

Module C-8 Identifying And Leading Change For Progress Sake (90 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Topic and Presenter(s)	Provide topic – have participants open PETS Learning Guide, C-8: Identifying and Leading Change for Progress Sake. Introduce concepts in change resource materials. Reflect on the reaction to change: How do people react to change? What makes you feel better about making a change? <u>We are laying the groundwork for formulating an action plan for leading change.</u>	10 min.
2.	Main Room/ Content Overview	1st Learning Objective: Identify attributes of a vibrant Rotary club. Refer to the Be A Vibrant Club brochure in A-1 and Flexible options for clubs and Club Models handouts in your PETS Learning Guide. Facilitate Discussion: What makes a vibrant club? Read p. 4 of brochure. How do you know if your club is making progress towards being vibrant? How can you use the flexible options and new club models to make progress towards being vibrant? See Breakout Room Questions	15 min
3.	Breakout Room/ Discussions	2nd Learning Objective: Recognize the Club President’s role in leading changes to be a vibrant club. Refer to both Leading Meaningful Change resource page and the Change Planning handouts in your Learning Guide. Facilitate Discussion: As Club President, in what ways can you promote change within the club? Which steps of leading change are most challenging to accomplish?	20 min
4.	Breakout Room/ Discussions	3rd Learning Objective: Articulate insights about their club culture, diversity, and change. Refer to the Rotary Belonging and Engagement and Diversity and Inclusion information and the Diversity assessment tools in your PETS Learning Guide. Facilitate Discussion: What can you do as Club President to inspire change in order to build a diverse and representative club membership to make an impact in your community? List three key points.	20 min
5.	Charting Change/ Sharing Back/ Q & A	After reviewing the Change literature and sharing in your breakout discussion groups for this Change module, it is time to start formulating your action plan for change in your club during your year as Club President. Facilitate Discussion: List three critical areas of needed change for your club. List one action step for each change area. Share back with your group. Make sure to get feedback from group members.	20 min
6.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring week with acknowledgements for their upcoming year of service as club president/club president-elect. Ask them to go to notes page at end of module and jot down their thoughts. Point out Your PETS Experience: Final Takeaways and Best Practices questions to answer on their own time. Remind participants to complete module evaluation via mobile app. Proceed with transition to completion of program -- keynote speaker and District meetings.	5 min

Lone Star P.E.T.S. 2026

PRESIDENTS-ELECT LEARNING GUIDE

SATURDAY

MODULE C-8 IDENTIFYING AND LEADING CHANGE FOR PROGRESS SAKE

GOAL

Club Presidents will have insight about assessing and leading needed change within their respective clubs in relation to Vibrant Club culture.

OBJECTIVES

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

1. Identify attributes of a vibrant Rotary club.
2. Recognize the Club President's role in leading changes to be a vibrant club.
3. Articulate insights about their club culture, diversity, and change.

REFERENCE MATERIALS

Flexible Options for Clubs
Club Flexibility FAQ
Club Types, Formats, and Models
Leading Meaningful Change
A Model for Change Planning
Rotary's Approach to Change
Change Management Plan
Enhancing Belonging and Engagement at Rotary
Our Rotary Culture
The Future is Inclusive
Diversifying Your Club: Club Readiness Assessment
A Diversity Assessment
A Prospective Member Exercise

Module C-8: Identifying and Leading Change For Progress Sake

Breakout Discussion Questions

1. Refer to the Be A Vibrant Club brochure included in A-1 and Flexible options for clubs and Club Models handouts in your PETS Learning Guide.
What makes a vibrant club?
How do you know if your club is making progress towards being vibrant?
How can you use the flexible options and new club models to make progress towards being vibrant?
2. Refer to both Leading Meaningful Change resource page and the Change Planning handouts in your PETS Learning Guide.
As Club President, in what ways can you promote change within the club?
Which steps of leading change are most challenging to accomplish?
3. Refer to the Rotary Belonging and Engagement and Diversity and Inclusion information and the Diversity assessment tools in your PETS Learning Guide.
What can you do as Club President to inspire change in order to build a diverse and representative club membership to make an impact in your community.
List three key points.
4. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
5. What is your primary takeaway from the Change session?
6. Any other question(s)?



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Flexible Options for Clubs



Rotary and Rotaract clubs are empowered to create a culture that provides a positive club environment for their members. Each club also offers a unique experience for its members, whether it does so by following a club model that appeals to certain people or by allowing members to join with differing levels of

involvement. When club leaders [ask what members want](#), they can design or adjust the club to keep everyone engaged and ensure the club experience is meaningful.

What options do we have for enhancing our club experience?

Rotary has many programs and opportunities that engage members and offer them a range of experiences. Your club can also make its own innovative changes, customized for your members, potential members, and your community. Here are some examples:

- Explore various [club types, meeting formats, and models](#).
- Offer different membership types, such as [corporate membership](#).
- Change your meeting location, frequency, or attendance policy.
- Try new meeting practices, [content](#), and service projects.
- Start a [satellite club](#) to specialize in a particular interest of, or meet a particular need of, a group of members.

How will we know which options are best for our

club?

Use Rotary's [Assess and Adapt resources](#) to learn what your club's members want. Then, based on their feedback or your other findings, try some new things.

Here are some examples of how you can use member feedback to improve the club experience:

Sample feedback: Our club doesn't reflect the community in terms of gender, profession, ethnicity, or age.

Possible solution: Your club can attract a wider array of people by building genuine connections with different groups in the community or nearby — for example, by collaborating with them on projects. Also, consider offering alternative membership types that would appeal to prospective members from underrepresented groups.

Sample feedback: Some members have difficulty attending meetings because of the time or location.

Possible solution: Your club could relax its attendance expectations, offer a virtual meeting option, or consider an alternative day, time, or location for at least some meetings.

If you change your meeting time or place, make sure that is reflected both on your club's website and in its listing in Rotary's [Club Search](#), so that prospective

members can visit. You can [report](#) multiple meeting times and locations through My Rotary if needed.

Sample feedback: Belonging to the club is too expensive for some people or takes too much time.

Possible solution: Review your club's dues, or consider reducing the cost of membership in other ways. For example, the club could meet without having a meal or at a location that offers à la carte pricing for food and drinks. Or offer alternative membership types with lower costs and less time commitment.

Sample feedback: We lose members and prospective members who say it's hard to balance club commitments and family responsibilities.

Possible solution: Consider planning service projects and social events that allow members to include their partners and children in meaningful ways.

Sample feedback: The meetings are not enjoyable.

Possible solution: Include service projects, leadership development, or talks on topics that interest members in your club's regular meetings. Ask members what other changes would appeal to them.

Social ties also help members enjoy meetings. Observe how members interact to gauge whether they are enjoying the meetings. Try replacing at least one of your meetings with a social gathering or find other ways to foster personal connections among members.

Resistance to change

When you make changes to your club, you may encounter resistance from some members. Taking the courses in the Change Management learning plan can help you lead change effectively.

Resources

- [Membership Assessment Tools](#) (PDF)
- [Building New Clubs Using Innovative Club Models](#) (video)
- [Club Flexibility Frequently Asked Questions](#)
- [Guide to Corporate Membership](#) (PDF)
- [Satellite Club Frequently Asked Questions](#) (PDF)
- [Satellite Clubs Explained](#) (video)
- [Guide to Passport Clubs](#) (PDF)
- [Engaging Online Meetings](#)
- [Standard Rotary Club Constitution](#) (PDF)
- [Standard Rotaract Club Constitution](#) (DOC)
- [Recommended Rotary Club Bylaws](#) (DOC)
- [Recommended Rotaract Club Bylaws](#) (DOC)

For other membership resources, write to membershipdevelopment@rotary.org.

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Club Flexibility FAQ

Many of the traditional rules and requirements that Rotary clubs have had historically, such as weekly meetings, attendance requirements, morning or lunch meetings, traditional classifications, and high costs, have limited who is able or willing to join. When we join together different perspectives and backgrounds, professions and areas of expertise, talents and resources, we can see challenges in new ways and identify creative solutions.

Any Rotary club wishing to try a new approach can do so by amending its bylaws as permitted by the [Standard Rotary Club Constitution](#). But clubs can also continue to follow their current requirements for meetings, attendance, structure, and categories of membership. Have a conversation with your club members to determine whether flexible options can help to address your club's membership needs.

Meeting format

In what ways are clubs changing their meeting format?

Clubs are demonstrating innovation and flexibility by replacing the traditional speaker and meal meeting format with a variety of new formats. Some clubs are rotating where they meet by holding gatherings in a member's home, a local restaurant, or other "offsite" locations such as a local business. Some clubs are meeting virtually or allowing some of their members to call into the in-person meeting. Many clubs are using meetings to plan and conduct their service projects and fundraisers, and having social events to get to know other members better. Consider surveying your members to see what new formats they would be interested in.

What are the advantages of changing the meeting format?

Changing the meeting format not only gives members a variety of club experiences, but also keeps them engaged and active in the club. It can also be more appealing to guests to have hands-on, fun, productive meetings that connect with Rotary's values and mission. This form of flexibility also makes it easier for some members to attend meetings virtually when they would not have been able to attend in person. We recommend asking current and prospective members what they hope for in a club meeting experience.

Meeting frequency and attendance

How frequently should clubs meet?

Clubs should offer opportunities to meet twice per month at minimum. Those meetings could be traditional meetings, social outings, service projects, etc. Clubs that wish to meet more often can do so.

Are clubs allowed to remove attendance requirements?

Yes. Clubs are encouraged to relax attendance expectations or not have them at all. Our research shows that rigid rules and policies are a barrier to attracting new members and engaging current ones. Further, it excludes younger professionals who have developing careers and young families. Attending meetings is an opportunity, not an obligation.

Does our club secretary still need to send monthly attendance reports to the district governor?

Rotary International does not collect attendance reports, which were originally thought of as a way to gauge how engaged members are and how healthy the club is. Some districts continue to follow this method. However, we can measure club health in other ways – for example, by how many members are involved in a project, club leadership role, or by how many

beneficiaries have benefitted from your club's service. Ask your district governor what is preferred, and whether a report is needed or whether the information can be captured and shared using Rotary Club Central.

Membership types

What membership types exist?

There can be as many types of membership as are created by clubs. Some popular examples are corporate, family, or younger professional membership. However, a club is free to design different membership types that attract diverse members, as long as it's documented how they differ from traditional membership in their club bylaws. The Rotary International database does not track membership types – only whether a member is active or honorary.

What's the difference between active and honorary members?

Rotary International defines active members as those who meet the requirements for membership, pay RI dues, are eligible to vote on club and district matters, are eligible to hold a club officer position and count in the club's membership numbers in Rotary's database. Honorary membership is used to recognize people who have distinguished themselves by meritorious service and embody Rotary ideals, or those considered friends of Rotary for their support of Rotary's causes. They are exempt from paying RI dues, have no vote in Rotary

matters, are not eligible to hold any club office, and are not included in a club's membership numbers in Rotary's database. Active members are called Rotarians, while honorary members are called honorary Rotarians.

Honorary membership should not be confused with Rotarians whose excused absence is approved by a club's board. In order to count in a club's membership numbers in Rotary's database, one must be reported as an active, RI-dues paying member. An active member can be an honorary member of another club, but cannot be an active member of another club.

How do corporate memberships work?

Your club is free to offer alternative membership types of any kind, as long as new members are counted as individuals — corporate members in this case — rather than the corporations that sponsor their membership. If the members pay RI dues, they will be included in your club's official membership count and receive all the benefits that other active, dues-paying members enjoy.

Your club can have different policies for these members' other financial obligations (club and district dues, meal costs, etc.), attendance requirements, or service expectations, as long as these policies are reflected in the club bylaws. Learn more in our [Guide to Corporate Membership](#).

How do family memberships work?

Family membership – also called spouse or partner memberships – are similar to corporate membership, in that there is often a primary member and one or more alternate members. Often times, the alternate members are young adult children of the primary member or a partner or spouse. Clubs that offer this type of membership typically offer a reduced rate for the alternate member(s) as an incentive to join. The alternate members can attend in the primary member's place or come along with their family member Rotarian. Alternate members may be active, RI-dues paying members or not, depending on how the club chooses to structure this membership type.

How do associate memberships work?

Your club can define associate membership as it wishes. Some clubs use associate membership as a trial period to engage prospective members. If the associate members see value in the experience, they can join the club. In such cases, the club would report them as active members once they've joined, and the members would then receive all the benefits that other active, dues-paying members enjoy and would be included in the club's membership count.

How do younger professional memberships work?

Some clubs have designed a membership type for younger professionals with a more affordable dues structure, and more flexible expectations for

participating. Clubs that create this type of membership recognize that younger members can play an integral role in the future of their club, but may not have the financial resources or available time to attend weekly meetings at this point in their careers.

Are Rotaractors now also Rotarians?

No. Members of Rotary clubs are Rotarians and members of Rotaract clubs remain Rotaractors. The enactment that passed at the 2019 Council on Legislation (19-72) will not change the separate identity of Rotaractors. It simply expands the membership of Rotary International to include both Rotary and Rotaract clubs. For more information, see [Frequently asked questions about 2019 Council on Legislation changes to Rotaract.](#)

If I'm a Rotaract member and a Rotary member, do I have to pay dues to both clubs?

Yes. You would pay any required club or district dues for both clubs, and Rotary member dues to Rotary International. However, your club has the flexibility to create different membership types for Rotaract members and younger professionals. This could include reduced club or district dues for members who belong to both Rotaract and Rotary, as long as the dues to RI are paid.

Also, while there are many benefits that come with dual membership, it should be noted that when Rotaractors

join Rotary, they become ineligible for Global Grant scholarship funds, Rotary Peace Fellowships, and Rotaract Convention registration rates.

Club models

What Rotary club models are there?

Club models simply refers to the way a club chooses to operate. The beauty of flexibility is that each club is free to define its own internal way of life within the framework set by the constitutional documents. Some trends that have emerged are included in [this document](#).

How does a satellite club work?

Satellite clubs are branch clubs of a sponsor club. The satellite club members are Rotarians and considered members of the sponsor club. Only eight members and the support of a sponsor club are needed to start a satellite club. They often offer a different club environment or meeting time and location from their sponsor club. Like a Rotary club, satellite clubs hold regular meetings, have bylaws and a board, and get involved in community service projects. The sponsor club provides advice and support. In some cases, satellite clubs may grow and apply to become a separate Rotary club. Satellite club members are Rotarians. Officially, they are members of the sponsor club. For more information, see the [Guide to Satellite Clubs](#) and the [Satellite Club Frequently Asked](#)

Questions.

How could my club benefit from creating a satellite club?

Starting a satellite club offers the additional benefits of expanding project possibilities, visibility, and the impact of Rotary in your community. Satellite clubs can also attract members who want a different or more affordable club experience or bring Rotary to communities that might not be able to support a standalone club, and serve as transitional Rotary clubs.

Are satellite club members equal to Rotary club members?

Yes. Satellite clubs are not substandard Rotary clubs. Their members are members of their sponsor club, and therefore, Rotarians. They have club leaders and committees, conduct service projects, and meet regularly, just like traditional Rotary clubs. Learn more in the [Guide to Satellite Clubs](#) and the [Satellite Club Frequently Asked Questions](#).

Now that Rotary no longer distinguishes between e-clubs and other clubs, are clubs that meet primarily online still called e-clubs?

It is up to the club. Rotary no longer distinguishes between clubs that hold face-to-face meetings and clubs that meet online. That's because all clubs now have the option of meeting in person, online (using

applications such as Skype, Zoom, or FaceTime), or a combination of both. If they choose, clubs that meet exclusively or primarily online may keep that word in their name and continue to brand themselves as an e-club to emphasize their preferred meeting format.

Are current Rotaract and Interact e-clubs still considered e-clubs?

The Rotaract and Interact standard club constitutions and bylaws already permit these clubs to meet in person, online, or a combination of both, with the approval of their sponsor Rotary club or clubs. Rotaract and Interact clubs' official names do not include "e-club," but clubs may name and brand themselves as e-clubs to emphasize that they meet exclusively or primarily online.

Because of the age of Interact members, all online activities, such as the club website and social media pages, must be operated in accordance with applicable laws and regulations, and sponsor Rotary clubs must obtain written consent of Interactors' parents or legal guardians in advance of Interact participation as necessary.

What are passport clubs?

Passport clubs are Rotary clubs that are using a model that gives members a more flexible club experience, such as frequently visiting other clubs, a relaxed attendance policy, and meetings that don't involve a

meal and a speaker. The term “passport” refers to the ability to move freely from club to club visiting meetings or participating in their activities. Any Rotarian can visit another club when traveling, but passport clubs encourage their members to do so on a regular basis. This is how passport clubs got their name.

How many passport clubs is a district able to have?

There is no limit to the number of passport clubs in a district.

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CLUB TYPES, FORMATS, AND MODELS



All Rotary and Rotaract clubs share similar values and a passion for service, but each offers a unique experience. When you start a club, you'll need to choose a club type, a meeting format, and a club model. Consider the needs of your community and the club's prospective members to decide which kind of club would be best.

CLUB TYPE: First, determine whether your new club will be a Rotary club, a Rotaract club, or a satellite of a Rotary or Rotaract club.

Club type	Description	Appeals to	Member minimum for new clubs
Rotary club	Professionals and other leaders who meet regularly for service, connection, and personal growth Learn about a successful Rotary club.	People who are looking for friendship, service, and networking opportunities Learn more with the Starting a Club online course.	15 required
Rotaract club	Adults who take action through community and international service while learning leadership skills and developing professionally Learn about a successful Rotaract club.	Younger professionals and university students who want to become more effective leaders, find innovative solutions to community issues, and have fun through service Learn how to start a club.	12 recommended
Satellite club	A part of a Rotary or Rotaract club that has its own meetings, projects, bylaws, and board, managed in collaboration with its sponsor club Learn about a successful satellite club.	Those who want a club experience, meeting format, or meeting time other than what local clubs offer and who appreciate the support and partnership of another club. Some satellite clubs eventually form standalone clubs, while others, sometimes called companion clubs, do not. Learn more in the Guide to Satellite Clubs.	8 for a satellite Rotary club 4 for a satellite Rotaract club

MEETING FORMAT: Next, determine whether your club will meet in person, online, or both.

Meeting format	Description	Appeals to
In person	A club that meets in person at a designated location Learn about a successful club that meets in person.	Those who consider face-to-face interactions an important part of the meeting experience or who don't enjoy online meetings
Online	A club that meets primarily online and offers in-person service opportunities Learn about a successful club that meets online.	Frequent travelers, people who have difficulty attending in-person meetings, or those who prefer an online experience Learn more about online club meetings.

CLUB TYPES, FORMATS, AND MODELS



<p>In person and online</p>	<p>A club that holds some meetings in person and others online, or one that holds in-person meetings that some members attend virtually Learn about a successful club that meets in person and online.</p>	<p>People who have various needs and enjoy a flexible schedule and those who want many attendance options or a mix of experiences Learn more about clubs that meet online and in person.</p>
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CLUB MODEL: Finally, determine the approach your club will offer. You can choose a model below or design your own.

Club model	Description	Appeals to
Traditional	<p>The club experience includes having a meal, hosting a speaker, and practicing traditions that members value. Traditional clubs often have higher dues because of venue and meal costs. Learn about a successful traditional club.</p>	<p>People who want to socialize over a meal while learning about a new topic or an opportunity to serve the community</p>
Passport	<p>A club that allows members to attend other clubs' meetings frequently if they attend a specified number of home club meetings each year Learn about a successful passport club.</p>	<p>People who travel frequently or who enjoy trying a variety of club experiences and meeting lots of people Learn more in the Guide to Passport Clubs.</p>
Cause-based	<p>A club whose members are passionate about a specific cause and focus their service efforts on that topic Learn about a successful cause-based club.</p>	<p>People who want to connect with others while addressing a particular issue</p>
Interest-based	<p>A club that focuses on a particular interest or hobby Learn about a successful interest-based club.</p>	<p>People who want to enjoy Rotary by focusing on a shared interest or activity, such as professional development</p>
Corporate	<p>A club whose members (all or most of them) work for the same employer Learn about a successful corporate club.</p>	<p>Employees of one organization who want to do good in their community</p>
Alumni-based	<p>A club in which most members (or a majority of charter members) are former Rotary program participants or former Rotaractors or Rotarians Learn about a successful alumni-based club.</p>	<p>People who have previously participated in Rotary International or Rotary Foundation programs, or are former members</p>
Service-based	<p>A club that meets at least twice monthly for service projects and meets occasionally for social events or fundraisers Learn about a successful service-based club.</p>	<p>People who join Rotary to participate in service but who don't want to or can't attend meetings, or those who want a club with lower dues</p>

CLUB TYPES, FORMATS, AND MODELS

Language-based	A club whose members speak a common language other than the primary language of their district Learn about a successful language-based club.	People, such as expatriates, who want to connect with each other using a common language, or people who prefer to connect through that language
International	A club whose members are from different countries than the district where they reside Learn about a successful international club.	People who want to connect with others from all over the world or want a more international club experience
Districtwide online	A club whose members are from anywhere in the district rather than a specific locality, and who meet online. These clubs can function as a temporary club for members exploring different Rotary experiences or a permanent club for those who prefer this format. Learn about a successful districtwide virtual club.	People who want to connect online with others from a larger geographical area, and those who want to volunteer and meet others but may not be able to attend regular meetings in person and fulfill other club membership commitments. This model works well to engage prospective members or re-engage former members and program participants who may want to explore various projects and clubs.

Leading Meaningful Change

Increase Urgency – Creating a feeling of urgency so that people start talking about doing something about the problems and opportunities. Reducing the complacency, fear, and anger that prevent change from starting.

Build the Guiding Team – Helping pull together the right group of people with the right characteristics and sufficient power to drive the change effort. Helping them to behave with trust and emotional commitment to one another.

Get the Vision Right – Facilitating the movement beyond traditional plans and budgets. Creating the right compelling vision to direct the effort. Helping the guiding team develop bold strategies for making bold visions a reality.

Communicate for Buy-In – Sending clear, credible, and heartfelt messages about the direction of the change. Establishing genuine gut-level buy-in that shows up in how people act. Using words, deeds, and new technologies to unclog communication channels and overcome confusion and distrust.

Empower Action – Removing barriers that block those who have genuinely embraced the vision and strategies. Taking away sufficient obstacles in their organizations and in their hearts so that they behave differently.

Create Short-Term Wins – Generating sufficient wins fast enough to diffuse cynicism, pessimism, and skepticism. Building momentum. Making sure successes are visible, unambiguous, and speak to what people deeply care about.

Don't Let Up – Helping people create wave after wave of change until the vision is a reality. Not allowing urgency to sag. Not ducking the more difficult parts of the transformation, especially the bigger emotional barriers. Eliminating needless work so you don't exhaust yourself along the way.

Make Change Stick – Ensuring that people continue to act in new ways, despite the pull of tradition, by rooting behavior in reshaped organizational culture. Using the orientation process, the leadership succession process, and the power of emotion to enhance new group norms and shared values.



Vision	Collaborative Commitment	Skills	Rewards	Resources	Action Plan
<p>Describe why the change is necessary and how things will work after it's implemented.</p> <p>Consider:</p> <ul style="list-style-type: none"> • What will be different when the change is complete? • Will people do new things to make it work? 	<p>Ask people at all levels of the organization for input.</p> <p>Consider:</p> <ul style="list-style-type: none"> • How can I help people feel committed to the vision? • How can team members contribute their skills, talents, and knowledge? 	<p>Determine what skills are needed to implement and sustain the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> • Do people in key positions have those skills? • If not, how can they learn those skills? • What support or training can we offer? 	<p>Promote the benefits of embracing the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> • How to answer those who ask, "What's in it for me?" • What incentives can we offer? • What activities can we plan to encourage people? 	<p>Develop tools and resources to support the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> • What tools will help team members the most? • How will we make these resources available? • Who will be available to support and encourage people? 	<p>Separate the change into small, manageable steps.</p> <p>Consider:</p> <ul style="list-style-type: none"> • What steps will we take to implement the change? • How will we talk about the change with members, employees, and customers? • How can we make implementing and adopting the change as easy as possible?
<p>What to do:</p> <ul style="list-style-type: none"> • Collaborate on a vision statement. • Engage other leaders and members in group meetings. • Communicate in different ways to reach many audiences. 	<p>What to do:</p> <ul style="list-style-type: none"> • Create teams to collect data and help refine the vision and action plan. • Invite team members to contribute their ideas and expertise. 	<p>What to do:</p> <ul style="list-style-type: none"> • Determine what skills people need and if they are missing any. • Provide training and share the best practices, with examples and lessons you learned. • Offer workshops to give team members practical experience. 	<p>What to do:</p> <ul style="list-style-type: none"> • Hold contests that encourage participation. • Recognize those who are adapting to the change. • Plan activities and events that build the team. 	<p>What to do:</p> <ul style="list-style-type: none"> • Write an FAQ that people can consult. • Create how-to guides for new processes. • Have experts or coaches provide guidance. 	<p>What to do:</p> <ul style="list-style-type: none"> • Make a formal plan. • Create a list of all of the steps. • Agree on what will constitute success. • Gather and share success stories.

Why do some changes fail?



When you incorporate each element of the change plan, you have a better chance of succeeding. Leaving out any element makes the process more difficult, and eliminating more than one may also eliminate your chance of success. Review the chart to understand what may happen without that item.

Vision	Collaborative Commitment	Skills	Rewards	Resources	Action Plan
If you don't explain your vision clearly, people may be confused about the purpose of the change, leading to an incomplete or failed implementation.	People might not commit to a change if they feel that they weren't included in the planning or implementation.	If people lack the skills they need to make the change, anxiety about their lack of knowledge or expertise can lead to resistance.	People may be slow to adopt the change if they don't see the benefits of embracing it.	A lack of resources makes it difficult for people to learn what they need to know. That can cause frustration and resistance to change.	The change you are trying to implement may not get started at all if you haven't thoroughly planned for it.

NOTES:

ROTARY'S APPROACH TO CHANGE

We believe that for change to be successful, change leaders must always engage those who will be affected by the transition. From the start, change leaders and their teams should keep these people at the center of their plans.

A three-part focus on commitment, communication, and coaching can ensure that people remain the most important element of a change initiative.



ASSESS

Before any action is taken, the change leader should be able to describe the need for change. **What to ask:** What problem is the change solving? **What to do:** Understand the environmental influences for the change, and write an initial statement clarifying the desired outcome.

DESIGN

Next, the change leader will design a change strategy. **What to ask:** What is our vision for success? What is the new way people will do things? **What to do:** Write a vision statement, assemble a change team, and decide what organizational tools are needed for success.

BUILD

In this phase, the change leader develops the roadmap for the change. **What to ask:** How, and how often, should I communicate with stakeholders? Who needs training and when? **What to do:** Create a communications and training plan.

IMPLEMENT

The change is put in place. The change leader must support people, adjust benchmarks if necessary, and respond to resistance. **What to ask:** Is the change team ready to lead? Are the people affected prepared for this change? **What to do:** Support people throughout the change with commitment, coaching, and communication. Respond to resistance thoughtfully.

SUSTAIN

Ensure the change will last. **What to ask:** Are the structures in place for this change to continue after the change team disbands? **What to do:** Invest in necessary technology and resources, and ask for the commitment of future leaders and team members.

[TITLE OF CHANGE] CHANGE MANAGEMENT PLAN



Introduction

Managing and implementing change can be challenging, but being able to adapt is critical for Rotary to keep growing and making an impact well into the future.

The plan you create using this template will bring together in one document all the ideas, actions, and strategies for the change you want to implement. This includes the vision, benefits, budget, and implementation activities. It also will help you think about any risks that are part of the change process and how you can address or minimize them.

People are the most important part of any change initiative, which is why Rotary's change model has "Engage People" at the center. Always share your change plan with the people who'll be affected, so they can review it and offer feedback.

This template will help guide your collaborative discussions of a proposed change, your development and implementation of the plan, and how you reach your expected outcomes.

Rotary's change model has these phases:

- Assess
- Design
- Build
- Implement
- Sustain



As you plan your change, consider how to engage both the people helping you implement it and those who will be affected so you can build toward success. To secure people's **commitment**, provide them with clear **communication** and offer empathetic **coaching** that addresses their concerns.

We recommend using this template along with the Change Management learning plan in the Learning Center. One course introduces the model and others describe each phase. You can practice with a hypothetical change or think through an actual change for your club or organization.



Assess

SPECIFY THE NEED FOR CHANGE

Before deciding how to implement a change, think about why this change is needed. Consider these questions to develop a brief explanation of the changes you'll introduce.

- What is the current situation?
- What is changing?
- What is motivating the change?
- What are the risks of taking no action?
- What resources and time will be needed?

CREATE A VISION STATEMENT

Now that you have specified the need for change, you can create a vision statement. A clear and concise vision statement defines the desired outcome of the change and helps bring people together to understand and support it. An effective vision statement:

- Explains why the change is needed and what will be different
- Serves as a common reference to set and maintain the scope of the initiative
- Can be stated in pragmatic or aspirational terms
- Represents the best outcome possible from the change or the team
- Describes what will be considered success

DEFINE ELEMENTS OF THE CHANGE

Define the scope. Think about what's included in the project and what isn't. It's easy for elements to get added to an initiative, expanding the scope beyond its original parameters. As you think about the scope, consider budgets, people's capacity, and timelines while also considering the vision statement and desired outcomes.

Describe the expected benefits. Outline the positive outcomes you anticipate from the change. These statements are more general and strategically oriented around the change. Identifying the benefits can also help increase support for the change and motivate people to be committed to the project.

Determine the key performance indicators. These indicators the step-by-step actions you'll take to implement the change and help you evaluate its success. They should always be specific, measurable, and time-bound. Consider how you'll access or collect information to indicate if you've achieved the key indicators.

Do a cost-benefit analysis. Consider the cost of implementing the change. The benefits can be more specific (such as increased membership or higher revenue) or less

so (such as increased engagement or brand recognition). Also consider the potential costs of any negative impact from the change.

Set a timeline and milestones. A detailed schedule and measurable benchmarks will help the change team stay focused. Use the timeline to monitor your progress and adjust it if necessary.

CONDUCT A PARTICIPANT ANALYSIS

By learning about the people who'll be affected by the change, you can more effectively communicate with specific groups at specific times, coach them through any resistance, and gain their commitment. This is an important part of keeping people at the center of any change and will help you plan and implement the initiative.

When gathering this information, be sure to collect:

- Name and contact information
- Affiliation with the club or organization
- What would change for this person or group
- How significantly the change will affect this person or group



Design

ASSEMBLE A CHANGE TEAM

A change team includes people with different responsibilities who'll help you successfully implement the initiative. Your team should have people in some of the key roles listed below, but might not include all of them. Refer to the Change Management: Design course for descriptions of each role and list the team members below.

Change leader:

Project manager:

Change ambassadors:

Subject matter experts:

DETERMINE YOUR APPROACH

Use the questions below to guide your thinking and then write a high-level summary of your approach to your communications, any learning needs, organizational matters, and implementation. You can type your answers next to each question or write a paragraph that includes each aspect of your strategy below the questions.

Communication:

- Who are your audiences?
- What is each audience's preferred communication method (digital, print, social media, in-person)?
- What frequency of communication is ideal for each audience?
- Will you need to update websites or printed materials to support the change?

Learning:

- Who are your participants?
- What knowledge, skills, or behaviors do they need to acquire for the change to be successful?
- What's the gap between their current knowledge, skills, or behaviors and what they need?
- What structured learning will you use (in-person, virtual, facilitator-led, self-directed)?

Organizational structures:

- Are any roles or the relationship between roles changing? Do you need to create new role descriptions?

- What impact will there be on people currently in those roles if they are changed or eliminated? How will you handle that change?
- What policies, processes, or procedures will be affected by the change and will need to be developed or updated?

Implementation:

- Will you conduct a small-scale test of the change?
- Will you make the change all at once or use a phased approach?
- Will you need additional help from people or other support throughout the implementation?
- How will you collect, analyze, and respond to feedback about the change during implementation and shortly afterward? What about six months or a year later?
- How will you manage information? Specifically, where will any new materials such as policies, procedures, or guides be stored or posted?

IDENTIFY AND MITIGATE RISKS

Use the space below to list potential problems that could affect the success of your initiative. Include ideas about what you can do to reduce the risk.

Risk name:

Description:

How to mitigate it:

Risk name:

Description:

How to mitigate it:

Risk name:

Description:

How to mitigate it:



Build

DEVELOP NEW POLICIES, PROCEDURES, AND PROCESSES

You'll develop any new policies, procedures, and processes in conjunction with specialists in the topic and other supporters of your initiative.

Use these questions to guide your thinking:

- Who are the experts about the change who need to be involved?
- Who is responsible for updating or creating the policies, procedures, or processes that are changing?
- When does the change need to be fully implemented?
- How will you know if the change was successfully implemented?

COMMUNICATE ABOUT THE CHANGE

Use the guidelines and questions below to develop clear and effective communications.

- **Make sure every message has a purpose.**
 - What are your objectives for each message (provide information, motivate action, influence feelings)?
- **Share status updates regularly.**
 - Who should the information come from?
 - How should it be distributed (social media, email, newsletter, in person)?
 - What is the appropriate timing and frequency?
- **Provide clear instructions and resources.**
 - What key messages and directions need to be shared?
 - What resources are required?
- **Know your audience.**
 - Who will be receiving this particular message?
 - How can you best communicate with this group?
- **Include opportunities for feedback.**
 - When will you request feedback?
 - How will you collect it (via a form, meetings, email)?
 - How will you address or implement the feedback you receive?

PREPARE FOR IMPLEMENTATION

The change team will use the change plan to ensure that the initiative is successfully implemented. Use the questions below to review your plan and help you prepare.

- Who will this change affect?
- Do you anticipate any resistance to the change?
- What will you do to resolve any resistance that emerges?
- What new actions or activities will need to be completed?
- Will anyone need additional coaching or resources?
- Will anyone need additional communication about the change?
- What new learning materials or resources will be needed?
- What expert or facilitator will develop the new materials or sessions?
- How will the learning materials, resources, or practice opportunities be provided?
- What is the schedule or sequence for the transition?



Implement

ASSESS PEOPLE'S READINESS

Just before implementation, you should assess the preparations for the change. This includes consulting with people who have direct knowledge about the readiness of any technology, people, or process involved. You should also revisit your list of potential risks to ensure that any remaining ones are acceptable.

You can use a template like this to track the initiative's readiness to launch:

Task	Status (red/yellow/green)	Progress notes

IMPLEMENT THE CHANGE

This is when the initiative takes effect. You and the change team will have outlined all the elements of implementation earlier in the process. The implementation might occur all at once or through a phased approach, depending on the project.

As people adopt new technologies, processes, and ways of interacting, it's especially important to refocus on the three aspects of engaging people in change:

communication + coaching = commitment.

MONITOR MILESTONES AND RECOGNIZE PROGRESS

As people begin to take on new roles, you and your team should think often about the timeline and milestones to ensure that the team is achieving the benchmarks necessary for success. Consider:

- Are you meeting your goals within your established timelines?
- What is working well in your change plan?
- What would you do differently if you did this again?
- Who has supported your efforts? How can you recognize them?

OFFER WAYS TO GIVE FEEDBACK

You'll want to develop a plan to solicit, review, and act on feedback. Consider a variety of methods, audiences, and time intervals for collecting this information. Also think about

whether you'll request it by email, via social media, in person at meetings, or through observation. Incorporate this feedback to adjust the change plan as needed.

Use the space below to develop a feedback plan.

Feedback request 1

Audience:

Method:

Timeline:

Feedback review plan:

Feedback request 2

Audience:

Method:

Timeline:

Feedback review plan:

Feedback request 3

Audience:

Method:

Timeline:

Feedback review plan:

Sustain



EVALUATE THE PROCESS

Establish an evaluation plan

It's also important to evaluate the entire process to make sure the changes have been effective and that your club or district is responding positively.

The best approach is to conduct evaluation sessions at various times after the initiative has been implemented. If you review it immediately afterward, you won't have enough data to determine its effectiveness. But waiting too long might cause people to forget key details they wanted to mention.

Let members know in advance that you'll be evaluating the process and encourage them to take notes throughout it to retain those key details.

Conducting a session

In a successful evaluation session, members feel comfortable sharing their ideas and believe that their opinions are valued.

Consider these questions as you prepare for an evaluation session:

- How can you encourage participants to be honest and candid?
- How can the session remain objective? What type of questions should you ask to encourage objectivity?
- What questions can you ask to elicit both positive and negative aspects of the implementation plan?
- How can you keep the session focused on the future?

Consider asking these questions during an evaluation session:

- Are we achieving the goals and metrics we established?
- How do you rate your satisfaction with the process and outcome?
- What do you think went particularly well?
- What parts were more challenging?
- What factors that you didn't expect led to those challenges?
- What would you do differently next time?

COMPILE DOCUMENTATION

Keeping records about the changes you implemented and their level of their success will help other leaders sustain the change and apply what you learned to other initiatives. Be

sure to review and revise any new procedures you created during the process. Without documentation, it's easy to overlook important details.

Answer these questions about documenting and sharing information:

- How does your club or district store and share files?
- Where does your district store private or sensitive information?
- Who in your club needs access to this information? Who on the change team needs access?
- How do you manage old files? Do you have a procedure for deleting them?

Outgoing leaders should meet with the new leadership team to review the change plan. Be sure to include information about where important documents are stored, details about the change plan such as what's next, the feedback you're incorporating, and who is responsible for what. Incoming leaders should feel empowered to manage the change plan and build on it.

CELEBRATE SUCCESS

Acknowledging people for their efforts to make the initiative a success helps establish a culture of change. It's important to recognize the change team, change ambassadors, and others who helped in various ways.

Consider these questions when you're planning a celebration:

- What specific teams and people involved should be acknowledged?
- How do people like to be recognized?
- Do you have money in the budget for a celebration? If not, how can you best acknowledge people?

Enhancing Belonging and Engagement at Rotary

At Rotary, we believe that creating a culture of belonging is essential to who we are. Our strength comes from the connections we build, the respect we show, and the opportunities we create so that everyone can thrive. Belonging, engagement, and accessibility are at the heart of how we grow together and create lasting change. Everyone is welcome in Rotary. Discover how Rotary and Rotaract members are taking action to make their clubs and communities more diverse, equitable, and inclusive on the [Rotary 360 blog](#). Resources for Rotary members are available on [My Rotary](#).

If you want to lend your voice and make a difference in your community, [join us](#).

Our diversity, equity, and inclusion statement, first adopted in 2019 and strengthened in 2021, remains a foundation for the evolution of our commitment:

- At Rotary, we understand that cultivating a diverse, equitable, and inclusive culture is essential to realizing our vision of a world where people unite and take action to create lasting change.

- We value diversity and celebrate the contributions of people of all backgrounds, across age, ethnicity, race, color, disability, learning style, religion, faith, socioeconomic status, culture, marital status, languages spoken, sex, sexual orientation, and gender identity as well as differences in ideas, thoughts, values, and beliefs.
- Recognizing that individuals from certain groups have historically experienced barriers to membership, participation, and leadership, we commit to advancing equity in all aspects of Rotary, including in our community partnerships, so that each person has the necessary access to resources, opportunities, networks, and support to thrive.
- We believe that all people hold visible and invisible qualities that inherently make them unique, and we strive to create an inclusive culture where each person knows they are valued and belong.
- In line with our value of integrity, we are committed to being honest and transparent about where we are in our DEI journey as an organization, and to continuing to learn and do better.

<https://www.rotary.org/en/about-rotary/enhancing-belonging-and-engagement-at-rotary>



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Our Rotary Culture



Belonging starts here

At Rotary, we believe everyone should feel welcome, respected, and connected. We're building a culture where people from all backgrounds can grow, lead, and thrive—together.

Learning opportunities

Explore a series of [free online courses](#) designed to help members build respectful relationships and contribute to a welcoming and inclusive Rotary environment.

Understanding how clubs represent their communities

We encourage clubs to use the [diversity assessment](#) to help identify people, skills, and experiences that are underrepresented and develop a plan to address that.

Contact us

Want to learn more?

Contact culture@rotary.org to submit a story or share feedback.

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The future is inclusive

Broaden your connections and discover the positive impact of DEI

By **Arnold R. Grahl**

Interview with Todd “Bowtie” Jenkins – Rotary Club of Fayetteville, Arkansas – Diversity, Equity, and Inclusion (DEI) Task Force member.

1. You have worked with such companies as Walmart, Google, Facebook, American Airlines, and Kellogg’s. What can Rotary learn from these companies regarding DEI?

There is no one right way or one-size-fits-all to make DEI (diversity, equity, and inclusion) work. As individuals and as an organization, we must understand that we are all on a journey. These big companies have done a great job of understanding the business case for practicing DEI — that the most diverse companies are more likely than ever to outperform less-diverse peers. Rotary must use its connections to continue to activate an inclusive growth-mindset and become something the world hasn’t seen before — an organization where inclusion is at the core of everything we think, say, or do.

2. You speak to Rotary clubs and districts worldwide about DEI. Are there frequent questions you hear, and how do you address them?



Illustration by Viktor Miller Gausa

There are certainly some common themes. One common question is: “Where do we start?” This is a great first question. It is vital to assess your community, where you are at, and understand where you wish to go. Then, most important, build a plan to get there, and live out your plan in behaviors and actions.

Another question is: “How do we connect with diverse communities?” This one should be so easy for Rotary because connection is all about building relationships — authentic relationships! Get to know people who are different from you, and partner with marginalized communities through service projects or meaningful events.

A third, frequent question is: “How do we get buyin?” This is where it is so important to make sure that DEI efforts extend to all activities and involve everyone. Make sure there is a commitment to the work at the highest levels of the club and district, and if you can, make sure all the goals have measurable results.

3. As more clubs and districts work to set up specific committees to address DEI, what advice do you have for them?

Don't shy away from having hard conversations, but make sure you are able to answer two questions: Whom will this conversation benefit, and what are we looking to accomplish? We all come to these efforts differently, so we need to create spaces to listen and ask tough questions around representation, culture, systems, policies, and programs, all while avoiding the tendency toward shame and blame. I have learned to practice curiosity with compassion — looking to understand different views and perspectives. The more we practice these traits, the better we will become.

4. How optimistic are you for the future of diversity, equity, and inclusion within Rotary?

Hope is all we have, and it is part of why I believe Rotary is ready to do the work. Rotary brings hope every day to communities around the world. This work and commitment are not meant to always be exhausting. Yes, you will have challenging times and conversations. However, I have seen in my profession that small changes in DEI work can make a big difference. You should celebrate the small wins. COVID-19 has taught us so many lessons, including that of gratitude. So don't forget to smile and enjoy the process of doing the right thing.

Learn more about Rotary's Diversity, Equity, and Inclusion Statement at [rotary.org/dei](https://www.rotary.org/en/the-future-is-inclusive).

Related Content

[Rotary's commitment to diversity, equity, and inclusion](#)

[Board of Directors strengthens Rotary's diversity, equity, and inclusion statement](#)

[Message from our leadership](#)

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DIVERSIFYING YOUR CLUB: A READINESS ASSESSMENT

Clubs vary widely in their readiness to work on building connections with new people and creating a culture of inclusion. Complete the table below, using the empty rows to add your own ideas. Then take the Diversifying Your Club course to prepare for the steps you may not be comfortable with yet.

IS YOUR CLUB READY TO ...	YES/NO (circle one)	NEXT STEPS
Discuss the benefits of having its membership accurately represent your community?	Yes No	
Dedicate time during a few meetings to conduct the Diversifying Your Club assessment, including completing the Member Diversity Worksheet?	Yes No	
Consider several perspectives when applying The Four-Way Test?	Yes No	
Recognize the difference between equality and equity, and why equity is our goal?	Yes No	
Understand and counteract the ways in which unconscious biases can shape how we perceive people?	Yes No	
Build authentic relationships with diverse groups of people?	Yes No	
Include members of underrepresented groups in any discussion of community needs and give them an active role in any initiative?	Yes No	
Develop a culture of inclusion where everyone who engages with us feels respected and valued for their unique qualities?	Yes No	
	Yes No	
	Yes No	
	Yes No	

UNDERSTANDING HOW YOUR CLUB REPRESENTS YOUR COMMUNITY: A DIVERSITY ASSESSMENT



Rotary is committed to diversity, equity, and inclusion (DEI). Thinking about whether your club is diverse means evaluating how well it reflects factors such as the different ethnicities, ages, and professions in your community and whether it has an appropriate gender balance. This assessment will help you identify people, skills, and experiences that are underrepresented in your club and develop a plan to address that. It's equally important to provide the support each person needs so they can have the same kind of experience, which is what we mean by equity. We always want to create a culture of inclusion, where people's differences are respected, supported, and valued.

WHAT YOU'LL GAIN

Conduct this diversity assessment and act on its results to:

- Raise your members' awareness of the diversity in your community
- Build member support for diversifying your club
- Make adjustments so that your club better represents the community

GETTING ORGANIZED

Learn more about diversity and Rotary's recommendations for your club by taking these courses in the Learning Center: [Creating an Inclusive Club Culture](#), [Microaggressions](#), and [Diversifying Your Club](#). Then plan how you'll carry out the assessment, such as by dedicating time at a series of club meetings to each step of the process. Use the Club Action Plan in appendix 1 to track your progress.

Choose a facilitator (such as a DEI expert outside your club) who is comfortable talking about diversity and why it's important. This activity should involve all club members so that everyone has a stake in the process. Including your club members in this process now will increase awareness and support for more action in the future.



Diversifying your club isn't just about changing the mix of people. It also needs to involve making everyone feel valued and welcome, or they won't stay with Rotary.

GETTING STARTED

Step 1: Discuss the advantages of having diverse members.

Talk about the benefits of diversity and celebrate how it has helped you in the past. For example, highlight a project that was more successful because it involved members with diverse professional skills. Or acknowledge a member who identified a club bylaw that could exclude some people and talk about how your club changed it. Discuss how diverse perspectives aid your club's ability to address local needs. Reflect on your club's representation by profession, gender, age, ethnicity, and culture in your community.

Step 2: Collect information.

At the next meeting, summarize your previous discussion and briefly reiterate the positive effects of having diverse members. Explain that the next step is researching your community's demographics so that you can better understand your community's composition by age, gender, ethnicity, income levels, sexual orientation, and more. Distribute the Member Diversity Worksheet. Split club members into groups and ask each group to gather the specified information and complete what they can of the worksheet before the next meeting. You could organize the groups this way:

- **Group 1** gets data on the demographics of the community from a local business association, such as the chamber of commerce.
- **Group 2** gathers information about the community's cultural and demographic composition from the local tourism bureau.
- **Group 3** gets socioeconomic statistics from local economic development experts or the city government.
- **Group 4** gets the most recent census results, which may include information on the age, gender, profession, and ethnic identity of the area's residents.

Step 3: Discuss the findings within each group.

At the following meeting, ask each group to discuss what it found, share what it completed on the worksheet, and compile the findings. Then have each group choose a representative to present its data to the club later on. The goal is to have reliable data about the diversity in your community.



Remember as you try to assess the diversity in your club and community that there is a lot of nuance. People can belong to more than one ethnic group or have disabilities that aren't evident. Avoid making assumptions, such as about someone's sexual orientation or gender identity.

Step 4: Report the results and discuss their implications.

Give each group about five minutes at a club meeting to present its findings. Lead a discussion about the information and what it shows.

Talk about whether your club's members reflect:

- The ages of your area's population
- The gender composition of the community's working professionals
- The ethnic and cultural diversity of the community
- The varied socioeconomic levels of the community
- The various types of professions in the community
- The proportion of professionals who have disabilities



Be sure to allow enough time when you're planning the schedule. Each step can take a week or longer.

Step 5: Develop a member diversity action plan.

Now that you've determined who is underrepresented in your club, find ways to connect with these members of your community. You could invite someone to speak to the club about their perspective on the area and the issues you might work on together. Ask people about their experiences and if they are willing to share what they believe the community needs. Determine their interest in joining, how they could contribute to your club, what your club could offer them, and how your club could accommodate their needs. Document your plan and assign tasks to people on the membership committee or other club members. Set goals for how you want to diversify your club, monitor your progress, and keep club members updated.

Want to do other assessments?

[Member Interest Survey](#)

[Prospective Member Exercise](#)

[Retention Assessment and Analysis](#)

[Member Satisfaction Survey](#)

[Exit Survey](#)

Use the Club Action Plan in appendix 1 to track your membership efforts.

MEMBER DIVERSITY WORKSHEET

1. What sources did you consult to find data about your community's demographic composition?

2. What data did you find about:

Age:

Gender:

Nationalities (what countries are represented?):

Ethnic background:

Professions:

Sexual orientation:

People with disabilities:

Socioeconomic status:

3. Does this data correspond to the current composition of your club? Explain your evidence.

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

5. What surprised you the most?

6. What surprised you the least?

7. Which demographic groups are underrepresented in your club?

8. What can your club do to better represent your community?

9. Do you think people from groups that are currently underrepresented would feel welcome in your club?

10. What do your club materials, website, and social media posts show about your club's diversity?

11. How can you integrate your findings into a plan of action?

FINDING PEOPLE TO INVITE: A PROSPECTIVE MEMBER EXERCISE



You can find new members by asking people you know, following up on your club's online membership leads, identifying who's missing from your club, cultivating new relationships, and leveraging social media.

Encourage members to invite prospective members to service activities, club meetings, and events so that they can learn how your club works with the community and provides opportunities for friendship and connection. Each club should review its list of membership leads regularly and contact those people. And keep making progress on making your club better reflect your community.

To reach an even broader group of people, work with your public image committee to promote your club's service and social activities on social media. Tagging contacts who may be interested in an event, adding a "join" link on public documents or webpages, and using hashtags strategically are all ways to broaden your reach.

WHAT YOU'LL GAIN

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

- Develop a group of potential candidates for membership
- Determine how to introduce prospective members to your club
- Get to know people and what they're looking for so you can meet those needs



Clubs around the world approach member recruitment in very different ways. Customize this exercise to make it appropriate and relevant for your region.

GETTING ORGANIZED

Set aside time for members to complete the Identifying Prospective Members Worksheet at a club meeting. This exercise generally 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 year.

GETTING STARTED

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

Explain the purpose of this exercise and ask club members to fill out the worksheet. Compile the information they provide, along with your club's membership lead candidates, and maintain a list of prospective members.

Step 2: Make an action plan.

Invite the prospective members to a club meeting, service activity, or social event. If you conducted the diversity assessment, refer to the list of groups you found to be underrepresented in your club and include people from those groups as well. Now you can develop a plan that specifies:

- Who you want to invite, and if you want to do so in small groups
- Who is responsible for inviting each person
- What event they'll be invited to
- How the person responsible will make the invitation
- How they'll follow up with the prospective member after the event

Step 3: Invite prospective members to a club event.

Invite the people from your list to attend an upcoming service activity 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.



You can use the Manage Membership Leads page of My Rotary to [store information](#) about all your prospective members.



Two of every three prospective members who are referred by a current member join Rotary. If a prospect is interested but can't join your club, you can still help Rotary grow by referring them to another club.

Step 4: Follow up with prospective members.

- Ask members who invited guests to contact them and then share their interest or feedback with the club.
- Keep the worksheets and your compiled list for future membership efforts.
- Regularly use the Club Administration area of My Rotary to track membership leads gathered through Rotary's website.
- If you find people who are interested in Rotary and would be good members, but they aren't a good fit for your club, refer them to another club.

Want to do other assessments?

[Member Interest Survey](#)

[Diversity Assessment](#)

[Retention Assessment and Analysis](#)

[Member Satisfaction Survey](#)

[Exit Survey](#)

Use the Club Action Plan in appendix 1 to track your membership efforts.



You can also review the [Rotary Research page](#) for a broader understanding of membership trends.

IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

Think of your contacts, acquaintances, friends, and family members, as well as community residents who might be interested in your club. You don't have to know if they're ready to join Rotary.

After you've listed the names of people who might be interested, circle anyone you think would be a good fit for your club in particular.

Your name: _____ Date: _____

Professional contacts

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

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Service contacts

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

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Community contacts

Consider other people you know in your community, such as:

- Accountants
- Business consultants
- Civic leaders
- Construction workers
- Dentists
- Entrepreneurs
- Financial managers or planners
- First responders
- Food or beverage industry workers
- Health care workers
- Information technology professionals
- Lawyers
- Local innovators
- Nonprofit professionals
- Nurses or doctors
- Psychologists
- Public relations professionals
- Real estate agents
- Religious leaders
- Sales executives
- School administrators
- Social workers
- Stay-at-home parents
- Teachers or professors
- Veterinarians

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Rotary contacts

Consider past members or Rotary alumni that you know or that your club maintains contact with. Rotary alumni are people who have participated in:

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

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

All Modules: Your PETS Experience: Final Takeaways and Best Practices

Following the conclusion of all the PETS learning sessions, answer the questions below as you continue to plan for an impactful year as Club President.

Discussion Questions

Takeaways for Yourself

1. List three takeaways for yourself.
 - a.
 - b.
 - c.

2. Which takeaway is the most critical to the vibrancy of yourself as Club President?

Best Practices for Your Club

3. List three best practices for your Club.
 - a.
 - b.
 - c.

4. Which best practice is the most critical to the vibrancy of your Club?

Most Impactful Overall Takeaway / Best Practice

- 5.

