change your meeting schedule.** Your club can vary its meeting days, times, and frequency. For example, you could hold a traditional meeting on the first Tuesday of the month to discuss business and service projects and get together socially on the last Friday of the month. You just need to meet at least twice a month.

2. **Vary your meeting format.** Your club can meet in person, online, or a combination, including letting some members attend in-person meetings through the Internet.

3. **Relax attendance requirements.** Your club can ease attendance requirements and encourage members to participate in other ways, such as taking a leadership role, updating the club website regularly, running a meeting a few times a year, or planning an event. If your club is dynamic and offers a good experience for members, attendance won't be a problem.

4. **Offer multiple membership types.** Your club could offer family memberships, junior memberships to young professionals, or corporate memberships. Each type of membership can have its own policies on dues, attendance, and service expectations. Rotary will count these people in your club membership and will consider them active members if they pay RI dues.

5. **Invite Rotaractors to be members of your club.** You can invite Rotaractors to join your club while remaining members of their Rotaract clubs. If your club chooses to, it can make special accommodations for these members, such as relaxed attendance requirements or reduced fees, as long as they are reflected in the club bylaws.

Find examples of bylaw amendments that clubs might use to try these new flexible options below and review our frequently asked questions for more information.

## Resources & reference (myrotary.org)

- Frequently asked questions
- Rotary's governance documents
- Start Guide for Alternate Membership Types (includes sample bylaws)
- Start Guide for Flexible Meeting Formats (includes sample bylaws)
- Club meeting flexibility and format (video)
- Membership Types and Attendance Flexibility (video)
- Satellite club FAQ (PDF)
- Satellite club application (PDF)
- Satellite club member information form (PDF)
- Membership Flexibility Overview

# Notes

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# Lone Star P.E.T.S. 2019

**SATURDAY, MARCH 2, 2019**

**SESSION B-6**          **INCREASING HUMANITARIAN SERVICE**

> **GOAL**
> **Club Presidents-elect will have the skills necessary to evaluate service projects and the involvement of club members.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1. Describe how service projects impact the retention of club members

2. Engage club members to reach out to local agencies or organizations to identify community needs

3. Explain ways to evaluate a service project to determine whether to continue the project

REFERENCE MATERIALS

Lead Your Club:  President -- Chapter 8:  Your Projects

# COMMUNITY ASSESSMENT TOOLS

## A resource for Rotary projects

**Rotary**

Assessing your community's strengths, weaknesses, needs, and assets is an essential first step in planning an effective project. By taking time to learn about your community, you can discover the most relevant opportunities for projects and maximize your club's ability to make a meaningful impact.

A community assessment can help you get a better understanding of the dynamics of your community and help both you and the beneficiaries make important decisions about service priorities. Even if you're actively involved in your community, an assessment can reveal additional strengths and opportunities for growth. Perhaps you'll find a new way to address a known issue. Before you start an assessment, consider what you specifically want to learn about your community. An effective assessment will reveal things you did not know before.

Doing an assessment also helps you build valuable relationships and encourages community members to actively participate in making lasting improvements. It's a critical first step in creating trust, community ownership, and sustainability

> Not sure where to start? Encourage community volunteers to form a Rotary Community Corps. An RCC is a team of men and women who aren't Rotarians but work in partnership with Rotary clubs to improve their communities. Sponsoring an RCC is a great way to fully integrate community members as your partners in service. Learn more at www.rotary.org/myrotary/rcc.

Having casual conversations with just one or two people isn't an effective way of finding out what a community needs. Assessments should be systematic, involve a wide variety of community stakeholders and beneficiaries, and engage them in a meaningful way.

## Six community assessment tools

The six assessment methods presented here aren't exclusive. You can combine or adapt them to best suit your club's resources and the preferences of the people you wish to engage with.

- Community meeting
- Survey
- Interview
- Focus group
- Asset inventory
- Community mapping

## Recommended Stakeholders for Rotary's Areas of Focus

**Peace and conflict prevention/ resolution**
- Victims of violence, refugees, or internally displaced people
- Perpetrators of violence
- Factions that are at odds with each other
- Civil society organizations
- Schools and educational institutions
- Local government and law enforcement authorities

**Water and sanitation**
- Parent associations
- School administration
- Teachers
- Students
- District municipalities
- Ministries of education and health
- Utility companies
- Farmers
- Governmental water authority
- Service providers (hand pump mechanics, community outreach workers, etc.)

**Basic education and literacy**

- Teachers
- Parents
- Students
- Out of school youth
- School administrators
- School management committees
- Ministry of education
- Adult education institutes
- Vocational training institutes
- Community and technical colleges
- Libraries/librarians

**Disease prevention and treatment & maternal and child health**

Individual health care recipients:

  ➤ Pregnant women

  ➤ At-risk children

  ➤ Adults at risk for noncommunicable and communicable diseases

  ➤ At-risk aging population

- Community health centers and hospitals
- Mobile outreach systems
- Community health care workers
- Skilled birth attendants
- Health care professionals (nurses, doctors midwives, technicians, specialists, etc.)
- Access and continuum of care structures:

  ➤ Prevention, primary care, and referral systems

  ➤ Transport

  ➤ Hospitalization and follow-up services

  ➤ Rehabilitation services

  ➤ Chronic care support and palliative/hospice care systems

**Economic and community development**

- Local government authorities
- Entrepreneurs
- Farmers
- Unemployed youth and adults
- Business owners
- Banks
- Cooperatives (agricultural, savings/loan, etc.)

- Microfinance institutions
- Vocational training institutions
- Community colleges
- Secondary schools
- Universities
- Adult education organizations

## Community Meeting

A community meeting, sometimes called a town hall or public forum, is an informal public gathering that brings together members of a community to discuss issues, voice concerns, and express preferences for community priorities.

In a community meeting, a facilitator leads discussions on issues related to the community's strengths and potential challenges and encourages attendees to vocally participate. The facilitator also directs any questions to known subject matter experts. It is advisable to appoint a locally respected individual or a representative from a community organization to serve as the meeting facilitator, particularly if there are any cultural or language barriers between your club and the community being served. Before organizing a meeting, define objectives for what you wish to accomplish and provide training for your facilitator. Knowing what you hope to achieve will help you plan and host a successful meeting.

**Advantages of community meetings include:**

- Gives people of diverse backgrounds a chance to express their views
- Allows participants to build upon one another's responses
- Can involve a fairly large group of people at one time
- Can help identify respected community leaders to involve in a project
- Can help discern the significance of a variety of issues
- Helps explore potential solutions

**Challenges with community meetings may include:**

- Can be difficult to maintain an open, comfortable, relaxed environment
- Can be difficult to keep the conversation on topic
- May be influenced by social constraints including gender disparities, power dynamics, cultural norms, etc.
- May be dominated by one or two vocal participants to the exclusion of others

**Addressing challenges in community meetings**

- If certain participants are dominating the conversation, make a point of asking others for their ideas.

- Watch body language and make adjustments as necessary. Maybe the facilitator needs a break, or you need to stop someone from speaking too much. A quick five-minute break can help refocus the discussion.

- Use encouraging body language and tone of voice, as well as words. For instance, lean forward when people are talking, keep your body position open and approachable, and be attentive to everyone, not just those who are most articulate.

- Pay attention to group dynamics. Be aware of emotional reactions participants may have to others' comments, particularly if they appear to be upset, hurt, angry, or defensive. A trained facilitator should encourage participants to follow ground rules and express themselves without making personal accusations or embarrassing others. If participants seem puzzled or confused, revisit the comments or points that caused the confusion or try to restate them more clearly.

- Keep the meeting on topic. If you need to refocus the discussion, summarize the points that have been made and ask if anyone has additional thoughts about the original question.

**Following up after a community meeting**

- Thank participants for attending and sharing their feedback.

- Summarize key findings and outline any action plans moving forward.

- If a project is identified, consider inviting key stakeholders to assist with the initiative.

## TIPS FOR HOSTING A COMMUNITY MEETING

**Identify your goals.** What insight do you hope to gain from this meeting? Are there specific issues in the community that you want to better understand? Design questions that will provoke constructive answers.

**Select an accessible location and convenient time.** Host the discussion at a venue that is easy to find and easy to access. Consider the participants' schedules when determining a time.

**Promote the event throughout the community.** Be mindful of cultural values and norms that may affect responses (for example, in some communities women may not feel empowered to talk openly and honestly in the presence of men). Factor in the level of literacy in the community and how residents normally receive information (e.g., fliers, radio, announcements at schools or houses of worship).

**Prepare a list of questions.** Keep your questions simple and concise. If you hear new concerns or the same issues being raised by participants, follow up on their responses with leading questions.

**Set and follow a schedule.** Decide how much time should be spent on each question and factor in new questions based on issues/ideas identified during the discussion.

**Set and state ground rules.** Share ground rules with participants before the meeting begins to prevent one or two participants from monopolizing the forum, help engage every member in the discussion, and keep the conversation on track.

**Take notes.** Write down ideas publically so everyone can see the notes during the discussion. Enlist one or two others to help you keep track of the conversation.

**Be an active listener.** Let all participants know that you're engaged and interested in what they have to say. Be considerate of their time.

**Ask participants to elaborate.** Ask follow-up questions if you don't understand their feedback.

**Allow for small group discussions.** Small groups can be effective in helping to ensure more speaking opportunities for attendees. Ask each group to record notes, and have a designated group member briefly summarize their discussion for the larger audience. Consider the composition of small group members to enhance communication opportunities for those community members less likely to speak out (a group of all women, young people, people with disabilities, ethnic minorities, etc.).

# Survey

Surveys are a popular method for collecting information and opinions. In the context of a community assessment, a survey can be an effective way to assess the community's perceived strengths, weaknesses, needs, and existing assets. Surveys can be general or targeted to specific segments of a community. Surveys can be delivered by email, phone, or in person.

**Advantages to using surveys include:**
- They can be administered remotely.
- They can be repeated.
- They can be completed anonymously, encouraging candid responses.
- They're generally inexpensive to administer.

**Challenges with surveys may include:**
- Identifying prospective respondents and obtaining their personal contact information can be difficult.
- Emailed surveys are ineffective in places where Internet access is limited.
- Phone surveys may be subject to sample or interviewer bias.
- Response rates for remote surveys are generally low compared to in-person assessments.
- Written surveys are ineffective with illiterate populations.
- Written surveys don't allow for follow-up questions.

**Types of survey questions**
- **Multiple choice questions.** Respondents select one or more options from a list. Multiple choice questions work best to use when you have a fixed number of options.

  **Example:** *What do you feel are the most pressing needs in your community (select two):*

  ☐ Health care

  ☐ Quality of education

  ☐ Employment opportunities

  ☐ Public safety

  ☐ Other (please describe): _____

- **Open-ended questions.** Respondents answer questions in their own words. This format can elicit more nuanced responses, but survey results aren't as easily quantifiable and must be individually analyzed.

  **Example:** *If you could improve one aspect of your community, what would it be and why?*

- **Demographic questions.** Demographic information (e.g., gender, education, income level) can add context to responses that will reveal trends within a larger population.

  **Example:** *What is your age?*

  ☐ 18-24

  ☐ 25-34

  ☐ 35-44

  ☐ 45-54

  ☐ 55-64

  ☐ 65+

- **Rating scales.** Respondents rate their opinion of a statement or set of statements along a range of feelings or attitudes.

**Example:** *Please respond to each statement about your school:*

| | 1 Strongly Disagree | 2 Somewhat Disagree | 3 Neither Agree nor Disagree | 4 Somewhat Agree | 5 Strongly Agree |
|---|---|---|---|---|---|
| The number of teachers is sufficient. | | | | | |
| Our teachers are well-qualified. | | | | | |
| Our school provides a safe environment for our children. | | | | | |
| Our classrooms are well-equipped. | | | | | |
| I am familiar with my child's curriculum. | | | | | |
| I regularly help my child with homework. | | | | | |
| Our school provides nutritious meals. | | | | | |

## TIPS FOR DESIGNING A GOOD SURVEY

**Explain why you're asking the questions.** Participants are more likely to respond if they feel there will be a valuable outcome, like the possibility of a future project that will attempt to address their needs.

**Keep it short and simple.** If your survey is too long, respondents may rush their responses or even drop out of the survey before completing it. Make sure your questions are brief and specific.

**Make sure your questions are unbiased.** Avoid leading questions like "Would you like to see a new library in the vacant lot instead of a playground?" in favor of a more neutral form: "What would you like to see developed in the vacant lot? A) library B) playground C) other (please describe)"

**Conduct a small pilot of the survey.** Testing your survey can reveal whether your questions are clear and specific.



# Interview

Interviews are one-on-one conversations between a facilitator (the interviewer) and a community stakeholder (the respondent). Interviews allow you to gain a deeper understanding of the respondent's ideas and feelings. Unlike surveys, interviews give the facilitator the freedom to veer off script and ask follow-up questions. And unlike group assessments, such as community discussions and focus groups, the respondent has the facilitator's sole attention and is more likely to share personal opinions freely.

**Advantages to using interviews include:**

- They allow the facilitator to follow the flow of conversation and ask spontaneous questions.
- They encourage the respondent to speak freely and give spontaneous answers.
- They're the most accurate and thorough way to obtain qualitative data from your respondents.
- They're effective with illiterate populations.

**Challenges with interviews may include:**

- They're time consuming.
- They reach only one respondent at a time.
- Conducting a good interview requires practice and some degree of skill.
- Finding willing respondents for "cold call" interviews can be difficult. (It's better to schedule phone interviews in advance.)

## TIPS FOR DESIGNING AND CONDUCTING A GOOD INTERVIEW

**Identify your goals.** What insight do you hope to gain from this interview? Are there specific issues in the community you want to better understand? Design questions that will provoke constructive answers.

**Identify your target respondents.** Whose opinions are you interested in understanding? Will you identify specific individuals to invite to appointments or will you solicit random participants in a public place?

**Prepare your interview questions.** Keep your questions as simple and concise as possible. If you have complex questions to ask, ask them toward the end of the interview. If you have sensitive questions to ask, be sure to conduct your interview in a private place. Keep your choice of words at a third-grade reading level.

**Practice.** Conduct some mock interviews with your colleagues and solicit their feedback.

**Establish rapport.** Make your respondent feel comfortable before you dive into your questions.

**Conduct your interview like a real conversation.** It's best to have your questions committed to memory so you can ask them naturally, switching up the order and adding impromptu follow-up questions as needed.

**Take accurate notes.** If you're recording your conversation instead, get the respondent's consent beforehand.

**Be an active listener.** Show your respondent that you're engaged and interested. Be considerate of their time. After all, this may be the first conversation in a long and productive service partnership!

**Ask respondents to elaborate.** Simple yes/no answers won't yield much useful information. Probe further with follow-up questions and ask respondents to clarify if you don't understand. You may want to prepare specific prompts for drawing out additional information. For example:

**Question:** How easy is it to get health care in your community?

**Prompts:**
– Is it easy to get to a hospital in your community? Is it easy to get medical treatment at the hospital?
– Do you visit the hospital for check-ups, or only for emergencies?
– In your experience, is medical care affordable? Do you need to have insurance?
– What happens to uninsured people? Where do they go?
– Have you or anyone you know gone without medical treatment due to the cost?

## Focus Group

A focus group is a carefully guided discussion used to determine a target group's preferences and opinions on a particular issue or idea. It can help you determine how the stakeholders believe community issues should be addressed.

Conducting a focus group requires careful planning and a skilled discussion facilitator. Most focus groups consist of six to 12 diverse stakeholders. Participants are asked a series of carefully worded, open-ended questions on different issues in the community. This approach promotes self-disclosure among participants.

In a group setting, dialogue tends to evolve and participants build on each other's responses. An effective focus group will seem more like a collaborative discussion than a debate. It's most effective to conduct a focus group in a private, comfortable setting, with one facilitator and someone to record participant responses.

While you want a diverse group of participants, keep cultural beliefs and community structure in mind. In some communities, women may not feel comfortable expressing their opinions in front of male facilitators or men from the community. Similarly, youth may not feel comfortable expressing their opinions in front of adults. You may need to host a number of focus groups with different participants based on occupation, age, gender, family structure, or other factors.

**Advantages to using focus groups include:**
- They're quick and easy to set up.
- Group dynamics can provide useful information that individual data collection doesn't.
- They're useful for gaining insight into a topic that's not easily quantifiable.
- They're effective with illiterate populations.

**Challenges with focus groups may include:**
- Facilitators are susceptible to bias.
- Discussion can be dominated or sidetracked by a few individuals.
- Analyzing data can be time consuming.
- They don't provide valid information on an individual level.
- The information may not represent the whole community, which may require additional focus groups.

**Preparing questions**

Develop a list of concepts you wish to discuss. These could include issues your club thinks might exist in the community, ideas for projects, or people's perceptions of community resources. Make sure your questions will help guide the discussion and encourage participants to share their ideas. Focus group questions include:

- **Opening questions** get participants talking and feeling comfortable. They should be easy to answer.
  - ➤ How long have you worked at the school?
  - ➤ What do you teach/which position do you hold?
- **Introductory questions** get the group thinking about the topic and focus the conversation.
  - ➤ If you could change three things at the school, what would you change and why?
- **Transition questions** prepare participants for the in-depth conversation.
  - ➤ Why do you think 50 percent of girls stop attending the school after their second year?
- **Key questions** focus on major areas of concern and guide the majority of the discussion.
  - ➤ What resources and training does the school need to encourage girls to return after their second year?
  - ➤ What resources and training do families need to send their daughters back to school after their second year?

- **Closing questions** wrap up the discussion and allow participants to voice any final thoughts.
    - ➤ Do you know any parents who would be interested in sharing why they didn't send their daughters to school after the second year?
    - ➤ Do you know any parents who want their daughter to return to school but are unable to send her?

**Following up with participants**

After completing the focus group, thank participants for their time and input. Consider how you'll follow-up with them and maintain relationships. Share your conclusions with focus group participants. Consider inviting participants to be involved in the project in some capacity, if appropriate.

**Variations**

- Hold separate focus groups on the same issue with members of your club and members from the community. Are the responses the same or different? Were additional concerns or factors expressed that you had not previously considered?
- Separate groups according to subgroup characteristics, such as gender, age, education or literacy, disability, ethnicity, etc.

## Asset Inventory

An asset inventory identifies various types of resources in a community, including its people, physical environment, institutions, services, and events. To conduct the inventory, participants identify people, places, and things they think are valuable and then document and analyze their findings. The resulting inventory identifies assets and can start the process of exploring the interconnectedness of those assets and how they can be used to create positive change.

**Advantages to using an asset inventory include:**

- Maximizes available resources
- Encourages the creation of broad, inclusive networks to affect change
- Helps identify areas of community member interest
- Can be maintained, expanded, and used repeatedly

**Challenges with asset inventories may include:**

- Data analysis can be time consuming.
- Organizing assets and identifying interconnectedness can be difficult.
- Interests, skills, and other nonphysical assets can be easily overlooked.

---

### TIPS FOR CONDUCTING A FOCUS GROUP

**Select a location that's convenient,** private, and comfortable for a small-group discussion and a time that participants can attend.

If your facilitator is someone local, **provide training** beforehand.

**Arrange for another facilitator to record the focus group session or take public notes of participants' responses.** Periodically ask participants if the notes accurately capture the group's input.

**Invite Rotary Community Corps members** to participate in focus group activities.

**Invite six to 12 participants,** an ideal size for a focus group. Make sure they're representative of the community and interested and willing to provide feedback.

**Explain the purpose of the focus group, and state your goals openly.** Establish simple ground rules to promote positive interaction and confidence in the process.

**Introduce the main topic of discussion, and guide the discussion using your prepared questions.** Establish a schedule beforehand, such as 10-15 minutes per question.

**Allow each person time to answer.** Listen carefully to the ideas expressed and ask for clarification if needed, but avoid confrontations or debates.

**Allow participants to respond to comments.** Make sure the discussion and comments stay on topic.

**Suggested inventory questions:**

- What is special about your community?
- What products are made in your community?
- What events take place in your community?
- When and where do people gather, and what do they do together? Include religious, social service, sporting, entertainment, and other types of gatherings.
- Who do you know? What skills do they have? What do they own? What do they know about that might be taught to others?
- Is there an enterprising spirit in your community, either in business or civic/cultural activities?
- What topics or issues interest a significant number of community members?
- What institutions exist in the community, both private and public?
- Who are the formal and informal leaders of the community? Who do people listen to?
- How does information spread in your community?
- What services are provided in your community? Who provides them?
- What natural resources are found in your community? Which areas have open space?
- What skills or knowledge in your community should be passed down to the next generation?
- What businesses exist in your community?
- What volunteer activities exist in your community, both formal and informal?
- How do community members demonstrate that they care for and trust their neighbors?

### Sample Community Assets

- Skill of older community members in gardening, canning, and preserving home-grown fruits and vegetables
- Interest of youth in learning about and practicing computer programming
- Enterprising spirit of a group of potential business owners
- Sporting venues, parks, forests, and other green spaces
- Parent associations, religious congregations, and other volunteer groups
- Common practice of sharing food with the sick and visiting the elderly
- Cultural activities and events coordinated by immigrants in the community

**Variations**

- Divide participants into groups by gender, age, or profession to reveal the ways different groups view the community.
- Instead of a broad-based inventory, choose a specific community issue such as education or health and create an inventory of only those assets.
- Incorporate a walk or drive around the community to encourage an expansive approach to identifying assets.

## TIPS FOR CONDUCTING AN ASSET INVENTORY

**Determine what you want to inventory,** and identify potential participants.

**Invite a small, diverse group of community members** to conduct the inventory in one or more sessions.

**Use strong group facilitators to ensure that all participants have an opportunity to contribute** and that each discussion group stays on task and on time.

**Analyze the results.** Organize assets by category and document interconnections.

**Use available assets to create coalitions and networks** to address community issues.

**Update and maintain the inventory regularly.**

# Community Mapping

Community mapping is used to reveal different perspectives about a community. It requires few resources and little time and can be adapted for participants of virtually any age or educational background.

In this facilitated activity, individuals or groups draw a map of their community, marking certain points of importance and noting how often they visit these places. A facilitator leads a discussion about the maps, while another facilitator records the discussion. A successful community mapping exercise will get participants to:

- Identify how they use community resources and any barriers they experience in accessing these resources
- Compare perceptions of the importance of various community resources
- Generate ideas for community improvement

**Advantages of community mapping include:**
- It's a lively and engaging activity.
- It encourages participants to discuss how they might improve their community.
- Activity can be broken up into multiple sessions with different community stakeholder groups.

**Challenges with community mapping may include:**
- Analyzing results can be a difficult process, because the information is gathered in a visual format.
- Drawing conclusions from the maps and determining next steps may require additional assessment activities.

**What to map**
- Places of residence
- Places of importance to them, such as markets, religious centers, schools, community centers, parks, businesses, fields, water sources, government offices, health clinics, police stations, and recreational areas
- Places where they spend the most time, using different colors to indicate daily, weekly, monthly, or yearly visits
- Places where they enjoy and don't enjoy spending time, indicated by different colors of markers
- Places they'd like to add to the community, indicated by sticky notes or small squares of paper

**Variations**
- Separate participants into small groups by gender, age, ethnicity, profession, etc., to encourage diversity of the resulting maps.
- Have groups tour the community before drawing their maps.
- Ask participants to identify a central place in the community to help orient everyone's maps.

## Sustainability

Sustainable projects build a community's capacity to address issues without relying on external support. When choosing a project, think carefully about both the short-term and long-term impact. For example, building a modern well and water pump for a neighborhood without access to clean drinking water might solve a community's immediate water problems. But if the community cannot maintain the well, the people's water problems will quickly return. The same might be said for a community beautification project. A club could build a park, clean up litter, or paint over graffiti in an impoverished neighborhood in their community. However, if people from the neighborhood aren't invested in the project, the graffiti and litter will almost certainly reappear. Sustainable projects take these issues into account and provide long-term solutions to chronic problems.

## Partners in Service

Rotary's partners in service — Rotary Volunteers, Rotaractors, Interactors, and Rotary Community Corps members — all have special talents that can strengthen a club's service efforts. Clubs may be more interested in projects that involve partners in service and should consider how different service opportunities might best employ the talents of each group.

## Community Collaboration

Your project can be greatly enhanced by tapping the community's existing resources and involving community groups or businesses, particularly those that have a tie to the area being served. This sort of increased community support helps give ownership to a broader range of community members and increases the likelihood of having the project result in real, meaningful change.

Working with other organizations in the community such as local governments, nongovernmental agencies, and other service clubs can heighten a project's impact. Rotary clubs often find that working with national and international organizations strengthens local initiatives. The World Health Organization, for example, frequently works with Rotary clubs on service projects. Many international organizations maintain field offices in countries where they have ongoing projects and programs. Speak with these organizations when planning a project to learn about the resources, such as technical expertise, training, equipment and grants, they may be able to contribute to a project.

When working on a joint project, make sure you are certain of the cooperating organization's integrity.
*Ask these questions:*

- What is the organization's mission?
- Does its mission agree with the values of your club?
- What is the organization's history and reputation in the community?
- Does the organization have financial statements available?
- Is the organization willing to work with your club and share public relations opportunities?
- What kinds of hands-on service opportunities would members of your club have in working with the organization?

## Rotary's Cooperative Relationships

To provide Rotary clubs with additional opportunities for service and technical expertise the RI Board has approved several cooperative relationships with other organizations. Rotary clubs and districts are encouraged to collaborate with these organizations on projects in their communities. Fact sheets on each cooperative relationship are available at www.rotary.org.

### Some Things to Think About

- Will the project be supported by the community and involve community stakeholders?
- Does this project match your club's pattern of community involvement?
- What is your club's community service history?
- Is the project attractive to your club's members?
- What financial and time commitments will be required of your club?
- How long will the project last?
- Will the project be sustainable?
- How can you work with Rotary's partners in service?
- How will other community organizations be involved in your club's project?
- Can your club collaborate on a community project with an organization from Rotary's cooperative relationships?

# Service Project Evaluation Survey

Please tell us about your volunteer experience today. You helped to create positive change in our community, and we want to hear about it. We will process this information and share the results of your team's hard work. Please complete this survey before you leave the project site and turn it in to your Volunteer Leader.

Rate the following statements on a scale of 1-5, where 1=Strongly Disagree and 5=Strongly Agree.

**Scale**

1 Strongly Disagree    2 Disagree    3 Neutral    4 Agree    5 Strongly Agree

1. The project we completed made a positive impact on the community.

    1      2      3      4      5

2. Participating in this project was a good way to meet and network with people in my community.

    1      2      3      4      5

3. I feel a stronger connection to my community after participating in this project.

    1      2      3      4      5

4. I have a greater sense of pride in my community after participating in this project.

    1      2      3      4      5

5. I felt a sense of accomplishment at the end of the project.

    1      2      3      4      5

6. The project was well organized.

    1      2      3      4      5

7. This project motivated me to continue to volunteer.

    1      2      3      4      5

8. I would like to lead a project in the future.

    1      2      3      4      5

# Service Project Evaluation Survey

Share a memorable moment from the project (use the back of this sheet, if necessary):

How could we have improved this volunteer experience for you?

If you would like to share any other feedback, please list below.

Thank you!

# Lone Star P.E.T.S. 2019

**SATURDAY, MARCH 2, 2019**

**SESSION B-7        PROMOTING ROTARY**

> **GOAL**
> **Club Presidents-elect will be able to provide leadership in reviewing and planning activities to enhance public and club awareness of Rotary s impact.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1.  Identify ways that each respective club is impacting their community

2.  Share methods for getting the story out in the club and local community about the good each Rotary club is doing

3.  List resources that can be employed to promote Rotary

REFERENCE MATERIALS

Lead Your Club: President -- Chapter 6: Promoting Rotary

# KEY POINTS FOR TALKING ABOUT ROTARY

Here are messages to help you develop key points before media interviews and speeches to external audiences.

### INTRODUCTORY PRIMARY MESSAGE

- Every day, in our communities and around the world, our neighbors face tough challenges — conflict, disease, and lack of clean water, health care, education, and economic opportunity.

### SUPPORTING MESSAGE

- Rotarians have a vision of what's possible for their neighbors. They mobilize other leaders and experts to take action and see it through.

### ABOUT ROTARY — PRIMARY MESSAGES

- Rotarians are people of action, driven by a desire to create opportunities, strengthen communities, and find solutions to the tough challenges that affect people around the world.

- Rotary is a community of 1.2 million men and women from all continents, cultures, professions, and experiences who connect through our local clubs.

- Rotary clubs tackle projects of every scale and inspire fellow Rotarians, friends, neighbors, and partners to share their vision, exchange ideas for lasting solutions, and take action to bring those ideas to life.

### SUPPORTING MESSAGES

- Together with our partners, neighbors, and friends, we're:
  - Promoting peace — encouraging dialogue to foster understanding within and across cultures
  - Fighting disease — educating and equipping communities to stop the spread of life-threatening or preventable diseases
  - Providing clean water — building local solutions to bring clean water and sanitation services to more people every day
  - Saving mothers and children — expanding access to quality care so mothers and children can live and grow stronger
  - Supporting education — expanding access to education and empowering educators to inspire more children and adults to learn
  - Growing local economies — creating opportunities for individuals and communities to thrive financially and socially
  - Eradicating polio — uniting the world to end polio, once and for all

- Rotary is a trusted partner and resource. With members and projects in almost every part of the globe, there's no limit to the good we can do.

**Rotary's top philanthropic goal is to eradicate polio worldwide.**

- Rotary and its partners are close to eradicating polio, having achieved a 99.9 percent reduction in cases since 1988.

- Rotary's chief role is fundraising, advocacy, and mobilizing volunteers.

- Rotary's contributions to the global polio eradication effort will exceed more than $2.2 billion and countless volunteer hours to protect more than two billion children in 122 countries from polio.

- Rotary is working to raise an additional $50 million per year through 2020 for polio eradication, to be matched 2-to-1 by the Bill & Melinda Gates Foundation.

**Rotary builds peace and international understanding not only through education and humanitarian service but also by developing young leaders.**

- More than 900 graduates of the Rotary Peace Centers master's degree program are in key decision-making positions in governments, corporations, and organizations around the world.

- Rotary's humanitarian projects help prevent the underlying causes of conflict, such as poverty, illiteracy, and lack of clean water.

- Rotary's Youth Exchange program fosters international goodwill by enabling over 8,000 high school students to live and study abroad each year in 115 countries.

- Rotary's Interact and Rotaract programs develop young leaders by promoting volunteer service, leadership, and professional growth.

# ROTARY UNITES LEADERS

- Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.
- Rotary brings together leaders who use their combined expertise to tackle some of the toughest challenges facing our communities.
- Rotary harnesses the strength and experience of professional and community leaders from nearly every country around the world.

# ROTARY EXCHANGES IDEAS

- At Rotary, we discover and celebrate our diverse perspectives during club meetings, conferences, service projects, and social events.
- Rotary finds a place for your expertise and passion. Whether you want to lead a project or participate in one, Rotary welcomes your involvement.

# ROTARY TAKES ACTION

- Rotary creates positive change in communities around the world through our service projects.
- From stocking food pantries to providing clean water and improving maternal health, Rotary clubs join forces to carry out impactful and sustainable projects in communities around the world.

# THROUGH ROTARY

- We build lifelong relationships.
- We honor our commitments.
- We connect diverse perspectives.
- We apply our leadership and expertise to address social issues.

# Rotary

## Overview

Our identity at a glance contains the basic elements in our visual system: our logos, color palette, typography, iconography, and information graphic styles, along with photography style and suggested subject matter and merchandise ideas. Each element is designed to work in harmony with the others, while providing flexibility within a framework. When combined, they clearly convey our active leadership, our persevering spirit, and our compassion. Please use this condensed guide in conjunction with the full guidelines available at www.rotary.org.

### What logo format do I use for:

| | | |
|---|---|---|
| Print | .eps | spot or cmyk |
| Embroidery | .eps | spot or cmyk |
| Silkscreen | .eps | spot or cmyk |
| Word Doc (Print) | .png | rgb |
| PowerPoint | .png | rgb |
| Digital: Web/Email Tablet/Mobile | .png | rgb |

## Logos

**Masterbrand Signature**

RotaryMBS-R_PMS-C.eps

RotaryMBS-R_Rev-Gold-PMS-C.eps

RotaryMBS-R_Rev.eps

RotaryMBS-R_Azure-PMS-C.eps

RotaryMBS-R_Black.eps

**Mark of Excellence**

RotaryMOE-R_PMS-C.eps

RotaryMOE-R_Rev.eps

RotaryMOE-R_Azure-PMS-C.eps
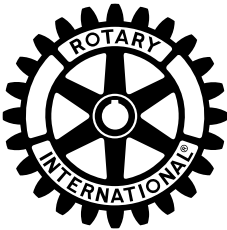
RotaryMOE-R_Black.eps

**Single Page Logo Usage Example**
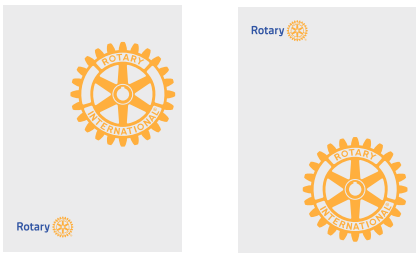
**Multipage Example (front/back)**
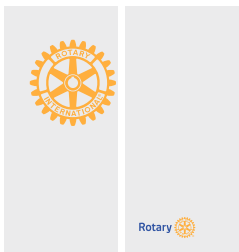
**Signature System for Clubs, Districts, Zones, and Projects**

Rotary
Club [of/at] [Location]

Rotary
District 1239

Rotary
Zone 33

Rotary
Club of Evanston

Day of Service

## Typography

**Licensed Option —** fonts for purchase

Primary
**FRUTIGER BLACK CONDENSED ALL CAPS FOR HEADLINES**
Frutiger for subheads, secondary nav, info graphics, and lockups

Secondary
Sentinel for body text, secondary heads, captions, and callouts

**Free Option —** when Frutiger and Sentinel are not available or are cost-prohibitive

Primary
**OPEN SANS CONDENSED**
OPEN SANS
**ARIAL NARROW
FOR HEADLINES**
Arial for subheads, secondary nav, etc.

Secondary
Georgia for body text, secondary heads, etc.

## Imagery

Rotarians Taking Action for Community

Rotarians Uniting and Exchanging Ideas

Metaphorical

## Member Pin

Recognized by Rotarians the world over, your Rotary pin remains unchanged as a proud symbol of membership.

## Colors

**Azure**
PMS 2175C
C99 M47 Y0 K0
PMS 2175U
C99 M53 Y0 K0
Hex #0050a2
R0 G93 B170

**Royal Blue**
PMS 286C
C100 M80 Y9 K2
PMS 286U
C100 M92 Y9 K2
Hex #0c3c7c
R23 G69 B143

**Gold**
PMS 130C
C0 M41 Y100 K0
PMS 129U
C0 M35 Y100 K0
Hex #f7a81b
R247 G168 B27

# Lone Star P.E.T.S. 2019

**SATURDAY, MARCH 2, 2019**

**SESSION C-8          ATTRACTING MEMBERS**

> **GOAL**
> **Club Presidents-elect will begin to develop innovative strategies for attracting new members**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1. Outline a process for working with club members to develop new strategies for attracting new members

2. Recall ideas offered by other members of the group during this session for including non-Rotarians in club projects or meetings

3. Identify prospective groups and individuals in each respective community with the interest in connecting with Rotary clubs

REFERENCE MATERIALS

Lead Your Club:  President -- Chapter 5:  Strengthening Your Membership

# FINDING NEW CLUB MEMBERS

Asking your fellow members about people they know in the community who would be assets to the club is an important step in membership growth. Prospective members are likely to rely on the experiences and opinions of their friends, family, or colleagues when considering joining an organization like Rotary.

Encourage others to invite prospective members to club meetings, service projects, and events so they can see how your club helps the community and provides opportunities to form connections and friendships. It may take a few conversations or several visits for prospective members to get a full understanding of Rotary and how they could benefit from membership. It's important to allow that time to make sure that it's a good fit for everyone involved.

## OUTCOME

Identifying prospective members and actively recruiting them will help your club:

- Develop a pool of potential candidates for membership

- Determine how to introduce prospective members to your club

- Get new members who are well vetted and more likely to stay

## GETTING ORGANIZED

Set aside time for members to complete the worksheet on page 3.3 at one of your club meetings. Typically, this exercise works best at the beginning of a Rotary year, when annual membership goals have just been set, or in March, when the incoming president is planning for the next Rotary year.

# GETTING STARTED

Ready to start? Here's how.

## Step 1: Ask members to complete the Identifying Prospective Members Worksheet

Explain the purpose of this exercise and how it relates to the assessments your club has already completed. Distribute the worksheet to club members and ask them to complete it. Compile the information from the worksheets and maintain a master list of prospects.

## Step 2: Make an action plan

Compile the names that were circled on the worksheets and make a plan to invite those people to a club meeting, service project, or social event. If you conducted classification and diversity assessments, refer to the list of groups you found to be underrepresented in your club. Your plan should specify who you'll invite, to what, who will invite them, and how they'll do so.

## Step 3: Invite prospective members to a club event

Invite the people you identified as qualified prospective members to attend an upcoming service project or meeting. Or host a special event where they can meet club members and learn about the club in a casual atmosphere. Make them feel welcome by having the club president or another leader greet them personally.

## Step 4: Follow through

• Ask members who invited prospective members to contact their guests and report back on their interest in joining.

• Keep the worksheets and your compiled list for future recruiting efforts.

• Regularly go to My Rotary's Club Administration area to track membership leads gathered through Rotary's website.

• If you find people who are interested in Rotary and qualified for membership but not a good fit for your club, refer them to another club.

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### Interested in doing other assessments?

Representing Your Community's Professions: A Classification Assessment

Diversifying Your Club: A Member Diversity Assessment

Improving Your Member Retention: Retention Assessment and Analysis

Enhancing the Club Experience: Member Satisfaction Survey

Understanding Why Members Leave: Exit Survey

# IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

Think of your contacts, acquaintances, friends, and family members who might qualify for membership in your club. It's not necessary to know whether they are ready to join Rotary.

Once you've listed your contacts, circle the names of any you feel would be a good fit for your club.

Member name: _____ Date: _____

## Professional Contacts

Consider your supervisor, current and former colleagues, acquaintances from professional associations, and people you have done business with recently.

Name: _____ Occupation: _____

Name: _____ Occupation: _____

## Service Contacts

Consider neighbors, community leaders, and acquaintances who have volunteered with you on Rotary or non-Rotary events or service projects.

Name: _____ Occupation: _____

Name: _____ Occupation: _____

## Community Contacts

- Physicians
- Dentists
- Real estate agents
- Financial managers or planners
- Religious leaders
- Lawyers
- Business consultants
- Accountants
- Veterinarians
- Internet technology consultants
- Public relations professionals
- Entrepreneurs
- Nonprofit professionals
- School administrators
- University professors
- Civic leaders
- Social workers
- Psychologists
- Sales executives

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Name: _____ Occupation: _____

## Rotary Contacts

Consider past members or Rotary alumni that you know or that your club maintains contact with. Rotary alumni are those who have experienced Rotary through various programs, including:

- Interact
- Rotaract
- Rotary Youth Exchange
- New Generations Service Exchange
- Rotary Youth Leadership Awards (RYLA)
- Rotary Peace Fellowships
- Rotary Scholarships
- Vocational training teams
- Ambassadorial Scholarships
- Grants for University Teachers
- Group Study Exchange
- Rotary Volunteers

Name: _____ Occupation: _____

Name: _____ Occupation: _____

# REPRESENTING YOUR COMMUNITY'S PROFESSIONS

In Rotary, members' classifications refer to their occupations, professional expertise, and training. Rotary clubs aim to include members from a number of classifications because bringing together professionals from different fields and industries increases a club's capacity to serve its community as well as giving its members an opportunity to learn more about others in the community. To maximize your impact, strive for professional diversity that represents the professions held in your community. Because business activities and terminology vary from community to community, Rotary doesn't maintain a comprehensive list of classifications. Be open to nontraditional professions that bring new skills and perspectives to your club.

## OUTCOME

Conduct this classification assessment and act on its results to:

- **Grow and diversify your club's membership.**
  You will clearly see which professions are represented in your club and what skills and expertise it's missing. Each gap you identify presents an opportunity to target your recruitment efforts.

- **Make the best use of members' expertise and skills.**
  Your club's collective knowledge and talent can help it make a more significant impact in your community. Once you recognize the expertise and skills your members have acquired through their professions, you'll be better able to use them to the club's advantage. Recognizing members for their unique talents will yield a number of benefits, too. When members' professional skills are put to good use:

- Retention rates are higher, because members feel useful and valued
- Clubs are better equipped to conduct successful service projects
- Members are motivated to excel
- Members have more opportunities to grow professionally and network
- Clubs are more attractive to prospective members

## GETTING ORGANIZED

To conduct a successful classification assessment, you'll need a dedicated group of members. It could be your membership committee, or you can organize a classification assessment team.

## GETTING STARTED

Ready to start? Here's how.

### Step 1: Gather member data

Have all club members complete the Occupation and Professional Expertise Survey on page 1.4. You can ask them to take it during a club meeting or turn it into an online survey that they can complete in their own time. Explain the purpose of the classification assessment and make sure that members understand the benefits of having a good mix of professions represented in your club.

Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time. Steps 3 and 4 could take 1-2 weeks.

### Step 2: Evaluate the data

Analyze the completed Occupation and Professional Expertise Surveys and fill in the Classification Audit on page 1.6 with the professions of your club's members.

### Step 3: Collect data on your community

Gather data about the professional makeup of your community. You can research local employment statistics online or ask your chamber of commerce or another local business association for information.

Next, fill in the Classification Audit table with the top five professions in your community, along with the percentage of community members in those professions.

### Step 4: Analyze the data

Use the results of the Classification Audit to determine which professions should be added to your club to achieve a balanced membership. Finally, answer questions on the Classification Worksheet on page 1.7.

## Step 5: Present the results

Present your results and recommended actions at a club meeting, including:

- How seeking members from underrepresented classifications can guide your efforts to identify potential members

- How the skills you've discovered among your current members can be used to strengthen your club and enhance service projects

Get member input on your recommended actions, gather consensus, and adjust your action plan accordingly.

## Step 6: Take action

The final step is to take action based on your results. Identify qualified prospective members according to the gaps you found in your club's classifications. Ask current members to fill club roles or apply their skills to service projects to maximize the club's impact.

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### Interested in doing other assessments?

Diversifying Your Club: A Member Diversity Assessment

Finding New Club Members: A Prospective Member Exercise

Improving Your Member Retention: Retention Assessment and Analysis

Enhancing the Club Experience: Member Satisfaction Survey

Understanding Why Members Leave: Exit Survey

# OCCUPATION AND PROFESSIONAL EXPERTISE SURVEY (FROM STEP 1)

**Rotary**

1. What is your current profession? If retired, give your most recent profession.

2. Have you had other professions, or do you have other expertise that's not related to your current profession?

3. In what industry do you work? (For example, food industry, publishing, etc.)

4. Do you have experience or expertise in the following areas? If so, please briefly explain.

    A. Leadership roles

    B. Training / teaching

    C. Mentoring

    D. Website design or management

    E. Social media (blogging, Twitter, Facebook, LinkedIn, etc.)

    F. Research or survey design

    G. Fundraising

    H. Public relations or marketing

    I. Project management

    J. Strategic planning

    K. Other experience, expertise, or skills

# CLASSIFICATION AUDIT

| Professions represented in the club | Number of members in that profession | Percentage of membership |
|---|---|---|
| 1. | | % |
| 2. | | % |
| 3. | | % |
| 4. | | % |
| 5. | | % |
| 6. | | % |
| 7. | | % |
| 8. | | % |
| 9. | | % |
| 10. | | % |
| 11. | | % |
| 12. | | % |

| Top professions in the community | Percentage of community (if available) |
|---|---|
| 1. | % |
| 2. | % |
| 3. | % |
| 4. | % |
| 5. | % |

# CLASSIFICATION WORKSHEET

1. What are the top classifications or professions in your community or the surrounding area that are either not represented or underrepresented in your club?

2. What challenges could your club face in filling the classification gaps you've identified?

3. Which of the classifications you listed in your response to question 1 should your club focus on filling? Why?

# ACTION PLAN

Use your findings to create an action plan that addresses your club's professional diversity.

| Action | Person responsible | Time frame | Resources needed |
|---|---|---|---|
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# DIVERSIFYING YOUR CLUB

Diversity refers to inclusion of people from many groups. It is a source of innovation, as well as one of Rotary's core values. Having members with different backgrounds and viewpoints gives your club a broader understanding of the community, its problems, and possible solutions. Strive to have a group of members who offer the club diverse skills, talents, and experiences. If your club includes different ethnicities, ages, and cultures, as well as a good gender balance, it will have greater capacity to serve your community and communities around the world. Equally important is creating a culture of inclusion, where these differences are respected, supported, and valued.

Diversifying your club is not just about including a mix of people. It's also about working well together.

## OUTCOME

Conduct this diversity assessment and act on its results to:

- Raise your members' awareness of the diversity in your community
- Build member support for increasing diversity
- Diversify your club to better represent the working professionals in your community

## GETTING ORGANIZED

Dedicate time in a series of club meetings to conducting each step of your member diversity assessment. Choose a facilitator (the membership committee chair, a committee member, or the club president) who is comfortable talking about diversity and passionate about the need for greater diversity in your club. Or, consider inviting a diversity and inclusion leader to talk to your club. This activity should involve all club members so that they all have a stake in the process. Greater inclusion will increase awareness and support for future action.

# GETTING STARTED

Ready to start? Here's how.

## Step 1: Discuss the benefits of having a diverse membership

Discuss the benefits of diversity with your club. Recognize and celebrate past successes, if appropriate. For example, highlight a service project or other club accomplishment that has been achieved through having members with diverse professional skills. Discuss your club's representation of professional field or classification, gender, age, ethnicity, and culture, and set goals.

## Step 2: Collect information

Recap the diversity discussion from step 1 and reiterate the positive effects of having a more diverse membership.

Distribute the Member Diversity Worksheet. Split club members into four groups and instruct each group that they are to gather information from one of the following sources on their own time between this meeting and the next, completing what they can of the worksheet:

- **Group 1:** Get data on the demographics of the community from a local business association, such as the chamber of commerce

- **Group 2:** Gather information about the community's cultural and demographic composition from the local tourism bureau

- **Group 3:** Get socioeconomic statistics from local economic development experts or city government departments

- **Group 4:** Get the most recent census results, which may include information on the age, gender, and ethnic makeup of the area's residents and review them

## Step 3: Discuss the findings within the groups

The following week, ask groups to meet to discuss their assignments, share what they completed on their worksheets, and compile their findings. Then have each group choose a spokesperson who will present its findings to the club at a future meeting.

## Step 4: Report the results and discuss their implications

Have each group spend about five minutes presenting its findings at a club meeting. Facilitate a discussion about the reports and their relevance.

Does your Rotary club's membership reflect:

• The ages of the professional population in the community?

• The gender composition of the working professionals in the community?

• The ethnic and cultural diversity of the community?

## Step 5: Develop a member diversity action plan

Find strategies to reach out to specific groups that were found to be underrepresented in your club. Document your plan and assign tasks to those on the membership committee, or ask other club members to help. Monitor progress toward your diversity goals and continually update club members.

### Interested in doing other assessments?

Representing Your Community's Professions: A Classification Assessment
Finding New Club Members: A Prospective Member Exercise
Improving Your Member Retention: Retention Assessment and Analysis
Enhancing the Club Experience: Member Satisfaction Survey
Understanding Why Members Leave: Exit Survey

# MEMBER DIVERSITY WORKSHEET

**Rotary**

1.  What sources did you consult in your search for data on your community's demographic composition?

2.  What data did you find on:

    Age:

    Gender:

    Ethnic background:

3. Does this data correspond to the current composition of working professionals in your community? Explain your evidence.

4. What fact or statistic did you find most interesting?

5. What surprised you most?

6. What surprised you least?

7. Are any demographic groups underrepresented in the club?

8. What can the club do to better represent working professionals in the community?

9. How can your findings be integrated into an action plan for membership development?

# Notes

# Lone Star P.E.T.S. 2019

**SATURDAY, MARCH 2, 2019**

**SESSION C-9          ENGAGING AND RETAINING MEMBERS**

> **GOAL: Club Presidents-elect will begin to design a strategy to engage and retain club members in activities including training and development.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1.  Explain the value of membership assessment tools in the planning of strategies to engage and retain club members

2.  Identify how key benefits of attending district events and seminars impact membership engagement and retention

3.  Explain the value of a comprehensive membership engagement and retention strategy for their respective Rotary club

REFERENCE MATERIALS

Lead Your Club:  President -- Chapter 5:  Strengthening Your Membership

# ENHANCING THE CLUB EXPERIENCE

The power of your club lies in your members. By asking them for feedback regularly, you are demonstrating your openness to change and empowering them to help craft an ideal club experience. Use this survey to obtain member feedback about your club. Then use the information to make a plan to ensure that members are enjoying their Rotary club experience.

## OUTCOME

Conduct this assessment and act on its results to:

- Identify what your members like and don't like about their club experience

- Develop an action plan that builds on what your members like and discontinues or changes what your members aren't satisfied with

## GETTING ORGANIZED

You'll need a dedicated group of members to conduct the member satisfaction survey. It can be your club's membership committee or a few interested, unbiased members. You can either devote time during a club meeting to talking about member satisfaction and taking the survey or hand it out or email it to members and allow them more time to complete it. Alternatively, hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.

Keep responses confidential when discussing and analyzing them.

# GETTING STARTED

Ready to start? Here's how.

## Step 1: Introduce the survey

Discuss why it's important to get feedback from all club members.

## Step 2: Distribute the survey

Pass out or email the Member Satisfaction Survey to members or use an online survey tool. Explain that their responses are confidential and will be used to enhance the club experience for both current and prospective members.

## Step 3: Analyze the data

Have your dedicated group review the survey results. Stress the importance of confidentiality and respecting all viewpoints.

## Step 4: Present the results

Present and discuss the survey results to the club. Allow time for members to ask questions.

## Step 5: Make an action plan

Hold a forum where club members can offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for implementing changes.

## Step 6: Take action

The final step is to implement the action plan. Talk to members and involve as many of them as you can in the process so that they are invested in enhancing the club experience.

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### Interested in doing other assessments?

Representing Your Community's Professions: A Classification Assessment

Diversifying Your Club: A Member Diversity Assessment

Finding New Club Members: A Prospective Member Exercise

Improving Your Member Retention: Retention Assessment and Analysis

Understanding Why Members Leave: Exit Survey

# MEMBER SATISFACTION SURVEY

This survey focuses on your day-to-day experiences in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers; we simply ask for your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with your membership in our Rotary club?

   ☐ Satisfied

   ☐ Somewhat satisfied

   ☐ Neither satisfied nor dissatisfied

   ☐ Somewhat dissatisfied

   ☐ Dissatisfied

2. Considering our club's **culture, members, and meetings**, indicate your agreement with the following statements.

| | Agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Disagree |
|---|---|---|---|---|---|
| Club meetings are a good use of my time | ☐ | ☐ | ☐ | ☐ | ☐ |
| My club does a good job involving new members | ☐ | ☐ | ☐ | ☐ | ☐ |
| My club's members care about one another | ☐ | ☐ | ☐ | ☐ | ☐ |
| My club reflects the demographic profile of our area's business, professional, and community leaders | ☐ | ☐ | ☐ | ☐ | ☐ |

| | Agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Disagree |
|---|---|---|---|---|---|
| My club actively seeks to involve all members in projects and activities according to their interests, skills, and availability | ☐ | ☐ | ☐ | ☐ | ☐ |
| The amount of fundraising activities is appropriate | ☐ | ☐ | ☐ | ☐ | ☐ |

**Comments and suggestions:**

3. How would you rate the following aspects of our **weekly meetings**?

| | Excellent | Good | Fair | Poor | Very poor | N/A |
|---|---|---|---|---|---|---|
| Rotary International updates | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Length | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Time for socializing | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Professional connections and networking | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Variety of program topics | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Location | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Meeting time and day | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Meals or refreshments | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Speakers and programs | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |

**Comments and suggestions:**

4. What are your opinions about our club's **service projects**?

| | Just right | Too many | Too few |
|---|---|---|---|
| Total number of service projects | ☐ | ☐ | ☐ |
| Number of community service projects | ☐ | ☐ | ☐ |
| Number of international service projects | ☐ | ☐ | ☐ |

| | Agree | Disagree | No opinion |
|---|---|---|---|
| Service projects are well organized | ☐ | ☐ | ☐ |
| Service projects make a difference in the community or the world | ☐ | ☐ | ☐ |
| Service projects are meaningful to me | ☐ | ☐ | ☐ |

**Comments and suggestions:**

5. Thinking about **communication** and **responsiveness** in our Rotary club, indicate your agreement with the following statements.

| | Agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Disagree |
|---|---|---|---|---|---|
| My club does a good job communicating to members | ☐ | ☐ | ☐ | ☐ | ☐ |
| My club does a good job listening to members | ☐ | ☐ | ☐ | ☐ | ☐ |
| My club seeks input and ideas from members | ☐ | ☐ | ☐ | ☐ | ☐ |
| My club regularly acts upon members' input and ideas | ☐ | ☐ | ☐ | ☐ | ☐ |
| I am comfortable with the pace of change in my club | ☐ | ☐ | ☐ | ☐ | ☐ |
| My club works to update club processes and rules to meet the needs of its members | ☐ | ☐ | ☐ | ☐ | ☐ |

**Comments and suggestions:**

6. Indicate your agreement with the following statements about the **value** of your membership.

| | Agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Disagree |
|---|---|---|---|---|---|
| I feel welcome in my club | ☐ | ☐ | ☐ | ☐ | ☐ |
| I make valuable connections through my club | ☐ | ☐ | ☐ | ☐ | ☐ |
| My club provides opportunities to use my talents and skills | ☐ | ☐ | ☐ | ☐ | ☐ |
| My experience as a member is worth the money I spend on Rotary participation | ☐ | ☐ | ☐ | ☐ | ☐ |
| My experience as a member is worth the time I give to Rotary | ☐ | ☐ | ☐ | ☐ | ☐ |
| My family sees value in my Rotary membership | ☐ | ☐ | ☐ | ☐ | ☐ |
| My friends see value in my Rotary membership | ☐ | ☐ | ☐ | ☐ | ☐ |
| Through Rotary, I make a difference in my community | ☐ | ☐ | ☐ | ☐ | ☐ |
| Through Rotary, I make a difference in the world | ☐ | ☐ | ☐ | ☐ | ☐ |

**Comments and suggestions:**

7. Indicate your agreement with the following statements about **club engagement**.

| | Agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Disagree |
|---|---|---|---|---|---|
| I invite my friends, family, and colleagues to club events | ☐ | ☐ | ☐ | ☐ | ☐ |
| I invite qualified prospective members to join my Rotary club | ☐ | ☐ | ☐ | ☐ | ☐ |
| I frequently participate in my club's activities, projects, and programs | ☐ | ☐ | ☐ | ☐ | ☐ |
| I'm proud of my Rotary club | ☐ | ☐ | ☐ | ☐ | ☐ |

**Comments and suggestions:**

8. Thinking about the **costs** associated with club membership, how would you rate the following?

| | Too low | Just right | Too high | Not applicable |
|---|---|---|---|---|
| Club dues | ☐ | ☐ | ☐ | ☐ |
| Meals at weekly meetings | ☐ | ☐ | ☐ | ☐ |
| Club fines | ☐ | ☐ | ☐ | ☐ |
| Club assessments | ☐ | ☐ | ☐ | ☐ |
| Requests for donations for service projects | ☐ | ☐ | ☐ | ☐ |
| Requests for contributions to The Rotary Foundation | ☐ | ☐ | ☐ | ☐ |

**Comments and suggestions:**

# IMPROVING YOUR MEMBER RETENTION

Keeping current members is a sign of a club's stability and overall well-being. Many clubs don't recognize their retention problems if the number of members remains somewhat steady. However, clubs that consistently lose members and compensate by inducting new members are not managing their growth or retention well. This assessment provides a view of how both the induction and the termination of members contribute to the net gain or loss of members.

## OUTCOME

Conduct this assessment and act on its results to:

- Determine when and why members leave your club
- Generate strategies to keep them engaged and involved so they stay

## GETTING ORGANIZED

To complete the steps below, you will need access to club membership reports on My Rotary. The club president, secretary, treasurer, membership chair, and Foundation chair have this access and can delegate it to any fellow club member. It may be helpful to work with a member who has experience in data analysis.

## GETTING STARTED

Ready to start? Here's how.

### Step 1: Review your club's historical and existing member retention percentages

Go to Rotary Club Central's Reports page and, under **Club Reports**, choose the **Member Viability and Growth** report to see current retention rates for existing members.

Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.

To run the Member Viability and Growth report without following a link to the Reports page:

- Sign in to My Rotary

- From the **Take Action** menu, choose **Rotary Club Central**

- Choose **Reports** from the options on the left

- Under **Club Reports**, choose **Member Viability and Growth**

## Step 2: Determine when members leave your club

Run the Membership Termination Profile report to see when people are most likely to terminate their club membership and the reasons they give for doing so. Knowing at what point in their Rotary tenure members are most likely to leave can help you recognize the club's retention strengths and weaknesses and focus your efforts accordingly.

Go to Rotary Club Central's Reports page and, under **Club Reports**, choose **Membership Termination Profile**.

To run the Membership Termination Profile without following a link to the Reports page:

- Sign in to My Rotary

- From the **Take Action** menu, choose **Rotary Club Central**

- Choose **Reports** from the options on the left

- Under **Club Reports**, choose **Membership Termination Profile**

## Step 3: Generate strategies for keeping members

Once you've reviewed the Member Viability and Growth and Membership Termination Profile reports, discuss the results within the membership committee. Consider these questions:

- Who is leaving your club? Veteran members? New members? Both?

- Why are members leaving?

## Step 4: Develop an action plan

Report the membership committee's findings to the club. Facilitate a discussion about how you might address areas of weakness and build on what you're doing well.

# ROTARY RESEARCH

Understanding why members leave is crucial to strengthening your club. The Exit Survey in Understanding Why Members Leave is designed to gather this information. Rotary International has conducted extensive research on the reasons members leave their clubs worldwide. Here's what we've found.

## Members who stay less than 1 year

Many members leave within the first year because they were not fully informed about the responsibilities of membership before joining or not fully educated about Rotary after joining. Some have trouble meeting attendance requirements or struggle with financial obligation, while others say that their networking expectations were not being met.

### *What you can do*

If your club loses members within the first year, focus on:

• Communicating better to prospective members, both about the personal and professional benefits that your club has to offer, as well as about the responsibilities of being a Rotary member

• Planning meaningful induction ceremonies that celebrate this special step and making sure current members make new members feel welcome

• Making club meetings fun, energetic, and humorous, without losing sight of Rotary's mission

• Assigning new members mentors who can explain club workings and traditions, answer questions, help them get to know other members, and, if they miss any meetings, make sure all is well

• Offering useful new member orientation programs

• Assigning newer members to committees or otherwise involving them in the club

• Connecting often with new members to answer questions and teach them about Rotary

## Members who stay for 1-2 years

Many members who leave after spending one to two years in a club do so because they do not feel engaged in club events and activities, their fellowship expectations aren't being met, or they have difficulty meeting the attendance requirements because of competing priorities.

### *What you can do*

Take action to keep members who have been in your club for one to two years:

• Identify members who have been in your club for one to two years and make sure they are involved in a project or committee that interests them.

• Ask these members for their feedback. They may have ideas for revitalizing the club's fellowship activities or service projects.

• Suggest hosting a Youth Exchange student, or see if they would like to serve as a liaison to your Rotaract or Interact club.

• Assign mentors to members who don't have them, or suggest that they change mentors if they would like to.

## Members who stay for 3-5 years

Members who leave after spending three to five years in a club may do so because their fellowship expectations are not being met, they are frustrated with the club's leadership, or they have difficulty meeting the attendance requirements because of competing priorities.

### *What you can do*

For members who have been in your club for three to five years:

• Provide leadership opportunities. Members can get more involved by serving as club officers. Encourage those who have already held club leadership positions to mentor newer members or participate in district activities. In taking on leadership roles, they will feel useful, valued, and connected with the club's decisions and events.

• Organize new activities, such as continuing member education, or revitalize established club activities so that members remain engaged and excited about attending club meetings and fellowship opportunities.

• Get members' feedback on their club experience and ask for their ideas on what could be improved.

• Put their expertise and skills to use and recognize them for their efforts.

## Members who stay 6-10 years

Some members who leave after spending six to 10 years in a club report that their fellowship expectations weren't being met and that they were frustrated with the club's leadership. Others leave when they retire or need to relocate.

### *What you can do*

For members who have been in your club for six to 10 years:

- Recommend they mentor newer members and get involved in more district activities, such as planning the district conference or serving on a district committee. Or they might wish to join a Rotary Fellowship. Both can help them meet more people and experience Rotary beyond the club.

- If members are planning to leave upon retiring, remind them that retired members are an important part of Rotary. They provide valuable perspective and can serve as mentors to younger professionals in the club.

- If members are relocating, forward their contact information to the clubs in their new area, refer them through My Rotary, or encourage them to let Rotary know they want to change clubs.

- Put their expertise and skills to use and recognize them for their efforts.

## Members who leave after 10 years

Many members who leave after spending more than 10 years in a club say they are not interested in the club's meetings and activities. Other members choose to leave because of retirement, family obligations, financial constraints, or health problems.

### *What you can do*

For members who have been in your club more than 10 years:

- Spend some time with them to learn whether any of the reasons above could prompt them to leave your club. Some reasons for leaving are beyond your control, but learning why members might leave can help you find ways to prevent it.

- Ask for their opinions on how to energize or reinvent your club meetings, or gauge their interest in taking on a district leadership position — assistant governor, district governor, or district committee chair.

- Consider easing the financial obligations of members of this group, who may be under financial strain because of retirement or other factors.

- Put their expertise and skills to use and recognize them for their efforts.

- See if they would be interested in mentoring a new member.

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### Interested in doing other assessments?

Representing Your Community's Professions: A Classification Assessment

Diversifying Your Club: A Member Diversity Assessment

Finding New Club Members: A Prospective Member Exercise

Enhancing the Club Experience: Member Satisfaction Survey

Understanding Why Members Leave: Exit Survey

# Notes

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# Lone Star P.E.T.S. 2019

**PRESIDENTS-NOMINEE WORKBOOK**

**SATURDAY, MARCH 2, 2019**

**SESSION C-10        LEADING MY VIBRANT ROTARY CLUB**

> **GOAL**
> **Club Presidents-elect will individually work to develop continuity and build relationships with club members to strengthen their respective club.**

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1. Explain the values of tradition, continuity, and change as related to leadership within a Rotary club

2. Identify ways a club president-elect can build relationships with other club members to develop a vibrant club leadership team

3. Identify ways to engage their leadership team in planning for needed change to maintain a vibrant Rotary club
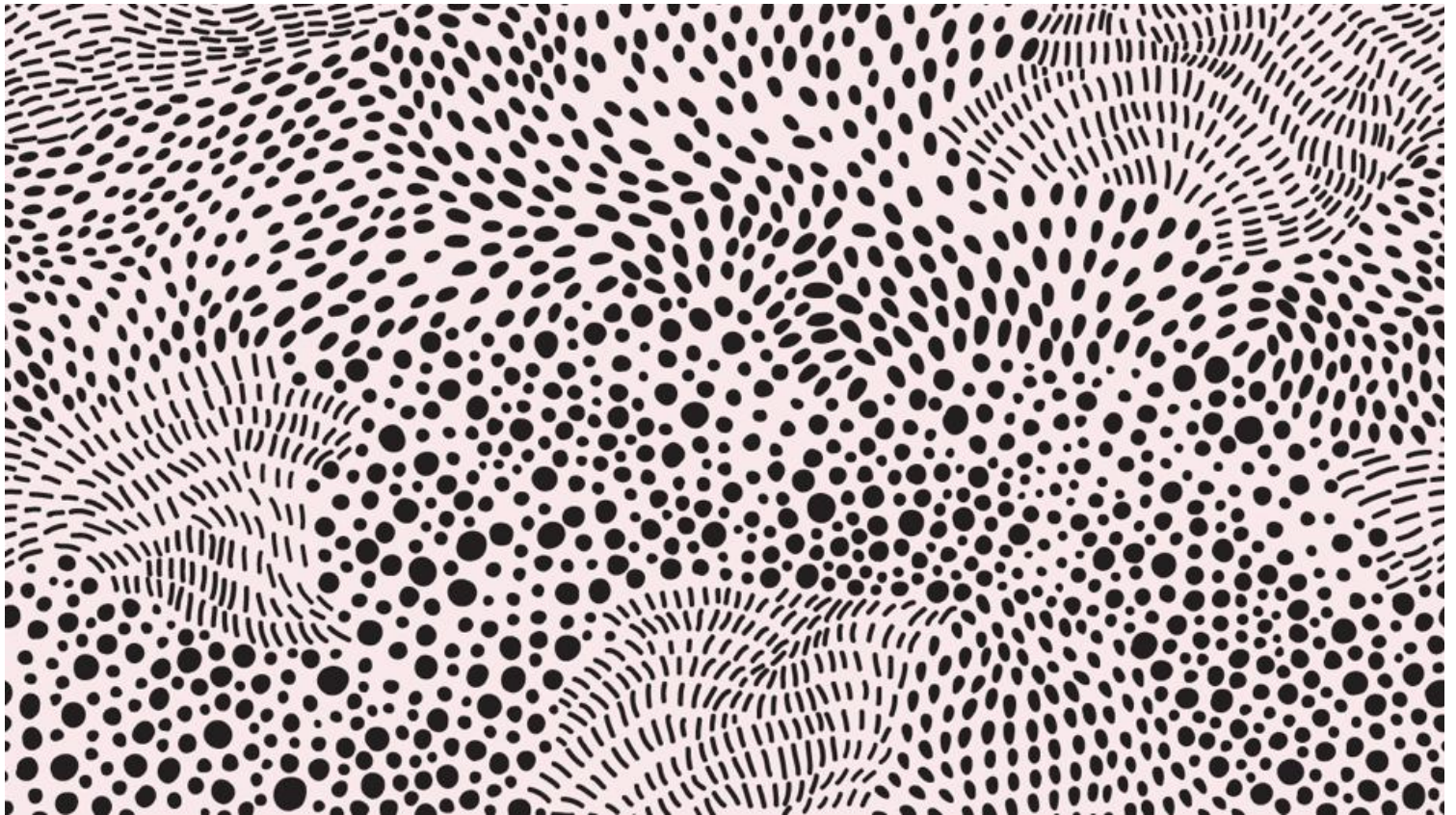
REFERENCE MATERIALS

Lead Your Club:  President -- Chapter 2:  Leading Rotarians

CHANGE MANAGEMENT

# All Management Is Change Management

by Robert H. Schaffer

OCTOBER 26, 2017

Change management is having its moment. There's no shortage of articles, books, and talks on the subject. But many of these indicate that change management is some occult subspecialty of management, something that's distinct from "managing" itself. This is curious given that, when you think about it, all management is the management of change.

If sales need to be increased, that's change management. If a merger needs to be implemented, that's change management. If a new personnel policy needs to be carried out, that's change management. If the erosion of a market requires a new business model, that's change management. Costs reduced? Productivity improved? New products developed? Change management.

The job of management always involves defining what changes need to be made and seeing that those changes take place. Even when the overall aim is stability, often there are still change goals: to reduce variability, cut costs, reduce the time required, or reduce turnover, for example. Once every job in a company is defined in terms of the changes to be made (both large and small), constant improvement can become the routine. Each innovation brings lessons that inform ongoing operations. The organization becomes a perpetual motion machine. Change never occurs as some sort of happening; it is part of everyday life.

Today's change management movement has arisen in response to the difficulty companies have had in making constant, rapid improvement a routine aspect of work. Efforts to overcome this have led to the bifurcation of organizational life into ordinary times and change management times. As an increasing number of people take on the role and mindset of the change management professional, instead of striving to make innovation and improvement routine, they naturally encourage the treatment of change as something

special. Managers start to view change as an extraordinary event that must be dealt with using change management techniques and special skills. And then it's easy for people to become resistant to change.

What needs to change is that thinking. Leaders should view change not as an occasional disruptor but as the very essence of the management job. Setting tough goals, establishing processes to reach them, carrying out those processes and carefully learning from them — these steps should characterize the unending daily life of the organization at every level. More companies need to describe their work in terms of where they are trying to go in the next month or next quarter or next year.

How do you transition into such a company? The simple answer is to skip the months spent creating a comprehensive plan to make the company more change-oriented. Instead, focus on some important goals that are not being accomplished. Have teams carve out some sub-goals they will aim to achieve in a few months. They should be asked to test innovative steps they think will make a difference and to learn from the process. Maintaining a short time frame for these experiments permits the rapid testing of many modest innovations. Of course, these are steps to advance major strategic goals, but the emphasis should be on executing specific changes — with each success followed by a new round of more-ambitious goals to tackle.

For example, Gary Kaplan, president of XL Catlin's North American Construction insurance, got his division started by formulating some major strategic goals. Then he launched a series of short-term "results-seeking projects," each focused on achieving some aspect of those strategic goals. The projects aimed to have people experiment with innovation. As they tested ideas and learned from them, they incorporated new ways of working into the fabric of the organization.

Each year they carry out about 50 such results-seeking projects. Of those recently completed, one won $8 million of new business in a particular region of the country and another focused on reducing costs by redesigning a process to shift major tasks to lower-level, less-costly staff. Kaplan's project-centric strategy allowed the company to bring in $1 billion of premium revenue five years after the launch of the division, and then another billion dollars in the next 18 months.

A critical part of this evolution is holding managers accountable for continuing improvements. As Kaplan told me, by making the operating managers responsible, they develop their capacity to lead continual change while their people develop the capacity to implement it. Specialist experts can be used for support, but actual management of the changes must remain in the hands of the managers. Because, as Kaplan so neatly demonstrates, change management is management, and management is change management.

**LEADERSHIP DEVELOPMENT**

# The Fundamentals of Leadership Still Haven't Changed

by Ron Ashkenas and Brook Manville

NOVEMBER 07, 2018

GARY S CHAPMAN/GETTY IMAGES

Recently the Chief HR Officer for a healthcare firm asked us to identify the best new framework for leadership that she could use to train and develop a cadre of high potentials. The challenge, she said, was that these managers were highly proficient in their own disciplines such as finance, marketing, research, clinical care, and insurance reimbursement — and had demonstrated that they could manage people in these areas — but she needed them to be "bigger" leaders. What, she asked us, did the newest thinking about leadership development say they needed to learn to lead multiple functions, or influence whole segments of the organization, particularly in the rapidly changing world of healthcare?

Explicit in our HR officer's question was her assumption that the *newest* thinking on leadership development must contain something essential. After all, there are hundreds of books written about leadership every year, adding to the thousands of titles already available on Amazon. There also are new assessment tools based on advancements in brain science, emotional intelligence, and relational modeling; new computer aided algorithms

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for decision-making; virtual reality simulations; and a host of new experiential programs, online courses, and university certifications. With such a flurry of developments, there must be some useful new ways to think about leadership.

The reality, however, is somewhat different. Yes, the leadership development industry is thriving, and yes there are a lot of new and interesting ideas, some of which may prove to be helpful. But despite many changes in our context – as organizations have become more democratic and networked, for example – in its fundamentals leadership has not changed over the years. It is still about mobilizing people in an organization around common goals to achieve impact, at scale.

This tried and true perspective on leadership was reinforced for us during the past year as we researched and wrote the *HBR Leader's Handbook*. We interviewed over forty successful leaders from a variety of organizations (corporate, non-profit, startup), across different industries. We then reviewed several decades worth of articles from the Harvard Business Review to understand the recurring messages from academics and practitioners about what leaders should do. Our conclusion from this research, and from our own years of experience as leadership and organizational advisors, was that the best leaders with the most outsize impact almost always deploy these six classic, fundamental practices:

1. uniting people around an exciting, aspirational vision;
2. building a strategy for achieving the vision by making choices about what to do and what not to do;
3. attracting and developing the best possible talent to implement the strategy;
4. relentlessly focusing on results in the context of the strategy;
5. creating ongoing innovation that will help reinvent the vision and strategy; and
6. "leading yourself": knowing and growing yourself so that you can most effectively lead others and carry out these practices.

Sure, sometimes the starting point is different, or one of the six areas requires more heavy lifting than another, or the sequence of activities varies. And yes, leaders go about these practices in different ways depending on their personalities and their situations. But the same handful of practices are always present.

For example, when Seraina Macia (one of the leaders we interviewed) joined XL Insurance in 2010 to head their North American Property and Casualty unit, it was a stable, but slow-growth business.  As she learned about the numbers, the organization, and the markets, Macia envisioned that the unit could be transformed into a much faster-growing and more profitable company with a wider range of product offerings. Bringing her team together around this vision, and sharpening it with their help, which is the first fundamental practice, became the focus of her early days with XL.

To translate that vision into action, Macia then challenged her team to triple the level of premiums, without sacrificing underwriting quality, in three years — and asked each of them to quickly develop a strategy for how to make that happen in their product areas, and how to best use underwriting and the other support functions to do it. She then worked with each manager to help them craft these strategies, making choices about how to deploy resources, where to focus, and how fast to proceed.  This is the essence of the second core practice that we heard about in our research.

When some of Macia's team members struggled to come up with thoughtful strategies, or couldn't move quickly into action, she gave them tough feedback, pushed them beyond their comfort zones, gave them developmental help as needed, and in some cases replaced them or moved them to other positions. These actions were all in the service of building the best team to implement the strategy, which is practice number three.

This stronger team was then able to respond to Macia's unrelenting drive for results by quickly testing new ideas, engaging local brokers, expanding target markets, and a host of other specific action-steps, all of which were aimed at focusing on results, which is the [143]

fourth practice. As results came in, Macia encouraged the team, to reassess their plans, learn from their experiences, innovate, and continually improve, which exemplifies the fifth practice, innovation. For instance, some of the teams experimented with sending underwriters out to the field to work with brokers so that they would send them business that was more likely to be underwritten by XL, a complete departure from past practices, and one that turned out to be key to the unit's success.

While taking these actions, Macia also was learning about her own leadership, what worked and what she needed to do differently. Gradually she learned how best to allocate her time, how to build support from other parts of the company, what metrics were most useful, and how to make faster decisions about people, all of which is part of the leading yourself practice.

Most importantly, by putting all six of these practices together, Macia succeeded in doubling the level of profitable premiums in two years and (after she left for another job) seeing her successor reach the original goal of tripling the business the year after.

To move their organizations to the next level, all of the leaders we talked with deployed these practices — practices that are supported by numerous studies and articles, many of them far from new. And even though these leaders were operating in different industries, geographies, and with new technologies and structures, they were still dealing with people who needed to work together to achieve a common goal, which is what leadership has always been about. So when it's time to think about developing bigger leaders—as our HR executive wanted to do—we believe the secret is not to look for a new framework, but rather to help leaders master the tried and true practices that already exist.

# 2019 PETS Resources found at: www.lonestarpets.org

| A-1 | Becoming a Vibrant Club Leader |
|---|---|

Be A Vibrant Club

Creating Your Club Leadership Plan

Newsletters - My Rotary

| A-2 | Striving to Be a Vibrant Rotary Club |
|---|---|

John Hewko RI Report 2018

Rotary Club Central

   *How to Record Club Service Activities*

   *How to Record Progress on Goals*

   *How to Set a Goal*

   *How to View Information*

Rotary Club Central Handout

Rotary Strategic Plan

Strategic Plan - My Rotary

Strategic Planning Guide

| A-3 | Growing and Engaging Your Club Membership |
|---|---|

Connect to Membership Leads

Impact Begins With You

Membership - My Rotary

Membership Assessment Tools

Membership Resource Guide Dec2018

Online Club Meetings - My Rotary

Rotary Club Health Check

Satellite Club FAQ

Starting a New Club

Strengthening Your Membership

Your Membership Plan Worksheet

| A-4 | Increasing Humanitarian Service by Supporting "Our" Foundation |
|---|---|

Areas of Focus

Paul Harris Society

Project Lifecycle Resources - My Rotary

Rotary Foundation Facts

Rotary Foundation Reference Guide

| **B-5** | **Energizing My Rotary Club** |
|---|---|

Club Flexibility
Energizing My Rotary Club
Rotary Basics

| **B-6** | **Increasing Humanitarian Service** |
|---|---|

City of Denton 2018-19 Public Hearing Survey
Communities in Action: A Guide to Effective Projects
Community Assessment Tools
Community Collaboration
Denton County United Way 2017 Needs Assessment
Get Hands On Survey
Hands On Volunteer Leader Guide

| **B-7** | **Promoting Rotary** |
|---|---|

Key Points for Talking About Rotary
Messaging Guide
People of Action Campaign
Promoting Rotary
Rotary At A Glance
Strengthening The Rotary Story

| **C--8** | **Attracting Members** |
|---|---|

Diversifying Your Club
Finding New Club Members
Membership Assessment Tools
Representing Your Community's Professions
Strengthening Your Membership
Your Membership Plan Worksheet

| **C-9** | **Engaging and Retaining Members** |
|---|---|

Connect For Good
Enhancing The Club Experience
Improving Your Member Retention
Membership Assessment Tools
Strengthening Your Membership
Understanding Why Members Leave

| C-10 | **Leading My Vibrant Rotary Club** |
|------|-------------------------------------|

All Management is Change Management
Creating Your Club Leadership Plan
The Fundamentals of Leadership Still Haven't Changed

**General**

Be A Vibrant Rotary Club
Lead Your Club President 2019-22
RI Club and District Support

**Websites**

https://brandcenter.rotary.org/en-GB
https://learn.rotary.org/members/learn/catalog
https://my.rotary.org/en/learning-reference/document-center
https://rcc.rotary.org/#/dashboard
www.endpolio.org
www.polioeradication.org

# Breaks at Lone Star PETS 2019

There should be a break Friday morning in the Hall of Friendship between 10:15-10:45 AM for everyone at the same time.

Friday afternoon:  2:30-4:00 PM
First Group: Industry & Leadership Wings & Innovation Rooms: 2:30-3:00 PM
Second Group: Made In Texas Rooms: 3:30-4:00 PM

Saturday Morning: 9:30-10:45 AM
First Group: Industry & Leadership Wings & Innovation Rooms: 9:30-10:00 AM
Second Group: Made In Texas Rooms:10:15-10:45 AM

Saturday Afternoon: 2:45-4:00 PM
First Group: Industry & Leadership Wings & Innovation Rooms: 2:45-3:15 PM
Second Group: Made In Texas Rooms: 3:30-4:00 PM