

# Lone Star PETS 2025

## PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, MARCH 1, 2025

### SESSION C-8      ATTRACTING MEMBERS

#### **GOAL**

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

#### OBJECTIVES

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

1. Outline a process for working with club members to develop new strategies for attracting new members.
2. Recall ideas offered by other members of the group during this session for including non-Rotarians in club projects or meetings.
3. Identify prospective groups and individuals in each respective community with interest in connecting with Rotary clubs.

#### REFERENCE MATERIALS:

Member Interest Survey

Perspective Member Exercise

## Module C-8: Attracting Members

### Breakout Discussion Questions

1. Why is it important to attract new members to Rotary?  
Why is it important to attain a diverse club which reflects your community's demographic composition?  
How can a club attract new members and achieve a diverse composition?  
Refer to Member Interest Survey and Perspective Member Exercise.  
How could you as PE work with your club to develop this plan for identifying new members who represent your community?
2. Go to Perspective Member Exercise worksheet.  
Discuss ideas for including non-Rotarians in club meetings and projects.  
Select one outstanding idea and share with the entire group?
3. What groups does your club work with on service or fundraising projects? How can your relationships with these groups lead to attracting new members? What other groups locally would have interest in connecting with your club?
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 Attracting Members session?
6. Any other questions?

# GETTING TO KNOW PROSPECTIVE AND NEW MEMBERS: MEMBER INTEREST SURVEY



Did you know that when members leave Rotary, one of the primary reasons they cite is that their expectations weren't met? Getting to know new and prospective members early on is helpful for everyone. If you understand someone's background, interests, and what they want to contribute, you can determine whether your club can offer what they want and how to involve them in ways they'll enjoy. You might even find opportunities for them to help your club grow. Surveying new and prospective members gives you feedback on any factors that might prevent them from joining or fully participating. You may also discover ways your club can be more flexible and accommodate more people.

## WHAT YOU'LL GAIN

If you consistently conduct this survey and act on its results, you can:

- Help prospective members and new members feel comfortable in your club
- Increase member engagement and satisfaction
- Improve your club's retention rate
- Help your club make the most of members' unique skills and expertise

## GETTING ORGANIZED

Identify a group of people who are committed to welcoming and involving new members and helping them understand the culture of your club. This may be your membership committee or a newly organized member interest team. Next, decide how you'll use the survey. You can send it to guests who inquire about joining, include it in the membership application, make it part of new member orientation, or use it as the basis for an informal conversation. You'll also need to decide whether you'll print copies of the survey, email it to people, or use one of the survey platforms mentioned above.



Some clubs that use this survey in their membership application take an additional step. If it's clear that the club doesn't meet the person's interests, the club asks the assistant governor to find one that does.

## GETTING STARTED

### Step 1: Decide what questions to ask and who will ask them.

Review the sample questions below and use them to create your club's survey or guide your informal conversations. Not every question will apply, so you can edit them, add your own, or omit some. Save them with your club files so they're ready to use. Determine who'll be responsible for sending out the survey or having the conversations.

### Step 2: Determine when to use the questions and then do so.

Distribute the survey or schedule a time to talk based on the timing your committee decided upon. That might be after a guest's first visit or after a new member has joined. Let the person know the purpose of the survey or conversation and that their responses will help you offer them a better experience. Use the questions that your club had selected earlier.

### Step 3: Use the feedback to engage each member in ways that suit their interests.

This is the most important step. If people take the time to answer the questions thoughtfully but there's no response, they might feel frustrated, which would undermine your goal. Because you know your club and Rotary well, learning what members are interested in will enable you to connect them with activities they'll find fulfilling. Review the sample below to learn how to address a member's response.

| NEW OR PROSPECTIVE MEMBER'S RESPONSE   | WAYS TO ACT ON THEIR RESPONSE  |
|--|--|
| <b>Example:</b> The person is interested in hands-on service, but also concerned about the attendance requirement. | Introduce the person to the service projects chair and ask if they want to join the committee.   |
|  | If your club doesn't have a strong service component, ask your assistant governor whether another club is a better fit or if there's a districtwide project the person could join. |
|  | Ask if the person is interested in sharing their ideas for service projects your club could conduct.   |
|  | Explain that attendance is flexible (if it is in your club). If it's not, consider updating your bylaws to better accommodate people with this concern.                            |

# MEMBER INTEREST SURVEY

## SAMPLE QUESTIONS

### Your background

1. What is your name and what do you like to be called?

What are your pronouns? (We ask because we always want to treat people with respect and ensure that people feel welcome.)

My pronouns are:   \_\_\_ he/him/his   \_\_\_ she/her/hers   \_\_\_ they/them/theirs

2. What title do you prefer? Please circle one:   Mr. / Mrs. / Ms. / Miss / Other: \_\_\_\_\_

3. Tell us about your areas of expertise.

4. What is your current or former profession?

5. What is your general field or industry? (For example, sales, publishing, etc.)

6. When is your birthday? (We ask so that we can honor you if you wish.)

7. Are there other significant dates we can help you or those close to you celebrate?

8. Tell us about where you grew up or the places you've lived.

9. What hobbies or interests would you like us to know about?

## Membership in Rotary

1. What motivated you to get involved with the club? How did you learn about us?
  
2. Have you engaged with Rotary in the past? If so, how?
  
3. What do you want most from your experience as a member?
  
4. What opportunities would keep you interested and improve your Rotary experience?
  
5. What strengths and skills do you have that could help your club?
  
6. Please rank these in order of what you want from your Rotary experience, using 1 for most important and 5 for least important:
  - \_\_\_ Friendship and fun
  - \_\_\_ Service activities
  - \_\_\_ Networking opportunities
  - \_\_\_ Leadership and personal development
  - \_\_\_ The club meeting experience

## Friendship and fun

1. What social activities are you excited to do with the club? This could include having coffee or tea and getting to know others better or attending sporting or cultural events.
2. What do you like about the club's social activities so far?

## Service activities

1. What needs in our community do you think are most vital for our club to address through service projects?
2. Are there any organizations that you'd like the club to work with to address needs locally or internationally?
3. What experience have you had in community activities? What are your main community interests?
4. Are you aware of any current club projects that you'd like to be involved in?

## Networking opportunities

1. What kinds of networking opportunities do you hope being a Rotary member will offer?
2. What do you like about the club's networking opportunities so far?

## Leadership and personal development

1. Our club has many roles that can help you develop your leadership skills. Mark any roles below that you want to learn more about or have questions about:

\_\_\_ Club president

\_\_\_ Club secretary

\_\_\_ Club treasurer

\_\_\_ Club administration committee member

\_\_\_ Club membership committee member

\_\_\_ Club public image committee member

\_\_\_ Club service project committee member

\_\_\_ Club Rotary Foundation committee member

\_\_\_ Other (Please specify.) \_\_\_\_\_

2. Do you have experience in volunteer leadership?

3. Are you interested in serving in a club leadership role at some point?

## The club meeting experience

1. What are your expectations for club meetings or the topics you want addressed there?

2. Can you attend meetings on [day] and [time] (enter your meeting schedule)?

Circle one: Yes / No / Unsure

3. How do you feel about the meeting format? (Note whether your meetings are in person, virtual, or hybrid.)



4. How do you feel about how often the club meets? (Note your club meeting frequency.)
5. How do you feel about the club's expectations for attendance and participation? (Note what your club's expectations are.)
6. Are you aware of the membership dues and fees? (List the dues and fees.)  
Circle one: Yes / No / Unsure
7. How do you feel about the club's fees, dues, and other costs? (Note any other costs.)

### **Want to do other assessments?**

Diversity Assessment

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.

# 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: \_\_\_\_\_



# Lone Star P.E.T.S. 2025

## PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, MARCH 1, 2025

### SESSION C-9      ENGAGING AND RETAINING MEMBERS

#### **GOAL**

**Club Presidents-elect will begin to design a strategy to engage and retain members through learning opportunities and events.**

#### OBJECTIVES

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

1. Explain the value of membership assessment tools in the planning of strategies to engage and retain club members.
2. Identify how key benefits of attending district events and seminars impact membership engagement and retention.
3. Explain the value of a comprehensive membership engagement and retention strategy for their respective Rotary club.

#### REFERENCE MATERIALS:

Member Satisfaction Survey

A Retention Assessment Analysis

Exit Survey



## Module C-9: Engaging and Retaining Members

### Breakout Discussion Questions

1. Refer to PN Workbook and handout Member Satisfaction Survey. What makes this a valuable process?  
How could you, as club PE, utilize this survey as a planning tool for your club.
2. How can having your club members attend these events assist in engaging and retaining your members?  
In what ways can a PE effectively promote district events?  
How can members who attend district events and seminars be engaged in club activities so their experience at the event helps the club as a whole?
3. Refer to handout in PN Workbook, Retention Assessment and Analysis, Discuss issues for assigned category of club members and develop three action steps.  
For each group, share one action step with entire group.
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 Engaging and Retaining Members session?
6. Any other question(s)?

# ENHANCING THE CLUB EXPERIENCE: MEMBER SATISFACTION SURVEY



The experience your club offers people affects how they feel about the club. By asking members for feedback regularly and then responding to it, you're showing your openness to change and empowering them to help create their ideal club experience. The Member Satisfaction Survey can help you gather feedback so you can use it to ensure that members are enjoying their experience.

## WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

- Identify what your members like and dislike about their club experience
- Develop an action plan that builds on what people enjoy and that ends or changes what they don't

## GETTING ORGANIZED

You'll need a dedicated group of people to conduct the Member Satisfaction Survey. It can be your club's membership committee or a few interested volunteers. You can devote time during a club meeting to discuss how satisfied people are and have them take the survey. You could also hand out the survey or email it to members so they can have more time to complete it. Or you could hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.



Emphasize to those administering the survey the importance of keeping the responses confidential when they discuss and analyze them. Be sure to tell members this will happen.

## GETTING STARTED

### Step 1: Customize the survey.

Use the sample questions below to develop your club's Member Satisfaction Survey.

### Step 2: Distribute the survey.

Distribute the survey to people or use an online survey platform. Explain that their responses are confidential and will be used to enhance the club experience for both current and prospective members.

### Step 3: Analyze the data.

Have the group you organized to administer the survey review the results. Remind people about the importance of confidentiality and respecting all viewpoints.

### Step 4: Share the results and make an action plan.

Present the survey results to the club and discuss them. Allow time for members to ask questions and offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for making changes.

### Step 5: Take action.

The final step is to implement the action plan. Talk to members and involve as many of them as you can in the process so that they're invested in making the club experience better for everyone.



Consider using an online survey platform. They're convenient, often free or inexpensive, and helpful in managing the response data.



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

### Want to do other assessments?

[Member Interest Survey](#)

[Diversity Assessment](#)

[Prospective Member Exercise](#)

[Retention Assessment and Analysis](#)

[Exit survey](#)

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

# MEMBER SATISFACTION SURVEY

## SAMPLE QUESTIONS

This survey focuses on your typical experiences in our club. Your input is valuable and will be used to make the club even better for everyone. There are no right or wrong answers, so simply offer your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with being a member of our club?

- Satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Dissatisfied

2. Thinking about our club’s **culture, members, and meetings**, indicate how much you agree with the following statements.

|  | Agree                    | Somewhat agree           | Neither agree nor disagree | Somewhat disagree        | Disagree                 |
|--|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|
| I enjoy our club meetings.                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My club does a good job involving new members. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| Members of my club care about each other.      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My club is as diverse as our community.        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |

|   | Agree                    | Somewhat agree           | Neither agree nor disagree | Somewhat disagree        | Disagree                 |
|---|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|
| Members are involved in ways that match their interests and skills. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| The number of fundraising activities is appropriate.                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| Our club has a welcoming environment.                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I can freely express myself among our club members.                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I'm proud to belong to this club.                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |

**Comments and suggestions:**

3. How do you rate the following aspects of club meetings?

|   | Excellent                | Good                     | Fair                     | Poor                     | Very poor                | Not applicable           |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Rotary International updates                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Length  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Frequency   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Format (online, in person, or hybrid)             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Time for socializing                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional connections and networking           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Content variety                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Location  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meeting time and day                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meals or other food options                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Opportunities to offer input and have discussions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Comments and suggestions:**

4. What do you think about these aspects of our club's **service projects**?

|                                  | Just right               | Too many                 | Too few                  |
|----------------------------------|--------------------------|--------------------------|--------------------------|
| Total number of projects         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Number of local projects         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Number of international projects | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

|   | Agree                    | Disagree                 | No opinion               |
|---|--------------------------|--------------------------|--------------------------|
| Our projects are well-organized.                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Our projects make a difference in the community or the world. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Our projects are meaningful to me.                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Comments and suggestions:**

5. Thinking about **communication** and **responsiveness** in our club, indicate how much you agree with the following statements.

|   | Agree                    | Somewhat agree           | Neither agree nor disagree | Somewhat disagree        | Disagree                 |
|---|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|
| My club is good at communicating with members.                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My club is good at listening to members.                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My club seeks input and ideas from members.                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My club regularly acts on input and ideas from members.                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My club updates our processes and rules to meet the needs of our members. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I'm comfortable with the pace of change in my club.                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |

**Comments and suggestions:**



6. Indicate how much you agree with the following statements about being a member.

|   | Agree                    | Somewhat agree           | Neither agree nor disagree | Somewhat disagree        | Disagree                 |
|---|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|
| I am welcome in my club.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I can be myself around members of my club.                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My club members know me and value me.                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I make valuable connections through my club.                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My club provides opportunities to use my talents and skills.    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I have access to leadership opportunities in my club.           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My Rotary experience is worth the cost.                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My experience as a member is worth the time I commit to Rotary. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |

|  | Agree                    | Somewhat agree           | Neither agree nor disagree | Somewhat disagree        | Disagree                 |
|--|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|
| My family understands the value I place on my Rotary membership. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| My friends understand the value I place on my Rotary membership. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| Through Rotary, I make a difference in my community.             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| Through Rotary, I make a difference in the world.                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |

**Comments and suggestions:**

7. Indicate how much you agree with the following statements about club engagement.

|   | Agree                    | Somewhat agree           | Neither agree nor disagree | Somewhat disagree        | Disagree                 |
|---|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|
| I invite my friends, family, and colleagues to club events.               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I invite prospective members to join my club.                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I frequently participate in my club's activities, projects, and programs. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
| I'm proud of my club.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |

**Comments and suggestions:**

8. Think about the costs associated with being a club member and rate these factors.

|   | Too low                  | Just right               | Too high                 | Not applicable           |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| Club dues   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Food  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Club fees   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Requests for donations for service projects         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Requests for contributions to The Rotary Foundation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Comments and suggestions:**

9. What didn't we ask about that you'd like to start, stop, or continue in your club?

# ENGAGING AND KEEPING MEMBERS: A RETENTION ASSESSMENT AND ANALYSIS



When members stay, it's a sign that your club's doing well. But just keeping your overall member count steady doesn't mean you don't need to be concerned about retention. If clubs are consistently losing members and inducting new ones, that indicates that they may need to change how they manage their growth or retention.

This assessment provides ways to understand your club's trends and engage people more meaningfully at different stages of membership. This increases the likelihood that they'll remain in Rotary.

## WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

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

## GETTING ORGANIZED

Part of this process requires access to club membership reports in Rotary Club Central. The club president, secretary, treasurer, membership chair, and Foundation chair have this access and can delegate it to anyone at the same organizational level. It may be helpful to involve a member who has experience in data analysis.

## GETTING STARTED


### Step 1: Gather information.

Think about the members who have resigned from your club during the past year or two. Consider whether they were newer members or longtime members, and whether they had any reasons in common. If your club surveys exiting members, you can gain insight from that feedback. When

you terminate a member in My Rotary, it's important to list the reason they left. This information will be used in the Rotary reports that are a good source for analyzing trends.

To access these reports:

- Sign in to My Rotary
- From the MEMBER CENTER menu, choose Online tools and then Rotary Club Central
- From the options on the left, choose **Reports**
- Under **Club Reports**, choose the report you'd like to access

You can use the Member Viability and Growth report to find the retention rates for existing members. You can also search for trends in when members leave your club and their reasons by using the Membership Termination Profile report. To export reports, select the "Export" icon  and choose a program or format. You can now save or print the report.

Knowing why people left and when in their Rotary membership they did so can help you recognize your club's retention strengths and weaknesses to focus your efforts.



To export reports, click or tap the "Export" icon  and choose a program or format. You can now save or print the report.

## Step 2: Understand when and why members leave your club.

Once you've reviewed the Member Viability and Growth and the Membership Termination Profile reports, discuss the results with the membership committee. Think about:

- Who is leaving your club? Are they longtime members, new members, or both?
- Why are members leaving?
- Are any common themes emerging from the data?

## Step 3: Develop an action plan to better engage members.

Present the membership committee's findings to the club. Ask your club to consider:

- What is our club good at?
- What could our club do better?
- What keeps our active members involved?
- How can we better engage those who aren't as involved?

Lead a discussion about how to build on what you're doing well and address any challenges. Encourage members to share their ideas about how to involve people at different stages of membership.

# WHY MEMBERS LEAVE AND TIPS TO RETAIN THEM

Understanding why members leave is crucial to strengthening your club. The Exit Survey we discuss elsewhere in this guide helps you gather this information on a club level. Rotary has also conducted extensive research worldwide on why people leave at various points in their membership. Here's what we've found along with tips to address various situations.

## MEMBERS WHO STAY LESS THAN A YEAR

Although about three-fourths of new members who leave say they were told about the responsibilities of being a member before they joined, 40% cite the cost or time commitment as their reasons. Others lose interest, don't feel included, or find that their experience didn't meet their expectations. Some say they weren't able to engage with the club or found the club unwilling to change its traditions.

### What you can do

If your club is losing members within their first year, try these strategies:

| With prospective members  | With new members   | With your club practices   |
|---|--|--|
| Communicate better about the personal and professional benefits that your club offers as well as the expectations that the club has for members.              | Plan meaningful induction ceremonies that celebrate the occasion and include their families.   | Make sure current members make new members feel welcome (such as by engaging them in conversation or inviting them to sit with you at meetings).   |
| Ask for their impressions of the club and be willing to act on their suggestions.   | Offer orientation programs that help them learn more about Rotary and how to get involved in the areas they're especially interested in. | Pair new members with mentors who can explain the club's practices and traditions, answer questions, introduce them to other people, and talk regularly with them about how they're enjoying their experience. |
| Tell them about the professional development opportunities available through Rotary, such as the leadership and communication courses in the Learning Center. | Involve them in ways that match their specific interests and expertise rather than in ways that fill the club's needs.                   | Keep club meetings fun, energetic, and entertaining without forgetting that most people join Rotary for the opportunity to engage in meaningful service.   |

## MEMBERS WHO LEAVE AFTER 1-2 YEARS

Many members who leave after a year or two say they didn't feel involved in club events and activities, didn't get along with people in the club, or had difficulty fitting Rotary into their lives because of other commitments.

### What you can do

If your club is losing members after one to two years, try these strategies:

| Get them involved   | Connect with them  | Emphasize learning  |
|---|--|---|
| Talk to members who are reaching this point about opportunities to join a committee or get involved in a project.                                   | Ask these members for feedback about what they like and what they want to change. They may have ideas that can revitalize the club's social activities or service projects.      | Remind them about the professional development opportunities available through Rotary, such as the leadership and communication courses in the Learning Center. New courses are added regularly, so they may have more options than when they first joined. |
| Ask how they want to get involved (find ideas in <a href="#">Connect for Good</a> and the <a href="#">guide to Avenues of Service activities</a> ). | Pair members who don't have mentors with one, or suggest that they change mentors if they want a different perspective or have become interested in different aspects of Rotary. |   |

## MEMBERS WHO LEAVE AFTER 3-5 YEARS

Members who leave after three to five years may do so because their social expectations weren't being met, they were frustrated with the club's leaders, or they had difficulty meeting the expectations for members because of other commitments.

### What you can do

If your club is losing members after three to five years, try these strategies:

| Innovate   | Listen   | Provide opportunities   |
|--|--|---|
| Implement new activities so that people remain excited about attending meetings and other club functions.  | Ask these members for feedback about what they like and what they want to change. They may have ideas that can revitalize the club's social activities or service projects.  | Offer these members leadership opportunities and ensure that those who want these kinds of roles are considered for them. By taking on leadership roles, they'll feel useful, valued, and more connected with the club. |
| <a href="#">Find videos</a> from recent Rotary events to supplement your club meetings. After you watch, ask people to discuss the topic's relevance in their club or community. | Ask them to give a presentation to the club about something that's important to them.<br><br>Encourage those who are in club leadership roles to mentor newer members or participate in district activities, which puts them and others in a position to take on more challenging roles. |   |
| Organize social activities that are different from the ones your club has held before.   | Ask them what's preventing them from participating more fully, then accommodate them as much as you can.   | Ask them to advise on or lead a project or activity in their specific area of expertise, and recognize them for their efforts.  |



## MEMBERS WHO LEAVE AFTER 6-10 YEARS

Some members who leave after six to 10 years say that their social expectations weren't being met and they were frustrated with the club's leaders. Others left when they retired or needed to relocate.

### What you can do

If your club is losing members after six to 10 years, try these strategies:

| Understand their needs  | Recognize their value   | Connect them with a new club  |
|---|---|---|
| Talk with these members about what they're looking for and how their interests have changed since they joined.  | Let them know what you value about their perspective and what you look forward to doing alongside them in the future. | Forward a relocating member's contact information to clubs in their new area, refer them through My Rotary, or encourage them to let Rotary know they want to change clubs. |
| Ask if they're interested in mentoring newer members or getting involved in district activities, such as planning the district conference or serving on a district committee. | Thank them for their contributions, big and small.  |   |
| Ask them what they need or if you can make something easier for them that will keep the club experience relevant and accessible for them and others.                          | Give them an opportunity to lead in some capacity.  | If several members have different interests, suggest that they start a satellite club.  |

## MEMBERS WHO LEAVE AFTER 10 YEARS

Many members who leave after more than 10 years say they weren't interested in the club's meetings and activities. Others left because of retirement, family obligations, financial constraints, or health problems.

### What you can do

If your club is losing members after more than 10 years, try these strategies:

| Show them they matter   | Offer new ways to get involved   | Accommodate them if you can  |
|---|--|--|
| Talk with these members to learn what they're experiencing and feeling.                                   | Ask for their opinions on how to energize or reinvent your club meetings.  | Consider easing the financial or participation obligations on these members if it's a factor that pressures them to leave.   |
| Recognize them for their efforts over the years by <u>nominating</u> them for an award.                   | Ask if they're still interested in the club's activities or what might interest them instead.  | Be aware that these members may have health concerns that they may or may not want to disclose. Ask them what they need or if you can make something easier for them that will keep the club experience relevant and accessible for them and others. |
| Tell them what you value about them and how much your club benefits from their perspective and expertise. | Gauge their interest in taking on a district leadership position such as assistant governor, district governor, or district committee chair. |  |



Use the Member Satisfaction Survey to ask everyone for feedback about the club and the Member Interest Survey to learn more about people so you can better engage with them.

## Want to do other assessments?

Member Interest Survey

Diversity Assessment

A Prospective Member Exercise

Member Satisfaction Survey

Exit Survey

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

# UNDERSTANDING WHY MEMBERS LEAVE: EXIT SURVEY



The exit survey can help you understand why members leave and suggest changes your club can make to better accommodate people in the future so they stay. Your club membership committee can review and customize the survey to meet your needs. You can also choose to create an online form or conduct an in-person interview.

## WHAT YOU'LL GAIN

Use exit surveys and act on their results to:

- Determine why members resign from your club
- Address any issues the survey reveals

## GETTING ORGANIZED

Taking this survey may be the final contact that a person has with Rotary, and it's very important to listen to their feedback. If you conduct the survey online or use a paper survey, delegate someone to manage the process whenever a member leaves the club. If you have an in-person conversation, ask someone who is a good listener to talk with the member who's leaving. The interviewer will need to share the results with the membership committee and club board.

## GETTING STARTED

### Step 1: Ask permission.

Ask the person who is leaving if they're willing to take a confidential exit survey. Explain that the purpose is to understand any problems that need to be addressed in order to improve the club for others and prevent even more members from leaving.



Consider using an online survey platform. They're convenient, often free or inexpensive, and helpful in managing the response data.

### **Step 2: Provide the survey.**

Give the person the survey and ask them to complete it as soon as they can reasonably do so. You can edit the survey included in this document and attach it to an email or use an online survey platform. If the person cannot complete the survey online, use a paper form and provide a stamped, addressed envelope for them to return it.

### **Step 3: Discuss the results.**

After you receive the completed survey, discuss the results with your club's membership committee. If the person is leaving for a reason other than relocation or health issues, discuss what your club can change to prevent current or future members from leaving for similar reasons. Compare this person's responses to those on other recent exit surveys to identify any trends. Emphasize the importance of confidentiality and respect for all viewpoints.

### **Step 4: Take action.**

This step is crucial. You invest time and resources into attracting and engaging members, so it's important to protect that investment by addressing any reasons that make people leave. Although not every exit survey will require action, they do all merit consideration. Create a plan to address any issues and delegate the tasks that it involves. Once a year, update your club's Member Satisfaction Survey based on the responses from resigning members over the previous year.

#### **Want to do other assessments?**

[Member Interest Survey](#)

[Diversity Assessment](#)

[Prospective Member Exercise](#)

[Retention Assessment and Analysis](#)

[Member Satisfaction Survey](#)

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

# EXIT SURVEY

## SAMPLE QUESTIONS

We're sorry to lose you as a member of our club. To help us understand why you're leaving and what we can do to improve the club for others, please answer these questions about your Rotary experience. We appreciate your candid and honest responses.

1. What were your primary reasons for joining the club? (Choose all that apply.)

- Community service
- International service
- Personal development
- Leadership or professional development
- Family legacy or tradition
- Status and prestige
- Social opportunities
- Networking
- Opportunity to facilitate international exchange
- Tutoring and mentoring young people
- Reconnecting with Rotary as an alum
- Other: \_\_\_\_\_

2. How long have you been a member of this club?

- Less than a year
- 1-2 years
- 3-5 years
- 6-10 years
- More than 10 years

3. What did you like best about being a member of this club?

What did you like least?

4. How many prospective member information sessions did you attend before you joined?

- 1
- 2
- 3 or more
- None, because the club didn't offer them
- None, because I wasn't interested

5. How many club meetings did you attend before you joined?

- 0
- 1-2
- 3-4
- 5 or more

6. How did you learn about club activities and your responsibilities before joining? (Choose all that apply.)

- I attended information sessions.
- I received information from a club officer.
- I received information from my sponsor.
- I found information on my own.

7. Did you learn more about Rotary in a structured way (such as through a new member orientation or continuing education) after you became a member? (Select one.)

|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1                        | 2                        | 3                        | 4                        | 5                        | 6                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Not at all               |                          |                          | Definitely               |                          |                          |

8. Do you believe you were adequately informed about the financial and time commitments of being a club member? (Select one.)

|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1                        | 2                        | 3                        | 4                        | 5                        | 6                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Not at all               |                          |                          | Definitely               |                          |                          |

9. Were club meetings a worthwhile use of your time? (Select one.)

|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1                        | 2                        | 3                        | 4                        | 5                        | 6                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Not at all               |                          |                          | Definitely               |                          |                          |

10. Did you feel welcome in the club? (Select one.)

|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1                        | 2                        | 3                        | 4                        | 5                        | 6                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Not at all               |                          |                          | Definitely               |                          |                          |

11. Did you feel comfortable expressing concerns to club leaders? (Select one.)

|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1                        | 2                        | 3                        | 4                        | 5                        | 6                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Not at all               |                          |                          | Definitely               |                          |                          |

12. If you didn't feel welcome or didn't feel comfortable expressing concerns, please explain why.

13. How would you describe the club's culture?

14. What can club leaders do to improve the experience for new members?

15. How do you rate these aspects of the club meetings?

|   | Excellent                | Good                     | Fair                     | Poor                     | Very poor                | Not applicable           |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Rotary International updates                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Length  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Frequency   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Format (online, in person, or hybrid)             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Time for socializing                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional connections and networking           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Content variety                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Location  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meeting time and day                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meals or other food options                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Opportunities to offer input and have discussions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



16. Please evaluate these aspects of club meetings.

| Meeting components   | Excessive                | Reasonable               | Inadequate               |
|--|--------------------------|--------------------------|--------------------------|
| Learning about Rotary<br>(Rotary Youth Exchange,<br>Rotary Foundation<br>programs, etc.) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Fundraising  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Content  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Structure  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

17. Did you participate in service projects?  Yes  No

18. If no, why not?

- Type and quality of projects
- Number of projects
- Personality conflicts
- Cost
- Schedule conflicts
- Other: \_\_\_\_\_

19. How satisfying was your participation in service projects? (Select one.)

- |                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1                        | 2                        | 3                        | 4                        | 5                        | 6                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Not at all               |                          |                          |                          |                          | Very                     |

20. If your participation in service projects wasn't satisfying, why not? (Choose all that apply.)

- Lack of variety in projects
- Lack of quality of projects
- Not enough projects
- Personality conflicts
- Lack of support from other members
- Insufficient family involvement
- High costs
- Did not feel welcome
- Schedule conflicts
- Other: \_\_\_\_\_

21. Please evaluate how your Rotary experience aligned with your family commitments.

| Family and Rotary   | Agree                    | Disagree                 | Not applicable           |
|---|--------------------------|--------------------------|--------------------------|
| Rotary interfered with my family responsibilities.                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| My family was proud of my involvement in Rotary.                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| My family wanted to be more involved in Rotary.                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| I had opportunities to include my family in club activities and projects. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

22. How could club leaders provide more opportunities for families to be involved?

23. Please evaluate the costs associated with being a member.

| Cost  | Too high                 | Reasonable               | Too low                  | Not applicable           |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| Club dues (including RI and district dues)    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meal costs (if applicable)                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Club operations                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Club fines                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service project contributions (time or money) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rotary Foundation contributions               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

24. How well does the club reflect the demographic profile of professionals in the community?  
(Select one.)

|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1                        | 2                        | 3                        | 4                        | 5                        | 6                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Not at all               |                          |                          |                          |                          | Very well                |

25. Think about what you were told when you joined the club. Were your expectations met?

26. Why did you terminate your membership?

27. Would you consider joining another club?

Yes

No

Not sure

28. What advice do you have for the club's leaders?

29. Do you have any other comments?

Thank you for completing this survey. If you ever want to rejoin or change clubs, you can start at [rotary.org/join](https://rotary.org/join).



# Lone Star P.E.T.S. 2025

## PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, MARCH 1, 2025

### SESSION C-10

### LEADING MY VIBRANT ROTARY CLUB

#### **GOAL**

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

#### OBJECTIVES

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

1. Explain the values of tradition, continuity, and change as related to leadership within a Rotary club.
2. Identify ways a club President-elect can build relationships with other club members to develop a vibrant club leadership team.
3. Identify ways to engage their leadership team in planning for needed change to maintain a vibrant Rotary club.

#### REFERENCE MATERIALS:

A Model for Change Planning

Why do Some Club Changes Fail

Our Commitment to Diversity, Equity, and Inclusion

Rotary's Framework for Diversity, Equity, and Inclusion

Diversity, Equity, Inclusion, and Code of Conduct

A Diversity Assessment



## Module C-10: Leading My Vibrant Rotary Club

### Breakout Discussion Questions

1. Refer to the Be A Vibrant Club: Your Club Leadership Plan. Describe a time when you have seen a disconnect between successive leaders in your club who have not balanced tradition, continuity, and change. What is the effect on the entire club when there is continuity of leadership vs a disconnect?
2. Lists ways a club PE can build relationships with other club members to focus on tradition, while leading to continuity, and a vibrant club leadership team. For each group, share lists.
3. As club President-elect, what methods can you use to engage your leadership team to plan for needed change in your Rotary club? What is the common theme underlying these methods? Refer to the Rotary Diversity, Equity, and Inclusion policy and the diversity and classification assessment tools in your PN Workbook. What can you do to support your club President to inspire change 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 Leading My Vibrant Rotary Club session?
6. Any other question(s)?



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



## 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:

---



---



---



---



---



At Rotary, we're committed to treating everyone with dignity and respect, allowing everyone's voice to be heard, and providing equitable opportunities for fellowship, service, and leadership.

Our members want and expect Rotary to be a diverse, equitable, and inclusive organization. Although the Rotary experience may differ from country to country, issues of diversity, equity, and inclusion are globally relevant.

We embrace the principles of diversity, equity, and inclusion. We recognize that being a diverse, equitable, and inclusive organization will enhance the experience that members have in Rotary, allow us to carry out more meaningful and effective service efforts, and create open, welcoming environments that appeal to people who want to connect with us. Through the work of our [Diversity, Equity, and Inclusion Advisory Council](#), we are taking action to follow these principles in everything we do.

## Understanding DEI at Rotary

In 2021, we used the responses from 31,000 members around the world who reported their experiences with DEI in Rotary through our first diversity, equity, and inclusion survey to develop our [DEI framework](#).

We are currently using the findings from our second DEI survey to strengthen our established framework and continue to drive our work forward.

## How we're committed to DEI

The foundation of our focus is our [DEI commitment statement](#).

The [DEI code of conduct](#) provides a supportive framework for how Rotary members can create and maintain an environment that is collaborative, positive, and healthy for everyone. It asks Rotary

members to:

- Use respectful language
- Be supportive
- Foster a welcoming and inclusive environment
- Celebrate diversity

Although free expression is important, what we say and how we behave matter. Rotary does not tolerate speech or behavior that promotes bias, discrimination, prejudice, or hatred because of age, ethnicity, race, color, disabilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity.

All Rotary leaders, from club presidents and district governors to directors and trustees, are expected to apply the DEI code of conduct uniformly by taking responsibility for how their words and actions may affect others, while also holding others accountable for what they say and/or do.

If you hear something or observe behavior that doesn't align with the DEI code of conduct, you have several options for addressing it:

- If the situation can be resolved through discussion, talk to the person directly. Very often, a person who said something or acted in a way that made you/others feel excluded, marginalized, or targeted did not do so intentionally. Although there might be mistakes, missteps, and uncomfortable conversations along the way, there is also the opportunity for learning and growth and the end result is a better, stronger Rotary.
- If a discussion is not possible, report the incident to your club or district leadership. If the situation involves someone in a leadership role or from another club, contact [Club and District Support staff](#), who will review the information and follow up appropriately.
- If anyone is in danger or their safety is in doubt, contact local law enforcement and notify Rotary's [Club and District Support staff](#).

## Support DEI in your club, programs and community

- Expand your knowledge and increase your ability to facilitate positive discussions about DEI issues with courses available in the Learning Center:
  - [DEI Basics](#)
  - [DEI Intermediate](#)
  - [DEI Webinar Series](#)
- Promote diversity, equity, and inclusion in your club by:
  - Talking about the benefits of a diverse and inclusive club with your fellow club members and using the [Diversifying Your Club](#) assessment to create a member diversity and inclusion plan.
  - Inviting local diversity, equity, and inclusion experts to speak to your club.

To connect with your District DEI Chair or a member of the Rotary Diversity, Equity, and Inclusion Advisory Council, contact [dei.inquiries@rotary.org](mailto:dei.inquiries@rotary.org).

- Connecting with organizations that support DEI efforts and working with them on projects or events.
  - Seeking out new voices when you're making appointments and encouraging people who have been underrepresented in these roles to take on leadership positions.
  - Holding conversations about diversity, equity, and inclusion. It's important to acknowledge that this can be uncomfortable and very personal. Establish the expectation that everyone must remain respectful so each person can learn and be heard.
  - Appointing a DEI Chair or creating a club DEI committee that focuses on identifying collaborative learning, sharing, and service opportunities.
  - Design inclusive youth programs that instill long-term belonging in Rotary by:
    - Supporting Rotary Youth Exchange students of varying sexual orientations with the guide: [Diversity, Equity, and Inclusion in Rotary Youth Exchange: Supporting Lesbian, Gay, Bisexual, Transgender, and Queer \(LGBTQ+\) Exchange Students](#)
    - Increasing youth voice by learning how to create a youth advisory council for your district or zone in these [10 steps](#) (PDF).
    - Incorporating the DEI tips highlighted throughout the [Interact](#) and [RYLA](#) handbooks into your local Interact and RYLA programs.
    - Applying the concepts of youth voice and positive youth-adult partnerships from our webinar recording, [Expanding Reach: Partner with Youth in Service](#).
    - [Expanding girls' skills, rights, and opportunities to lead](#)
-



## ROTARY'S FRAMEWORK FOR DIVERSITY, EQUITY, AND INCLUSION

Rotary strives to create and maintain an experience for members and participants that reflects our fundamental values, empowers people to contribute at their fullest potential, and celebrates people as they are. Our core values — service, fellowship, diversity, integrity, and leadership — align with our commitment to foster a diverse, equitable, and inclusive environment for all.

To assess the state of diversity, equity, and inclusion (DEI) at Rotary, we worked with specialists at PricewaterhouseCoopers, a global network of professional services firms. As part of this, we:

- Reviewed Rotary's documented policies and procedures
- Conducted focus groups and interviews with Rotary leaders and members
- Analyzed 31,000 responses to a global survey to understand the sentiments and experiences of our members
- Used DEI Task Force meetings to build support among Rotary leaders and develop a path forward

This assessment has become the basis of the framework that we'll use to further integrate DEI into all aspects of our culture, including welcoming more diverse members, building a more inclusive culture, and providing more equitable opportunities.

Eight key themes emerged from the assessment. We've already begun to address some of these and will use them all to guide our work to improve diversity, equity, and inclusion in Rotary.

**1. Members are invested in making Rotary a more diverse, equitable, and inclusive organization in order to grow our membership and increase our impact.**

Our members guide our actions. We'll continue to respond to your interest and belief in DEI by making Rotary a more diverse, equitable, and inclusive organization for everyone.

**2. Rotary's current DEI policies and procedures vary by region, leading to inconsistent and inequitable experiences.**

We're now emphasizing inclusive leadership expectations, where our leaders think and act more inclusively — and creating DEI training for club, regional, district, and senior leaders to ensure more consistency in people's experiences. This includes training our leaders about DEI, expecting them to model the behavior outlined in the DEI Code of Conduct, and asking them to apply the code so that all members recognize the effect their words and actions have on others.

**3. Members don't have enough information or insight about our efforts to be more diverse, equitable, and inclusive. We discovered a lack of awareness about our DEI commitment statement, training courses, and webpage.**

We've created a hub on [My Rotary](#) where you can learn more about our action to incorporate diversity, equity, and inclusion into all that we do. You can download and share resources such as the DEI Code of Conduct, terms and definitions, and Rotary's commitment statement. You can also find links to Learning Center courses to expand your knowledge about DEI and find suggestions about how your club can support DEI locally. We'll promote this page and other

resources in all of our communication channels to bring you the most up-to-date information.

- 4. More than 25% of the survey respondents said they don't know how to report discrimination or harassment at Rotary. Some members also noted the lack of a central place to report, collect, or address instances of this behavior. Members said some incidents go unreported and some inappropriate behavior incurs no consequences.**

The goal of the DEI Code of Conduct is to be clear about how Rotary members are expected to conduct themselves in order to create and maintain collaborative, positive, and healthy environments. This means we expect all members to use respectful language, be supportive, foster a welcoming and inclusive environment, and celebrate diversity.

In any instance when a member acts in an unsupportive or unwelcoming manner, or anytime you experience or witness behavior that doesn't align with the DEI Code of Conduct, you can contact [cds@rotary.org](mailto:cds@rotary.org). Rotary staff will review your report and follow up appropriately.

- 5. More than 30% of the survey respondents said they don't believe that Rotary leaders are actively promoting DEI. They said they don't see Rotary leaders being held accountable, and they don't believe those leaders uniformly apply or uphold Rotary's DEI principles.**

All Rotary leaders are expected to uniformly apply and uphold the DEI Code of Conduct. If you experience or witness behavior from a Rotary leader that doesn't align with the code, you can contact [cds@rotary.org](mailto:cds@rotary.org). Rotary staff will review your report and follow up appropriately.

- 6. Members believe that leadership opportunities are limited for anyone who doesn't fit the traditional profile of a Rotary leader. They said members who don't look or behave in a certain way or have the "right" Rotary resume don't have the same opportunities to advance.**

Rotary International's Board of Directors has reviewed and updated the qualifications for some key leadership roles, including the International Assembly moderator and regional leaders, in order to welcome more diverse voices. For the first time, a Rotaractor has been appointed to serve as a Rotary public image coordinator in 2022-23.

We'll continue to seek opportunities to make leadership roles more accessible.

- 7. The cost of joining Rotary remains an obstacle to retaining members, attracting new ones, and accurately representing our communities. When we welcome only those with the financial means, we exclude community members who want to make a difference but can't afford to join.**

We want to ensure that the cost of Rotary is commensurate with the value of being a member. But we don't want cost to keep potential people of action from connecting and making a difference through Rotary. We'll explore more ways to make Rotary accessible to more people who want to create change in their communities.

- 8. Younger members, particularly Rotaractors, said they don't have a pathway to leadership and aren't offered meaningful opportunities to get involved, showcase their ideas, or take part in making decisions because of their age or perceived lack of experience.**

Since the 2019 Council on Legislation voted to include Rotaract clubs as a distinct membership type in Rotary International, we've incorporated Rotaract into our operational processes and strategic initiatives. We're in the process of ensuring that Rotaractors participate in leadership

development efforts and have access to other products and services for members, as well as to our grants, giving, and fundraising efforts.

In addition to these themes, we'll center our efforts on *managing change, strengthening governance and accountability, training and educating leaders, reporting and escalating issues, and engaging marginalized groups*. The DEI Task Force will keep using the feedback from the member survey to create meaningful change throughout our organization that enhances the Rotary experience for all members and participants. We'll update you about our progress periodically.

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 are committed to this path, and with your support, we can grow and strengthen Rotary for the next generation of people of action.

Write to [dei.inquiries@rotary.org](mailto:dei.inquiries@rotary.org) with questions.



# DIVERSITY, EQUITY, AND INCLUSION CODE OF CONDUCT

Rotary core values: fellowship, integrity, diversity, service, and leadership

This code of conduct reflects our core values and explains the responsibility that comes with being a Rotarian and Rotaractor, which includes members from nearly every country in the world, speaking over 100 different languages. We are committed to upholding and evolving this code as our organization grows.

Like our core values, we expect Rotarians and Rotaractors to exemplify this code of conduct as they interact with one another, Rotary program participants, Alumni, project partners, and members of the community. Specifically, the code of conduct applies at all club, district, zone, and Rotary International meetings, trainings, events, and anywhere else a member represents Rotary and on My Rotary and social media.

## Expectations

All club members and other participants including Rotary program participants, Alumni, project partners, and representatives of Rotary are expected to comply with this code of conduct, be considerate and contribute to a collaborative, positive, and healthy environment in which all are respected and valued.

### USE RESPECTFUL LANGUAGE

- When you first meet someone, introduce yourself and explain how you would like to be addressed, including your preferred pronouns (he/him/his, she/her/hers, they/them/theirs). Call others by their preferred name, rather than using a nickname that is easier to pronounce.
- When addressing larger groups, utilize gender neutral words to avoid gender assumption.
- Use active listening to deepen your understanding of others.
- Be conscious of language use and adapt depending on region. Some wording is acceptable in some cultures but unacceptable in others.
- Avoid slang or idioms that do not translate across cultures or be deliberate in explaining them to share our diverse cultures and languages.
- Speak plainly and avoid acronyms and jargon that not everyone may understand.
- If you are curious about someone's cultural background, faith, sexual orientation, gender, or another characteristic, ask if they are open to sharing more about themselves. Refrain from asking if the topic is not relevant to your conversation.
- Foster an atmosphere of intergenerational dialogue and avoid describing anyone by their age.

### BE SUPPORTIVE

- Be an ally and advocate for others and be ready to intervene when you see a need.
- If you see or hear something inappropriate, address the behavior in a way to offer support to those affected.
- As a member of Rotary, uphold the Code of Conduct, build this culture within your club experience, and address any issues as they arise.



## **FOSTER A WELCOMING AND INCLUSIVE ENVIRONMENT**

- Ensure every member and participant can fully engage in any meeting, event, or activity that you organize in person or online by offering an accessible venue, simultaneous interpretation, closed captioning and/or transcripts, and other resources as needed.
- Review any club or program traditions and stop or change activities that may be offensive or alienating to a specific group.
- Create a welcoming environment and include all in conversations, projects, and events.
- As much as possible, pay attention to nonverbal communication such as eye contact, facial expressions, tone of voice, personal space, gestures, and posture, and how it impacts your ability to engage with and relate to others.
- Know the important dates of various religions and schedule events and activities in a way that is inclusive and considerate of people who observe them.
- Be aware of people's dietary and health restrictions.
- Open opportunities for everyone to hold leadership roles in your club and district or engage with your community partners.

## **CELEBRATE DIVERSITY**

- Increase your club's awareness, understanding, and acceptance of people with disabilities.
- Celebrate a variety of cultural events and religious observances, rather than continually conducting service projects or hosting events associated with a single culture or religion.
- Acknowledge and celebrate significant dates relevant to diversity.
- Avoid stereotyping and mocking any specific group.
- Acknowledge and celebrate different genders.

## **Code of Conduct Questions and Concerns**

For questions or concerns regarding the code of conduct or behavior that goes against the code of conduct, email [DEI.Inquiries@rotary.org](mailto:DEI.Inquiries@rotary.org).

## **Adult Harassment Issues**

Per the Rotary Code of Policies, Rotary currently maintains the following to report issues of harassment involving Rotarians or Rotaractors at meetings, events, or activities:

Rotary is committed to maintaining an environment that is free of any form of harassment, broadly defined as any conduct, verbal or physical, that denigrates, insults, or offends a person or group based on any characteristic<sup>1</sup> (age, ethnicity, race, color, disability, religion, socioeconomic status, culture, sex, sexual orientations, or gender identity).

If you are notified of any allegation of harassment involving an adult, or you feel you have been harassed, follow these steps:

1. If anyone's safety is in doubt, contact local law enforcement.
2. Notify a club officer (club president or secretary), district leader (district governor or district governor-elect), or zone leader (RI director).
3. Report the incident to Rotary International's Club and District Support team by contacting [cgs@rotary.org](mailto:cds@rotary.org).
4. Any allegation of harassment or abuse that involves young people must be reported to Rotary International at [youthprotection@rotary.org](mailto:youthprotection@rotary.org) within 72 hours.

<sup>1</sup> Characteristics listed here are from the Rotary Code of Policies, Harassment-free Environment at Meetings, Events, or Activities. As the Rotary Code of Policies is updated, this Code of Conduct section will be updated.

# 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?





## All Modules: Your PETS Experience -- Final Takeaways

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

### Discussion Questions

#### Takeaways For Your Club

1. List three takeaway strategies for your Club.
  - a.
  - b.
  - c.
  
2. Which strategy is the most critical to the vibrancy of your Club?

#### Takeaways For Yourself

3. List three takeaway strategies for yourself.
  - a.
  - b.
  - c.
  
4. Which strategy is the most critical to the vibrancy of yourself as Club President-elect?

#### Most Impactful Takeway

- 5.

