

Session B-5 **RE-Energizing My Rotary Club** (90 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Facilitators and Overview	Briefly introduce yourselves. Provide overview for this first breakout session. Mention grouped by similar club sizes. Participants will stay together for the day.	5 min.
2.	Introductions Icebreaker and Midway Review	Start with an Icebreaker to re-energize the participants. Have each one share the following: a. Name b. Role at PETS c. Club and city d. Most important characteristic for a Rotary leader e. Desired individual takeaway from PETS Then conduct a brief midway review of the PETS experience. What is your primary takeaway from PETS thus far?	30 min
3.	Provide topic	Provide topic. Have them open their Workbook to B-5 RE-Energizing My Rotary Club	2 min
4.	Main Room/ Content Overview	1st Learning Objective: Understand the importance of connecting your club to RI vision and engaging the leadership team to explore flexibility options. Ask participants to open their workbook to the Rotary Action Plan Flyer and Club Flexibility Options. Facilitate class discussion: What resonates with you in the Rotary Mission Statement and Four Priorities? Which of the flexibility options could energize your club? Why?	20 min
5.	Breakouts/ Discussions	2nd Learning Objective: Identify club members of each respective club who would serve to form a strong club leadership team. Ask participants to open their PN Workbook to Module B-5.: Designing Your Rotary Club Experience Facilitate class discussion: Describe the relationship between a strong leadership team and a positive club experience. What committee structure exists within your club? How can your club develop committee chairs? List three keys to success.	13 min
6.	Breakouts/ Discussions	3rd Learning Objective: Explain the importance of a strong club leadership team. Facilitate classroom discussion: Where does your club need more leadership? What steps can you take this year to build a strong leadership team? List three key steps.	13 min
7.	Q & A	Ask for any questions and respond briefly	4 min
8.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	3 min

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

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, MARCH 1, 2025

SESSION B-5 RE-ENERGIZING MY ROTARY CLUB

GOAL

Club Presidents-elect will recognize RI strengths, club flexibility options, and the need to develop a strong club leadership team.

OBJECTIVES

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

1. Understand the importance of connecting the local club to RI Action Plan and engaging the leadership team to explore flexibility options.
2. Identify club members of each respective club who would serve to form a strong club leadership team.
3. Explain the importance of a strong club leadership team.

REFERENCE MATERIALS:

Rotary Action Plan Flyer
Flexible Club Options
Guiding Principles
Designing Your Rotary Experience

Module B-5: RE-Energizing My Rotary Club

Breakout Discussion Questions

1. Open PN Workbook to the Rotary Action Plan Flyer and club flexibility options.
What resonates with you in the Rotary Mission Statement and Four Priorities ?
Which of the flexibility options could energize your club?Why?
2. Open PN Manual to Module B5.
Describe the relationship between a strong leadership team and a positive club experience.
What committee structure exists within your club?
How can your club develop committee chairs?
List three keys to success.
3. Where does your club need more leadership?
What steps can you take this year to build a strong leadership team?
List three key steps.
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 RE-Energizing session?
6. Any other question(s)?

The ROTARY ACTION PLAN



TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. **The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.** To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the coming years.

INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

INCREASE OUR ABILITY TO ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

Want to offer more flexibility but not sure where to start?

Select one of these options that describes the most pressing challenge your club faces, and find solutions and resources to help.

- [My club does not reflect our community when it comes to gender, profession, ethnicity and age.](#)
- [People have trouble making it to our meeting because of its time or location.](#)
- [We have trouble attracting members because people are too busy or the cost is too expensive.](#)
- [We are losing members because they have different interests and experience levels.](#)
- [We have trouble finding new members because we do the same service project every year.](#)
- [We lose potential members because family members aren't welcome at our meetings and events.](#)
- [It is challenging to find new people to lead our club.](#)

Start a new type of club

Rotary clubs are autonomous and all have their own culture. You can create a club that offers a club experience that works for you and others with similar needs. For example, you could start a satellite club for your less traditional members and your traditional members can remain in the sponsor club.

Benefits:

- Creates new opportunity for prospective members in your area
- Allows disengaged members to try new practices and ideas
- Creates opportunity for new leadership
- Allows members in traditional clubs to continue if they enjoy their club experience

Resources:

- [Rotary club models](#) (PDF)
- [Guide to satellite clubs](#) (PDF)
- [Guide to passport clubs](#) (PDF)
- [Practicing Flexibility and Innovation](#) (online course)
- [Story – A club built from scratch focuses on service](#) (Rotary Club of Seaford, Australia)
- [Club models FAQs](#)

Offer alternative membership types

Your club could offer family memberships, junior memberships to young professionals, or corporate

memberships to business leaders and their employees. Each type of membership can have its own policies on dues, attendance, and service expectations, provided these policies are documented in your club bylaws. Rotary will count these people in your club membership and will consider them active members if they pay RI dues.

Benefits:

- Presents options for prospective members with different pricing structures and levels of time commitment
- Presents an opportunity to partner with a local corporation
- Diversifies club by attracting businesses, prospective members with young families, and other groups who aren't able to join as traditional members

Resources:

- [Guide to corporate membership](#) (PDF)
- [Start Guide for Alternate Membership Types \(includes sample bylaws\)](#) (DOC)
- [Practicing Flexibility and Innovation](#) (online course)
- [Story – Corporate Citizens](#) (Rotary Club of DeMotte-Kankakee Valley, Indiana)
- [Membership types FAQ](#)

Change meeting format

Change your meeting format and engage your members in fun, productive ways! You can meet in person, online, or a combination, including letting some members attend in-person meetings through the Internet. Or you can change the format of your in-person meetings to include service projects, leadership development, committee reporting, social gatherings, member professional talks, and educational talks on diversity, club vision, and other topics your club determines.

Benefits:

- Makes club meetings more interesting, which engages members and guests
- Creates culture where agility and creativity are valued and demonstrated
- Members can gain professional development skills

Resources:

- [Start Guide for Flexible Meeting Formats \(includes sample bylaws\)](#) (DOC)
- [Leadership in Action: Your Guide to starting a Program](#) (PDF)
- [Story – Happy wanderers](#) (Rotary E-Club of Australian Nomads)
- [Story – 3 Meeting Formats that Increased Member Participation](#) (Rotary Club of Rochester, Minnesota) (Audio)
- [Meeting format FAQs](#)

Relax attendance expectations / reduce meeting frequency

Change your meeting schedule to make it easier for your members to attend.

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

Benefits:

- Accommodates members who have busy schedules
- Encourages participation outside of in-person meetings
- Better captures member engagement
- Makes club more appealing to prospective members (research tells us that rigid rules keep non-members from joining)
- Diversifies club if other nontraditional groups are motivated to join
- Compels clubs to make good use of meeting time (so members come because they want to not because they have to)

Resources:

- [Meeting frequency and attendance FAQs](#)
- [Guide to passport clubs](#) (PDF)
- [Practicing Flexibility and Innovation](#) (online course)
- [Story – Meeting flexibility attracts young professionals](#) (Rotary Club of Invercargill, New Zealand)

Resources & reference

- [Club Planning Assistant](#) (interactive form)
- [Practicing Flexibility and Innovation](#) (online course)
- [Rotary Club Models](#) (PDF)
- [Guide to Satellite Club](#) (PDF)
- [Satellite club FAQ](#) (PDF)
- [Satellite club application](#) (PDF)
- [Satellite club member information form](#) (PDF)
- [Guide to Corporate Membership](#) (PDF)
- [Corporate Membership: Making the offer](#) (DOC)
- [Corporate Membership: Sample Bylaws](#) (DOC)
- [Guide to passport clubs](#) (PDF)

- [Sample passport club bylaws \(DOC\)](#)
 - [Membership Flexibility Overview \(DOC\)](#)
 - [Rotary's governance documents](#)
 - [Start Guide for Alternate Membership Types \(includes sample bylaws\) \(DOC\)](#)
 - [Start Guide for Flexible Meeting Formats \(includes sample bylaws\) \(DOC\)](#)
 - [Club flexibility Frequently asked questions](#)
-

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DESIGNING YOUR ROTARY EXPERIENCE

GET INVOLVED IN WAYS THAT MATTER TO YOU

Rotary offers benefits for people of all ages and backgrounds. From learning more about the world to learning more about yourself, you can grow by engaging with Rotary's global network and the array of activities, programs, and interest groups that Rotary offers.

When you get involved in Rotary, whether as a Rotarian, Rotaractor, or program participant, you expand your perspective by honing your skills, learning from professionals, making new connections, and making a difference in your community and around the world.

We know that each member has a unique combination of interests, skills, and talents, and so each member will be attracted to different activities. This guide describes the options you can choose from to personalize your Rotary experience and get involved in ways that matter to you.



Rotary 



MAKE CONNECTIONS

Rotary is a global community with 1.4 million Rotarians and Rotaractors from clubs in nearly every country. This means you can connect with others near home or across the globe. Here are some ways you can make connections through Rotary.



+ ATTEND CLUB MEETINGS AND EVENTS.

Introduce yourself to members in your club to get to know them better. Being genuinely interested in others shows people you value them, and these small interactions can lead to lasting friendships.

+ CREATE A MY ROTARY ACCOUNT.

When you register for a [My Rotary account](#) and create a profile, you can access Rotary's online tools and locate and connect with members near and far using the [Find a Member](#) tool.

+ ATTEND DISTRICT MEETINGS AND EVENTS.

Clubs are grouped into more than 500 districts worldwide. By connecting with other clubs and leaders in your district, you can learn how to get involved in Rotary beyond your club and make a greater impact.

+ GET INVOLVED WITH CLUB INITIATIVES.

Volunteering to take part in a project, attend a meeting, or serve in a club role, such as being on a [committee](#), will let you work with others in meaningful ways and contribute to your club's impact. You can also suggest speakers from [service and project partners](#) or from other organizations that share Rotary's values. Ask your club how you can help.

+ VISIT ANOTHER CLUB.

You can locate Rotary and Rotaract club meetings to attend using the [Find a Club](#) tool. You might think of ways to collaborate on club activities or hear of an idea you want to try with your club. Visiting other clubs fosters new connections and inspiration.

+ JOIN A ROTARY FELLOWSHIP.

Meet others with similar interests by joining a [Rotary Fellowship](#), an international group of people with a common hobby, identity, culture, or vocation. This is a fun way to make friends and explore a pastime or profession.

+ JOIN A ROTARY ACTION GROUP.

These include people around the world who have expertise and passion in a particular area, such as economic development, education, the environment, or safe water. Join a [Rotary Action Group](#) to share your knowledge, develop your skills, and make professional and personal connections.

+ PARTICIPATE IN A ROTARY FRIENDSHIP EXCHANGE.

Experience different cultures and build international understanding and friendships. This program for Rotary members and friends prioritizes cultural immersion, international service, or vocational exchanges. [Friendship Exchange](#) participants take turns hosting one another in their homes and clubs.

+ ATTEND A PROJECT FAIR.

Meet people with whom you can collaborate on international projects. [Project fairs](#) typically last two or three days and can include visits to project sites as well as opportunities to experience the local culture. These activities let visitors learn about the community and build long-lasting relationships with their hosts.

+ ATTEND THE CONVENTION.

The [Rotary International Convention](#) is held in a different international city each year. You'll meet members from around the world, learn how to expand our impact, and enjoy inspiring talks from global leaders, celebrities, and activists.

PARTICIPATE IN MEANINGFUL SERVICE

Making a difference in the community is one of the top reasons people get involved in Rotary. We channel this commitment through five Avenues of Service — Club Service, Vocational Service, Community Service, International Service, and Youth Service. Here are some ways you can take part in meaningful service through Rotary.



+ SUPPORT YOUR CLUB.

You can help your club thrive by offering your expertise and skills through serving as a club officer, as a committee member, or in another role.

+ PARTICIPATE IN LOCAL SERVICE ACTIVITIES.

Find out what projects your club, neighboring clubs, and your district are working on and volunteer for one or more. Work with partners or conduct a community assessment to identify projects that would benefit your local area.

+ PARTICIPATE IN INTERNATIONAL PROJECTS.

Many clubs partner with clubs in other parts of the world to address a need in one of their communities. Together, they have more time and funding, as well as the expertise of members, partners, and Rotary program alumni to bring about sustainable, positive change. Find a project and get involved.

+ USE YOUR PROFESSIONAL EXPERTISE.

Many districts have a district resource network of local experts who can use their experience, technical knowledge, and project-planning skills to assist clubs in the design and implementation of meaningful projects. Contact your district international service chair to offer your skills to mentor clubs and improve communities.

+ SUPPORT AN INTERACT CLUB.

Interact clubs bring together people ages 12-18 to develop leadership skills while participating in service. If your club sponsors or co-sponsors an Interact club, you can help empower Interactors to make a difference in their communities and globally by supporting their service-learning projects.

+ PARTICIPATE IN ROTARY YOUTH LEADERSHIP AWARDS.

RYLA events provide opportunities to build leadership, communication, and problem-solving skills, while having fun and forming lasting friendships. Talk to your club and district leaders about getting involved by nominating participants or assisting event organizers.

+ WORK WITH A ROTARY COMMUNITY CORPS.

These groups of nonmembers partner with local Rotary and Rotaract clubs on service projects. By working with a Rotary Community Corps, you can build engagement in the area and make your projects more sustainable by positioning local leaders to pioneer change.

+ USE YOUR SKILLS WITH A ROTARY ACTION GROUP.

Use your professional skills to make a sustainable impact locally and globally through one of Rotary's more than 25 action groups. By leveraging people's expertise and our global network, Rotary Action Groups help clubs and districts plan and implement meaningful, large-scale humanitarian service projects.

+ APPLY FOR A GRANT.

If your project meets certain requirements, it might be eligible for funding from The Rotary Foundation. Explore the grant types and find one that's right for your project.

+ JOIN THE EFFORT TO ERADICATE POLIO.

Raise awareness about Rotary's work to end polio, donate to the PolioPlus Fund, or volunteer for a National Immunization Day. Post about polio on social media or include a link to endpolio.org in your email signature. Write to us to learn about upcoming trips for NIDs.

+ SUPPORT ROTARY'S CURRENT WORK.

You can do this by giving to The Rotary Foundation, which sustains thousands of projects in your community and around the world. The Foundation supports projects and programs that transform lives by addressing poverty, disease, conflict, and lack of education and water.

BECOME A LEADER

Rotary offers many opportunities to develop your leadership capabilities. Whether you're interested in a club or district role or in building new skills, leadership can be a cornerstone of your Rotary experience. Here are ways you can become a leader through Rotary.



+ SHARE YOUR IDEAS WITH YOUR CLUB.

You can help your club achieve its goals, improve its projects, and enhance the member experience. Clubs can evolve by being receptive to new and diverse perspectives, and your suggestion could become the next big initiative in your club or community.

+ EXPLORE LEADERSHIP COURSES.

Use Rotary's Learning Center to improve and practice your skills. Rotary's [professional development courses](#) include topics such as resolving conflict, public speaking, and networking. You need to have a My Rotary account, so be sure to [register](#) if you haven't already.

+ GIVE A SPEECH AT A CLUB MEETING.

Introduce yourself or discuss an area of expertise in order to practice your presentation skills. If your club meetings don't offer this opportunity, suggest it to your club leaders or contact [your local Toastmasters club](#) and ask to be a guest speaker.

+ BECOME A MENTOR.

Share your professional expertise, community knowledge, or Rotary information as a mentor. Ask if your club has a mentoring program, and if not, propose starting one. Take the [Mentoring Basics course](#) and learn to use your experience to help others grow.

+ LEAD YOUR CLUB.

Find out what committees and other leadership opportunities your club has, and volunteer for one that interests you. You'll learn more about your club and Rotary and gain skills in the process. Explore the [Club Leadership catalog](#) to find out about these roles.

+ ORGANIZE A CLUB EVENT.

Volunteer to coordinate a social gathering or service project, and gain skills including collaboration, public speaking, or managing other volunteers.

+ LEAD YOUR DISTRICT.

If you've served as a club leader and want to get more involved, find out how to do so at the district level. Learn about district roles with the [District Leadership catalog](#) and talk to your club and district leaders about available opportunities.

+ BUILD PEACE.

Join the [Rotary Positive Peace Academy](#), created with Rotary's partner, the Institute for Economics and Peace, to learn about building and sustaining peace and the Positive Peace framework. Learn about the [Rotary Peace Centers program](#), which trains leaders from communities around the world to address peace and development issues.

+ SERVE IN INTERNATIONAL LEADERSHIP ROLES.

Lead global groups of communities of people with similar interests, hobbies, professions, and passions by serving in a leadership role in a [Rotary Fellowship](#) or [Rotary Action Group](#).

EXPAND YOUR PERSPECTIVE

When you make connections, participate in meaningful service, and take leadership roles, you'll inevitably develop and expand your perspective. Here are more ways you can experience personal growth and expand your perspective through Rotary.



PERFORM ACTS OF KINDNESS.

Being gracious and caring empowers all parties involved and contributes to people's mental well-being. In Rotary, you have many opportunities to make a positive impact on someone's life by expressing kindness.



TAKE COURSES IN THE LEARNING CENTER.

Beyond the courses mentioned elsewhere in this guide, you can find online courses about specific Rotary programs, policies, and leadership roles, as well as more general skill development. Courses are available in more than 20 languages.



CONNECT WITH TOASTMASTERS.

Rotary's alliance with Toastmasters International means you can take [leadership courses](#) to develop and practice your skills. You can also [visit](#) a meeting or work with a Toastmasters club on joint initiatives.



ATTEND LEARNING EVENTS.

Connect with other members in your area by taking part in one of these informational events offered by your district. You'll learn more about Rotary and other clubs in your community. Visit your district's website or contact your club leaders to find out when your district's next event will occur.



WELCOME A YOUTH EXCHANGE STUDENT.

If your district is certified to participate in [Rotary Youth Exchange](#), you can offer to host or help welcome a student from another country, learn about their culture, share your culture with them, and create a memorable learning experience.



EXPLORE OTHER CULTURES.

Because Rotary and Rotaract clubs are all over the world, you can [visit clubs](#) when you travel and experience how diverse clubs in other towns or countries are. In addition to programs like Friendship Exchange or Youth Exchange, this is a way to broaden your intercultural understanding, build friendships, and learn about a region's history and customs.

HOW WILL YOU GET INVOLVED?

With so many ways to get involved, you can design the Rotary experience that suits you best. Talk to your fellow club members and leaders and share your interests and ideas. Take an active role in shaping your club. All of this will allow you to get the most out of your Rotary experience!

Guiding principles

These principles have been developed over the years to provide Rotarians with a strong, common purpose and direction. They serve as a foundation for our relationships with each other and the action we take in the world.

Object of Rotary

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

- FIRST: The development of acquaintance as an opportunity for service;
- SECOND: High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;
- THIRD: The application of the ideal of service in each Rotarian's personal, business, and community life;
- FOURTH: The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

The Four-Way Test

The Four-Way Test is a nonpartisan and nonsectarian ethical guide for Rotarians to use for their personal and professional relationships. The test has been translated into more than 100 languages, and Rotarians recite it at club meetings:

Of the things we think, say or do

1. Is it the TRUTH?
2. Is it FAIR to all concerned?
3. Will it build GOODWILL and BETTER FRIENDSHIPS?
4. Will it be BENEFICIAL to all concerned?

Avenues of Service

We channel our commitment to service at home and abroad through five Avenues of Service, which are the foundation of club activity.

- Club Service focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.
- Vocational Service calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society. Learn more in [An Introduction to Vocational Service](#) and the [Code of Conduct](#).
- Community Service encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest. Learn more in [Communities in Action: A Guide to Effective Projects](#).
- International Service exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.
- Youth Service recognizes the importance of empowering youth and young professionals through leadership development programs such as [Rotaract](#), [Interact](#), [Rotary Youth Leadership Awards](#), and [Rotary Youth Exchange](#).

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Session B-6 **Increasing Humanitarian Service** (60 minutes)

	Step?	We want to accomplish?	How long?
1.	Topic/ Overview	Provide topic – have participants open PN Workbook to B-6.	1 min
2.	Breakouts/ Discussions	<p>1st Learning Objective: Describe how service projects impact the attraction/recruitment and engagement/retention of club members.</p> <p>Divide participants into four groups.</p> <p>Have groups share service projects ideas.</p> <p>Ask the groups to choose the idea that accomplishes the most impact and take a couple of minutes to list the kinds of impact.</p> <p>Have each group share their lists with the class.</p>	24 min
3.	Breakouts/ Discussions	<p>2nd Learning Objective: Engage club members to reach out to local agencies or organizations to identify community needs.</p> <p>Still in groups, have participants turn to Conducting Community Assessment Tools in PN Workbook. Have groups discuss the importance of undertaking a community needs assessment, as well as the types of methodologies of an assessment.</p> <p>Then ask groups to share reasons why community assessments are important, as well as examples of community assessment methodologies in their communities (have each group give one two-part answer).</p> <p>Next, have groups discuss the various types and characteristics of organizations and groups with which to partner in their communities.</p> <p>Then ask groups to share types and characteristics of partners in their communities (again have each group give one two-part answer).</p> <p>As time allows, ask for additional sharing on community assessments and methodologies and partners and characteristics.</p>	18 min
4.	Breakouts/ Discussions	<p>3rd Learning Objective: Explain ways to evaluate a service project to determine whether to continue a project.</p> <p>Refer participants to Service Project Evaluation Survey in PN Workbook.</p> <p>Still in groups, have groups discuss the warning signs of a project that needs to be re-evaluated and the reasons to discontinue a project.</p> <p>Ask each group to provide a brief summary of their discussion.</p>	11 min
5	Q & A	Ask for any questions and respond briefly.	3 min
6	Wrap Up and Evaluations	<p>Thank participants for an impactful and inspiring session.</p> <p>Ask them to go to notes page at end of module and jot down their thoughts.</p> <p>Remind participants to complete module evaluation via mobile app.</p> <p>Proceed with transition to next module topic and facilitator.</p>	3 min

Lone Star P.E.T.S. 2025

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, MARCH 1, 2025

SESSION B-6 INCREASING HUMANITARIAN SERVICE

GOAL

Club Presidents-elect will have the skills necessary to evaluate service projects and engage of club members.

OBJECTIVES

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

1. Describe how service projects impact the attraction/recruitment and engagement/retention of club members.
2. Engage club members to reach out to local agencies or organizations to identify community needs.
3. Explain ways to evaluate a service project to determine whether to continue the project.

REFERENCE MATERIALS:

Conducting Community Assessments
Service Project Evaluation Survey

Module B-6: Increasing Humanitarian Service

Breakout Discussion Questions

1. Share service project ideas.
Choose the idea that accomplishes the most impact.
List the kinds of impact.
2. Turn to Community Assessment Tools in PN Workbook.
Discuss the importance of undertaking a community needs assessment, as well as the types of methodologies of an assessment.
Share reasons why community assessments are important, as well as examples of community assessment methodologies in their communities.
Discuss the various types and characteristics of organizations and groups with which to partner in your communities.
Share types and characteristics of partners in their communities.
3. Refer to Service Project Evaluation Survey in PN Workbook.
Discuss the warning signs of a project that needs to be re-evaluated and the reasons to discontinue a project.
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 Increasing Humanitarian Service session?
6. Any other question(s)?

Conducting Community Assessments

Building a foundation for effective Rotary projects



Click below to go to a page.

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Why community assessments are important

Effective service projects need a solid foundation. Although clubs and districts invest a lot of time and money into various projects, some still don't make a lasting impact. A well-planned project that fits the community's culture and context is more likely to succeed, and conducting a thorough community assessment significantly increases your chances for success. An assessment can help you:

- **Understand the community.** Working with the community to understand its history, culture, strengths, assets, weaknesses, and needs through a broad assessment is an essential first step in planning an effective project. By scheduling enough time to gather input from and information about the community, you can discover the best opportunities for service and maximize your club's ability to bring about positive and lasting change. Even if you're actively involved in the community, an assessment

can reveal a new way to address a known issue or give residents a chance to note overlooked challenges.

- **Make informed decisions.** Assessments provide data to guide your club and the community as you decide what project to do; how to allocate time, funding, and other resources; and what's the best way to collaborate with relevant local groups.
- **Build trust and community involvement.** Developing trust in communities can require time — in some cases, months or even years. Conducting an assessment is critical to building valuable relationships and engaging residents in the project, fostering a sense of commitment that will sustain the change.

Click below to go to a page.

Why community assessments are important

Tips for conducting community assessments

Consent and data privacy

Examples of community assessments in action

Types of assessments

Asset inventory

Community mapping

Community meeting

Document and policy review

Focus group

Interview

Survey

Who to consult with throughout the assessment

Preparing the community assessment report

Rotary 

Why community assessments are important

A community assessment is much broader than needs or solutions. It should have the complete context about a community's culture, unity, divisions, and how decisions are made. Strive to include these topics, using the tools in this guide:

1. Daily life. Ask each group or person you interview what daily life is like. What are everyday tasks? How do they do them? What are the benefits of doing them that way? How do they wish things were different? (Include educational opportunities, jobs or income, health, nutrition, their physical environment and surroundings, cleanliness, personal safety, and more.)
2. What are the biggest issues in the community? What things cause anger, frustration, arguments, or an inability to achieve goals? What things prevent growth or achievement? How might they be addressed? What things bring joy, collaboration, cohesion, wellness, and productivity? Why do they work well?
3. What is the history of these issues?
 - What has the community (or groups in it) tried to do? What was the outcome?
 - What have nongovernmental organizations, universities, or other outside groups done? What was the outcome?
 - What have the local, regional, and central governments done or not done? What was the outcome?
- Why do the issues persist?
- Do colonialism, paternalism, old customs, traditions, and other long-lasting practices prevent change? Why does that still happen?
- What can be done to remove these barriers, encourage reconciliation, or facilitate community harmony? What can be done to improve people's lifestyles or livelihoods, or make things better in other ways?
4. Who is in control of these issues or the underlying causes? Which people are not involved in leadership or discussions? Why?
5. Who are the most trusted leaders in the community (men, women, boys, and girls)?
6. How would advocacy with leaders or the government improve the issues?
7. What other changes would make the community and its members happier, healthier, and better off financially?

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DIVERSITY, EQUITY, AND INCLUSION

Rotary International is committed to creating environments that are diverse, inclusive, equitable, and beneficial to all in the community. All members and participants have a responsibility to uphold these principles. When you conduct a community assessment, be sure to engage people from traditionally underrecognized groups and build partnerships with a variety of groups in the community. By including people with a range of perspectives and welcoming them into the conversations and decisions, you'll help maintain an environment that aligns with [Rotary's commitment to diversity, equity, and inclusion](#).

- **Ensure that the assessment is led by a local club or organization.** The host club's participation is critical to ensure a deep understanding of the community and help you build ongoing relationships. Even if the assessment is conducted by another local collaborator, make sure the local club is involved in or aware of the process.
- **Consider yourself an outsider.** Even if you live in the community where your club wants to do a project, find an individual, group, or organization that can introduce you to a variety of residents who will bring different experiences, perspectives, and ideas to the assessment process. Ask participants who else in the community they think you should speak with.
- **Choose participants carefully.** Conversations with a few people aren't enough to understand a community. Consider the composition of the community and be sure to include a representative cross-section of relevant groups (e.g., by gender, age, ethnicity, religion, income level, and vocation). Remember that you shouldn't include children in the assessment or ask them questions without their primary caregivers' consent, and you also need to comply with all of Rotary's policies for working with young people.
- **Include frequently marginalized groups.** Women, young people, older people, people with disabilities, and people from smaller religious and ethnic groups are often underrepresented. Think about the social dynamics of the community in deciding whom to meet with. Convene people from each group separately so they're more comfortable sharing their perspectives. When you schedule these meetings, consider what might prevent people from specific groups from attending, such as the accessibility of the location, financial considerations, gender roles, religious observances, or caregiver responsibilities.
- **Establish a data collection and monitoring system.** Determine what data is relevant for you to gather during the assessment. Many organizations and government entities collect community-level information and will share it with your project team. Seeking and using available data to supplement your own research will help your team better understand the community's priorities and the best approaches to address its needs. Also think carefully about how you'll measure impact and how to structure the data collection system to make it objective and impartial. Consider who will collect and receive the data and how community leaders, clubs, and partners might adapt the project or training if necessary to achieve the desired outcome.

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- **Manage expectations.** Make it clear that the assessment is exploratory and collaborative, and that your interest in working with the community is not a commitment to address a predefined issue. The benefits of partnering with Rotary and how the community will participate in, contribute to, and maintain the solution will be determined later in the planning process.
- **Understand the difference between a feasibility study and a community assessment.** A feasibility study is an analysis to determine the practicality of a proposed project. Avoid studying whether a specific solution or project would benefit the community. Instead, focus on understanding the community's main concerns and the underlying causes of those concerns — a community assessment.
- **Collaborate, don't duplicate.** In some cases, local governments, nongovernmental organizations, nearby clubs, or other civil society associations may be already studying the community or planning to address issues there. Make sure your assessment, and any subsequent projects, don't duplicate efforts. Investigate whether a collaboration could strengthen an existing community assessment or initiative.
- **Learn from what hasn't worked.** Remember to ask about what hasn't worked for the community in the past. If recent projects didn't meet their goals or address the issue they were intended to improve, find out why they didn't have the expected effect.

During the assessment

- **Go to the community.** Talk to people in the area where they live or work rather than asking them to travel to a location where they may be uncomfortable, concerned about safety, or incur transportation costs.
- **Listen without judgment.** Avoid assuming you know what's best for the community or what challenges it faces. Acknowledge your own cultural background and biases but try to suspend your preconceived ideas. Focus on listening, learning, and understanding other perspectives. Absorb information without forming conclusions or indicating any to those you speak with. Ask open-ended questions such as, "Tell me about..." or "How does [X] happen...?" Pay attention to the answers and ask follow-up questions to learn more.
- **Foster a safe environment for youth.** Young people can add valuable perspectives to community assessments and service projects when they feel safe and welcome. It's important for you and anyone else who works with young people

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through Rotary to make their safety your top priority. You need to obtain consent from a young person's primary caregiver for them to participate in any activity or project. Before engaging with minors, review Rotary's statement of conduct for working with youth at the beginning of the [Rotary Youth Protection Guide](#) and take the course in the Learning Center.

- **Craft a compelling narrative.** Structure data collection activities that create a natural flow of information for you and the community. The assessment tools you use should build on one another, making it easier to collect and analyze information. What will help you and your partners understand the community and help the community understand Rotary and its partners?
- **Communicate respectfully.** In all your communications about the assessment or a possible project, treat community members as active participants rather than passive recipients of the project benefits. Focus on their strengths, incorporate their perspectives and ideas into the process, and highlight community-driven solutions. Understanding the community, listening to the residents, and creating environments where they feel empowered is fundamental to the way we work with people.
- **Determine if an issue is a one-time problem or a recurring problem.** If it's recurring, find out why. Are existing laws or programs not being adhered to? Is there a need for training, data collection, or established processes? This broader approach investigates and seeks to address the underlying causes of an issue and could benefit the community you want to work with as well as others facing similar situations.
- **Emphasize community involvement.** Make it clear that you are interested in working with the community to address a local need and that the community will retain and maintain any result of that collaboration. Talk about the fact that any collaboration will involve long-term solutions led by diverse local representatives (including people from historically underrepresented groups). The community should lead every decision, with your club available to assist. This promotes local involvement and sustainability.
- **Create environments where people feel empowered.** Speak *with* community members, not *at* them, and find opportunities for them to be actively included in the project planning and decisions. Ensure that community partners are a central part of any initiative — not only during the assessment process, but also during implementation, evaluation, and the long-term sustainability of project activities.

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It's important to remember that during the assessment process, you might be asking sensitive questions, collecting personal information, or conducting surveys, interviews, and focus groups with people from vulnerable or underrepresented groups. Ensure that you have consent from each person to collect their information and that you have a secure method to keep their data private.

Consent means that the person answering questions is doing so by their choice and without coercion and understands how their answers may be used.

Data privacy means protecting the personal information that you collect and using it only for its original purpose.

Consider these questions about data privacy and consent:

- Do people know that they can decline to answer a question or stop participating at any time?
- If you're using a survey, will their names be linked to their responses or will answers be anonymous?
- Can the answers be connected to a specific person? If so, could it cause them harm?
- Where will you store the survey responses or notes from your interviews and focus groups? When and how will you delete the data after it's no longer needed?
- Who will have access to the data?
- Will any results be shown about specific individuals or only at the group level?
- Is the data you are collecting necessary and relevant?

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Example 1

A Rotary club in Roatán, Honduras, wanted to work with people in St. Helene, an island 45 minutes away by boat. Club members were interested in collaborating with the people in St. Helene to improve sanitation, strengthen their economy, implement access to safe water and electricity, improve educational outcomes, and address widespread health issues. The club invited residents in St. Helene to take part in a community assessment so it could learn about the local priorities.

The Roatán club members started by organizing a community meeting. Although many people attended, St. Helene's council members did most of the talking. Others, including parents and local elders, sat in the back and nodded. Club members noticed that most of the community members didn't share their opinions at the meeting, so they scheduled smaller focus groups with residents that didn't include the council members. Some people echoed the concerns of the council, but they also mentioned other issues. In the focus group, they were honest about their struggles and the lack of opportunity for themselves and their children.

The club organized a community mapping activity to further understand different perspectives and get feedback from more people. Participants drew local maps and highlighted the places that were most important to them. The school was important to people with children, and the clinic was important to almost everyone. This activity helped residents talk about what they did and didn't have and

prioritize their interests. The Rotary members asked about previous efforts to address these priorities, and residents explained what was done, how it failed, why a new idea was better, and how they could maintain it. This process shaped a shared understanding of the community and future service efforts.

As a result of the assessment, residents in St. Helene have collaborated with Rotary members on a series of water, sanitation, and hygiene projects at the locations that the community mapped to be the most accessible and visited. Locally made hand washing stations were placed in multiple locations, with health workers and locally influential people hosting learning sessions every two weeks until proper hand washing behavior became a habit. A schedule is in place for latrine cleaners, followed by inspections, to ensure that the new latrines are inviting, well-maintained, and used properly. Two residents gather data on the current condition of every latrine and hand washing station. Village leaders, health officials, and local club members can then review the information to ensure the facilities are being properly maintained.

The club continues to work with the St. Helene community and involve international club partners to understand the community's evolving priorities through follow-up assessments and projects in which residents develop solutions based on their shared needs.

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Example 2

Rotary clubs in Italy learned during the early part of the COVID-19 pandemic that projects cannot succeed solely on good intentions. A well-planned project involves the community and is based on residents' input and priorities.

In 2020, many clubs in Italy's Romagna region reacted quickly to the pandemic out of a desire to help COVID patients and local health care systems. The clubs inundated local hospitals with donations, including materials like oximeters and thermometers. The donations quickly piled up. Although the members wanted to help, it was clear that already overwhelmed hospitals were now overloaded with unused medical supplies and burdened with sorting through the donations that — although generous — they didn't need or couldn't use.

Recognizing that this approach was creating more problems, the clubs decided to change their focus. With the district's support, more than a dozen clubs from Romagna formed a task force with health care experts, government

officials, patients, residents, and community leaders to identify how the Rotary clubs could support local priorities during the public health emergency.

As part of its assessment, the task force consulted with relevant groups such as public health officials, technicians, doctors, nurses, health service managers, community members, and Rotary members who had expertise in the health sector to understand local needs. The assessment found an overlooked vulnerability: chronically ill cardiology patients lacked access to crucial heart monitoring systems because of lockdown restrictions and COVID priorities. The clubs formed partnerships with telemedicine companies and public health agencies on a project to connect patients with cardiac devices to essential monitoring systems. The data showed that heart attack and death rates had fallen 74% over two years because of the monitoring system.

To develop a strong project from the start, ask your district international service chair to connect you with members of your district resource network. This network includes local and regional experts, like members of Rotary Action Groups and The Rotary Foundation Cadre of Technical Advisers. They have experience planning projects (from the community assessments to measurement and evaluation plans) and technical expertise in our areas of focus and Rotary grants. International service chairs can introduce you to Rotarians, Rotaractors, Rotary alumni, community members, and professionals from other organizations who are eager to support club projects. Some will be familiar with the culture and history of the region where you are working.

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Combine and adapt these kinds of assessments to best suit the composition and preferences of the community:

- Asset inventory
- Community mapping
- Community meeting
- Document and policy review
- Focus group
- Interview
- Survey

As you determine your approach, consider any available data about the community. Has the local, regional, or national government recently published credible findings that could inform your research? Have other organizations or institutions researched the community? Do you notice any gaps in official statistical data that could be addressed through the assessment? To answer these questions, consider partnering with local experts as well as with nearby clubs and experts within Rotary who may offer different perspectives and considerations.

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Asset inventory

An asset inventory identifies the characteristics of a community, including its physical environment, institutions, services, events, and especially its people. To conduct the inventory, participants highlight individuals, places, and things to illustrate their value, use, and relevance, and then document and analyze their findings. The results can help a community explore how its assets are connected and how it can use them to create positive change. The results may also reveal prospective partners by identifying entities that care about serving the same groups or solving the same problem. These partners might help fill gaps or add value that increases the impact of your project.

Advantages of asset inventories:

- They maximize available resources.
- They encourage the creation of broad, inclusive networks to effect change.

- They help identify areas of community member interest.
- They can be maintained, expanded, and used repeatedly.
- They can account for environmental factors that are visible but undervalued.

Challenges with asset inventories:

- Data analysis is time-consuming.
- Organizing assets and identifying connections can be difficult.
- Physical assets may be overemphasized since they are easier to identify.
- Interests, skills, and other nonphysical assets can be easily overlooked.

Tips for conducting an asset inventory

- Determine what you want to inventory and identify potential participants.
- Invite a small, representative group of community members to conduct the inventory in one or more sessions.
- Use strong group facilitators who know how to ensure that all participants have an opportunity to contribute and that each discussion group stays focused on its task and completes it on time.
- Analyze the results with the community members. Organize assets by category and document connections among them.
- Use available assets to create coalitions and networks to address community issues.
- Share the inventory results with other community members to identify potential gaps and incorporate different perspectives.
- Update and maintain the inventory regularly.

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Sample inventory questions

VARIATIONS

- Divide participants into groups by gender, age, or profession to reveal how different groups perceive the community.
- Instead of a broad-based inventory, choose a specific community issue such as education, health, or the environment that you identify through another assessment tool like a survey, focus group, or community meeting. Create an inventory of only the assets related to that issue.
- Incorporate a walk or drive around the community to encourage an expansive approach to identifying assets.

- What is special about your community?
- What products are made in your community? What events take place in your community?
- When and where do people gather, and what do they do together? Include religious, social service, sporting, entertainment, informal or routine activities, and other types of gatherings.
- What topics or issues interest a significant number of community members?
- Who are the formal and informal leaders of the community? Who do people respect and regard?
- How is information shared in your community?
- What services are provided in your community? Who provides them?
- What natural resources are found in your community? Which areas include space with nature?
- What skills or knowledge in your community have been and should be shared with the next generation?
- What businesses, professional associations or councils, philanthropic or nongovernmental organizations, and public or private institutions exist in your community?
- What volunteer activities exist in your community, both formal and informal?
- How do community members demonstrate that they care for and trust their neighbors?
- What payment or financing systems are in place to pay for goods and services?
- Does a governing body help manage services, create and enforce rules, and perform other critical functions?

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Community mapping

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

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

- Identify how they use community resources and any barriers to accessing them
- Compare perceptions of the importance of various community resources
- Generate ideas for community improvement
- Identify prospective partners
- Have a sense of commitment to the process

Advantages of community mapping:

- It's a lively and engaging activity.
- It encourages participants to discuss how they might improve their community.
- It can be separated into multiple sessions with different relevant groups.
- It can add historical context and reveal geographical considerations.

Challenges with community mapping:

- Analyzing the results can be difficult because the information is in a visual format.
- Deriving conclusions from the maps and determining what to do next may require additional assessment activities.
- The activity may be more focused on physical assets and infrastructure and overlook less tangible resources or challenges, such as attitudes, behaviors, or knowledge.

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Tips for community mapping

- Consider consulting a community historian who can provide context about different locations.
- Keep the groups small and inclusive — ideally no more than 20 participants, divided into smaller groups of four to six people with varied representatives of the community.
- Help each small group draw a map based on its own perceptions of the community. The variety of maps will yield a substantial amount of information.
- In the large group, discuss all the maps, including:
 - o What are the differences between them?
 - o Why might the differences be important?
- What are the similarities between the maps?
- What important aspects of the community are implied by the similarities?
- What are some suggested additions to the maps? How would these places improve the community?
- Do the maps indicate any specific activities or projects that might improve the community? Which institutions would likely want or need to be involved, given their expertise or connections in that geographic area?
- Ask participants to volunteer for a committee to further analyze the maps and identify what to do next.

What to map

- Places of residence
- Places of importance to participants, such as markets, religious centers, schools, community centers, parks, businesses, fields, water sources, government offices, health clinics, police stations, natural areas, and recreational areas
- Places used for defecation or solid waste management, especially in relation to institutions, areas where people congregate, and water sources
- Places where participants spend the most time, using different colors to indicate daily, weekly, monthly, or yearly visits
- Places used for industry, business, and agriculture
- Places used for hunting, fishing, and harvesting or collecting food
- Places they enjoy and feel safe and welcome, as well as places they don't enjoy being and feel unsafe and unwelcome (indicated by different colors)
- Places they'd like to add to the community, indicated by type and location

VARIATIONS

- Divide participants into groups by gender, age, ethnicity, or profession to make sure that places important to underrecognized groups are represented on the maps.
- Have groups tour the community before drawing their maps.
- Ask participants to agree on a central place in the community to orient everyone's maps.
- Consider using the asset mapping tool together with the community mapping tool.

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A community meeting, sometimes called a town hall or public forum, is a public gathering that is intentionally organized to bring together residents to discuss priorities, consider potential goals, state concerns, and express preferences for possible solutions.

In these meetings, a facilitator leads discussions on issues related to the community's strengths and challenges and encourages attendees to participate. The facilitator also directs any questions to experts in the subject.

Consider appointing a respected member of the community or a representative from a trusted local organization to facilitate the meeting, particularly if cultural or language differences could be an issue. This approach also honors local decision-making methods and structures.

Before organizing a meeting, consult with residents to help define the objectives and think about different strategies that will encourage a representative group of people from the community to take part. Knowing what the community hopes to achieve at the meeting will help you plan and host a successful meeting.

Advantages of community meetings:

- They give people of diverse backgrounds a chance to express their ideas.
- They allow participants to build upon one another's responses.
- They involve a large group of people at one time.
- They identify respected community representatives to involve in a project.
- They allow participants to discern the significance of a variety of issues.
- They explore potential solutions.

Challenges with community meetings:

- It can be difficult to maintain an honest, comfortable, and relaxed environment.
- It can be difficult to keep the conversation on topic.
- They can be influenced by social constraints such as gender disparities, power dynamics, or cultural norms.
- They may be dominated by one or two active participants to the exclusion of others.

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Tips for hosting a community meeting

- **Identify your goals.** What insights do you hope to gain from this meeting? Are there specific issues in the community that you want to better understand? Design questions that will provoke constructive answers.
- **Select an accessible location and convenient time.** Host the discussion at a venue that is easy to find and easy to access. Consider the participants' schedules when determining a time and whether several sessions at different times and locations would allow more residents to participate.
- **Promote the event throughout the community.** Be mindful of cultural values and norms that may affect responses (for example, women may not feel empowered to talk openly and honestly in the presence of men). Factor in the level of literacy in the community and how residents normally receive information (e.g., flyers, radio, announcements at schools or houses of worship). Include details when promoting the meeting, such as whether food will be offered or childcare will be provided, as well as the start and end times.
- **Prepare a list of questions.** Keep your questions simple and concise and avoid questions designed to encourage a specific answer. If participants mention new concerns or multiple people mention the same issues, follow up with clarifying questions.
- **Set and follow a schedule.** Decide how much time to spend on each question, factoring in follow-up questions based on issues and ideas identified during the discussion.
- **Set and state ground rules.** Share rules with participants before the meeting to prevent people from monopolizing the forum, to help engage everyone in the discussion, and to keep the conversation focused.
- **Take notes.** Keep a record of the ideas in a way that everyone can examine during the discussion. Ask one or two people (not those present to engage in the conversation) to help you monitor the conversation. Record what is said, as closely as possible, rather than paraphrasing comments in your words.

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- **Be an active listener.** Use both verbal and nonverbal communication skills to show that you're engaged with and interested in what all participants have to say. Be considerate of their time. Try to connect different peoples' ideas and stories to demonstrate your understanding and create links between peoples' insights.
- **Request that participants elaborate.** Ask follow-up questions if you don't understand their feedback.
- **Allow for small-group discussions.** Small groups provide more speaking opportunities for attendees. Ask each group to record their notes and have a designated group member briefly summarize the discussion for the larger audience. To help make people feel

comfortable participating, consider creating groups composed entirely of community members who might be less likely to speak out (e.g., a group of all women, young people, people with disabilities, people from traditionally marginalized groups, etc.).

- **Get creative.** Consider using participatory activities, visual materials, games, or other tools to support the discussion and encourage all participants to share their opinions. For example, you could ask people to mark areas of a map or images that represent the areas that are their top priority. Think about community members, such as local artists, who have unique skills that could make the experience more engaging.

Addressing challenges in community meetings

- If certain participants are dominating the conversation, make a point of asking others for their ideas.
- Monitor people's body language and react as necessary. Maybe the facilitator needs a break, or you need to stop someone from speaking too much. A five-minute break can help refocus the discussion.
- Use encouraging body language and tone of voice. For instance, lean forward when people are talking, keep your body position open and approachable, and be attentive to everyone, not just those who are most articulate. Use words to acknowledge responses but avoid making value statements such as "Good question," "That is a good point," or "I like that idea." Instead say "Thank you for sharing."

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- Stay mindful of group dynamics. Be aware of emotional reactions participants may have to others' comments, particularly if they appear upset, hurt, angry, or defensive. A trained facilitator should encourage participants to follow the rules and express themselves without making personal accusations or embarrassing others. If participants seem puzzled or confused, revisit the comments or points that caused the confusion or try to restate them more clearly.
- In general, keep the meeting focused on the original objectives. Sometimes, the conversation may shift to new or unexpected topics. This can uncover new perspectives, ideas, or issues that help you learn about the community's priorities and goals. When you need to refocus the discussion, summarize the points that have been made and ask if anyone has additional thoughts about the original question.

Following up after a community meeting

- Thank participants for attending and sharing their opinions and ideas.
- Summarize the main findings and outline any plans for what will happen next.
- Consider inviting some participants who were very engaged to help determine what will happen next.

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Document and policy review

Reviewing documents and policies helps you understand the broader context while you gather information about a community. It requires few resources and should be used in conjunction with — and preferably before — another assessment method. Documents with government data or other publicly available information such as scholarly journal articles and news articles let you learn more about existing systems and policies, programs, budgets, and processes and uncover new information about the community.

This activity includes collecting information digitally or in person about a specific issue. Many government ministry websites have links to their policies, plans, programs, and procedures, as well as recent data about community needs.

Advantages of document reviews:

- They're a low-cost method to learn about a community.
- They offer important context about existing policies and programs.

Types of existing documents

- Data about the community and its historical needs
- Community demographics
- Government policies and current programs
- Government budgets for these programs
- Project reports, news articles, research papers, scholarly journal articles, and publications about the community or a local issue
- Maps, satellite images, or other geographic information

- The data already exists and doesn't need to be collected.

Challenges with document reviews:

- Documents often give an official perspective but don't include those of community members.
- Documents often don't show how policies are being implemented in the community.
- Publicly available data may be outdated.
- Publicly available data may not include groups that are traditionally marginalized or provide enough specificity.
- It may require a lot of time to collect and analyze many documents.
- Document reviews should only supplement, not replace, the collection of information, ideas, and feedback from community members.

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Focus group

A focus group is a carefully guided discussion that you can use to discover a community group's opinions on a particular idea. It can help you determine which issues residents believe should be addressed first and how to address them.

Conducting a focus group requires careful planning and a skilled facilitator. Most focus groups consist of six to 12 participants who represent a particular group in the community. They are asked a series of precise, open-ended questions about different issues in the community. This approach promotes dialogue because people are asked to share ideas in a group setting and can react to one another's comments in addition to answering the facilitator's questions.

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

You'll need to meet with a representative group of participants, so be sure to consider cultural beliefs, socioeconomic factors, gender and sexual orientation norms, community structures, and other social dynamics. In some places, women may not be comfortable expressing their opinions in front of male facilitators or other

men. Young people may not be comfortable expressing their opinions in front of adults. You will often need to host several focus groups with different participants based on occupation, age, gender, family structure, hierarchy dynamics, or other factors.

Advantages of focus groups:

- Group dynamics can provide worthwhile information that individual data collection doesn't.
- They're useful for gaining insight into a topic that's not easily quantifiable.
- They're effective in communities with low literacy levels.
- They offer relevant information from specific groups (teachers, doctors, Indigenous communities, etc.).

Challenges with focus groups:

- Facilitators are susceptible to bias.
- A few people may dominate or derail a discussion.
- Analyzing the data may require significant time.
- You'll likely need to have several focus groups to represent the whole community.

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Tips for conducting a focus group

- Select a location that's convenient, private, and comfortable for a small group discussion, and choose a time when participants can attend.
- If your facilitator is a community member, provide guidance beforehand about how to manage the discussion.
- Arrange for another facilitator to record the session or take notes on the group's responses, making sure participants can examine them. Periodically ask the group if the notes are accurate.
- Invite Rotary Community Corps members to participate in focus group activities.
- Invite six to 12 participants, an ideal size for a focus group. Make sure they're representative of the community and are willing to provide feedback.
- Explain the purpose of the focus group and state your goals honestly. Establish rules to promote positive interaction and confidence in the process.
- Introduce the main topic and guide the discussion using your prepared questions. Establish a schedule beforehand, such as 10-15 minutes per question.
- Encourage each person to answer each question, and allow adequate time for their responses. Listen carefully to the ideas expressed and ask for clarification if needed, but avoid confrontations or debates.
- Invite participants to respond to comments. Ensure the discussion and comments stay focused on the topic.

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Preparing questions

Develop a list of concepts you want to discuss to help you understand people's perceptions of the community's strengths and challenges and learn what ideas they have for projects. Make sure your questions will guide the discussion and encourage people to share their ideas. Here are some common types of focus group questions:

- **Opening questions** get participants talking and feeling comfortable. They should be easy to answer.
 - o How long have you worked at the school?
 - o What do you teach or which role do you hold?
- **Introductory questions** get the group thinking about the topic and focus the conversation.
 - o What are three strengths of the school?
 - o If you could change three things at the school, what would that be and why?
- **Transition questions** prepare participants for the in-depth conversation.
 - o Why do you think 50% of girls stop attending the school after their second year?

Following up with participants

- Thank participants for their time and input.
- Consider how you'll maintain the relationship with them.
- **Key questions focus** on major areas of concern and guide most of the discussion.
 - o What activities or training does the school have to encourage girls to keep attending school after their second year?
 - o What does the school need to do to encourage girls to return after their second year?
 - o What do families need so that they can send their daughters back to school after the second year?
- **Closing questions** conclude the discussion and allow people to express any final thoughts.
 - o Who else might be interested in sharing why they didn't send their daughters to school after the second year?
 - o Who else should we talk to about what prevents them from sending their daughters back to school?

VARIATION

- Hold separate focus groups on the same issue, one with members of your club and others with representatives from the community. Are the responses the same or different? Were any concerns or factors mentioned that you had not previously considered?

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Interviews are one-on-one conversations between a facilitator (the interviewer) and a community resident or other person with a relevant relationship to the community (the respondent). Interviews allow you to gain a more thorough understanding of someone's ideas and feelings. In an interview (unlike with surveys), the facilitator can ask questions that weren't prepared in advance to follow up on a response. And unlike in group assessments, such as community discussions and focus groups, the respondent has the facilitator's complete attention and is more likely to share personal opinions.

Advantages to interviews:

- They allow the facilitator to follow the flow of conversation and ask spontaneous questions.
- They encourage the respondent to speak honestly and give spontaneous answers.

- They're the most accurate and thorough way to obtain qualitative data from people.
- They're effective in communities with low literacy levels.
- They add valuable information as a follow-up to other assessment methods.

Challenges with interviews:

- They require significant time.
- They involve only one person at a time.
- Conducting an effective interview requires practice and some skill.
- It can be difficult to find willing respondents for impromptu sessions, so schedule interviews in advance whenever possible.



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Tips for designing and conducting an effective interview

- **Identify your goals.** What insights do you hope to gain from this interview? Are there specific issues in the community that you want to better understand? Design questions that will provoke constructive answers.
- **Select an accessible location and convenient time.** Host the discussion at a venue that is easy to find and easy to access. Consider the participants' schedules when determining a time and whether several sessions at different times and locations would allow more residents to participate.
- **Invite participants who represent the community.** Whose opinions are you interested in understanding? Will you identify specific individuals to invite for interviews, or will you try to find participants by chance in a public place? Consider people from groups who may be typically overlooked. Consider how you'll address potential language barriers. Will you need interpretation support or will you offer to schedule an alternate time with an interviewer who can communicate with them more easily?
- **Prepare the interview questions.** Keep your questions as straightforward and concise as possible. Rather than asking questions that participants could answer with just "yes" or "no," ask open-ended questions that allow them to explain their responses. If you have complex questions, ask them toward the end of the interview. If you have sensitive questions, be sure to conduct your interview in a private place. Choose words that are clear and conversational.
- **Practice.** Conduct some pretend interviews with your colleagues and solicit their feedback.
- **Share the questions in advance.** Many people will feel more comfortable if they know in advance what you want to ask about and have had time to think about and prepare their responses.
- **Establish a rapport.** Make sure the respondent is comfortable before you ask any questions.

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- **Set and follow a schedule.** Decide how much time to spend on each question, factoring in follow-up questions based on issues and ideas identified during the discussion.
- **Conduct your interview like a conversation.** Memorize your questions if possible so you can ask them naturally, changing the order and adding impromptu follow-ups as needed.
- **Take accurate notes.** If you're recording audio of your conversation, get the respondent's consent. Once you start recording, state the expectations of the interview process.
- **Be an active listener.** Show the other person that you're engaged and interested. Be considerate of the person's time. After all, this may be the first conversation in a long and productive service collaboration.
- **Ask people to elaborate on short responses.** Answers of just "yes" or "no" won't yield much useful information. Structure your follow-up questions in ways that require more detailed explanations.

Ask people to clarify or provide more information if you don't understand their responses. You may want to prepare specific prompts to request additional detail. For example:

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

Prompts:

- o For what reasons would you go to the hospital or clinic?
 - o What do people do if they need medical care but don't have insurance or funds to pay for it?
 - o How do people get to the health care facility?
- **Offer to follow up with the people you interview.** Ask them if they'd like to be involved in future assessments or community improvement activities. Be sure to follow through on these commitments.

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Surveys are a popular method of collecting information and opinions. In the context of a community assessment, a survey can reveal the community's perceived strengths, assets, weaknesses, and needs. Surveys can be general or focus on specific groups. Try to survey as many people as you can, focusing on the most relevant groups in the community — including marginalized groups. You can conduct surveys through email, by phone, or in person.

Advantages to surveys:

- They can be administered remotely.
- They can be repeated.
- They can be completed anonymously, which encourages candid responses.
- They're generally inexpensive to administer.
- They can be more inclusive of underrepresented community members who may not be able to provide feedback in person.

Challenges with surveys:

- Identifying prospective respondents and obtaining their personal contact information can be difficult.
- Emailed surveys are ineffective in places where internet access is limited.
- Phone surveys may be subject to sample or interviewer bias.
- Response rates for remote surveys are generally low compared to in-person assessments.
- In-person surveys may require a more significant investment of time or finances.
- Written surveys are ineffective in communities with low literacy levels.
- Written surveys don't allow for follow-up questions.

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Tips for designing an effective survey:

- **Compile and customize the questions.** Consider using existing tools from reputable organizations. Many are available online. For example, when you work on a WASH in Schools project, select questions from the [Rotary tools for assessing needs and collecting data](#) and modify them to fit the context.
- **Explain why you're asking the questions.** Participants are more likely to respond if they believe it will lead to a valuable outcome, such as change they want in their community. Emphasize that the questions are to determine the community's preferences and priorities, and that there are no right or wrong answers.
- **Keep it short and straightforward.** If your survey is too long, people may rush their responses or even abandon the survey before completing it. Make sure your questions are brief and specific.
- **Minimize bias in your questions.** Avoid leading questions such as "Would you like to see a new library in the vacant lot instead of a playground?" in favor of more neutral wording: "What would you like to see developed in the vacant lot? a) Library b) Playground c) Other (please describe)."
- **Conduct a small test of the survey.** This can reveal whether your questions are clear and specific.
- **Make adjustments as needed to improve it.** If you find that the questions aren't clear or the format isn't working, adjust the survey before asking more people to take part.
- **Make sure everyone can participate.** Offer the option to have unbiased volunteers help people complete the survey if they would have difficulty doing so on their own because of a disability, low literacy level, or other reason.
- **Explain what you'll do with the results.** Tell participants what you plan to do with the data and who will have access to it.
- **Ensure you have an appropriately representative sample.** The people you invite or select to complete the survey should be representative of the community's population.
- **Honor confidentiality.** If you have offered anonymity, ensure that the data you collect cannot be traced to the responder, and store and discard data as appropriate.

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Types of survey questions

- Multiple-choice questions.** Respondents select one or more options from a list. Multiple-choice questions work best when you can offer a fixed number of options.
 Example: What do you believe are the most pressing needs in your community (Select two.):
 - ☐ Health care
 - ☐ Quality of education
 - ☐ Employment opportunities
 - ☐ Public safety
 - ☐ Other (please describe): _____
- Demographic questions.** Information about the respondent (such as their gender, education level, income) can add context to responses and can reveal trends within a larger population.
 Example: What is your age?
 - ☐ 18-24
 - ☐ 25-34
 - ☐ 35-44
 - ☐ 45-54
 - ☐ 55-64
 - ☐ 65+
- Open-ended questions.** Respondents answer questions in their own words. This format can elicit more nuanced responses, but the survey results won't be as easily quantifiable and will need to be individually analyzed.
 Example: If you could improve one aspect of your community, what would it be and why?

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- **Rating scales.** Respondents rate their opinion of a statement or set of statements using a range of feelings or attitudes. To avoid confusion, try to present all statements positively rather than negatively. For instance, use “The number of teachers is sufficient” rather than “The number of teachers is not sufficient.”

Example: Please respond to each statement about your school:

	1 Strongly disagree	2 Somewhat disagree	3 Neither agree nor disagree	4 Somewhat agree	5 Strongly agree
The number of teachers is sufficient.					
Our teachers are well qualified.					
Our teachers continue learning and improving their skills.					
Our school provides a safe environment for children.					
Our classrooms are well equipped.					
I am familiar with my child's curriculum.					
I regularly help my child with homework.					
Our school provides nutritious meals.					

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Who to consult with throughout the assessment

Engaging with people and groups who live and work in the community and can offer unique perspectives and ideas is critical to a thorough assessment. Consider these suggestions about who to consult with as part of this process.

The list is divided by areas of focus, but it's also important to consider who might be affected outside the planned area of focus. In a medical outreach program (disease prevention and treatment), for example, could you also include

the responsible disposal of the medical waste produced (environment)? Could your teacher training initiative (basic education and literacy) positively contribute to peacebuilding and conflict prevention?

Explore the connections between the areas of focus to maximize the peacebuilding potential of your project. Use the [Positive Peace Project Design Tool](#) to help you identify how different kinds of projects can have an impact on peace.

Peacebuilding and conflict prevention

These projects need to use "do no harm" and conflict-sensitive approaches to carrying out assessments and designing the project. Always consider if your intervention could have unintended effects that would reinforce divisions in society. When you assess communities in conflict, people who have experienced trauma, or other sensitive populations, it's crucial to work directly with people and organizations that understand the dynamics of the situation and have specialized training to understand how to implement a project in the community. This will help ensure that assessments are conducted appropriately, with the best possible outcome. Consult with:

- Groups that are engaged in conflict or at risk of it
- Civil society organizations
- Schools and educational institutions

- Peace committees or peace organizations in the community
- Local business and economic development organizations
- Local government and law enforcement authorities
- Marginalized or underrepresented groups within the community
- People who have experienced violence, refugees, or internally displaced people
- Depending on the project: young people at economic risk, communities that have been persecuted or marginalized, or other groups affected by conflict or violence
- Rotary Peace Fellows or Positive Peace Activators who live or work in the area

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Disease prevention and treatment/Maternal and child health

- Individual health care recipients, prioritizing those at high risk for the condition or disease being addressed
- Community health centers and hospitals
- Mobile outreach systems
- Community health care workers
- Skilled birth attendants
- Health care professionals (nurses, doctors, midwives, technicians, specialists, etc.)
- Officials from the ministry of health
- Access and continuum of care structures:
 - o Prevention, primary care, and referral systems
 - o Transportation providers
 - o Hospitals
 - o Follow-up and rehabilitation services
 - o Chronic care support and palliative or hospice care systems

Not sure where to start?

One way to promote community involvement is to work with [Rotary Community Corps](#). These are teams of nonmembers who work with Rotary clubs to improve their communities. If your club sponsors an RCC in the community, work directly with the group. If not, encourage local volunteers to form one. Sponsoring a Rotary Community Corps is a great way for a club to collaborate with community members as true partners in service.

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Water, sanitation, and hygiene

- Community leaders, particularly women
- Officials from the ministries of water, sanitation, or environment
- Officials from the ministry of education, along with students, teachers, administrators, and parents (for WASH in Schools projects)
- Officials from the ministry of health (for projects in health care facilities)
- District or local government representatives
- Private and public utility companies
- Service providers (hand pump mechanics, community outreach workers, etc.)
- Farmers (irrigation)
- Water committees
- Water, sanitation, and hygiene advocacy associations

Disaster response

Working with people, institutions, community partners, and collaborators is essential to address emergency preparedness, disaster response, and recovery needs. Either before or after a disaster, these people and groups can help you identify where support is needed in a community:

- People directly affected by the crisis
- First responders, including emergency management institutions
- Organizations and institutions that specialize in disaster preparedness, search and rescue operations, and response and recovery efforts
- Government agencies and departments, including ministries of health, water and sanitation, the environment, education, emergency services, and law enforcement
- Institutions that oversee larger communal spaces, such as community centers, stadiums, or arenas

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Basic education and literacy

- Teachers
- Parents
- Students
- Youth who do not attend school
- School administrators
- School management committees
- Officials from the ministry of education
- Adult education institutes
- Vocational training institutes
- Community and technical colleges
- Libraries and librarians
- Local cultural leaders

Youth service

Your assessments may reveal opportunities to provide programs for young leaders like starting an Interact club to instill a passion for service or hosting a Rotary Youth Leadership Award (RYLA) event to help develop leadership skills and confidence in young people. Collaborate with the following groups and individuals to find out if a young leader program can add value:

- Young people directly
- Parents
- Educators and school administrators
- Youth community centers and groups
- Government ministries of education and youth development

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Community economic development

- Local government authorities
- Women's groups
- Government extension services
- Job research centers
- Entrepreneurs
- Officials from the ministries of trade, agriculture, social services, women's empowerment, and vocational services
- Farmers
- Unemployed youth and adults
- Business owners
- Banks
- Cooperatives (agricultural, savings and loan, etc.)
- Microfinance institutions
- Vocational training institutions
- Community colleges
- Technical and trade schools
- Universities
- Adult education organizations

Help young people get involved through service-learning

Service-learning is a proven method for encouraging young people to address the underlying causes of issues in their areas and create a lasting impact in their communities and in themselves. Find [interactive courses about service-learning](#) in the Learning Center, along with workbooks for youth participants and adult advisers.

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Environment

Assessing a community also means considering the local biological communities and their unique natural features. Think about how your project may affect local ecosystems, air and water, and who you might consult for perspective about the impact on local plants and animals. Seek opportunities to collaborate, avoid duplicating efforts, and learn from previous projects by talking to people and organizations in the area, such as:

- Community associations
- Local conservation groups
- Environmental leaders, especially women
- Representatives of Indigenous peoples, traditional peoples, or communal landowners in the region
- Officials from the ministries or departments of the environment, sustainable development, natural resources, forests or fisheries, or climate change (or the regional equivalents)
- Public and private utilities for water and energy
- Tourism sector representatives
- Parks and recreation departments
- Agricultural cooperatives, diverse types of farmers, and fishers
- Local mayoral offices
- Scientific institutions (for background data)
- Real estate experts and legal advisers
- University science and environmental departments, as well as relevant research centers
- Science teachers, school administrators, and students
- Representatives of environmental nongovernmental organizations in the country
- Park rangers, forest rangers, and conservation officers
- Water committees

Grants

The results of a community assessment can also help you determine whether you should apply for a grant from The Rotary Foundation to help address the community's priorities. Your project should be designed in response to what you discovered during your assessment. If you decide to apply for a global grant from The Rotary Foundation,

the community assessment results need to be submitted within your application. See the [Global Grants Community Assessment Results form](#) for the specific questions you need to answer. Find more information about the global grant application process and tips for strengthening your project in [A Guide to Global Grants](#).

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After you've finished collecting information, it's time to analyze the qualitative and quantitative data and prepare a comprehensive overview of the community's strengths, priorities, challenges, and opportunities so you can decide how to best work with the community toward its goals.

Your report should include:

- The purpose of the assessment and relevant background
- Community details such as demographics, social dynamics, economic conditions, health indicators, and environmental factors
- A description of your methods
- An analysis of the strengths and limitations of your approach, including an acknowledgment of biases
- Data and key findings, including the community's history, culture, strengths, assets, weaknesses, and needs
- Issues or projects to consider prioritizing

Share your findings with the community and the people and organizations that participated in the assessment phase. Give them an opportunity to offer feedback. Remember that the report does not select a solution for any issue. Instead, it provides an overview of the data and the findings and identifies the community's priorities.

Continue working with community members, organizations, and institutions to prioritize which challenges to address first and work collaboratively to design solutions that meet their needs. Learn more about [developing effective projects](#).

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This image shows a full page of blank, lined paper. It features approximately 28 horizontal blue lines spaced evenly across the page, typical of standard notebook paper. The lines are thin and light blue, set against a plain white background. There are no margins, text, or other markings on the page.

Session B-7 **Promoting Rotary** (30 minutes)

	Step?	We want to accomplish?	How long?
1.	Topic/ Overview	Provide topic – have participants open PN Workbook t B-7 andLYC	1 min.
2.	Breakouts/ Discussions	1st Learning Objective: Identify ways that each respective club is impacting their community. Have participants turn to the Impact Begin with You. brochure Facilitate classroom discussion: What is your club doing to impact your local community? What are the different kinds of impact?	7 min
3.	Breakouts/ Discussions	2nd Learning Objectives: Share methods for getting the story out in the club and local community about the good each Rotary club is doing. Have participants go to Connect for Good in PN workbook Facilitate classroom discussion: What elements in Connect for Good would help most to create a positive public image within your community? What steps could you as PE take to enhance public perception of your club? How can new members directly impact the club's public image?	8 min
4.	Breakouts/ Discussions	3rd Learning Objectives: List resources that can be employed to promote Rotary. Have them turn to the handout, Key Points For Talking About Rotary. Facilitate classroom discussion: What are the resources that can be used to promote Rotary?	8 min
5.	Q & A	Ask for any questions and respond briefly.	3 min
6.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to lunch. Tell them that the first afternoon breakout starts at 1:30 pm. Course materials may be left in the room. Take valuables (laptops/tablets etc.) with them.	3 min

Lone Star P.E.T.S. 2025

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, MARCH 1, 2025

SESSION B-7 PROMOTING ROTARY

GOAL

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

OBJECTIVES

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

1. Identify ways that each respective club is impacting their community.
2. Share methods for getting the story out in the club and local community about the good each Rotary club is doing.
3. List resources that can be employed to promote Rotary.

REFERENCE MATERIALS:

Impact Begins with You

Connect For Good

Key Talking Points for Talking About Rotary

Fact Sheet

Logos at a Glance

Club Brochure Template



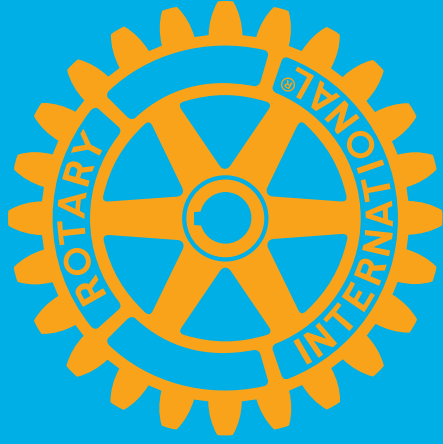
Module B-7: Promoting Rotary

Breakout Discussion Questions

1. Turn to the brochure impact Begins wit You, in the PN Workbook.
What is your club doing to impact your local community?
What are the different kinds of impact?
2. Go to Connect for Good in PN Workbook.
What elements in Connect for Good would help most to create a positive public image within your community?
What steps could you as PE take to enhance public perception of your club?
How can new members directly impact the club's public image?
Discuss engagement through social media.
3. Turn to the handout, Key Points For Talking About Rotary, in PN Workbook.
What are the resources that can be used to promote Rotary?
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 Promoting Rotary session?
6. Any other question(s)?



IMPACT BEGINS WITH YOU



CONNECT WITH A ROTARY CLUB TODAY

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

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

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



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

CONNECT WITH US:



THE ROTARY DIFFERENCE

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



IMPACT ACROSS THE WORLD



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

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

345



WE SEE DIFFERENTLY:

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



WE THINK DIFFERENTLY:

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

HOW ARE WE DIFFERENT?



WE LEAD DIFFERENTLY:

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



OUR ACTIONS MAKE A DIFFERENCE:

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



IMPACT BEGINS WITH OUR LOCAL CLUBS

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

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



CONNECT FOR GOOD

GET INVOLVED AND MAKE A DIFFERENCE



When you join a Rotary club, your potential to make a difference in the world grows exponentially. That's because you're joining a network of over 1.2 million people who take action — volunteers from all over the world who share a goal of improving others' quality of life.

In fact, the top two reasons people join Rotary are to connect with and give back to their communities. These are the same reasons members stay in Rotary year after year. But simply joining isn't going to change lives or make those connections. That happens when you get involved. You'll shape your own experience and decide how to get the most out of your membership.

This short guide is full of ways you can get involved in Rotary to connect with your club, your community, and the world. Get involved in ways that align with your passions, and you'll get much more from your experience.





CONNECT WITH YOUR CLUB



Membership in a Rotary club offers you opportunities to connect with other professionals who aren't afraid to lead and are dedicated to making a difference. Spending time with your fellow club members — whether to attend a meeting, plan a project, exchange ideas, or just have fun — can lead to lifelong friendships.

When you get involved and make connections, you will inevitably grow as a person and develop new skills. Here are some ways to connect within your club.

> **SHARE YOUR IDEAS** with club leaders to help your club achieve its goals, enhance its projects, and improve the member experience. Your suggestions could become the next big initiative in your club or community. See *Be a Vibrant Club* and learn more about club flexibility.

> **FIND A MENTOR** or mentor another member to share professional expertise, community knowledge, and Rotary information.


> **ORGANIZE A CLUB EVENT** or service project and gain new skills and experiences like event planning, public speaking, or managing volunteers.

> **TRY A NEW ROLE.** Broaden your knowledge and apply your experience and skills in a club leadership role. Take the first step by asking where your club needs help. If you've already been in a club leadership role, try serving in a district role. Ask your district governor and governor-elect where your expertise and talents could be useful.

> **BECOME A LEADER IN ACTION.** Participate in your club's leadership development program. If it doesn't have one, talk to your club leaders and help develop one for the members of your club.



CONNECT WITH YOUR COMMUNITY

A group of people are working on a community project. In the foreground, a man in a yellow shirt and black cap stands next to a red wheelbarrow filled with soil. In the background, several other people are working on a large mural of a landscape with trees and a river. One person is painting a tree, while others are working on the ground. The scene is outdoors with a clear blue sky.

Through your club, you can connect with your community by learning about its needs and working on long-term solutions. When you work with local leaders and beneficiaries, you'll strengthen both your community and your ties to it. Participating in a project that positively touches someone else's life can be life-changing for you as well. Here are some of the many ways your membership can help you connect to your community.

> VOLUNTEER TO HELP with your club's service projects. If you know of a need in your community, propose a project that addresses it. You can use Community Assessment Tools to evaluate your community's needs, and then use the resources in the Project Lifecycle Kit to design and implement a project. You can join your club service projects committee, browse other projects on Rotary Showcase, crowdsource the resources you need on Rotary Ideas, and learn how to apply for a Rotary grant to improve and help fund your project at rotary.org/grants.



> BRIDGE GENERATIONS by supporting local Rotary youth programs. Find out if your club supports an Interact or Rotaract club. If not, form one! You can build the future of Rotary and your club by connecting with Rotaractors and inspiring them to join your Rotary club. Show Interactors the impact they can have in their communities by supporting their service efforts.



> CREATE STRONGER COMMUNITY TIES with a Rotary Community Corps (RCC). RCCs are groups of non-Rotarians who share our commitment to service. RCC members plan and carry out projects in their communities and support local Rotary club projects. By working with RCCs, you can boost community engagement and your projects' sustainability by positioning local leaders to pioneer change. Learn more at rotary.org/rcc.

> PARTICIPATE IN TRAINING EVENTS offered by your district and connect with other members in your area. Districts hold a variety of training and informational events that are open to all members. Attending one can help you learn more about Rotary and what other clubs in your community are doing. Visit your district's website or contact your club leaders to find out when your district's next event will be held.



> COLLABORATE WITH OTHER CLUBS in your area on a joint service project or event. Rotary Ideas can make finding and collaborating with partners easier.

A close-up photograph of a man with a grey mustache wearing a red baseball cap with the words "END POLIO NOW" in yellow and white. He is carefully administering a vaccine from a small glass vial into the mouth of a young child. The child's mouth is open, and the vaccine is being dispensed. In the background, another man with a grey beard and a yellow tie is partially visible, looking on. The scene is brightly lit, suggesting an outdoor or well-lit indoor setting.

CONNECT WITH THE ROTARY WORLD

Rotarians make a difference on a global scale. Your membership gives you access to a global network of professionals and leaders who share a passion for applying their collective expertise and resources to make a positive change. Here are some ways to connect with the Rotary world.

> **MEET OTHER MEMBERS** with similar interests by joining a Rotary Fellowship or a Rotarian Action Group. Rotary Fellowships are formed around hobbies, interests, or vocations, and Rotarian Action Groups are formed around dedication to a particular cause. View lists of Rotary Fellowships and Rotarian Action Groups and contact one directly using the Rotary Fellowships directory or the Rotarian Action Groups directory.

> **PARTICIPATE IN INTERNATIONAL PROJECTS.** Many clubs partner with clubs in other parts of the world to address a need in one of their communities. Together, they leverage Rotarian and Rotary alumni expertise to build long-term partnerships for sustainable projects. You can find clubs that need partners, more volunteers, or other support on Rotary Ideas.

> **HELP ERADICATE POLIO** either by volunteering for a National Immunization Day (NID), contributing to the cause, or helping to spread the word. Email polioplus@rotary.org to connect with Rotarians leading upcoming trips. Post about polio on your social media pages, contribute to the PolioPlus Fund, or include a link to endpolio.org in your email signature.

> **ATTEND ROTARY EVENTS** to exchange ideas and meet people. Attend the Rotary International Convention, which is held in a different international city each year, with friends from your club or district. You'll enjoy inspiring talks from global leaders, celebrities, and activists, meet members from around the world, and learn how to expand our impact. Learn more at rotary.org/events.

> **SHARE INTERNATIONAL HOSPITALITY** and learn about another culture when you participate in a Rotary Friendship Exchange, host a Rotary Youth Exchange student, or explore other Rotary clubs. Friendship exchange participants take turns hosting and visiting one another, often developing friendships that last a lifetime. Youth Exchange hosts open their homes and hearts to create a memorable learning experience. Learn more at rotary.org/empower-leaders and rotary.org/youthexchange.



➤ **SUPPORT ROTARY'S CURRENT WORK** by giving to the Annual Fund, which sustains thousands of projects that are being conducted in your community and around the world. The Rotary Foundation supports projects and programs that transform lives by tackling poverty, disease, conflict, and lack of education and water. Go to rotary.org/give to make a donation.

➤ **JOIN ROTARY DISCUSSION GROUPS** on My Rotary. Hundreds of discussion groups allow members to connect and share diverse perspectives about all kinds of topics. If you have a My Rotary account, you can join an existing discussion group or start a new one. Rotary also has official pages on Facebook, Twitter, LinkedIn, Instagram, Flickr, and more.

➤ **SHARE YOUR EXPERTISE.** Join a Rotarian Action Group or area of focus discussion group and use your expertise to enhance the projects that Rotarians are working on. Check the Rotarian Action Groups directory and contact the one you're interested in. Read about the projects that Rotarian Action Groups have recently supported in the Rotarian Action Groups annual report. You can also share your expertise in the areas of focus and project planning by serving other clubs as a consultant on international projects or as a moderator in discussion groups. Contact your district international service chair or district governor to make your technical skills or experience known, and find out how you can become a part of your district's network of experts. Finally, if you have professional expertise in one of Rotary's areas of focus, you can serve on The Rotary Foundation Cadre of Technical Advisers and advise members carrying out grant projects around the world.

➤ **ATTEND A PROJECT FAIR** and find partners, meet people, and get ideas for projects. Fairs typically last two to three days and may include visits to project sites as well as opportunities to experience the local culture. These activities help visitors learn about the community and build long-lasting relationships with their international hosts. Learn more at rotary.org/project-fairs.





HOW WILL YOU GET INVOLVED?

When you get involved, it's not just your club and community that benefit. You benefit, too. As an active Rotarian, you'll make connections and develop skills while Doing Good in the World. You'll meet community leaders and tackle local and global issues that are important to you and your fellow club members. You'll feel the shared sense of purpose that comes from working together to better your community. When it comes to being an active Rotarian, the opportunities are endless.



There are countless ways to engage with Rotary and your Rotary club. You choose how — and how much — to get involved.



[ROTARY.ORG](https://rotary.org)

KEY POINTS FOR TALKING ABOUT ROTARY



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

INTRODUCTORY PRIMARY MESSAGE

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

SUPPORTING MESSAGE

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

ABOUT ROTARY — PRIMARY MESSAGES

- Rotarians are people of action, driven by a desire to create opportunities, strengthen communities, and find solutions to the tough challenges that affect people around the world.
- Rotary is a community of 1.2 million men and women from all continents, cultures, professions, and experiences who connect through our local clubs.
- Rotary clubs tackle projects of every scale and inspire fellow Rotarians, friends, neighbors, and partners to share their vision, exchange ideas for lasting solutions, and take action to bring those ideas to life.

SUPPORTING MESSAGES

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

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

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

- Rotary and its partners are close to eradicating polio, having achieved a 99.9 percent reduction in cases since 1988.
- Rotary's chief role is fundraising, advocacy, and mobilizing volunteers.
- Rotary's contributions to the global polio eradication effort will exceed more than \$2.2 billion and countless volunteer hours to protect more than two billion children in 122 countries from polio.
- Rotary is working to raise an additional \$50 million per year through 2020 for polio eradication, to be matched 2-to-1 by the Bill & Melinda Gates Foundation.

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

- More than 900 graduates of the Rotary Peace Centers master's degree program are in key decision-making positions in governments, corporations, and organizations around the world.
- Rotary's humanitarian projects help prevent the underlying causes of conflict, such as poverty, illiteracy, and lack of clean water.
- Rotary's Youth Exchange program fosters international goodwill by enabling over 8,000 high school students to live and study abroad each year in 115 countries.
- Rotary's Interact and Rotaract programs develop young leaders by promoting volunteer service, leadership, and professional growth.



FACT SHEET

Rotary unites people from all continents and cultures who take action to deliver real, long-term solutions to our world's most persistent issues. In communities across the globe, our 1.4 million members come together to strengthen their connections to friends and neighbors and their commitment to improving lives.

While our 46,000 clubs all share a commitment to community service, the experience, focus and dynamics of each club is unique. Becoming a Rotary member connects you with a diverse group of professionals who share your drive to give back.

Causes: Solving real problems takes real commitment and vision. Each year, Rotary members invest hundreds of millions of dollars and countless volunteer hours in sustainable, community-based solutions to promote health, peace, and prosperity in communities across the globe. Rotary combines global reach, local resources, and highly skilled volunteers with a funding structure that distributes US\$200 million annually to provide [clean water and sanitation](#), support [education](#), prevent and treat [disease](#), save [mothers and children](#), grow local [economies](#), promote [peace](#), and protect the [environment](#).

For more than 30 years, Rotary has been the driving force in the effort to [end polio](#) worldwide. Alongside our partners in the [Global Polio Eradication Initiative](#), we have achieved a 99.9 percent reduction in polio cases, with less than 150 cases of wild polio reported in 2020 compared with 350,000 a year in the late 1980s. Our members have contributed \$2.4 billion and countless volunteer hours to protect more than 3 billion children in 122 countries from this paralyzing disease. Today, two countries continue to report cases of wild poliovirus, Afghanistan and Pakistan.

History: For 116 years, Rotary members have been addressing challenges around the world. It started with the vision of one man — Paul Harris. The Chicago (United States) attorney formed the Rotary Club of Chicago on Feb. 23, 1905, so professionals with diverse backgrounds could exchange ideas, form meaningful, lifelong friendships, and give back to their communities. Rotary's name came from the group's early practice of rotating meetings among the offices of its members.

For more information, visit www.rotary.org

A consistent voice and visual identity are essential components of a strong brand. By using the design elements in this guide you ensure that our brand is presented in a unified way, helping to build awareness and recognition of Rotary and Rotaract. You can find more information on the Brand Center at rotary.org/brandcenter.

Your club, district, or zone logo is made up of the Masterbrand Signature (MBS) plus the club name, or the district or zone number. Multiple district or zone numbers can also be listed. This logo must be used instead of the MBS alone. No other words should appear above or below the MBS.

You can use either the MBS or the simplified version in your club, district, or zone logo. We recommend using the simplified version if the logo will be smaller than 1.25 cm (0.5 inches) or will be embroidered.

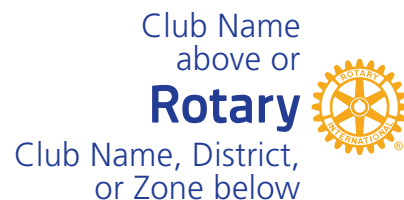
Find templates for creating your logo on the Brand Center at rotary.org/brandcenter.

Reverse Options

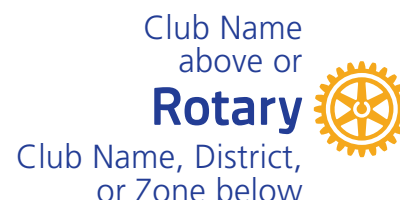


CLUB, DISTRICT, OR ZONE LOGOS

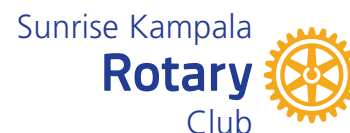
Masterbrand Signature



Masterbrand Signature Simplified



Examples



Rotaract Masterbrand Signature



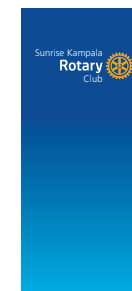
Rotaract Masterbrand Signature Simplified



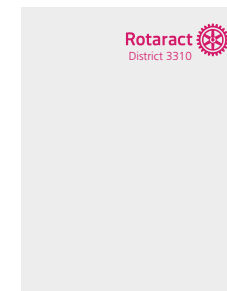
Examples



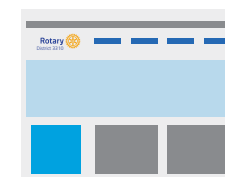
Layout Examples



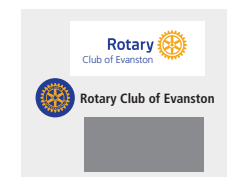
club brochure



flyer



website



facebook*
*exception: the Mark of Excellence can be used for social media profile pictures

Clear Space



Clear space is the space surrounding the club, district, or zone logo that needs to remain empty. It is equal to the height of the capital "R" in "Rotary" or "Rotaract."

Lockups are used to show a relationship between your club, district, or zone and partners, sponsors, programs, or events. Only one logo can be featured in a lockup with your club, district, or zone logo.

The lockup should not be used as your club, district, or zone logo.

Find templates for creating your own lockup on the Brand Center at rotary.org/brandcenter.

RESOURCES

BRAND CENTER:
rotary.org/brandcenter

LEARNING CENTER:
rotary.org/learn

LICENSED VENDORS:
my.rotary.org/licensed-vendors

SUPPORT CENTER:
rotarysupportcenter@rotary.org

CHECKLIST

Make sure to use your club, district, or zone logo on the following:

- ☐ Your club website
- ☐ Your club social media sites
- ☐ Banners and event signage
- ☐ Signage, including those located outside of your club meeting place or on city welcome signs
- ☐ Flyers and brochures
- ☐ Apparel and goods (purchased or produced by a Rotary-licensed vendor)
- ☐ Name badges
- ☐ Trading banners/flags

LOCKUPS

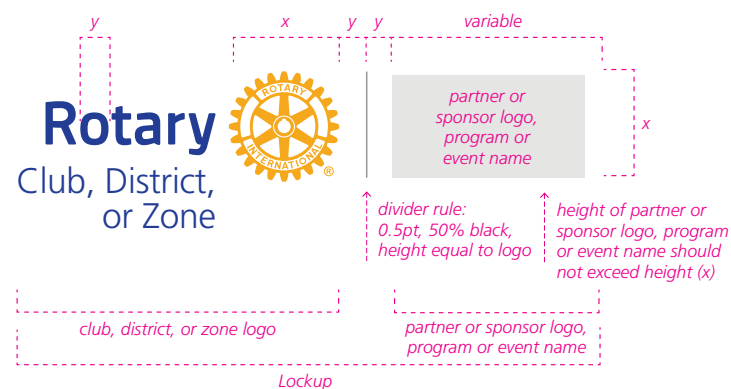
Logo Lockup Examples



Word Lockup Examples



Lockup Construction



NAMING PROJECTS OR EVENTS

When naming a project, event, or website URL, you must include the name of your club or district if you want to include the word Rotary or Rotarian(s). For example, instead of calling your event Rotary Bingo, call it Rotary Club of Evanston Bingo Night. You might also call it We Love Bingo!, leaving out any reference to Rotary. These guidelines are outlined in the Rotary Code of Policies. Please note that when using your club name, your club must be in full control of the event or project. The Rotary name cannot be licensed to a third party. For example, if a summer camp is opening in cooperation with your club, don't name it Rotary Camp.



Club logo on installation



Multiclub sign



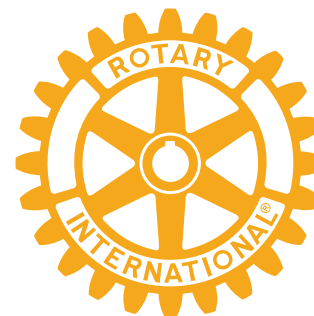
Rotaract club event



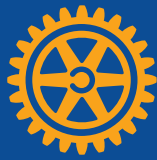
Rotary club event

MARK OF EXCELLENCE

The Rotary wheel is the Mark of Excellence (MOE) and should be considered the secondary logo. When you use it, we encourage you to position your club, district, or zone logo nearby for clarity and recognition. There is no simplified version of the MOE — the words "Rotary International" must always appear in the wheel.



The MOE should appear in Rotary Gold. If you're printing one-color, azure or black can be used. It cannot appear in colors other than those shown here. Information about Rotary's color palette can be found on the Brand Center.



Rotary
Club Name, District,
or Zone Number

OUR EVENTS

Date — event description, location, time.
Date — event description, location, time.
Date — event description, location, time.
Date — event description, location, time.

Join our next meeting or service project.
Contact our club president to schedule your visit.
We look forward to meeting you!

INSERT YOUR CLUB NAME

Insert name of your club president
Insert phone number
Email address
Website



Rotary
Club Name, District,
or Zone Number





PEOPLE OF ACTION

Our club is a proud part of this community and of Rotary International. Rotary is a global network of more than 1.2 million members who believe that great things happen when dedicated minds come together. We are community and business leaders representing different professions, experiences, and perspectives but with a shared desire to connect with others to address the challenges affecting our community and communities around the world.

Our club offers opportunities for our members — and those interested in making a difference — to get involved. Through meetings, social events, and volunteer projects, our members learn about the issues facing our community and communities all over the world, partnering with local, national, and global experts to exchange ideas about potential solutions and to draw up action plans to respond. Along with these opportunities to serve, members also are able to regularly network, resulting in lifelong friendships and business connections.



MAKING A DIFFERENCE

Solving real problems takes real effort, commitment, and vision. Rotarians work to protect communities from preventable disease, keep women and children healthy, improve education and economic outcomes, create safe water and sanitation infrastructure, and make our community and the world a more peaceful place.

We are working with various partners on the following projects:

- Local project name — project description, outcome/impact
- Local project name — project description, outcome/impact
- International project name — project description, outcome/impact
- Ending polio — Partnering with the Bill & Melinda Gates Foundation, the World Health Organization, and UNICEF to end polio, once and for all



GET INVOLVED

Becoming a member enables you to meet your community's leaders and to make an impact both here and around the world. We invite you to visit our club and find out more about us and the opportunities we offer to get involved.

Our members have found that it's a truly rewarding experience.

My experience with our club has been immensely valuable. I've made lifelong friends and important connections that have helped me succeed in my business.

— Club member

My experience with our club has been immensely valuable. I've made lifelong friends and important connections that have helped me succeed in my business.

— Club member

This image shows a full page of blank, lined paper. It features approximately 28 horizontal blue lines spaced evenly across the page, typical of standard notebook paper. The lines are thin and light blue, set against a plain white background. There are no margins, text, or other markings on the page.

Session C-8 **Attracting Members** (45 minutes)

	Step?	We want to accomplish?	How long?
1.	Welcome	<p>Welcome them back after lunch. Then have everyone stand up with their materials and choose new seats sitting next to different people.</p> <p>Provide topic – have participants open PN Workbook to C-8.</p>	4 min.
2.	Main Room/ Content Overview	<p>1st Learning Objective: Outline a process for working with club members to develop new strategies for attracting new members.</p> <p>Facilitate classroom discussion: 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?</p> <p>Reference Member Interest Survey and A Perspective Member Exercise in the resource pages in PN Workbook. How could you as PE work with your club to develop this plan for identifying new members who represent your community?</p>	13 min
3.	Breakouts/ Discussions	<p>2nd Learning Objective: Recall ideas offered by other members of the group during this session for including non-Rotarians in club projects and meetings.</p> <p>Divide the participants into new trios. If needed, a facilitator may join one to make a trio.</p> <p>Go to handouts the Perspective Member Exercise Worksheet.</p> <p>Instruct the trios to discuss ideas for including non-Rotarians in club meetings and projects. Have each trio select one outstanding idea and share with the entire group.</p>	12 min
4.	Breakouts/ Discussions	<p>3rd Learning Objective: Identify prospective groups and individuals in each respective community with interest in connecting with Rotary clubs.</p> <p>Facilitate classroom discussion: What groups does your club work with on service or fundraising products? How can your relationships with these groups lead to attracting new members? What other groups locally would have interest in connecting with your club?</p>	10 min
5.	Q & A	Ask for any questions and respond briefly.	3 min
6.	Wrap Up and Evaluations	<p>Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts.</p> <p>Remind participants to complete module evaluation via mobile app.</p> <p>Proceed with transition to next module topic and facilitator.</p>	3 min

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 products? 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
Example: 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: _____

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal blue lines across its entire width. The lines are thin and consistent in color, set against a plain white background. There are no margins, text, or other markings present on the page.

Session C-9 **Engaging and Retaining Members** (60 minutes)

	Step?	We want to accomplish?	How long?
1.	Topic/ Overview	Provide topic – have participants open PN Workbook to C-9.	2 min.
2.	Breakouts/ Discussions	<p>1st Learning Objective: Explaining the value of membership assessment tools in the planning of strategies to engage and retain club members.</p> <p>Have participants refer to PN Workbook and handout Membership Satisfaction Survey</p> <p>Facilitate classroom discussion:</p> <p>What makes this a valuable process?</p> <p>How could you, as club PE, utilize this survey as a planning tool for your club?</p>	12 min
3.	Breakouts/ Discussions	<p>2nd Learning Objective: Identify how key benefits of attending district events and seminars impact membership engagement and retention.</p> <p>Facilitate classroom discussion:</p> <p>How can having your club members attend these events assist in engaging and retaining your members?</p> <p>In what ways can a PE effectively promote district events?</p> <p>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?</p>	12 min
4.	Breakouts/ Discussions	<p>3rd Learning Objective: Outline the steps to design a comprehensive membership engagement and retention strategy for their respective Rotary club.</p> <p>Divide the participants into 5 groups.</p> <p>Refer participants to the handouts in the PN Workbook and direct them to the A Retention System and Analysis.</p> <p>Assign each group to one of these categories: (Members who stay under 1 year; 1-2 years; 3-5 years; 6-10 years; leave after 10+years).</p> <p>Group is to discuss the issues for their assigned category of club member and develop three action steps. Spokesperson from each group shares one action step with entire group Encourage the use of the Exit Survey.</p>	31 min
5.	Wrap Up and Evaluations	<p>Thank participants for an impactful and inspiring session.</p> <p>Ask them to go to notes page at end of module and jot down their thoughts.</p> <p>Remind participants to complete module evaluation via mobile app.</p> <p>Proceed with transition to next module topic and facilitator.</p>	3 min

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.



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.

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.

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 Connect for Good and the guide to Avenues of Service activities).	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.
Find videos 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. 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 (Rotary Youth Exchange, Rotary Foundation 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.

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal blue lines across its entire width. The lines are thin and consistent in color, set against a plain white background. There are no margins, text, or other markings present on the page.

Session C-10 Leading My Vibrant Rotary Club (75 minutes)

	Step?	We want to accomplish?	How long?
1.	Topic/ Overview	Provide topic – have participants open PN Workbook to C-10	1 min.
2.	Breakouts/ Discussions	<p>1st Learning Objective: Explain the values of tradition, continuity, and change as related to leadership in a Rotary club.</p> <p>Have participants refer to the Be A Vibrant Club: Your Club Leadership Plan. A-1</p> <p>Facilitate group discussion: Describe a time when you have seen a disconnect between successive leaders in your club who have not balanced tradition, continuity, and change.</p> <p>What is the effect on the entire club when there is continuity of leadership vs a disconnect?</p>	14 min
3.	Breakouts/ Discussions	<p>2nd Learning Objective: Identify ways a club PE can build relationships with other club members to develop a vibrant club leadership team.</p> <p>Form groups of 4 or 5 and have each group make lists of 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.</p> <p>Have each group share their lists with the class.</p>	25 min
4.	Breakouts/ Discussions	<p>3rd Learning Objective: Identify ways to engage their leadership team in planning for needed change to build a vibrant and diverse Rotary club.</p> <p>Facilitate group discuss 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?</p> <p>Refer to the Rotary Diversity, Equity, and Inclusion information and the diversity assessment tool 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.</p> <p>Ask them to go to notes page at end of module and jot down their thoughts</p>	20 min
5.	Sharing Back/ Q & A	<p>Ask for good ideas to share and takeaways.</p> <p>Ask for any questions and respond briefly</p>	5 min
6.	Wrap Up and Evaluations	<p>Now add notes based on your insights over these two days.</p> <p>1st facilitator: Share two minute inspirational and uplifting Rotary leadership message with congratulations and best wishes for their year of service as club president elect.</p> <p>2nd facilitator: Thank participants for an impactful and inspiring day with acknowledgements for their year of service as club president elect.</p> <p>.Remind participants to complete module evaluation via mobile app</p>	10 min

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

Why do some changes fail?

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

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

NOTES:



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.

- 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. 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. 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 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.

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 characteristic¹ (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 within 72 hours.

¹ 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?

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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.

Notes

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