

Colors

Rotary's official colors are intended to express who we are: smart, compassionate, persevering, and inspiring leaders. Three shades of blue and one of gold are our main colors. To create a unified look and feel, use these colors more often than the other colors in our palette. Use secondary colors sparingly for emphasis or differentiation within a series.

Our colors should not be screened or adjusted. Apply the appropriate formulations listed for each color.

Pantone™ colors for print

CMYK for 4-color process print

Hexadecimal for web

RGB for digital

Primary Color Palette — Rotary Leadership Colors



Secondary Color Palettes

Vibrant



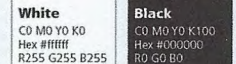
Pastels



Neutrals — Warm



Neutrals — Cool



Typography

To use typography correctly in Rotary-branded materials, whether in print or online, refer to both our licensed and free options.

Primary — Use ALL CAPS condensed style for headlines and main navigation. Use other styles (varied using both upper- and lowercase) for secondary headlines and secondary navigation.

Secondary — Use regular style for body text or other identifiers.

Use the free option when licensed options are not available or are cost-prohibitive.

Licensed options

Primary

FRUTIGER LT STD
47 Light Condensed
57 Condensed
67 Bold Condensed
77 Black Condensed

FRUTIGER

45 Light
46 Light Italic
55 Roman
56 Italic
65 Bold
66 Bold Italic
75 Black
76 Black Italic
95 Ultra Black

Secondary

Sentinel
Light
Light Italic
Book
Book Italic
Medium
Medium Italic
Semibold
Semibold Italic
Bold
Bold Italic
Black
Black Italic

Free options

Primary

OPEN SANS
CONDENSED
Condensed Light
Condensed Light Italic
Condensed Bold

OPEN SANS

Light
Regular
Italic
Bold

ARIAL NARROW

Regular
Italic
Bold
Bold Italic

ARIAL

Regular
Italic
Bold
Bold Italic

Secondary

Georgia
Regular
Italic
Bold
Bold Italic

Photography

Our photography focuses on relationships and community impact and should always tell a genuine story. They should be powerful images that inspire and motivate the public and show that Rotary is made up of people of action. Photography that uses a documentary style (meaning that the subjects of the image are not posed) usually accomplishes this best.

Be sure to get signed, written permission from anyone in the photos or videos used for Rotary purposes. For more information or questions, contact privacy@rotary.org.

People of Action style



[illegible]

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

	Step?	We want to accomplish?	How long?
1.	Introduction & Start	<p>Welcome them back. 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 and LYC, Chapter 5</p>	4 min.
2.	1st Learning Objective	<p>Outline a process for working with club members to develop new strategies for attracting new members</p> <p>Have participants go to pp. 37-38 of LYC and review President-Elect responsibilities 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 Finding New Club Members, Representing Your Community's Professions, and Diversifying Your Club, 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>	15 min
3.	2nd Learning Objective	<p>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 (start at one side of the u and have the 1st three form a trio, the next three as a trio, etc. If you end up with four in final group, that is ok. If only 2, then ask room host/facilitator to join them to make a trio.</p> <p>Go to handout behind Tab C-8 - Finding New Club Members, Step #3</p> <p>Instruct the trios to discuss ideas for including non-Rotarians in club meetings and projects (9 minutes) Have each trio select one outstanding idea and share with the entire group – (5 minutes)</p>	10 min
4.	3rd Learning Objective	<p>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 in your community would have interest in connecting with your club?</p>	10 min
5.	Q & A	Ask for any questions and respond briefly	2 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>	4 min

Lone Star PETS 2020

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, FEBRUARY 29, 2020

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

Lead Your Club: President -- Chapter 5: Strengthening Your Membership

FINDING NEW CLUB MEMBERS



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

Asking your fellow members about people they know in the community who would be assets to the club is an important step in membership growth. Prospective members are likely to rely on the experiences and opinions of their friends, family, or colleagues when considering joining an organization like Rotary.

Encourage others to invite prospective members to club meetings, service projects, and events so they can see how your club helps the community and provides opportunities to form connections and friendships. It may take a few conversations or several visits for prospective members to get a full understanding of Rotary and how they could benefit from membership. It's important to allow that time to make sure that it's a good fit for everyone involved.



Two out of every three prospective members who are referred by a Rotarian join Rotary. If a prospect can't join your club but is interested in Rotary, help Rotary grow by **referring him or her** to another club.

OUTCOME

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

- Develop a pool of potential candidates for membership
- Determine how to introduce prospective members to your club
- Get new members who are well vetted and more likely to stay

GETTING ORGANIZED

Set aside time for members to complete the worksheet on page 3.3 at one of your club meetings. Typically, this exercise 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 Rotary year.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.



Prospective members can also find their way to your club by inquiring about membership on [Rotary.org](https://www.rotary.org). To see a list of potential members in your area who have been reviewed by your district and assigned to your club for consideration, sign in to My Rotary and head over to the **Club Administration** page.

GETTING STARTED

Ready to start? Here's how.

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

Explain the purpose of this exercise and how it relates to the assessments your club has already completed. Distribute the worksheet to club members and ask them to complete it. Compile the information from the worksheets and maintain a master list of prospects.

Step 2: Make an action plan

Compile the names that were circled on the worksheets and make a plan to invite those people to a club meeting, service project, or social event. If you conducted classification and diversity assessments, refer to the list of groups you found to be underrepresented in your club. Your plan should specify who you'll invite, to what, who will invite them, and how they'll do so.

Step 3: Invite prospective members to a club event

Invite the people you identified as qualified prospective members to attend an upcoming service project 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.

Step 4: Follow through

- Ask members who invited prospective members to contact their guests and report back on their interest in joining.
- Keep the worksheets and your compiled list for future recruiting efforts.
- Regularly go to My Rotary's Club Administration area to track membership leads gathered through Rotary's website.
- If you find people who are interested in Rotary and qualified for membership but not a good fit for your club, [refer them](#) to another club.

Interested in doing other assessments?

[Representing Your Community's Professions: A Classification Assessment](#)

[Diversifying Your Club: A Member Diversity Assessment](#)

[Improving Your Member Retention: Retention Assessment and Analysis](#)

[Enhancing the Club Experience: Member Satisfaction Survey](#)

[Understanding Why Members Leave: Exit Survey](#)



IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

Think of your contacts, acquaintances, friends, and family members who might qualify for membership in your club. It's not necessary to know whether they are ready to join Rotary.

Once you've listed your contacts, circle the names of any you feel would be a good fit for your club.

Member name: _____ Date: _____

Professional Contacts

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

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Service Contacts

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

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Community Contacts

- Physicians
- Dentists
- Real estate agents
- Financial managers or planners
- Religious leaders
- Lawyers
- Business consultants
- Accountants
- Veterinarians
- Internet technology consultants
- Public relations professionals
- Entrepreneurs
- Nonprofit professionals
- School administrators
- University professors
- Civic leaders
- Social workers
- Psychologists
- Sales executives

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Rotary Contacts

Consider past members or Rotary alumni that you know or that your club maintains contact with. Rotary alumni are those who have experienced Rotary through various programs, including:

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

Name: _____ Occupation: _____

Name: _____ Occupation: _____

REPRESENTING YOUR COMMUNITY'S PROFESSIONS



In Rotary, members' classifications refer to their occupations, professional expertise, and training. Rotary clubs aim to include members from a number of classifications because bringing together professionals from different fields and industries increases a club's capacity to serve its community as well as giving its members an opportunity to learn more about others in the community. To maximize your impact, strive for professional diversity that represents the professions held in your community. Because business activities and terminology vary from community to community, Rotary doesn't maintain a comprehensive list of classifications. Be open to nontraditional professions that bring new skills and perspectives to your club.

OUTCOME

Conduct this classification assessment and act on its results to:

- **Grow and diversify your club's membership.**

You will clearly see which professions are represented in your club and what skills and expertise it's missing. Each gap you identify presents an opportunity to target your recruitment efforts.

- **Make the best use of members' expertise and skills.**

Your club's collective knowledge and talent can help it make a more significant impact in your community. Once you recognize the expertise and skills your members have acquired through their professions, you'll be better able to use them to the club's advantage. Recognizing members for their unique talents will yield a number of benefits, too. When members' professional skills are put to good use:

- Retention rates are higher, because members feel useful and valued
- Clubs are better equipped to conduct successful service projects
- Members are motivated to excel
- Members have more opportunities to grow professionally and network
- Clubs are more attractive to prospective members

GETTING ORGANIZED

To conduct a successful classification assessment, you'll need a dedicated group of members. It could be your membership committee, or you can organize a classification assessment team.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time. Steps 3 and 4 could take 1-2 weeks.

GETTING STARTED

Ready to start? Here's how.

Step 1: Gather member data

Have all club members complete the Occupation and Professional Expertise Survey on page 1.4. You can ask them to take it during a club meeting or turn it into an online survey that they can complete in their own time. Explain the purpose of the classification assessment and make sure that members understand the benefits of having a good mix of professions represented in your club.

Step 2: Evaluate the data

Analyze the completed Occupation and Professional Expertise Surveys and fill in the Classification Audit on page 1.6 with the professions of your club's members.

Step 3: Collect data on your community

Gather data about the professional makeup of your community. You can research local employment statistics online or ask your chamber of commerce or another local business association for information.

Next, fill in the Classification Audit table with the top five professions in your community, along with the percentage of community members in those professions.

Step 4: Analyze the data

Use the results of the Classification Audit to determine which professions should be added to your club to achieve a balanced membership. Finally, answer questions on the Classification Worksheet on page 1.7.

Step 5: Present the results

Present your results and recommended actions at a club meeting, including:

- How seeking members from underrepresented classifications can guide your efforts to identify potential members
- How the skills you've discovered among your current members can be used to strengthen your club and enhance service projects

Get member input on your recommended actions, gather consensus, and adjust your action plan accordingly.

Step 6: Take action

The final step is to take action based on your results. Identify qualified prospective members according to the gaps you found in your club's classifications. Ask current members to fill club roles or apply their skills to service projects to maximize the club's impact.

Interested in doing other assessments?

[Diversifying Your Club: A Member Diversity Assessment](#)

[Finding New Club Members: A Prospective Member Exercise](#)

[Improving Your Member Retention: Retention Assessment and Analysis](#)

[Enhancing the Club Experience: Member Satisfaction Survey](#)

[Understanding Why Members Leave: Exit Survey](#)



OCCUPATION AND PROFESSIONAL EXPERTISE SURVEY (FROM STEP 1)

1. What is your current profession? If retired, give your most recent profession.
2. Have you had other professions, or do you have other expertise that's not related to your current profession?
3. In what industry do you work? (For example, food industry, publishing, etc.)

4. Do you have experience or expertise in the following areas? If so, please briefly explain.

A. Leadership roles

B. Training/ teaching

C. Mentoring

D. Website design or management

E. Social media (blogging, Twitter, Facebook, LinkedIn, etc.)

F. Research or survey design

G. Fundraising

H. Public relations or marketing

I. Project management

J. Strategic planning

K. Other experience, expertise, or skills

CLASSIFICATION AUDIT

Professions represented in the club	Number of members in that profession	Percentage of membership
1. _____	_____	_____ %
2. _____	_____	_____ %
3. _____	_____	_____ %
4. _____	_____	_____ %
5. _____	_____	_____ %
6. _____	_____	_____ %
7. _____	_____	_____ %
8. _____	_____	_____ %
9. _____	_____	_____ %
10. _____	_____	_____ %
11. _____	_____	_____ %
12. _____	_____	_____ %

Top professions in the community	Percentage of community (if available)
1. _____	_____ %
2. _____	_____ %
3. _____	_____ %
4. _____	_____ %
5. _____	_____ %

CLASSIFICATION WORKSHEET

1. What are the top classifications or professions in your community or the surrounding area that are either not represented or underrepresented in your club?
2. What challenges could your club face in filling the classification gaps you've identified?
3. Which of the classifications you listed in your response to question 1 should your club focus on filling? Why?

ACTION PLAN

Use your findings to create an action plan that addresses your club's professional diversity.

Action	Person responsible	Time frame	Resources needed

DIVERSIFYING YOUR CLUB



Diversifying your club is not just about including a mix of people. It's also about working well together.

Diversity refers to inclusion of people from many groups. It is a source of innovation, as well as one of Rotary's core values. Having members with different backgrounds and viewpoints gives your club a broader understanding of the community, its problems, and possible solutions. Strive to have a group of members who offer the club diverse skills, talents, and experiences. If your club includes different ethnicities, ages, and cultures, as well as a good gender balance, it will have greater capacity to serve your community and communities around the world. Equally important is creating a culture of inclusion, where these differences are respected, supported, and valued.

OUTCOME

Conduct this diversity assessment and act on its results to:

- Raise your members' awareness of the diversity in your community
- Build member support for increasing diversity
- Diversify your club to better represent the working professionals in your community

GETTING ORGANIZED

Dedicate time in a series of club meetings to conducting each step of your member diversity assessment. Choose a facilitator (the membership committee chair, a committee member, or the club president) who is comfortable talking about diversity and passionate about the need for greater diversity in your club. Or, consider inviting a diversity and inclusion leader to talk to your club. This activity should involve all club members so that they all have a stake in the process. Greater inclusion will increase awareness and support for future action.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.

GETTING STARTED

Ready to start? Here's how.

Step 1: Discuss the benefits of having a diverse membership

Discuss the benefits of diversity with your club. Recognize and celebrate past successes, if appropriate. For example, highlight a service project or other club accomplishment that has been achieved through having members with diverse professional skills. Discuss your club's representation of professional field or classification, gender, age, ethnicity, and culture, and set goals.

Step 2: Collect information

Recap the diversity discussion from step 1 and reiterate the positive effects of having a more diverse membership.

Distribute the Member Diversity Worksheet. Split club members into four groups and instruct each group that they are to gather information from one of the following sources on their own time between this meeting and the next, completing what they can of the worksheet:

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

Step 3: Discuss the findings within the groups

The following week, ask groups to meet to discuss their assignments, share what they completed on their worksheets, and compile their findings. Then have each group choose a spokesperson who will present its findings to the club at a future meeting.

Step 4: Report the results and discuss their implications

Have each group spend about five minutes presenting its findings at a club meeting. Facilitate a discussion about the reports and their relevance.

Does your Rotary club's membership reflect:

- The ages of the professional population in the community?
- The gender composition of the working professionals in the community?
- The ethnic and cultural diversity of the community?

Step 5: Develop a member diversity action plan

Find strategies to reach out to specific groups that were found to be underrepresented in your club. Document your plan and assign tasks to those on the membership committee, or ask other club members to help. Monitor progress toward your diversity goals and continually update club members.

Interested in doing other assessments?

[Representing Your Community's Professions: A Classification Assessment](#)

[Finding New Club Members: A Prospective Member Exercise](#)

[Improving Your Member Retention: Retention Assessment and Analysis](#)

[Enhancing the Club Experience: Member Satisfaction Survey](#)

[Understanding Why Members Leave: Exit Survey](#)



MEMBER DIVERSITY WORKSHEET

1. What sources did you consult in your search for data on your community's demographic composition?

2. What data did you find on:

Age:

Gender:

Ethnic background:

3. Does this data correspond to the current composition of working professionals in your community? Explain your evidence.

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

5. What surprised you most?

6. What surprised you least?

7. Are any demographic groups underrepresented in the club?

8. What can the club do to better represent working professionals in the community?

9. How can your findings be integrated into an action plan for membership development?

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.	Introduction & Start	Provide topic – have participants open PN Workbook to C-9 and LYC Chapter5	2 min.
2.	1st Learning Objective	<p>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, Enhancing The Club Experience</p> <p>Facilitate classroom discussion: What makes this a valuable process? How could you as club president-elect utilize this survey as a planning tool for your club?</p>	12 min
3.	2nd Learning Objective	<p>Identify how key benefits of attending district events and seminars impact membership retention.</p> <p>Refer participants to pp. 15-16 in LYC</p> <p>Facilitate classroom discussion: How can having your club members attend these events assist in engaging and retaining your members? In what ways can a president-elect 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?</p>	12 min
4.	3rd Learning Objective	<p>Outline the steps to design a comprehensive membership engagement and retention strategy for their respective Rotary club.</p> <p>Divide the group into groups of 5 or 6</p> <p>Refer participants to the handouts behind the C-9 tab in the PN Workbook</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 members and develop 3 action steps along with the other information requested to fill in the chart in the Improving Your Member Retention of the PN Workbook (20 min) Spokesperson from each group shares one action step with entire group. (10 min)</p>	30 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>	4 min

Lone Star P.E.T.S. 2020

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, FEBRUARY 29, 2020

SESSION C-9

ENGAGING AND RETAINING MEMBERS

GOAL

Club Presidents-elect will begin to design a strategy to engage and retain club activities including training and development.

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

Lead Your Club: President -- Chapter 5: Strengthening Your Membership

ENHANCING THE CLUB EXPERIENCE



The power of your club lies in your members. By asking them for feedback regularly, you are demonstrating your openness to change and empowering them to help craft an ideal club experience. Use this survey to obtain member feedback about your club. Then use the information to make a plan to ensure that members are enjoying their Rotary club experience.



Keep responses confidential when discussing and analyzing them.

OUTCOME

Conduct this assessment and act on its results to:

- Identify what your members like and don't like about their club experience
- Develop an action plan that builds on what your members like and discontinues or changes what your members aren't satisfied with

GETTING ORGANIZED

You'll need a dedicated group of members to conduct the member satisfaction survey. It can be your club's membership committee or a few interested, unbiased members. You can either devote time during a club meeting to talking about member satisfaction and taking the survey or hand it out or email it to members and allow them more time to complete it. Alternatively, hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.



Consider using an online survey tool. They're convenient, are often free or inexpensive to use, and are helpful in managing response data.

GETTING STARTED

Ready to start? Here's how.

Step 1: Introduce the survey

Discuss why it's important to get feedback from all club members.

Step 2: Distribute the survey

Pass out or email the Member Satisfaction Survey to members or use an online survey tool. 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 your dedicated group review the survey results. Stress the importance of confidentiality and respecting all viewpoints.

Step 4: Present the results

Present and discuss the survey results to the club. Allow time for members to ask questions.

Step 5: Make an action plan

Hold a forum where club members can offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for implementing changes.

Step 6: 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 are invested in enhancing the club experience.

Interested in doing other assessments?

[Representing Your Community's Professions: A Classification Assessment](#)

[Diversifying Your Club: A Member Diversity Assessment](#)

[Finding New Club Members: A Prospective Member Exercise](#)

[Improving Your Member Retention: Retention Assessment and Analysis](#)

[Understanding Why Members Leave: Exit Survey](#)



MEMBER SATISFACTION SURVEY

This survey focuses on your day-to-day experiences in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers; we simply ask for your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with your membership in our Rotary club?

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

2. Considering our club's **culture, members, and meetings**, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Club meetings are a good use of my time	<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"/>
My club's members care about one another	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club reflects the demographic profile of our area's business, professional, and community leaders	<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 club actively seeks to involve all members in projects and activities according to their interests, skills, and availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The amount of fundraising activities is appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

3. How would you rate the following aspects of our **weekly meetings**?

	Excellent	Good	Fair	Poor	Very poor	N/A
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"/>
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"/>
Variety of program topics	<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 refreshments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speakers and programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

4. What are your opinions about our club's **service projects**?

	Just right	Too many	Too few
Total number of service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of community service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of international service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Disagree	No opinion
Service projects are well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service projects make a difference in the community or the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service 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 Rotary club, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club does a good job communicating to members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job 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 upon members' input and ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am comfortable with the pace of change in my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club works to update club processes and rules to meet the needs of its members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

6. Indicate your agreement with the following statements about the **value** of your membership.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I feel welcome in my club	<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"/>
My experience as a member is worth the money I spend on Rotary participation	<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 give to Rotary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My family sees value in my Rotary membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My friends see value in 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 your agreement 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 qualified prospective members to join my Rotary 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 Rotary club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

8. Thinking about the **costs** associated with club membership, how would you rate the following?

	Too low	Just right	Too high	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals at weekly meetings	<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"/>
Club assessments	<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:

IMPROVING YOUR MEMBER RETENTION



Keeping current members is a sign of a club's stability and overall well-being. Many clubs don't recognize their retention problems if the number of members remains somewhat steady. However, clubs that consistently lose members and compensate by inducting new members are not managing their growth or retention well. This assessment provides a view of how both the induction and the termination of members contribute to the net gain or loss of members.

OUTCOME

Conduct this assessment and act on its results to:

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

GETTING ORGANIZED

To complete the steps below, you will need access to club membership reports on My Rotary. The club president, secretary, treasurer, membership chair, and Foundation chair have this access and can delegate it to any fellow club member. It may be helpful to work with a member who has experience in data analysis.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.

GETTING STARTED

Ready to start? Here's how.

Step 1: Review your club's historical and existing member retention percentages

Go to Rotary Club Central's [Reports page](#) and, under **Club Reports**, choose the **Member Viability and Growth** report to see current retention rates for existing members.



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

To run the Member Viability and Growth report without following a link to the Reports page:

- Sign in to My Rotary
- From the **Take Action** menu, choose **Rotary Club Central**
- Choose **Reports** from the options on the left
- Under **Club Reports**, choose **Member Viability and Growth**

Step 2: Determine when members leave your club

Run the Membership Termination Profile report to see when people are most likely to terminate their club membership and the reasons they give for doing so. Knowing at what point in their Rotary tenure members are most likely to leave can help you recognize the club's retention strengths and weaknesses and focus your efforts accordingly.

Go to Rotary Club Central's [Reports page](#) and, under **Club Reports**, choose **Membership Termination Profile**.

To run the Membership Termination Profile without following a link to the Reports page:

- Sign in to My Rotary
- From the **Take Action** menu, choose **Rotary Club Central**
- Choose **Reports** from the options on the left
- Under **Club Reports**, choose **Membership Termination Profile**

Step 3: Generate strategies for keeping members

Once you've reviewed the Member Viability and Growth and Membership Termination Profile reports, discuss the results within the membership committee. Consider these questions:

- Who is leaving your club? Veteran members? New members? Both?
- Why are members leaving?

Step 4: Develop an action plan

Report the membership committee's findings to the club. Facilitate a discussion about how you might address areas of weakness and build on what you're doing well.

ROTARY RESEARCH

Understanding why members leave is crucial to strengthening your club. The Exit Survey in Understanding Why Members Leave is designed to gather this information. Rotary International has conducted extensive research on the reasons members leave their clubs worldwide. Here's what we've found.

Members who stay less than 1 year

Many members leave within the first year because they were not fully informed about the responsibilities of membership before joining or not fully educated about Rotary after joining. Some have trouble meeting attendance requirements or struggle with financial obligation, while others say that their networking expectations were not being met.

What you can do

If your club loses members within the first year, focus on:

- Communicating better to prospective members, both about the personal and professional benefits that your club has to offer, as well as about the responsibilities of being a Rotary member
- Planning meaningful induction ceremonies that celebrate this special step and making sure current members make new members feel welcome
- Making club meetings fun, energetic, and humorous, without losing sight of Rotary's mission
- Assigning new members mentors who can explain club workings and traditions, answer questions, help them get to know other members, and, if they miss any meetings, make sure all is well
- Offering useful new member orientation programs
- Assigning newer members to committees or otherwise involving them in the club
- Connecting often with new members to answer questions and teach them about Rotary



Use the Member Satisfaction Survey in **Enhancing the Club Experience** to ask all members for feedback about your club and ideas for improving their experience.

Members who stay for 1-2 years

Many members who leave after spending one to two years in a club do so because they do not feel engaged in club events and activities, their fellowship expectations aren't being met, or they have difficulty meeting the attendance requirements because of competing priorities.

What you can do

Take action to keep members who have been in your club for one to two years:

- Identify members who have been in your club for one to two years and make sure they are involved in a project or committee that interests them.
- Ask these members for their feedback. They may have ideas for revitalizing the club's fellowship activities or service projects.
- Suggest hosting a Youth Exchange student, or see if they would like to serve as a liaison to your Rotaract or Interact club.
- Assign mentors to members who don't have them, or suggest that they change mentors if they would like to.

Members who stay for 3-5 years

Members who leave after spending three to five years in a club may do so because their fellowship expectations are not being met, they are frustrated with the club's leadership, or they have difficulty meeting the attendance requirements because of competing priorities.

What you can do

For members who have been in your club for three to five years:

- Provide leadership opportunities. Members can get more involved by serving as club officers. Encourage those who have already held club leadership positions to mentor newer members or participate in district activities. In taking on leadership roles, they will feel useful, valued, and connected with the club's decisions and events.
- Organize new activities, such as continuing member education, or revitalize established club activities so that members remain engaged and excited about attending club meetings and fellowship opportunities.
- Get members' feedback on their club experience and ask for their ideas on what could be improved.
- Put their expertise and skills to use and recognize them for their efforts.

Members who stay 6-10 years

Some members who leave after spending six to 10 years in a club report that their fellowship expectations weren't being met and that they were frustrated with the club's leadership. Others leave when they retire or need to relocate.

What you can do

For members who have been in your club for six to 10 years:

- Recommend they mentor newer members and get involved in more district activities, such as planning the district conference or serving on a district committee. Or they might wish to join a [Rotary Fellowship](#). Both can help them meet more people and experience Rotary beyond the club.
- If members are planning to leave upon retiring, remind them that retired members are an important part of Rotary. They provide valuable perspective and can serve as mentors to younger professionals in the club.
- If members are relocating, forward their contact information to the clubs in their new area, [refer them](#) through My Rotary, or encourage them to let Rotary know they want to [change clubs](#).
- Put their expertise and skills to use and recognize them for their efforts.

Members who leave after 10 years

Many members who leave after spending more than 10 years in a club say they are not interested in the club's meetings and activities. Other members choose to leave because of retirement, family obligations, financial constraints, or health problems.

What you can do

For members who have been in your club more than 10 years:

- Spend some time with them to learn whether any of the reasons above could prompt them to leave your club. Some reasons for leaving are beyond your control, but learning why members might leave can help you find ways to prevent it.
- Ask for their opinions on how to energize or reinvent your club meetings, or gauge their interest in taking on a district leadership position — assistant governor, district governor, or district committee chair.

- Consider easing the financial obligations of members of this group, who may be under financial strain because of retirement or other factors.
- Put their expertise and skills to use and recognize them for their efforts.
- See if they would be interested in mentoring a new member.

Interested in doing other assessments?

[Representing Your Community's Professions: A Classification Assessment](#)

[Diversifying Your Club: A Member Diversity Assessment](#)

[Finding New Club Members: A Prospective Member Exercise](#)

[Enhancing the Club Experience: Member Satisfaction Survey](#)

[Understanding Why Members Leave: Exit Survey](#)

Action step	Who will be responsible?	How long will it take?	How will progress be measured?	What resources are available?
1				
2				
3				

[illegible]

Session C-10 **Leading My Vibrant Rotary Club** (One hour)

	Step?	We want to accomplish?	How long?
1.	Introduction & Start	Provide topic – have participants open PN Workbook to C-10 and LYC, Chapter 1	1 min.
2.	1st Learning Objective	<p>Explain the values of tradition, continuity, and change as related to leadership within a Rotary club.</p> <p>Have participants refer to their Be A Vibrant Club brochure</p> <p>Facilitate group discussion:</p> <p>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 club as a whole when there is continuity of leadership vs a disconnect?</p>	10 min
3.	2nd Learning Objective	<p>Identify ways a club president-elect 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 president-elect can build relationships with other club members to focus on tradition, while leading to continuity, and a vibrant club leadership team (about 5 minutes).</p> <p>Have each group share their lists with the class (3 minutes per group).</p>	25 min
4.	3rd Learning Objective	<p>Identify ways to engage their leadership team in planning for needed change to maintain a vibrant Rotary club</p> <p>Facilitate group discussion: (10 minutes)</p> <p>As club president-elect what methods can you use to engage your leadership team to plan for needed change in your Rotary club?</p> <p>What is the common theme underlying these methods?</p> <p>Then have them refer to their Creating Your Club Leadership Plan checklist from module A-1 on Friday, PN Workbook</p> <p>Now add notes based on your insights over these two days. (allow approx. 5 min)</p>	17 min
5.	Q & A	Ask for any questions and respond briefly	2 min
6.	Wrap up and evaluations	<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>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 schedule of evening program and events.</p>	5 min

Lone Star P.E.T.S. 2020

PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, FEBRUARY 29, 2020

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

Lead Your Club: President -- Chapter 2: Leading Rotarians

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:

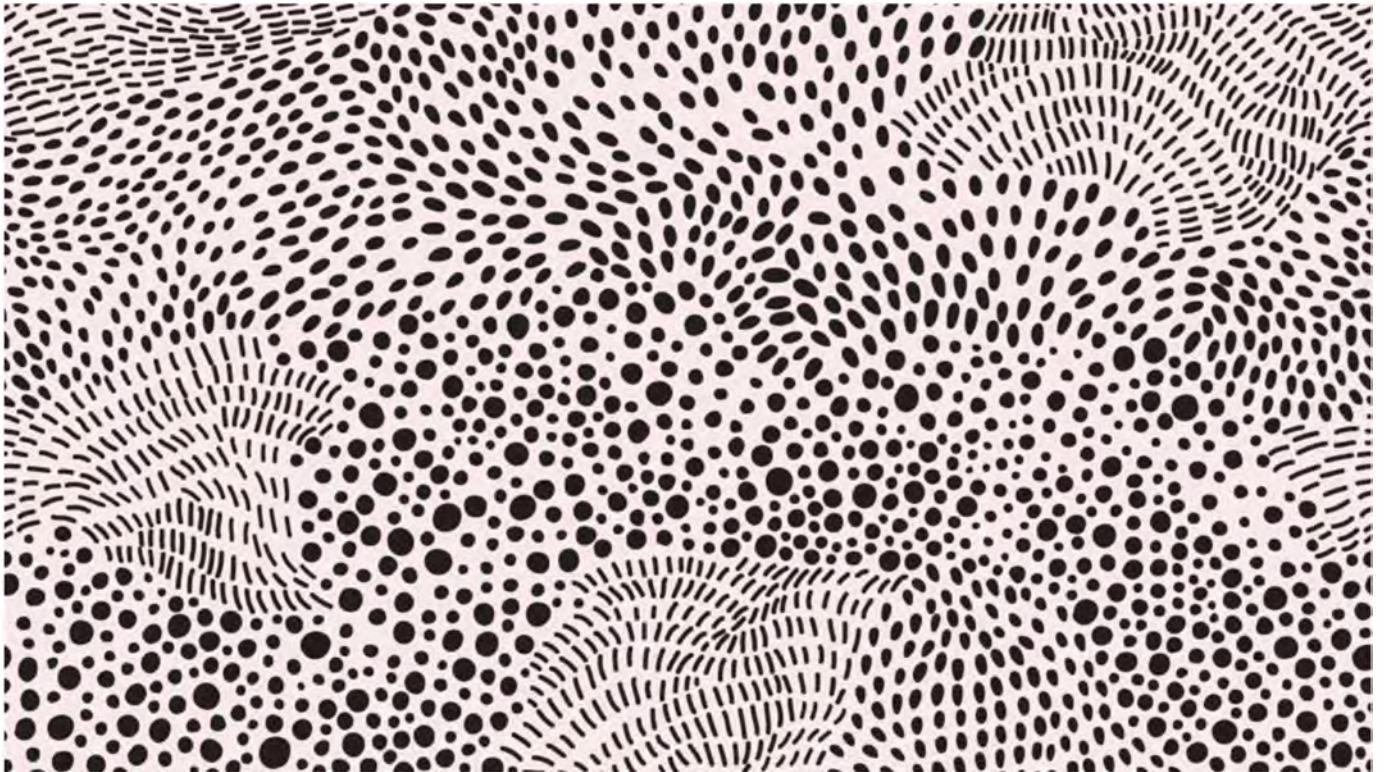
**Harvard
Business
Review**

CHANGE MANAGEMENT

All Management Is Change Management

by Robert H. Schaffer

OCTOBER 26, 2017



MARIA GALYBINA/ISTOCK

Change management is having its moment. There's no shortage of articles, books, and talks on the subject. But many of these indicate that change management is some occult subspecialty of management, something that's distinct from "managing" itself. This is curious given that, when you think about it, all management is the management of change.

If sales need to be increased, that's change management. If a merger needs to be implemented, that's change management. If a new personnel policy needs to be carried out, that's change management. If the erosion of a market requires a new business model, that's change management. Costs reduced? Productivity improved? New products developed? Change management.

The job of management always involves defining what changes need to be made and seeing that those changes take place. Even when the overall aim is stability, often there are still change goals: to reduce variability, cut costs, reduce the time required, or reduce turnover, for example. Once every job in a company is defined in terms of the changes to be made (both large and small), constant improvement can become the routine. Each innovation brings lessons that inform ongoing operations. The organization becomes a perpetual motion machine. Change never occurs as some sort of happening; it is part of everyday life.

Today's change management movement has arisen in response to the difficulty companies have had in making constant, rapid improvement a routine aspect of work. Efforts to overcome this have led to the bifurcation of organizational life into ordinary times and change management times. As an increasing number of people take on the role and mindset of the change management professional, instead of striving to make innovation and improvement routine, they naturally encourage the treatment of change as something

special. Managers start to view change as an extraordinary event that must be dealt with using change management techniques and special skills. And then it's easy for people to become resistant to change.

What needs to change is that thinking. Leaders should view change not as an occasional disruptor but as the very essence of the management job. Setting tough goals, establishing processes to reach them, carrying out those processes and carefully learning from them – these steps should characterize the unending daily life of the organization at every level. More companies need to describe their work in terms of where they are trying to go in the next month or next quarter or next year.

How do you transition into such a company? The simple answer is to skip the months spent creating a comprehensive plan to make the company more change-oriented. Instead, focus on some important goals that are not being accomplished. Have teams carve out some sub-goals they will aim to achieve in a few months. They should be asked to test innovative steps they think will make a difference and to learn from the process. Maintaining a short time frame for these experiments permits the rapid testing of many modest innovations. Of course, these are steps to advance major strategic goals, but the emphasis should be on executing specific changes – with each success followed by a new round of more-ambitious goals to tackle.

For example, Gary Kaplan, president of XL Catlin's North American Construction insurance, got his division started by formulating some major strategic goals. Then he launched a series of short-term "results-seeking projects," each focused on achieving some aspect of those strategic goals. The projects aimed to have people experiment with innovation. As they tested ideas and learned from them, they incorporated new ways of working into the fabric of the organization.

Each year they carry out about 50 such results-seeking projects. Of those recently completed, one won \$8 million of new business in a particular region of the country and another focused on reducing costs by redesigning a process to shift major tasks to lower-level, less-costly staff. Kaplan's project-centric strategy allowed the company to bring in \$1 billion of premium revenue five years after the launch of the division, and then another billion dollars in the next 18 months.

A critical part of this evolution is holding managers accountable for continuing improvements. As Kaplan told me, by making the operating managers responsible, they develop their capacity to lead continual change while their people develop the capacity to implement it. Specialist experts can be used for support, but actual management of the changes must remain in the hands of the managers. Because, as Kaplan so neatly demonstrates, change management is management, and management is change management.

The Fundamentals of Leadership Still Haven't Changed

by Ron Ashkenas and Brook Manville

NOVEMBER 07, 2018

GARY S. CHAPMAN/GETTY IMAGES

Recently the Chief HR Officer for a healthcare firm asked us to identify the best new framework for leadership that she could use to train and develop a cadre of high potentials. The challenge, she said, was that these managers were highly proficient in their own disciplines such as finance, marketing, research, clinical care, and insurance reimbursement – and had demonstrated that they could manage people in these areas – but she needed them to be “bigger” leaders. What, she asked us, did the newest thinking about leadership development say they needed to learn to lead multiple functions, or influence whole segments of the organization, particularly in the rapidly changing world of healthcare?

Explicit in our HR officer's question was her assumption that the *newest* thinking on leadership development must contain something essential. After all, there are hundreds of books written about leadership every year, adding to the thousands of titles already available on Amazon. There also are new assessment tools based on advancements in brain science, emotional intelligence, and relational modeling; new computer aided algorithms

for decision-making; virtual reality simulations; and a host of new experiential programs, online courses, and university certifications. With such a flurry of developments, there must be some useful new ways to think about leadership.

The reality, however, is somewhat different. Yes, the leadership development industry is thriving, and yes there are a lot of new and interesting ideas, some of which may prove to be helpful. But despite many changes in our context — as organizations have become more democratic and networked, for example — in its fundamentals leadership has not changed over the years. It is still about mobilizing people in an organization around common goals to achieve impact, at scale.

This tried and true perspective on leadership was reinforced for us during the past year as we researched and wrote the *HBR Leader's Handbook*. We interviewed over forty successful leaders from a variety of organizations (corporate, non-profit, startup), across different industries. We then reviewed several decades worth of articles from the Harvard Business Review to understand the recurring messages from academics and practitioners about what leaders should do. Our conclusion from this research, and from our own years of experience as leadership and organizational advisors, was that the best leaders with the most outsize impact almost always deploy these six classic, fundamental practices:

1. uniting people around an exciting, aspirational vision;
2. building a strategy for achieving the vision by making choices about what to do and what not to do;
3. attracting and developing the best possible talent to implement the strategy;
4. relentlessly focusing on results in the context of the strategy;
5. creating ongoing innovation that will help reinvent the vision and strategy; and
6. “leading yourself”: knowing and growing yourself so that you can most effectively lead others and carry out these practices.

Sure, sometimes the starting point is different, or one of the six areas requires more heavy lifting than another, or the sequence of activities varies. And yes, leaders go about these practices in different ways depending on their personalities and their situations. But the same handful of practices are always present.

For example, when Seraina Macia (one of the leaders we interviewed) joined XL Insurance in 2010 to head their North American Property and Casualty unit, it was a stable, but slow-growth business. As she learned about the numbers, the organization, and the markets, Macia envisioned that the unit could be transformed into a much faster-growing and more profitable company with a wider range of product offerings. Bringing her team together around this vision, and sharpening it with their help, which is the first fundamental practice, became the focus of her early days with XL.

To translate that vision into action, Macia then challenged her team to triple the level of premiums, without sacrificing underwriting quality, in three years – and asked each of them to quickly develop a strategy for how to make that happen in their product areas, and how to best use underwriting and the other support functions to do it. She then worked with each manager to help them craft these strategies, making choices about how to deploy resources, where to focus, and how fast to proceed. This is the essence of the second core practice that we heard about in our research.

When some of Macia's team members struggled to come up with thoughtful strategies, or couldn't move quickly into action, she gave them tough feedback, pushed them beyond their comfort zones, gave them developmental help as needed, and in some cases replaced them or moved them to other positions. These actions were all in the service of building the best team to implement the strategy, which is practice number three.

This stronger team was then able to respond to Macia's unrelenting drive for results by quickly testing new ideas, engaging local brokers, expanding target markets, and a host of other specific action-steps, all of which were aimed at focusing on results, which is the

fourth practice. As results came in, Macia encouraged the team, to reassess their plans, learn from their experiences, innovate, and continually improve, which exemplifies the fifth practice, innovation. For instance, some of the teams experimented with sending underwriters out to the field to work with brokers so that they would send them business that was more likely to be underwritten by XL, a complete departure from past practices, and one that turned out to be key to the unit's success.

While taking these actions, Macia also was learning about her own leadership, what worked and what she needed to do differently. Gradually she learned how best to allocate her time, how to build support from other parts of the company, what metrics were most useful, and how to make faster decisions about people, all of which is part of the leading yourself practice.

Most importantly, by putting all six of these practices together, Macia succeeded in doubling the level of profitable premiums in two years and (after she left for another job) seeing her successor reach the original goal of tripling the business the year after.

To move their organizations to the next level, all of the leaders we talked with deployed these practices — practices that are supported by numerous studies and articles, many of them far from new. And even though these leaders were operating in different industries, geographies, and with new technologies and structures, they were still dealing with people who needed to work together to achieve a common goal, which is what leadership has always been about. So when it's time to think about developing bigger leaders—as our HR executive wanted to do—we believe the secret is not to look for a new framework, but rather to help leaders master the tried and true practices that already exist.



Ron Ashkenas is a coauthor of the *Harvard Business Review Leader's Handbook* and a Partner Emeritus at Schaffer Consulting. His previous books include *The Boundaryless Organization*, *The GE Work-Out*, and *Simply Effective*.



Brook Manville is a coauthor of the *Harvard Business Review Leader's Handbook* and Principal of Brook Manville LLC, a consultancy in strategy, organization and leadership development. His previous Harvard Business Review Press books are *Judgment Calls* and *A Company of Citizens*. He also blogs about leadership at Forbes.com.

Resources

General Resources

RESOURCE	DESCRIPTION
How to Set a Goal in Rotary Club Central https://my.rotary.org/en/document/how-set-goal-rotary-club-central	A step-by-step visual guide to selecting and setting a goal in the Rotary Club Central tool for club officers
How to Report Progress on Goals in Rotary Club Central https://my.rotary.org/en/document/how-report-progress-goals-rotary-club-central	A step-by-step visual guide to updating goals with progress and achievements in the Rotary Club Central Tool for club officers
How to Record Service Activities in Rotary Club Central https://my.rotary.org/en/document/how-record-service-activities-rotary-club-central	A step-by-step visual guide to adding details about service projects and activities in the Rotary Club Central tool for club officers
How to View Information in Rotary Club Central https://my.rotary.org/en/document/how-view-information-rotary-club-central	A step-by-step visual guide to using features within the Rotary Club Central tool and viewing data at various levels for Rotarians

Membership Resources

RESOURCE	DESCRIPTION

Rotary Club Health Check (PDF)

<https://my.rotary.org/en/document/rotary-club-health-check>

Evaluate the health of your club and identify strengths and opportunities for improvement.

Membership Assessment Tools (PDF)

<https://my.rotary.org/en/document/membership-assessment-tools>

Understand the similarities between your club and community to recruit and retain members.

Strengthening Your Membership: Creating Your Membership Development Plan (PDF)

<https://my.rotary.org/en/document/strengthening-your-membership-creating-your-membership-development-plan>

Develop a plan to recruit, engage, and retain members.

Connect to Membership Leads (PDF)

<https://my.rotary.org/en/document/connect-membership-leads>

Manage membership leads for your club or district.

Club Flexibility

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

Understand how the most recent Council on Legislation flexibility measures can help your club thrive.

Young Leaders Resources

RESOURCE

DESCRIPTION

Youth Exchange

<https://my.rotary.org/en/take-action/empower-leaders/start-exchange>

Learn more about Youth Exchange and how to get your club involved.

Rotaract and Interact

<https://my.rotary.org/en/exchange-ideas/club-connections>

Understand how your club can get involved with Rotaract and Interact.

Empower Leaders Find new ways to engage young leaders in your community.
<https://my.rotary.org/en/take-action/empower-leaders>

Organize a RYLA event Learn more about what goes into organizing a Rotary Youth Leadership Awards program.
<https://my.rotary.org/en/take-action/empower-leaders/organize-ryla-event>

Service Resources

RESOURCE	DESCRIPTION
Lifecycle of a Project https://my.rotary.org/en/take-action/develop-projects/lifecycle-project	Learn about the steps that make a project successful and the tools available to help you do it.
Engage Members https://www.rotary.org/en/get-involved/rotary-clubs	Understand Rotary's history of service and various opportunities for your club to engage.
District and Global Grants https://www.rotary.org/en/our-programs/grants	Learn about the different kinds of grants that The Rotary Foundation offers and how to apply.
Rotary's Areas of Focus (PDF) https://my.rotary.org/en/document/rotarys-areas-focus	Learn about the different kinds of grants that The Rotary Foundation offers and how to apply.
Community Assessment Tools (PDF) https://my.rotary.org/en/document/community-assessment-tools	Evaluate your community's needs so your club can plan effective, meaningful projects.

Foundation Giving Resources

RESOURCE	DESCRIPTION
End Polio Now http://www.endpolio.org/	Learn more about Rotary's fight to eradicate polio worldwide.
The Rotary Foundation Reference Guide (PDF) https://my.rotary.org/en/document/rotary-foundation-reference-guide	Learn more about the Foundation's history and its efforts to improve the world.
Rotary Foundation Facts (PDF) https://my.rotary.org/en/document/rotary-foundation-facts	Get a snapshot of the Foundation's impact in 2016.
Paul Harris Society (PDF) https://my.rotary.org/en/document/paul-harris-society-brochure	Learn more about the Paul Harris Society and how to encourage giving.

Public Image Resources

RESOURCE	DESCRIPTION
Brand Center https://brandcenter.rotary.org/	The Brand Center has the digital resources clubs need to create communications that are effective and consistent with Rotary's image. Here you can find the Rotary club brochure template, press release designs, and other resources.
Voice and Visual Guidelines https://my.rotary.org/en/document/tell-your-story-voice-and-visual-identity-guidelines-rotarians	Refer to this tool for guidance on the Rotary voice, club logos, and color palettes and font styles for club communications.
Messaging Guide https://my.rotary.org/en/document/tell-your-story-messaging-guidelines	This document provides simple advice for telling Rotary's story in a clear, compelling, and consistent way.
Rotary Videos http://video.rotary.org	Use these videos to educate your community about Rotary's impact.

Rotary Citation Resources

RESOURCE	DESCRIPTION
Rotary Citation Webpage https://my.rotary.org/en/news-media/office-president/presidential-citation	Learn more about the Rotary Citation and download a copy of the brochure.
Rotary Citation Achievement Guide https://my.rotary.org/en/news-media/office-president/guide-earning-presidential-citation-your-rotary-club	Tips and tricks for mastering the Rotary Citation.
Reports: Rotary Citation Dashboard https://my.rotary.org/en/manage/club-district-administration/reports	Navigate to the Awards section of the reports page to check club progress toward the Rotary Citation.



