

Pre – PETS Training



Section 1 – Rotary International

Section 2 – The District

Section 3 – Being President

Section 4 – Membership

D7780 - Dick Hall

D7850 - Mike Carrier

D7870 - John Siemienowicz

D7890 - Joanne Alfieri

D7910 - Cliff Rober

D7930 - Terry Rezendes Curran

D7950 – William “Billy” Roberts

D7980 - Jeff Krause



Rotary

Pre-PETS Objectives

1. What attracts People to Rotary
2. Ideas on Attracting New Members
3. Membership Retention
4. Membership Data
5. What's Your Value Proposition
6. Membership Orientation Package
7. Setting Goals
8. Diversity, Equity and Inclusion
9. Unconscious Bias
10. Generational Gap.. How to Connect



Membership



What attracts people to Rotary?

Autonomy

People want to be part of something that is **self-governing**
(especially if it's bigger than they are)

Purpose

People want to be part of **something meaningful** –
an organization that is making a difference

Mastery

People want to be part of something that is
as good as any and better than most at what it does



What Do You Get out of Rotary?

Click to start Video





WE ARE ALL WELCOME

- All** ages
- All** sizes
- All** races
- All** abilities
- All** religions
- All** ethnicities
- All** nationalities
- All** sexual orientations
- All** immigration statuses
- All** socio-economic backgrounds
- All** gender expressions & identities



Membership Plan Elements

- Age demographics
- Gender balance
- Cultural diversity
- Recruiting
- Retention

SMART Objectives, Goals, & Actions



Ideas on Attracting New Members



Speakers, Donors, Charitable Organizations

- Ask the **speakers** of your club if they are interested in being members.
- **Donors** are already giving you money and believe in the work you do.
- Ask the **charitable organization** you donate to and support each year for a representative of their organization to join your club.
- Offer **corporate** and other flexible membership

Ideas continued...



Public Visibility

- Make sure that all your events are getting as much media attention as possible whether it's through your own social media pages (Facebook, LinkedIn, Instagram, Twitter, etc.) or by writing an article and sending in to the local paper.

Ideas continued...



Events and Socials

- **Host events** and socials in **fun environments** that are geared towards attracting new members! At the event, show them the great things your club has done over the last six months to a year.
- Entice current members to bring potential new members **by offering raffle prizes**, % off membership dues for a year, etc.
- Rotary Means Business (RMB) – leverage/invite members and prospective members



Membership Retention

[Rotary Club Health Check](#) — Identify your club's problem areas and make changes to help it stay relevant for members and the community.



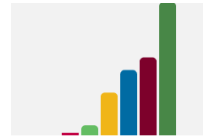
[Strengthening Your Membership: Creating Your Membership Plan](#) — Develop a long-term strategy for strengthening your club's membership.

[Introducing New Members to Rotary: An Orientation Guide](#) — Find ideas for engaging new members, getting them involved, and giving them a meaningful Rotary experience. Every new member has a mentor/sponsor.



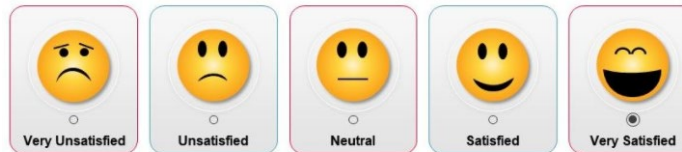
Membership Retention

[Membership Assessment Tools](#) — Analyze your member profile to identify prospective members and diversify your membership.



<https://rcc.rotary.org/#/dashboard>

Use the [Membership Satisfaction Survey](#) to identify your members' needs.



[Engage](#) — regularly recognize members for their achievements; keep members involved in club projects and activities; encourage members to take on leadership roles.



Membership Data: Does yours tell a story.

1. Is there **Data**?
2. Is there a **Plan**?
3. Is there **Diversity**?
4. Are we **Relevant**?
5. How do we **Communicate/Connect/Engage**?
6. What is the **Value Proposition**?



Membership Data...

What are **your** trends?

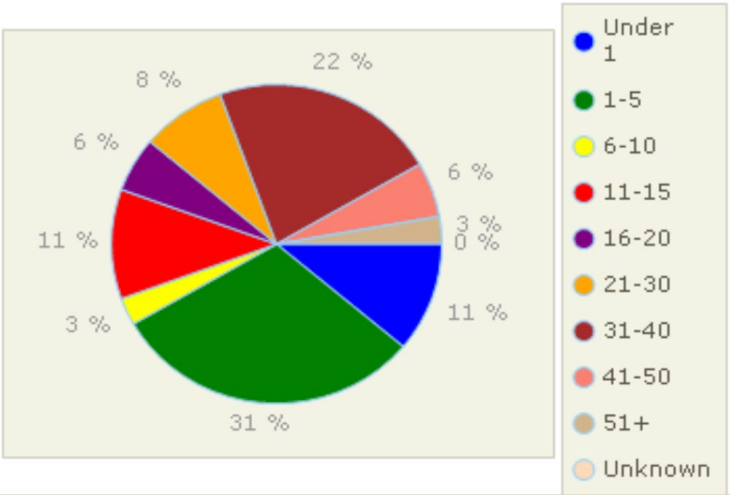


Increasing

Decreasing

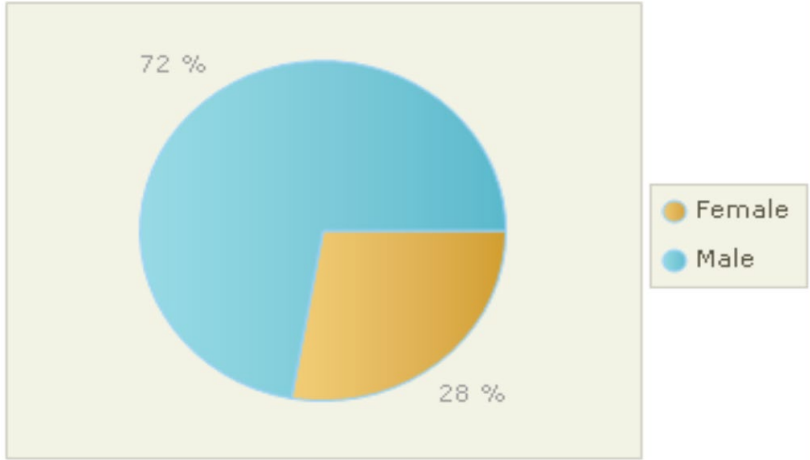
Plateauing

Membership Make-up

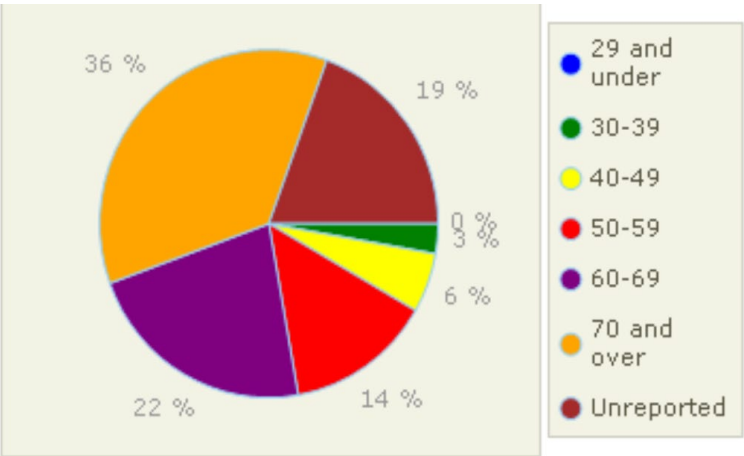


Years of service

Gender Distribution



Age Distribution



Data Available on Club Central

Dashboard

Welcome to Rotary Club Central, the online tool for setting goals and tracking progress. Explore data and trends related to your club's goals on this page, and use the tabs to manage goals, project activities, and more.

Please note: data reported outside Rotary Club Central, including data reported in My Rotary, will be delayed for at least 24 hours.

- Global
- My Zone
- My District
- All Club Groups ▾
- All Clubs ▾

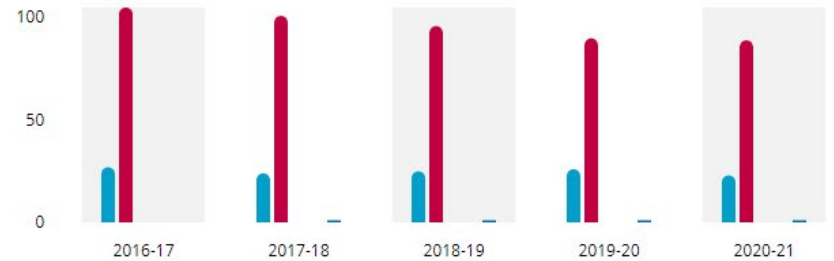
Rotary Club of **Portland**

Membership Trends



July 1	2016-17	2017-18	2018-19	2019-20	2020-21
	123	132	126	121	115

Gender Trends



	2016-17	2017-18	2018-19	2019-20	2020-21
Female	27	24	25	26	23
Male	105	101	96	90	89
Self-describe	0	0	0	0	0
Prefer not to identify	0	0	0	0	0
Unreported	0	1	1	1	1

Building a Culture of

SERVICE

- Build a culture where Rotarians can authentically contribute, lead to inspire and grow Rotary together.
- Achieve our mandate to “Grow Rotary” - gain more members, be open to change.
- Meet personalized needs of all members.



It's a Competitive Market

Young Professional Groups

- HYPE - Hartford Young Professionals and Entrepreneurs
- Boston YPA - Boston Young Professional Association
- CTYP - Connecticut Young Professionals

Networking

Related searches for young professionals' organization

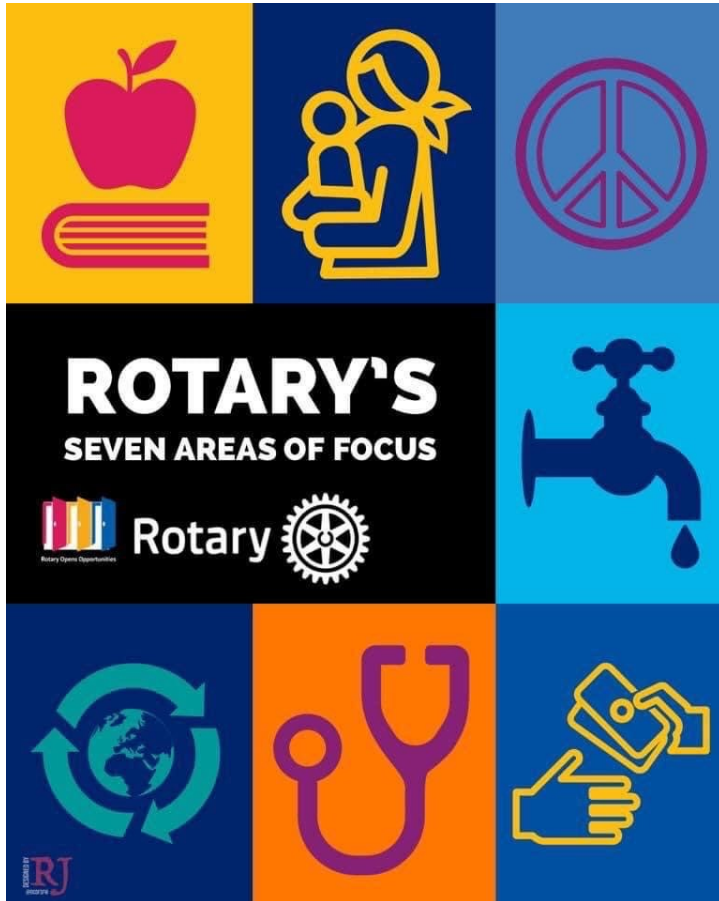
- [young professionals organization Cincinnati](#)
- [young professional organization Cleveland](#)
- [associations for young professionals](#)
- [creating a young professionals group](#)
- [young professionals organization Philadelphia](#)
- [young presidents' organization](#)
- [young professional organizations in Atlanta](#)
- [young professionals group](#)

Social

Volunteering



What's your Value Proposition?



Seven Areas of Focus

OR

Weekly Dinner Meeting



Value Proposition

Engagement not Attendance



OR

attendance
~~MATTERS~~

Rotary



Engagement

Satellite Clubs



E-clubs



meetup



Mobile Apps

FLASH MOB



Rotary



Add Excitement

- Listen to new ideas for service and socials
- Invite to plan activities and serve on a committee
- Ensure club's service projects are active and interesting
- Seek feedback from new members on club processes, service projects, and speakers
- Invite to Training Assembly or Conference



OUR MEMBERSHIP CHALLENGE

If your club is over 40 members: ??

- Grow your club by 7-10 new members

If your club is below 40 members: ??

- Grow your club by 5-7 new members



RIPE SHEKHAR'S MEMBERSHIP CHALLENGE

EACH ONE BRING ONE



Membership Orientation (Fireside Chat)

Assign a mentor and pair prior to orientation

- **Welcoming**
- **Important Club Info**
- **Invitation to serve**
- **Listen to where their interest resides**
- **Rotary International information**
- **Rotary Foundation**
 - **What it does**
 - **Why it is important to fund**



Club Types = Flexibility

Club Type	Description	2019-20 RI Dues	Estimated count on 1 January 2019	Minimum number of charter members	Voting privileges	Members are counted in RI database	Appeals to
Traditional Rotary Club	Professionals and aspiring leaders who meet regularly for service, connections, and personal growth	\$68	35,000	20	Yes, all RI dues-paying members	Yes, all active, RI dues-paying members	People looking for connections, service opportunities, and traditions
Satellite Club	A Rotary club sponsored by a traditional club but with its own meetings, projects, bylaws, and board	\$68	580	8	Yes, all RI dues-paying members	Yes, all active, RI dues-paying members	Those who want a club experience or meeting format or time other than what's offered by the traditional clubs in the area
E-Club	A Rotary club that meets only online	\$68	285	20	Yes, all RI dues-paying members	Yes, all active, RI dues-paying members	People who travel frequently, whose schedules make it difficult to meet in person, or who prefer an online experience
Passport Club	A Rotary club that allows members to attend other Rotary club meetings as long as they attend a specified number of meetings in their own club each year	\$68	20	20	Yes, all RI dues-paying members	Yes, all active, RI dues-paying members	People who travel frequently, or those who enjoy trying a variety of club experiences and meeting lots of new people
Corporate Club	A club whose members (or most of them) work for the same employer	\$68	1	20	Yes, all RI dues-paying members	Yes, all active, RI dues-paying members	Employees of an organization who want to come together to do good in their community
Cause-Based Club	A club whose members are passionate about a particular cause and focus their service efforts in that area	\$68	Unknown	20	Yes, all RI dues-paying members	Yes, all active, RI dues-paying members	People who want to connect with others while addressing a particular set of problems.
Rotaract Club	A club of members ages 18-30 that is sponsored by a Rotary club and often works with that club on projects	None	9,600	n/a	n/a	Does not count as a Rotary member	Younger people who want to serve their communities, develop leadership and professional skills, and have fun through service

All club types meet at least twice each month.



<https://my.rotary.org/en/club-flexibility>

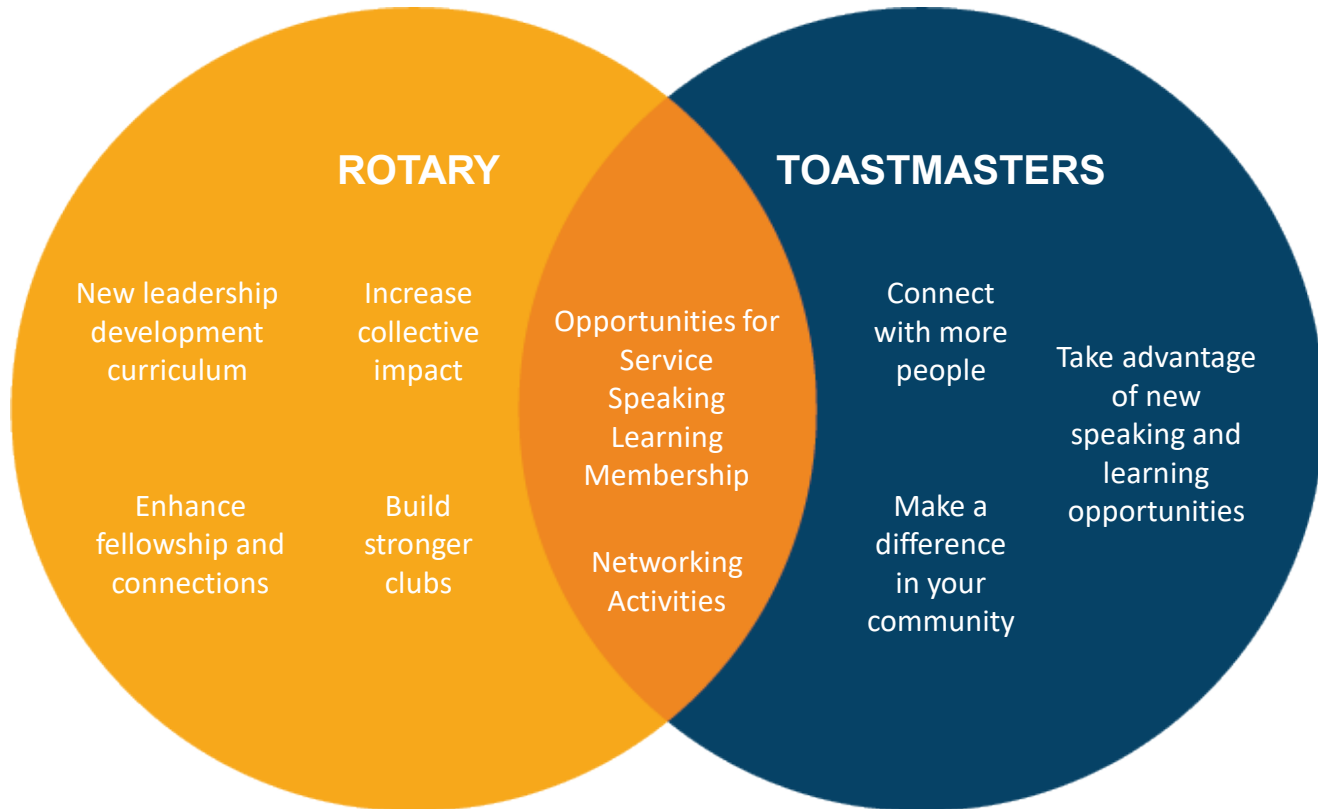
Our Toastmasters Partnership

Our alliance offers benefits to members of both organizations.

- Members of Toastmasters will be able to connect with more people, **take advantage of new speaking and learning opportunities**, and use their skills to make a difference in their communities with Rotary. For example, we recently heard about a Toastmasters member who developed a relationship with his local Rotary club, which led to him leading a public speaking workshop for Rotarians. He was excited to use his expertise to help others **while practicing his communications skills** with a new and bigger audience.
- Members of Rotary will have a new leadership development curriculum to develop and improve their leadership and communication skills, opportunities **to enhance their fellowship and connections, build stronger clubs**, and increase their collective impact by collaborating with their Toastmasters clubs.
- Both organizations will benefit from **increased service, speaking, learning, and membership opportunities**, as well as increased networking activities.



Benefits



Rotary



Organizational structure



Club Leaders
Assistant Governor
District committees
District Governor
Regional Leaders
Board of Directors and
Board of Trustees



Club Leaders
Area Director
Division Director
District Director
Region Advisors
Board of Directors



Take a course

- Developed by Toastmasters
- Leadership and communication skills
- Rotary's Learning Center



Reach out

Ask if you can attend your local Toastmasters club meeting

Welcome a Toastmaster who visits your Rotary or Rotaract club meeting

Invite a Toastmaster to be a guest speaker at your club meeting



QUESTIONS/Discussion



Diversity Equity Inclusion



Rotary International Diversity and Inclusion Statement

As a global network that strives to build a world where people unite and take action to create lasting change, Rotary **values diversity** and **celebrates the contributions of all backgrounds**, regardless of their age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity.



What your club can do...

Talk about diversity with your club members and create a member diversity and inclusion action plan using the Diversifying Club Assessment.

Invite local diversity, equity, and inclusion experts to speak at your club's next gathering.

Connect with local organizations that are supporting diversity, equity and inclusion efforts and work with them on projects or events.



What your club can do...

Encourage and support people from under-represented groups to take on leadership positions in your club and district.

Encourage club members to take the Building a Diverse Club course in the Learning Center to learn more about diversity, equity and inclusion.

Create a community advisory board and invite diverse members from the community and from your club to take part. You will learn what's important to the community and discover ways to work together and take action.



Is there Diversity?

Do you target . . .

- Women
- Young Professional
- Different Ethnic Groups
- Non-traditional Professions
- LGBTQIA



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

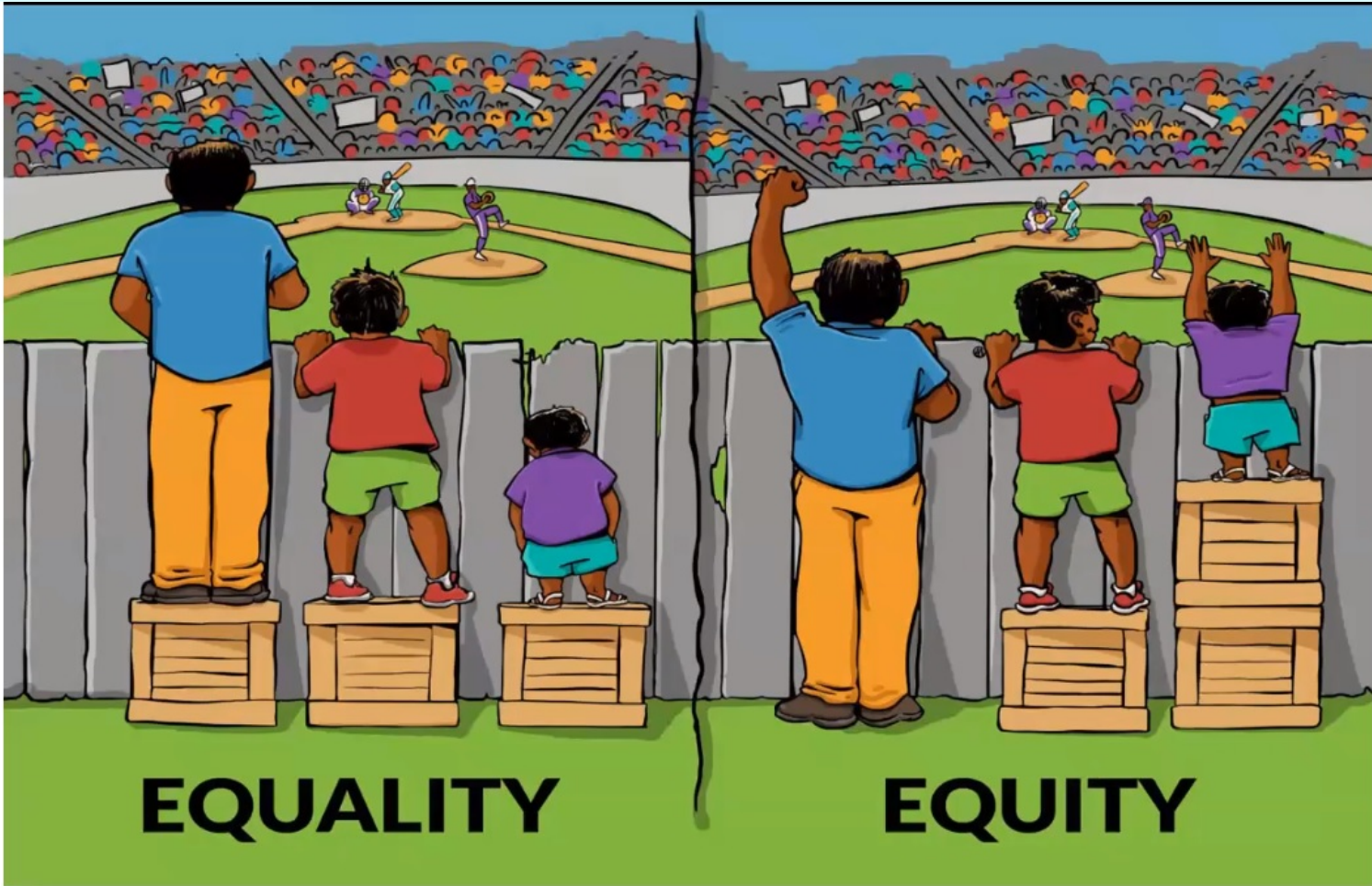
Equity versus Equality?

The term “equity” refers to fairness and justice and is distinguished from equality:

- Equality means providing the same to all,
- Equity means recognizing that **we do not all start from the same place** and must acknowledge and make adjustments to imbalances.

The process is ongoing, requiring us to identify and overcome intentional and unintentional barriers arising from bias or systemic structures.

Equity versus Equality



It's Not a Question of Height but a Question of Structural Barriers to Opportunity

Diversity Equity and Inclusion

Diversity means that everyone is invited to and welcome at the party.

Equity means that everyone has the chance to help plan the party, make decisions, and are able to attend

Inclusion means that everyone is fully engaged – dancing, talking eating, laughing – together.



Diversity and Inclusion



Diversity

Inclusion



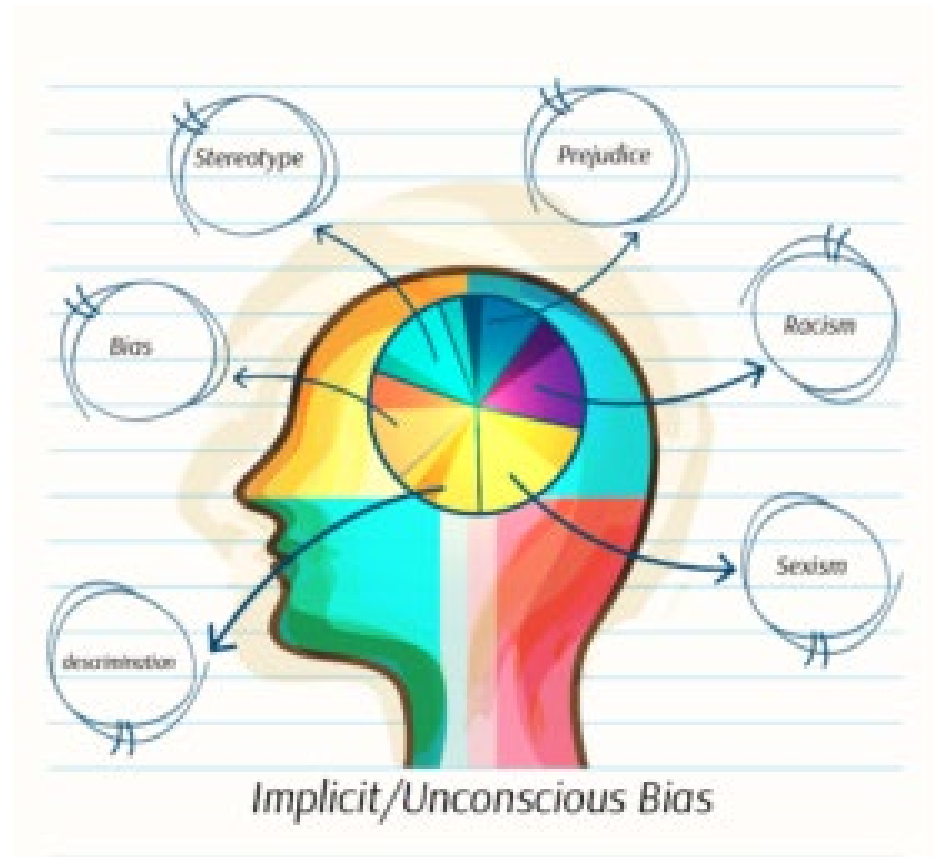
Rotary



Unconscious Bias

Unconscious Bias is:

- Everyday
- Automatic
- Hard-Wired
- None of us are immune



We don't see things as they are

We see things as we are

Unconscious Bias – Are you aware?

Focus Within:

- Tune into your emotions
- Recognize how your experience has shaped your perspective
- Stick to facts, and don't make assumptions.
- Turn frustration into curiosity.

Learn about others

- Recognize how their experiences have shaped their perspective
- Consider how they might see the situation and what is important to them
- Think about how your actions may have impacted them

Engage in dialogue

- Ask open-ended questions
- Listen to understand, not to debate
- Offer your views without defensiveness or combativeness
- Disentangle impact from intent
- Avoid blame, think contribution

"eXpand" the options

- Brainstorm possible solutions
- Be flexible about different ways to reach a common goal
- Experiment and evaluate
- Seek out diverse perspectives



Unconscious Bias

[Harvard Project Implicit](#)



Do you have an Unconscious Bias. Click on the link above and take the quiz.

Diversity Questions for Your Rotary Club

Do the demographics of your club match the demographics of the community?

Age

Race

Gender

Religion

Sexual Orientation

Economic

Career

Handicapped

Is there a bias in seeking new members?

Is there an active plan to increase diversity?



Equity Questions for Your Rotary Club

Is your meeting accessible to all?

Place

Handicapped Accessible

Time Accessible

Cost Accessible

Alternative Meetings/Times

Is there an Ethnic Bias to your Meetings/Menu?

Do you offer Hybrid Meetings?

Does everyone have the technology capabilities to join our zoom meeting?

Non Political

Non Denomination Reflection versus Spiritual versus Specific

Religious Prayers versus Moments of Reflection versus Rotary

Moments



Inclusion Questions for Your Rotary Club

Are all members involved on at least two committees or activities?

Are new members assigned a mentor?

Is every member considered for leadership positions?

Are members invited to participate, not just an announcement from the podium?

Are activities accessible so all can join?

- Day/Time/Location

- Physically Accessible

- Not conflicting with work or family

- Cost Accessible

- Are Alternatives possible?



Inclusion Questions for Your Rotary Club

Click to start Video

Rotary Zone 32 Membership Video Series

Is Your Club Really Welcoming? - Part 2



Rotary Links

- RI Diversity, Equity, and Inclusion Statement

<https://www.rotary.org/en/about-rotary/diversity-equity-and-inclusion>

- Rotary Learning Center: Committing to Diversity, Equity, and Inclusion

<https://learn.rotary.org/members/learn/course/679/committing-to-diversity-equity-and-inclusion>

- DEI in Rotary Youth Exchange

http://msgfocus.rotary.org/files/amf_highroad_solution/project_190/Youth_Exchange/LGBTQ_Resource/2020_LGBTQ_RYE_FINAL.pdf

- Rotary 2020: Moving from Diversity to Inclusive Actions

<https://www.youtube.com/watch?v=WxlbRNag3WE>



External (non-Rotary) Resources

- LinkedIn Learning Path on Diversity, Inclusion, and Belonging for All

<https://www.linkedin.com/learning/paths/diversity-inclusion-and-belonging-for-all>

- LinkedIn Course on Inclusive Leadership

<https://www.linkedin.com/learning/inclusive-leadership/welcome>

- The Look: A Story About Bias in America

<https://us.pg.com/talkaboutbias/>

- 10 Best Diversity Videos

<https://blog.ongig.com/diversity-and-inclusion/top-diversity-videos/>



The Generational Gap..... How to Connect



The Benefits of Bringing Generations Together

Intergenerational programs

- Understand and embrace their
- similarities and differences
- Encourage learning about the
- other group



Strengthen Communities through Mutual Understanding

- With increased communication, stereotypes are dismissed and both groups feel less alienated and more valued



The Benefits of Bringing Generations Together

Encourage Learning through Mentoring

- Each generation can learn from the other.
- Seniors can also mentor younger people, which can give the senior a sense of purpose and accomplishment..



Ageism...

Ageism:

Prejudice or discrimination against a particular age-group and especially the elderly

As Rotary “Ages Out”
Diversity & Inclusion



Legacy includes:

1. Knowledge and commitment to Rotary
2. Deep Pockets – Foundation
3. Attendance
4. Respect, recognition
5. Longevity

Personalization not Standardization...

things to think about

- Rotary – are we stuck between standardization and our new model of personalization?
- Have we built a culture that is agnostic to differences?
- Weekly dinner meetings (standardization) or e-club (Personalization)
- Has our thinking, our vision, our systems been so dependent upon focusing on standardization that we haven't provided the room to serve personalization?
- Individuals are no longer inclined to hide their diversity or feel pressured to fit into the standardized version of mainstream.....
- If we want to influence our organization and marketplace how do we lead in this age of personalization?