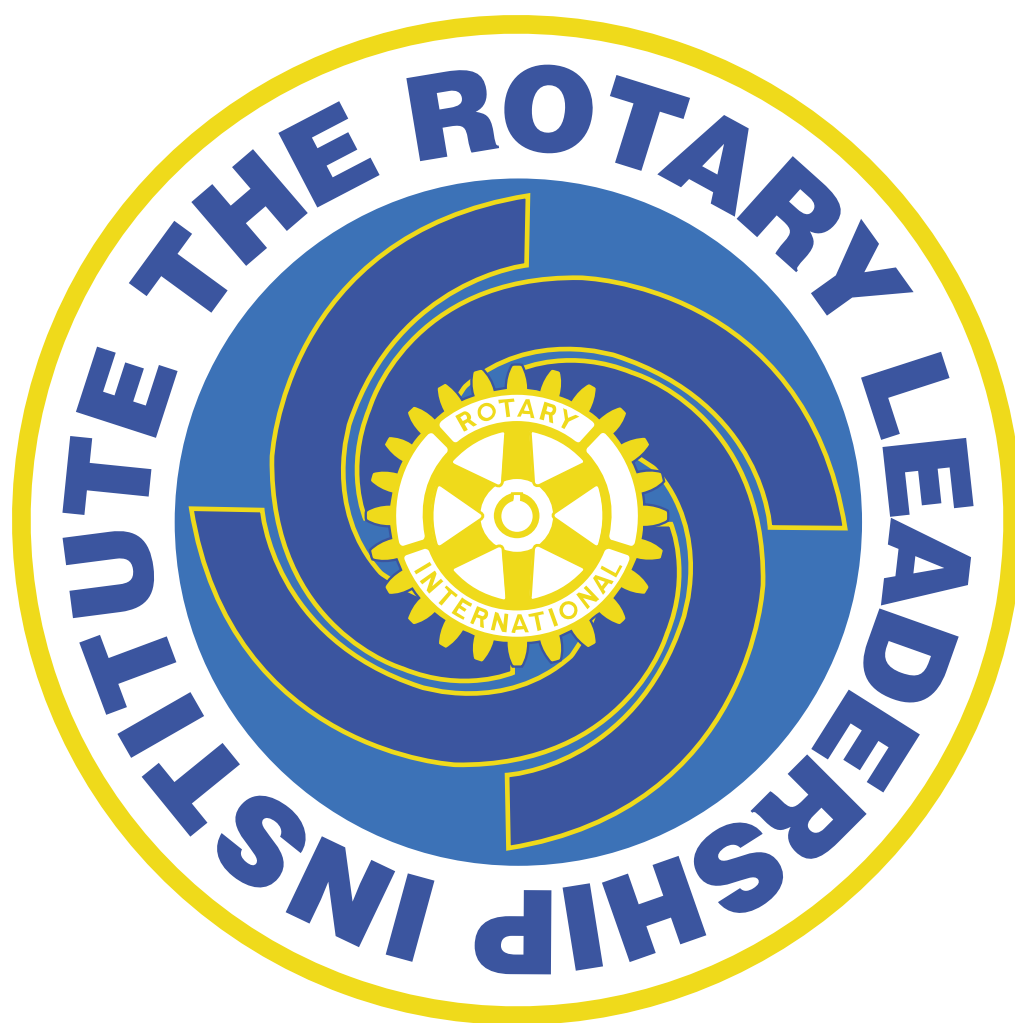


# RLI Graduate Course

2018-2019



*Faculty Guide*

**About Your RLI Program.** The Rotary Leadership Institute (RLI) is a multi-district, grassroots leadership development program of member districts organized into regional divisions throughout the world. It was recommended by the R.I. Board of Directors and strongly endorsed by the Council on Legislation at three of their triennial meetings. RLI conducts a series of quality leadership development courses for potential club officers and all other club members, including those who have recently joined a Rotary Club. The courses emphasize both leadership skills and knowledge of Rotary around the world. All course sessions are completely interactive. RLI believes that leadership education has a positive impact on membership retention by creating enthusiasm and furthering engagement for Rotary. For more information on RLI, see our web site at **www.rotaryleadershipinstitute.org**.

**The RLI Recommended Curriculum.** RLI recommends a curriculum and provides outlines and faculty materials to all its divisions. The curriculum has been continually revised and upgraded over the years. Because of the growth of RLI, it is expected that major revisions will be recommended every four years in order to give divisions a sufficient opportunity to orient their faculty members and to provide translations where necessary. Important changes in Rotary are provided annually to all divisions. All curriculum materials and available translations are posted on the RLI materials web site at **www.rlifiles.com**.

**The RLI Curriculum Committee.** RLI has determined to also hold Curriculum Committee meetings in various parts of the world. The current plan is to meet in the United States in two of each three year period and at one or two various international sites each Rotary year. All RLI Divisions will be given notice of such meetings with a request that RLI Divisions, member Districts/Clubs be requested to send their comments/suggestions to the International RLI officers. Building on actual RLI experiences around the world will enhance the value of RLI courses. **Any RLI Division may send representative(s) to any curriculum committee meeting at any location.**

2018-2021 RLI Curriculum Committee

# RLI Graduate Courses

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**The Rotary Leadership Institute (RLI)** is a multi-district leadership and Rotary development program using facilitation in small groups to engage Rotarians and strengthen clubs.

RLI is a recommended program of Rotary International but is not an official program of Rotary International.

**Our Mission:** The Rotary Leadership Institute is a grassroots, multi-district leadership development program whose mission is to strengthen Rotary clubs through quality leadership education.

***Material in bold is for Faculty use and is not included in Participant guides.***

### COURSE MATERIALS

Event Agenda, Faculty, Upcoming RLI Events, Division Leadership, and Welcome Letter are included as a supplement to the course materials or online. Outlines and materials are online at [www.rlifiles.com](http://www.rlifiles.com).

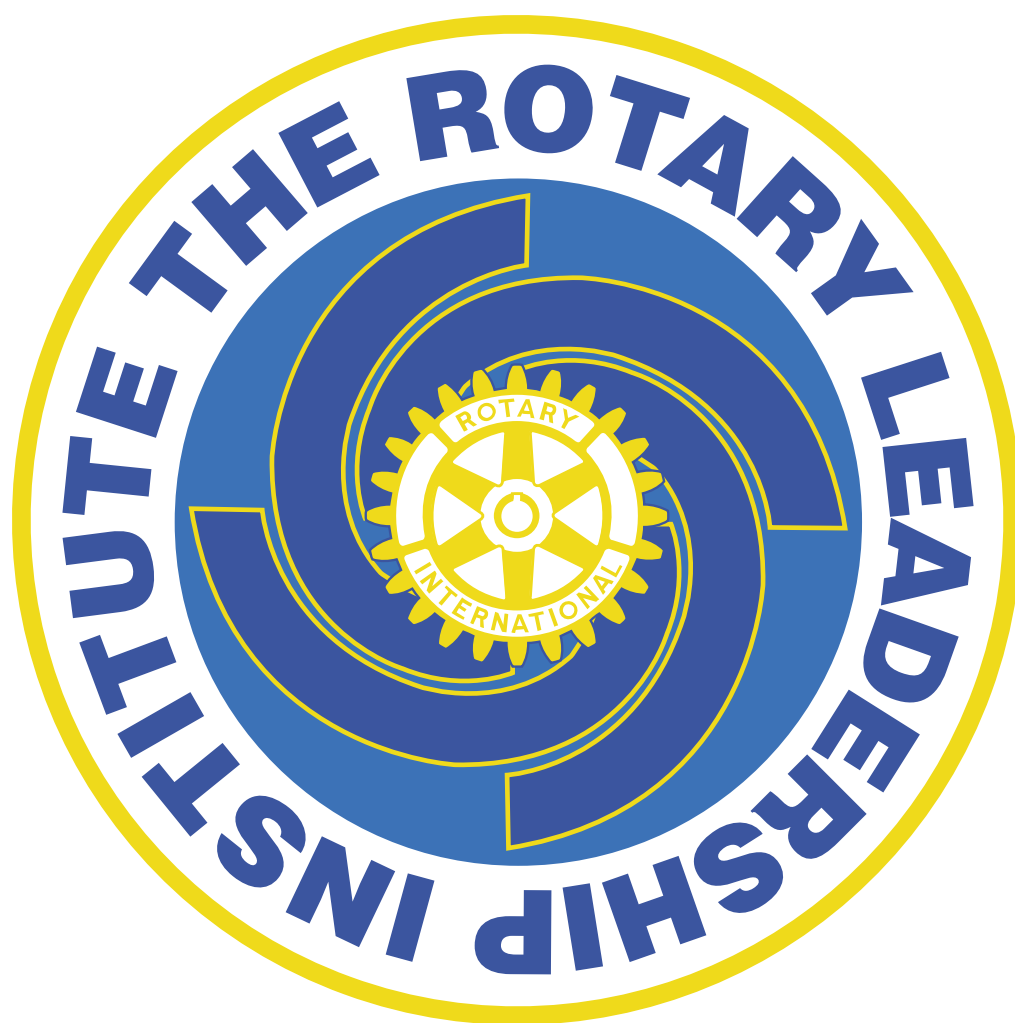
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Course Evaluation **Handout**

# RLI Graduate Course

**Motivating Volunteers**  
2018-2022



*Faculty Guide*

## RLI Graduate Course Motivating Volunteers

We realize that neither you nor I can motivate another person. Motivation must come from within. So why are we even discussing how to motivate Rotarians? Because there is much we can do to make participation in projects, programs, and service attractive to others, therefore stimulating their internal motivation to participate and contribute.

**Time Needed:** Half day (3–4 hours)

**Session Goals:**

- A. Define volunteerism and the role of the volunteer in our society
- B. Develop a deeper appreciation for the importance and need for volunteers in Rotary
- C. Plan ways to effectively motivate and engage Rotarians in our Clubs
- D. Plan ways to reward and thank volunteers in your Club

1. What are some of the most exciting activities going on in your Club?
2. How many members volunteer to participate?
3. How can you get more members engaged?
4. Why are you here today?

**Faculty:** *This discussion should show the group the need for the session goals.*

5. Why do YOU volunteer for Rotary?

**Faculty:** *List reasons on flip chart.*

6. What does being a volunteer mean to you?
7. What is "volunteerism"?

**Faculty:** *People reaching out with their individual skills, talents, and interests, to help organizations and communities meet needs, solve problems, and assist others. Have class read Maslow's Hierarchy of Needs (Appendix A). Take 10 minutes.*

8. Why is volunteerism so important to Rotary?

**Faculty:** *Few paid staffers. We are community members reaching out into the community. Our motto is "service" and we need to demonstrate it.*

9. Think of the most active and involved volunteer you know (in any organization). Why do they do it?
10. What are the qualities of a "perfect volunteer"?

**Faculty:** *List qualities on flip chart. Compare with reasons for volunteering listed earlier.*

## First Breakout

**Let's get specific:** You will break out into several groups and, given an actual problem, decide on a plan to get more members to volunteer to help.

**Faculty:** See list of scenarios. Make groups of 2 or 3 students, depending on size of class. Assign each group a scenario. Give them 20 minutes and then each group reports back.

11. Would you be as ready to volunteer to help others if you were jobless or had inadequate food for your family? Why not?

**Faculty:** Maslow's Hierarchy of Needs (Appendix A) — review attachment

**What are basic level needs/ Individuals act on upper level needs only when base level needs have been met. Is this a reason why fewer people volunteer nowadays? At what level do you think most Rotarians' needs begin?**

12. What do you think motivates most people to volunteer?

**Faculty:** List each and have students give examples of how/why this may be a factor:

- **Achievement**
- **Power**
- **Affiliation**
- **Recognition**
- **Altruism**

**Which reason do you think is most common among Rotarians?**

**How can we recognize what type of volunteer we are dealing with? Does it matter? How should we handle each type of motivation?**

13. How is working with volunteers different from working with paid employees on the job?

14. How do we match the volunteer with the job?

**Faculty:** Ask what their interests are and match to the job roles.

**Make the job attractive and fun.**

**Recognize different engagement levels and future ambitions of members.**

**Who are the "worker bees" and who will support others?**

**How do you select who will chair or lead a project?**

15. How do we motivate young professionals to join Rotary and to volunteer for service?

**Faculty:** Discuss Characteristics of Our Members (Appendix B)

**Discuss ways to motivate each age level.**

**In what situations would each generation be the best volunteer?**

16. What should a volunteer know when taking on a job?

**Faculty:** Know what to do, how to do it, be able to do it, agree to do it, and how performance will be judged.

17. In summary, therefore, how do we motivate volunteers to do the job?

***Faculty: Provide the goal or reason for the project, provide the specific goal to be reached (amount of money to be raised, number of children to be fed, etc.) and provide exciting meetings along the way (updates, encouragement, mid-level rewards)***

## **Second Breakout**

18. Choose a possible Club Project. You are the chairman. How will you excite members to become involved?

***Faculty: divide the class into 2 or 3 small groups. After 20 minutes, have them report back.***

19. What are ways to reward and recognize your volunteers? Does RI provide enough ways to reward our volunteers?

***Faculty: Many say that job satisfaction is the only pay a volunteer receives. Is this true?  
Over the years, what rewards made you work harder?  
Are there any rewards that actually “turn off” people?  
Review Appendix C through H.***

20. What have we discussed today that will help you to recruit and involve more volunteers in your Club? Have we met the goals of the session?

***Faculty: Review goals.***

## **Scenarios For Group Discussions**

- I. For the past several years, your Club's major annual fund raiser has been successful in generating money. However, each year, fewer and fewer Rotarians take part in the project, leaving only a handful to do the work. What can you do to motivate more members to volunteer to help?
- II. Each year, your Club has had difficulty in getting Rotarians to serve as President and chair some important committees. What can you do to motivate more members to take leadership roles?
- III. You want to do a water project in Honduras, but your Club traditionally only does service locally. How can you motivate volunteers to help with your project?
- IV. You are Chairman of your Club Membership Committee. You have brought in just one new member in the past year. How can you motivate good people to join Rotary?
- V. You are Chairman of the District Conference Committee. You have secured a lovely hotel within easy distance and planned several excellent programs. What can you do to motivate Rotarians to attend their District Conference?
- VI. Your Club has decided to participate in the local Meals on Wheels program, delivering meals to shut-ins every Monday. As Chairman, you are finding it harder to obtain the eight volunteers needed each week. How can you motivate more Rotarians to sign up each week?
- VII. Your Club has always sent six students to RYLA at a local college campus each June. This year, no parents are able to transport their students to the 5-day event, since it is a work day. As Chairman, you need several people with mini-vans to take the kids and their luggage, but everyone you ask is either working or on vacation. How do you appeal to the Club's would-be volunteers at the previous Club meeting, so that you can obtain two more van drivers?



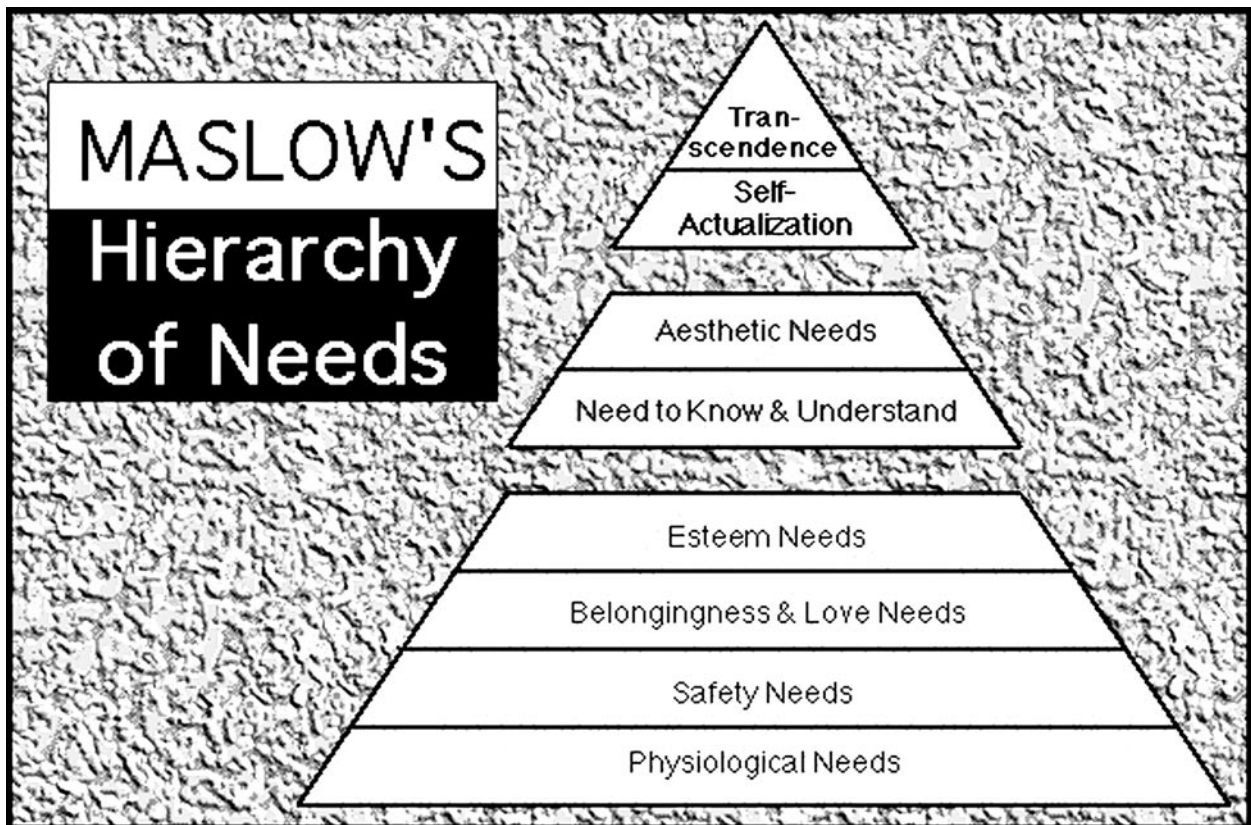
# Appendix A: Maslow's Hierarchy of Needs

## Maslow's Hierarchy of Needs

Citation: Huitt, W. (2007). Maslow's hierarchy of needs. Educational Psychology Interactive. Valdosta, GA: Valdosta State University. Retrieved [date] from, <http://www.edpsycinteractive.org/topics/regsys/maslow.html>

Abraham Maslow (1954) attempted to synthesize a large body of research related to human motivation. Prior to Maslow, researchers generally focused separately on such factors as biology, achievement, or power to explain what energizes, directs, and sustains human behavior. Maslow posited a hierarchy of human needs based on two groupings: deficiency needs and growth needs. Within the deficiency needs, each lower need must be met before moving to the next higher level. Once each of these needs has been satisfied, if at some future time a deficiency is detected, the individual will act to remove the deficiency. The first four levels are:

- 1) Physiological: hunger, thirst, bodily comforts, etc.;
- 2) Safety/security: out of danger;
- 3) Belongingness and Love: affiliate with others, be accepted; and
- 4) Esteem: to achieve, be competent, gain approval and recognition.



## Appendix B: Characteristics of Our Members

	<b>Silents</b> b. 1925–1944 Age 70–85	<b>Boomers</b> b. 1945–1965 Age 50–70	<b>GenX</b> b. 1965–1980 Age 35–50	<b>Millennials</b> b. 1981– Age 20–35
<b>Outlook</b>	Preservationist	Idealistic	Skeptical	Optimistic
<b>Work Ethic</b>	Dedicated	Driven	Balanced	Multi-Task, Outcome-Based
<b>View of Authority</b>	Reverent Acceptance	Love/Hate Chain of Command	Unimpressed Hate Policies, Rules	Want To Be Mentored, Will Speak Up
<b>Leadership By</b>	Hierarchy	Consensus	Competency	Achievement
<b>Perspective</b>	Civic-minded	Team-oriented	Self-reliant	Global

## Membership Issues

<b>Networking</b>	Person-to-person	Person-to-person	E-mail, Chat Room	Tech: MySpace, YouTube, Cell
<b>Participation</b>	Seat at the table	Seat at the table	Pay for access	Group activity
<b>Involvement Criteria</b>	Networking Value	Networking Value	Educational Value but Hates Lectures	Resume Building, Demand Interesting Tasks
<b>Priorities</b>	Here is my Agenda	Here is my Agenda	Whatever	Career Moves
<b>Attendance</b>	Regular	Regular	Sometimes	Commit To Serve A Cause

\*This material is a compilation, based on findings reported by ASAE, the ASAE Foundation and Marilyn Moats Kennedy/CareerStrategies, Inc.

\*\*This model is widely used in the United States. Terms, descriptions, and age ranges may vary according to country or region.

## Appendix C:

# 10 Ideas for Getting Young Professionals Involved & Excited


1. *Another Look at Student Membership*  
Reinvigorate or create a student membership
  - Appoint a task force to take a look at your student membership and its value to students (Note: Networking is probably high on their list of needs - are you delivering?).
  - Make sure students can be involved at all levels of the association - they are your future committee leaders and board members. Treat it as a training ground.
  - Create a student working group that can offer ideas and a new perspective on current association programs as it relates to them.
2. *Create a Young Professional Membership Category*
  - Create a Young Professionals Membership Category / Pricing. This will make it seem prestigious and special for them to join.
  - For business owners/staff of members who are under 30 (or whatever age you choose).
  - Make it affordable - remember they're just starting off on their career path.
3. *Form a Young Professional Task Force*
  - Create a young professionals task force
  - Let them develop programs/services specific to young business owners/staff. This allows you to deliver to them what THEY want rather than trying to guess.
  - Young professionals can often be intimidated by long time industry members so this is an outlet for them to express ideas freely with other like-minded individuals.
4. *Create Task Driven Initiatives*
  - Research shows that young professionals want dedicated tasks with a clear beginning and a clear end.
  - Start initiatives within your organization that don't require becoming a committee member for life (e.g. golf outing task force or mentorship program creation task force, etc.).
5. *Communication is Essential*
  - Managing "generational diversity" is only partly about knowledge, and it is mostly about communication.
  - Often conversations about recruiting or retaining younger generations turns to the topic of technology (i.e. Web 2.0, facebook, etc.) and we overlook the message itself. • Focus the message on what the association can do for them:  
Help you advance your career  
The Association as a change agent
6. *Rethink Leadership Roles*
  - Challenges with the current structure: Top Heavy
  - Many volunteer leaders don't know how to manage change (which is what we ask them to do when we want them to embrace a new member who thinks and acts differently).
  - Many volunteer leaders still use command and control approaches-which don't work with today's volunteers who want to be part of the solution rather than a committee member for years.

*Appendix C, continued*

- Many volunteer leaders support a culture based on martyrdom. The most worthy volunteers get Martyr of the Year awards. If they allow others to volunteer and have meaningful impact, the leader loses brownie points toward the big award. Why would they want to involve others?
  - The future: Flat - responsibility to everyone
  - A linear progression of leadership (one generation taking the reins from the next) may be on the way out.
  - Gen X (the smallest generation in history) doesn't have the numbers required to take over for the Baby Boomers. A new model of multigenerational leaders will develop in the near future. This will encounter resistance from current leaders so begin preparing them now.
  - Younger generations want to know they can lead without 10 years of following. Create training opportunities for young professionals to prepare them for these roles quickly. The opportunity to lead is appealing to them. But don't throw them to the wolves!
7. *Social Responsibility is Key*
- Young professionals want to contribute to the greater good. Create opportunities for them to do so ... and they will follow you.
  - Consider a community service project or environmental initiative they can get behind.
8. *Focus on Their Skills: Problem Solving*
- The Learning Shift
  - Gen X and Y learn through questioning and thinking critically. Therefore, they may question why you do things the way you do - not out of disrespect, but because that's the way they were taught to learn.
  - Allow young professionals to help you solve the problems you're facing - they want to help create a task force around an issue and let them go.
  - Issue them a challenge - they will rise to it.
  - But, make sure the leadership of the association is ready to take their ideas seriously or you risk losing them.
9. *Make it Fun*
- When Young Professionals come to your meetings, they don't want to be bored by talking heads. They want to be part of the learning experience. Younger members want to interact as they learn.
  - Consider updating your meeting structure to be more of a forum rather than a point by point agenda to keep these generations engaged.
  - Use interactive tools at your meetings - videoconferencing, etc.
  - Create fun activities such as speed networking, outing to a baseball game, a happy hour, not just meetings.
10. *Embrace Generational Change from the Top Down*
- Encourage your Board to begin the discussion of embracing change brought about by intergenerational involvement. If the leadership doesn't embrace change, you will fight it every step of the way.

"Working with Gen X and Gen Y Volunteers" by Cassie Larson, Minnesota Nursery and Landscape Association, appeared on the Nursery and Landscape Association Executives of North America website at [www.nlae.org](http://www.nlae.org) and is re-printed with permission.

## Appendix D: Motivating Rotarians




Sunshine  
Division

### Motivating Rotarians

What motivates a person to volunteer? There are only five categories.

1. **Achievement**
2. **Power**
3. **Affiliation**
4. **Recognition**
5. **Altruism**




***The achievement-motivated volunteer looks for situations requiring top performance in which they can excel. This person wants to out-perform others attaining unique accomplishments and enjoys striving for lofty goals. They want to do the job better, figure out ways to remove obstacles.***

***The power-motivated volunteer wants to have an impact on the project and influence others with their ideas. They want to win arguments and get others to do thing their way. They seek to influence through communication.***

***The affiliation-motivated volunteer likes being around other people. The social aspect of volunteering appeals to them. They want to build friendships and be respected. They like being with others, want to help people and care about other's feelings.***


***The recognition-motivated volunteer likes prestige and status. They prefer clear endings, short-term tasks. They enjoy public relations and want to be connected with popular projects. They want to advance new tasks and desire timely completion of work.***

***The altruistic-motivated volunteer pursues attainment for the general good. They have high ideals and values. They are concerned about interests that benefit the public. They care about accountability.***



## Motivating Rotarians

Why are volunteers important to Your Rotary Club?




What benefits do volunteers bring to Your Rotary Club?

**Why are volunteers important to an organization?**

- 1. Give their time**
- 2. Help staffing**
- 3. Help financially**

**What benefits do volunteers bring to an organization?**

- 1. Credibility**
- 2. Valuable public relations asset**
- 3. Refreshed energy – new blood**
- 4. Specialized skills and talents**
- 5. New ideas**
- 6. Focus on a particular task or issue**
- 7. Constructive criticism or feedback**
- 8. Ability to lessen overall workload**
- 9. Capacity to expand service**



## Motivating Rotarians

Volunteerism can be defined as people reaching out with their individual skills, talents, and interest to help organizations or communities meet needs, solve problems, and assist others.

Why do people volunteer?

- 1. To help others and contribute to the community**
- 2. To use skills and talents in a different setting**
- 3. To find and develop new friends and relationships**
- 4. Develop a sense of accomplishment and self-worth**
- 5. To learn new skills and talents**
- 6. To challenge themselves**
- 7. To work for a cause**
- 8. To gain recognition for their abilities**
- 9. To have fun**
- 10. Meet important people in the community**
- 11. Be part of a prestigious group**
- 12. To give something or pay back to the community**
- 13. To fulfill a moral or religious duty**
- 14. To be useful or get out of the house**
- 15. To be with friends**

## **Appendix E: Attracting Volunteers**

**Ask Them**

**Be Open To New People**

**Make The Task Attractive**

**Feed Them**

**Make It Fun**

**Learn About Their Interests**

**Match Tasks To Interests**



## **Appendix F: Key To Motivating Volunteers**

**Keep The Work Fun**

**Remove Barriers**

**Demonstrate Value**

**Be A Leader**

**Make It Interesting**

**Orient & Train**

**Feed Them**

## **Appendix G: Key To Having Them Back**

**Thank Them**

**Recognize Them**

**Help Them Achieve Success**

**“Pay” Them**

**Ensure Job is Relevant,  
Interesting and Doable**

**Feed Them**

## Appendix H: Provide Recognition

**Give it or else.** The need for recognition is very important. If volunteers don't receive it, only bad things can happen.

*Ask class how recognition is done in their club.*

**Give it frequently.** The most common complaint from a volunteer is that they receive too little or no recognition.

**Give it honestly.** Don't praise someone unless you mean it.

**Give it to the person, not the work.** Everyone likes hearing their name, so make sure you connect the volunteer's name to the project.

**Give it appropriately to the achievement.** Don't make a big deal out of a small success and a small deal out of a big success.

**Give it consistently.** If two or more volunteers are doing a project, make sure not to give the impression of favoritism.

**Give it on a timely basis.** Praise for work should be given as soon as possible after the achievement.

**Make it individualized.** Some volunteers like public recognition, others do not. In order to provide effective recognition, you need to get to know your volunteers and find out what they will respond to positively.

**Give it for what you want more of.** Don't ignore sub-par volunteers—just don't forget to make sure your praise the efforts of those who are doing the job.

*What are some suggestions to recognize volunteers?*

## Appendix I

# Stealth motivation

How to get volunteers to do what you want them to – and like it

by NANCY SHEPHERDSON

**W**hen I was a senior at the University of Illinois, I lived with some friends in an old house set in a grove of oak trees. I loved to take my homework outside and sit under a tree to study and daydream. One day, I went out and found stakes marking off big sections of the grove.

Racing inside, I begged my housemates to help me find out what was happening. We made phone calls and discovered that the university planned to cut down all the trees to build a parking lot. We made posters, gave save-the-trees presentations in the dorms nearby, and delivered impassioned pleas to administrators. Many noisy protests and negotiations later, the university backed down and let the trees stand. Somewhat to our own surprise, we had prevailed – and I had seen the power of motivated volunteers.

It was my first experience with what I've come to call "stealth motivation." Before that happened, I hadn't realized that I possessed any ability to motivate people. But I have learned that when you personally ask people to take on a task that is important to a cause they care about, great things can happen. The key is finding out what



will give volunteers satisfaction without drawing attention to the fact that you are trying to motivate them.

In many ways, motivating volunteers is much harder than motivating employees. You don't pay volunteers, and you can't fire them. But there are still effective approaches: Remember that every potential volunteer is looking for something, whether it's personal satisfaction, the chance to contribute to a good cause, or simply a fun thing to do.

Behavioral economist Dan Ariely, author of books including *Payoff: The Hidden*

*Logic That Shapes Our Motivations*, has spent a good portion of his career trying to discern under what circumstances people will do what you ask. Why do some people enthusiastically volunteer for every event your club puts on, while others rarely or never do?

Ariely believes that part of the answer depends on recognition. "Ignoring the performance of people is almost as bad as shredding their effort before their eyes," the Duke University Fuqua School of Business professor said in a 2013 TED Talk. "The good news is that adding motivation doesn't seem to be so difficult."

In an experiment he reported in *Payoff*, Ariely persuaded Intel to reward three sets of workers for productivity with either a monetary bonus, a pizza voucher, or a texted compliment. All of the rewards resulted in increased productivity the next day, but the compliment was the most powerful and had the longest-lasting effect.

Ariely was focused on employees, but he believes the power of compliments holds true for volunteers as well. When a reluctant volunteer receives public appreciation for his work, even just a text saying "good job," it can increase the chances

that he will step up for the next project.

But recognition alone isn't enough. Being a committed volunteer is hard work, and people know it. So to recruit volunteers, you must overcome what behavioral scientist David Halpern calls "friction": Will it be worth my time? Will I look like a fool? Will it be too hard? "Humans have a deep-rooted tendency to take the line of least resistance," notes Halpern, the author of *Inside the Nudge Unit: How Small Changes Can Make a Big Difference*.

Halpern directs a British government agency that tries to "nudge" people into changing their behavior by making it easier to perform the desired behavior. The Nudge Unit got a million more people to participate in a pension plan, for instance, simply by making it an "opt out" plan.

Similar techniques can work for volunteer projects. Always think about how to make it easier to participate, such as by breaking up large assignments into smaller tasks. It also helps, says Halpern, if you make the volunteer assignment as attractive as possible, for example by pairing it with an opportunity to promote the volunteer's business or to involve family in something fun. As an example, he points to advertisements for military service. Today's ads, rather than telling you that Uncle Sam wants you, "dwell much more on adventure and excitement," he says.

If an assignment isn't too onerous, you'll often find that people will put in more effort than they intended. But the opposite is also true, Halpern says: "A human impulse to do something grinds to a halt when it becomes a hassle."

So to maintain a contingent of motivated volunteers, you have to plan ahead. When you throw something together at the last minute, you'll find yourself relying on the same people who always carry the load. Or you'll quickly overtax new members, who are sometimes the most eager to get involved.

When I was incoming president of my club, I decided to ask people exactly what they wanted to get out of their membership. I spent a few months interviewing every

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When I was incoming president of my club, I decided to ask people exactly what they wanted to get out of their membership. I spent a few months interviewing every

member of the club, either over lunch or at their office. I heard some complaints but also a lot of good ideas. In the end, the effort made us a much stronger club. Among other things, we added a successful fundraiser and attracted nine new members.

According to Ann Rhoades, a co-founder of JetBlue and author of *Built on Values: Creating an Envidable Culture That Outperforms the Competition*, one of the most powerful things you can do to create an effective corporate culture is to listen to your best employees and create a shared culture based on their values. I helped Rhoades write that book, and what I learned from her led me to approach my club presidency the way I did.

Volunteer groups are not so different from companies, Rhoades told me recently. "The values of your most motivated volunteers can get other people excited to volunteer," she says. "Do some brainstorming to make these values explicit – whether it's making kids' lives better, helping the poor, or having fun – and then talk about them all the time. It's one of the most important things you can do to make volunteering more rewarding."

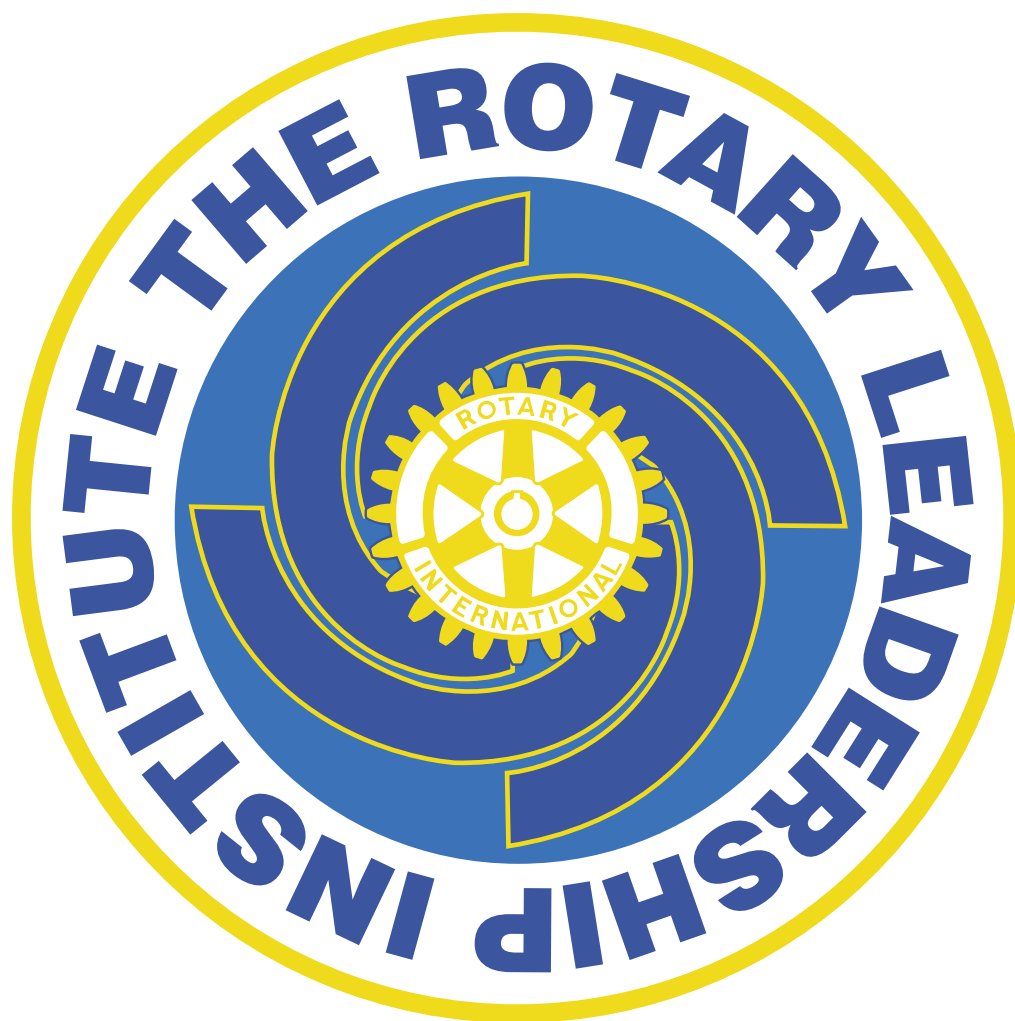
By listening to our club members, I discovered that many of them were primarily motivated by one thing: doing good for the children in our community. Two projects – giving books to kids and managing a Special Olympics event – grew out of that process.

Encouraging members to identify problems they want to solve and letting them come up with ways to address them are the keys to keeping people motivated. My club is in the midst of another listening tour that I hope results in more good projects that will, in turn, ease members into becoming more engaged. In my experience, if you praise regularly, nudge often, and make sure your group's values are clear, people who volunteer for you will be grateful to you – even if they're not sure why. ■

*Nancy Shepherdson is the co-author of five books and a past president of the Rotary Club of Lake Zurich, Illinois.*

# RLI Graduate Course

**Membership Issues**  
2018-2019



*Faculty Guide*

## Membership Issues

**Time Needed:** Half Day

### Session Goals:

- A. Create awareness of the current RI membership situation
- B. Discuss reasons for membership decline overall, but increase in some continents
- C. Address ways to restore membership growth and look at new kinds of Rotary clubs
- D. Begin to create a plan to stimulate your Club or District's membership growth

### This course is divided into 3 sections:

- Where We Are Now
- Why and How Did We Get Here?
- What Can We Do to Grow

### Where We Are Now:

<b>As of March 2018:</b>	<b>541 Districts</b>
	<b>35,784 Clubs</b>
	<b>1,230,000 Members</b>

How many new members were inducted in the past 10 years? 1,230,000

Membership is growing in Asia, Africa, and the Mideast; decreasing in North America, Europe, and Australia; staying constant is South America. What might be the reasons for this?

North America is now 30% of RI membership, but is predicted to be just 15% in 10 years.

### Changes in Zones:

- Every 8 years, RI recalculates the Zones to equalize their memberships.
- The US will lose 2 Zones, decreasing from 10 to 8
- Our Zone 32 will get to 18 Districts from 20 as 2 Districts are merged into 2 others: Districts 7470 and 7510 will become District 7475; District 7640 and 7500 will become District 7505.
- However 4 Districts from New York State will be added to Zone 32

*Sources: Beyond Borders Newsletter May 2018 and COL 2016 information*

***Faculty: Discuss these statistics, helping students to understand the implications of decreased membership and its effect on RI Directors and Zone conferences, as well as the increased influence of those continents and countries with significant growth. Will the U.S. decline in membership effect the future culture of Rotary International?***

### **Why and How Did We Get Here?**

1. Think about the members of your Club who have resigned in the past few years. What reasons did they give? Were those the real reasons they left?

**Faculty:** *List the reasons for resignation on the flip chart. Talk about possible “cures” for each reason.*

2. The average Club loses 10–15% of their members every year. Half of all new members leave within 5 years. Why? Look at how your Club orients and inducts new members.

3. We are very happy to bring in Young Professionals. But they leave at an even higher rate. Why?

**Faculty:** *YPs list 3 reasons for leaving Rotary: money, time commitment, and oppressive culture. Have the group discuss possible ways to alleviate these 3 problems.*

4. “Membership losses are caused by weak Clubs with weak Presidents.” —Bill Boyd, PRIP

**Faculty:** *What is your reaction to this quote? If true, what can be done about it?*

5. What is the image of Rotary in your community? Be honest...is there any truth to it?

6. Do you agree that increasing RI membership should be an important goal? For our Club/ For RI? What are the reasons?

7. Do you feel that RI does enough to help local Clubs grow their membership? Does your District do enough? What else could they do to support Clubs?

8. How can Clubs show that they value their members? How can Clubs make members want to stay?

9. What is the future of an organization that does not grow or change?



## What Can We Do To Grow?

1. Three reasons for joining Rotary are commonly listed: Service, fellowship, and networking. Look honestly at your Club. Do you meet each of these reasons? Could the reason for joining vary by age? By profession?

2. Does Rotary need a Paradigm Shift?

**Faculty: Definition of paradigm: a universally-held view about how things currently are and how they could be, if we did something different. Gather ideas about how Rotary could differ.**

3. Organizations need to adapt to the changing culture and customer. Think about Blockbuster, Sears, Kodak, etc. What happens to organizations which do not stay relevant?

4. Think of a person who would be a good Rotarian. Write down that name. Within 1 month, talk with that person, invite him or her to a Club service project, social event, or meeting.

5. Does your Club have a Membership Chair? A Membership Plan?

**Faculty: Discuss why each is important and how to form such a Plan**

6. Does your Club do an annual “health check”? Do you know what your members like and don’t like about your Club?

**Faculty: Refer students to the “Analyzing Your Club” survey in Part II of RLI**

7. What is the “culture” of your Rotary Club/ Does the membership reflect the community where you meet? Do you have well-organized meetings with worthwhile, interesting programs? How do you handle topics like religion and politics?

8. Do you make sure that new members feel welcome?

- An orientation session that includes the spouse and/or family?
- An induction ceremony that is meaningful and includes family?
- Engaging the new member immediately with a task or assignment?
- Providing a mentor for the first 6 months or so?

9. How can you encourage Rotary Alumni to join your Club? Do you encourage your speakers to join? How about parents of the students you honor? Link up with the local Young Professionals group or start a RotaryMeansBusiness (RMB).

***Faculty: discuss ways to include each of the above into the life of a Club***

10. Investigate the many new kinds of Rotary Clubs now available (Clubs now have the autonomy to innovate):

- eClubs
- satellite clubs
- varied meeting times and places (alternate breakfast and lunch, for example)
- now may meet every 2 weeks, or 1 meeting a month just for service
- passport clubs

***Faculty: See Attachment A and other attached pages for more information on each kind of Club. Have students discuss pluses and minuses of each strategy. Ask them to select one option and draft a preliminary plan as to how it could be implemented with their Club.***

# **Attachment A**

## **Difference Kinds of Rotary Clubs**

### **Satellite Clubs**

They function like a Club within a Club. Members are also members of the sponsoring Club, which may meet at different times and places. Satellites have separate meetings, but must operate according to the rules of a traditional Rotary Club.

—MOP 2016

### **E Clubs**

E Clubs meeting primarily online, rather than in person. They function like a regular Rotary Club with service projects, fundraising events, and fellowship opportunities. The club has all the rights, privileges, and requirements that a traditional club has. An E Club is assigned to a District, through locality is worldwide, or as determined by the Club Board.

—MOP 2016

### **Passport Clubs**

The philosophy behind these Clubs is that membership in Rotary is a passport. The Club meets within a defined area, usually just once a month. The second monthly meeting/obligation is doing service. There are usually no meals, allowing for lower cost and more flexibility as to meeting site. Social media is widely used, and social events are open to any who attend. Targets for membership in Passport Clubs are retirees, Rotary family, former Rotarians who couldn't meet previous meeting frequency or costs, and young people (from Young Professionals or Rotary Means Business).

—RI Webinar “Creating a Paradigm Shift in Membership” May 28, 2018

## Attachment B



We surveyed Rotaractors to find out what they are looking for in a Rotary club. They answered loud and clear.

### FAMILY-LIKE

## FRIENDSHIP

“Yesterday I heard one of the past governors of Rotary District 1911 speak, and he emphasized that one of the most important elements of Rotary is **friendship**. Sometimes we forget about this and get lost in other details.”

**NIKÉ PANTA**  
Rotaract Club of Budapest-City, Hungary

### ACTION

# NETWORKING

“A Rotary club should offer an avenue for a Rotaractor to become a successful individual in business. Then that person can have an impact on the community and change lives. Rotarians should be able and willing to **mentor, coach, and share** their success stories.”

**SSENDAWULA JAKOB**  
Rotaract Club of Kampala City, Uganda

### INCLUSIVE

# HANDS-ON PROJECTS

“I want to get my **hands dirty** and make a contribution to my community. Community projects get Rotary talked about and seen actively doing good in the world.”

**AMANDA FIRKINS**  
Rotaract Club of Hawkesbury, Australia

## FELLOWSHIP

### OPENNESS TO CHANGE

“ I want a club that recognizes the needs and wants of its members. That means **flexibility** in leadership, initiatives, and in where, when, and how we meet. ”

**WEITING XU**

Rotaract Club of York University, Ontario

**SIMPLICITY**

**FLEXIBILITY**

**ATMOSPHERE**

**MENTORING**

**FOCUSED  
PLANNING**

“ I’d look for an annual **strategic action plan** for managing and executing sustainable community service projects aligned with Rotary International objectives. ”

**DEWIN JUSTINIANO**

Rotaract Club of Valle de Sula, Honduras

**CULTURE**

**PASSION**

**OPEN-MINDED PEOPLE**

“ The best we can offer as people is an **open mind**, and that’s what we need in Rotary: people ready to do new things, ready for new and bigger challenges. ”

**MARÍA VALENTINA HENDERSON**

Rotaract Club of Montevideo, Uruguay

**CREATIVE SOLUTIONS**

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**CONTRIBUTING WRITERS:** Steve Almond, Anne Ford, Vanessa Glavinskas, and Ricardo Rosa

## Attachment C

# CLUB INNOVATION

**Rotary Club of Invercargill  
NRG, New Zealand**

*Charter date: 7 April 2016  
Original membership: 20  
Current membership: 28*



### **SERVICE WITH A SMILE:**

The Rotary Club of Invercargill NRG – the abbreviation stands for Next Rotary Generation – relishes its reputation as a projects-focused, hands-on team. A diverse group with members from all over the world – most of them women – the club has restored playgrounds, helped build a house that will be auctioned for charity, and distributed comic books to promote literacy. It has also adjusted some rules to make membership more feasible for younger people.

When Leon Hartnett, originally from Ireland, moved to Invercargill, New Zealand, he started looking into local service organizations. “I wanted to find something I could do to connect – and to help people.” When a colleague invited him to a Rotary meeting, Hartnett addressed practical concerns upfront. “I asked, ‘How does this work and how much does it cost?’” he recalls. “I had a young family and we had bought our first house. It sounded like a great organization, but I could not afford to be a member.”

Shortly afterward, in May 2015, District 9980 brought Holly Ransom, an Australian who as a 22-year-old had been one of

Rotary’s youngest-ever club presidents, to speak at a local community center. Hartnett left that talk inspired – and convinced that Rotary was devoted to new approaches to finding members. He was not mistaken. With the support of the district, he and a small group started doing projects, and soon they had enough people to charter a club. To make the



*From top: Members support polio eradication; the club helps with a Monopoly-themed fundraiser for a local charity.*

ROTARY CLUB OF INVERCARGILL NRG, NEW ZEALAND

## Meeting flexibility attracts young professionals

### **INNOVATION:**

Flexible attendance requirements and lower costs – members bring snacks to meetings to reduce meal expenses – attract service-oriented people, many of whom say they might not otherwise have joined Rotary. The twice-monthly meetings are not mandatory, but participation in projects is.

club attractive to younger members, they looked at the costs associated with membership. “We decided no meals. Too expensive. We’ll have nibbles,” he recalls. He estimates that each member saves about NZ\$700 a year on restaurant meals.

With an emphasis on service projects, the club made attendance at meetings optional. “But you are required to be active in the club through service,” Hartnett says. “Some of our club’s most involved members rarely attend meetings, but they are always the first to share ideas, give feedback, and then do the actual work. We do still have a good turnout at meetings, with an average of about 70 percent of members attending.”

These changes have attracted younger people. “When our club chartered, we had the youngest average age in Australasia – 28,” says Hartnett. The members now range from 21 to their mid-50s (Hartnett is 43).

The club often works with other local clubs. “We did a glow-in-the-dark golf event with the Rotary Club of Invercargill South. Their average age is 20 years older than us,” Hartnett says. “They brought logistical skills that we didn’t have, but we had some ways of doing things they hadn’t thought about. They thought we needed to create a website for the tournament. We said, ‘No, we can use Google Docs for people to sign up. Let’s not spend money on a website.’”

Despite the club’s novel approach, Hartnett says, “as time goes by, we tend to evolve into a more traditional Rotary club. At first we said, ‘Let’s not have a board.’ Now we have a board.” Some things they simply needed to discover for themselves.

“We are Rotarians in every sense of the word. We’re just doing it our own way.”

—BRAD WEBBER

**What is your club doing to reinvent itself?**

Email [club.innovations@rotary.org](mailto:club.innovations@rotary.org).

## Attachment D

# 4 questions about

## ... how to use Meetup to recruit new members

### with Steve Cook

past membership chair,  
Rotary Club of West Springfield, Virginia



#### **1. What led you to help create RotaryNXT as a satellite club of the Rotary Club of West Springfield?**

I've been a Rotarian for 34 years, and I've watched how younger people are attracted to Rotaract clubs. I wanted to figure out how to attract people to Rotary in a similar way.

We had to change the Rotary experience, because it wasn't working. We threw out the book when we started the satellite club. We said we'll meet twice a month for cocktails, and we'll do business education meetings for younger people or new businesses once a quarter, and see if that helps. We also said we'll continue service projects with our sponsor club and do some of our own.

#### **2. Why do you feel so strongly about the importance of attracting new members?**

If we don't tell our story and we can't attract younger people, we will age out and die. I have seen this attrition – clubs that started at 110

members are now down to 40. They're losing people faster than they're attracting them. How are we selling the Rotary experience? Good businesspeople know how to succeed, but with Rotary, they forget to think about what the product is. Our product is not meetings. We are a membership organization, and service is our product. The Rotary Foundation gives us the tools to do that service.

#### **3. How do you use Meetup.com?**

We have an IT guy who suggested we use it. We put up photos and advertise our meetings and other events and have folks RSVP. What we like about Meetup is that it gives you a list of who is attending.

People also search for social networking or service opportunities on the Meetup site. They ask to join our Meetup group and are accepted by the chair of RotaryNXT.

Meetup is like Facebook – it's another social media tool to get the word out to like-minded people. There's no pressure. We wanted to reach out to those looking to get involved in the community. Meetup costs us \$33 a year and gives us great visibility.

#### **4. Can anyone come to your Meetup events?**

Yes! When we post a club meeting on Meetup, for instance, we have current members as well as prospective members who are part of our Meetup group. They do not even have to be a member of the Meetup group, though we suggest they join to find out what we are doing.

The club started with eight members in January 2016. Now we have 16. Two new members have come through Meetup, and we have 119 people who are part of our Meetup group. They get all the information about meetings.

We consistently have 19 people at meetings, often including two or three new and inquiring minds.

**Find more ideas for connecting with potential members at [rotary.org/membership](http://rotary.org/membership).**

# Attachment E

## Membership Matters

### A Little Club Reinvents Itself By Emphasizing Service Over Meetings

By Marty Peak Helman, District 7780 Foundation Chair

For about a decade, the Bath Sunrise Rotary Club in District 7780 was “stuck” at a hard-core 11 members, who met regularly, did great service, but couldn’t seem to increase in number.

Club president Bob Reed says change began back in 2012 when, as District Governor, I challenged the club to reinvent themselves. “You’re small,” I pointed out in my “official” visit. “You

bers — was just too much. The club agreed on a new schedule, which called for a “regular” meeting with speaker the first week of the month, and a business meeting the third week of the month. During the second and fourth weeks, club members pledged to go out in the community and do service, and to report their “makeup” as, perhaps, reading to kids in school, or volunteering at the library or soup kitchen, or similar activity.



don’t have a bunch of old-timers telling you what you can’t do. And you’re not afraid of work. So go out and make the changes you want to become the club you want. Who’s to stop you?”

What I said slowly took root, and the club decided to go through the strategic Visioning process. Unfortunately—and erroneously—the club was told that it needed to field 30 members in order to qualify for Visioning. Seemingly rebuffed, in 2014-15 the club created its own strategic planning process, under the guidance of then-president Erika Helgerson Bensen.

First, Erika agreed to serve two years as president, and she asked her immediate successors to do the same. The goal was greater stability and a better time horizon for planning and execution. Since club members were repeating the presidency every few years anyway, this change was quickly agreed to.

Next, the club treasurer created a spreadsheet of all the club’s donations over the previous five years, and asked each member to weigh in on whether, in retrospect, they agreed with the funding decisions that had been made. Out of that exercise came a much clearer view of the club’s charitable priorities and financial needs.

Third, the club recognized that weekly meetings — on top of a monthly board meeting and committee meetings, service projects and fundraisers, all of which involved most of the mem-

It should be noted that Bath Sunrise moved to this schedule *prior* to the Council on Legislation’s 2016 determination that clubs could set their own meeting schedule. As a result, some nay-sayers believed that Bath Sunrise’s decision to choose service over meetings — and to leave it up to club members to self-report their service — was a way to move to (then-illegal) bi-monthly meetings.

Not so: Last spring, as District Foundation Chair, I was invited back to the Club to present Paul Harris Fellows to those members who had completed their agreed-upon service hours. President Bob estimates that the club’s 2500 service hours in 2016-17, figured at minimum wage, were worth \$35,000 to the community. For the 2017-18 Rotary year, Bob estimates the club is on track for 3000 more service hours!

And bimonthly service has had an unexpected impact: It has not gone un-noticed in the Bath community that so many club members are out there, wearing their Rotary shirts and doing good things. As a result, interest in Rotary is keen! Nine of those original 11 members remain active in the club; two others have resigned due to family/work issues. But new members have flocked to the challenge and today, three years into its service-oriented schedule, the club has doubled in size to 22 members.

The secret of Bath Sunrise’s success: An emphasis on weekly *service*, not weekly *meetings*.