COMMUNITY ASSESSMENT TOOLS

A resource for Rotary projects

Rotary

Contents

Introduction

Assessing your community's strengths, weaknesses, needs, and assets is an essential first step in planning an effective project. By taking the time to learn about your community, you can discover the best opportunities for service and maximize your club's ability to make an impact.

An assessment not only helps you better understand the dynamics of your community but also allows you and your project's beneficiaries to make informed decisions about service priorities. Even if you're actively involved in your community, an assessment can reveal additional strengths and opportunities for growth. Perhaps you'll find a new way to address a known issue, or give residents a chance to point out overlooked challenges. Before you start an assessment, consider what you want to learn about your community. An effective assessment will reveal things you did not know before.

Assessments are the foundation of every humanitarian project, small or large, because they provide a framework for identifying solutions to a community's problems. They also build valuable relationships and encourage residents to help make lasting local improvements. Developing trust in communities can take time — months, even years. Conducting an assessment is critical to creating that trust, and to fostering community ownership and sustainability.

Conversations with just one or two people aren't enough to reveal a community's needs. Assessments should be systematic, involve a variety of local stakeholders and beneficiaries, and engage them in a meaningful way.

While conducting an assessment, also be sure to manage expectations. Communities should understand the benefits of partnering with Rotary and how that partnership requires their involvement, contribution, and ownership.

NOT SURE WHERE TO START?
One way to ensure community ownership is to encourage local volunteers to form a Rotary Community Corps. An RCC is a team of men and women who aren't Rotarians but who work in partnership with Rotary clubs to improve their communities. Sponsoring an RCC is a great way to welcome community members as true partners in service. Learn more at **my.rotary.org/rcc**.

Types of assessments

You can combine or adapt the following six assessments to best suit your club's resources and the preferences of community members:

‣ Community meeting
‣ Asset inventory
‣ Survey
‣ Interview
‣ Focus group
‣ Community mapping

As you determine your approach, consider any available data about the community. Has the local, regional, or national government recently published credible findings that could inform your strategy? Have other organizations or institutions researched the community? Do you notice any gaps in official statistical data that need to be addressed through formal preliminary research? To answer these questions, consider partnering with local experts in your club or district.

TIPS FOR CONDUCTING ANY ASSESSMENT

☐ **Remain open minded.** Do not underestimate the community. Don't presume you know what it needs or what challenges it faces.

☐ **Choose participants carefully.** Consider the makeup of the community and ensure you include a diverse cross-section of relevant groups (e.g., gender, age, ethnicity, religion, income level, vocation).

☐ **Include overlooked or marginalized groups.** Women, young people, the elderly, and religious and ethnic minorities are often overlooked. Keep the community's social dynamics in mind, and provide a forum in which all groups feel comfortable sharing their views.

☐ **Consider yourself an outsider.** Even if you live in the community you want to work with, find a well-connected individual, group, or organization that can introduce you to local stakeholders.

☐ **Avoid promising a project before your club makes a formal decision.** But do assure participants that you'll let them know what your club decides. Invite them to take part in any future activities.

☐ **Empower stakeholders.** Speak with them, not at them, and encourage them to help inform decisions. Ensure stakeholders are an active part of any local initiative.

ARE YOU APPLYING FOR A GLOBAL GRANT? IF SO, YOUR COMMUNITY ASSESSMENT MUST:

☐ Include at least two involved stakeholder groups that represent the community fairly

☐ Use a formal methodology

☐ Assess more than infrastructure

☐ Describe the current situation in the community, including assets and needs

☐ Explain the connection between the project and community assessment

The **Global Grants Community Assessment Results** form may be included with your application. Find tips for strengthening your project in **A Guide to Global Grants**.

To develop a strong project from the start, ask your **district international service chair** to connect you with regional experts who have experience in project planning (from community assessments to measurements and evaluations), along with technical expertise in Rotary's six areas of focus and Rotary grants. International service chairs can introduce you to Rotarians, Rotary alumni, community members, and professionals from other organizations who are eager to support club projects or grants. They are also outstanding resources for finding international partners, as well as publications and online tools that could help improve your project.

COMMUNITY ASSESSMENTS IN ACTION

"When you go into a developing community, the people there will take whatever help you want to bring. They're not going to say no to a project. But that doesn't mean that my idea of their greatest need is the same as theirs." — Mike Wittry, President, Rotary Club of Roatan, Islas de la Bahía, Honduras

After completing playground projects in Belize, District 5370 — which includes Edmonton, Alberta, Canada — decided to expand its efforts to Honduras. The Rotary Club of Roatan helped encourage local communities to apply for one of two playgrounds.

The village of St. Helene, a 45-minute boat ride from Roatan, had poor sanitation, a weak economy, and widespread health issues. It lacked water and electricity, and its school had no books or classroom materials. But the people there wanted a playground, and they had a piece of land to donate.

The Canadian Rotarians spent about two weeks building the playground in St. Helene. The work was just beginning, though: They asked their local Rotary partners to conduct a community assessment that would help them learn about the villagers' priorities.

Mike Wittry, then president of the Roatan club, and his fellow club members started with a community meeting. Although many people attended, the village council did most of the talking. The others — moms and dads, local elders — sat in the back and nodded. Then the club held smaller focus groups that did not involve the community leaders. Some people shared the same concerns as the village council, but they also raised other issues. They were open about their struggles and the lack of opportunity for themselves and their children.

The club also organized a community mapping activity to help understand residents' different perspectives. Participants drew a map of their village and highlighted the places that were most important to them. The school was important to people with children, and the clinic was important to almost everyone. This exercise helped villagers talk about what they had and didn't have, and prioritize their needs. It also shaped future service efforts: Now Rotarians are taking a holistic approach in St. Helene through a series of water and sanitation projects.

Community meeting

A community meeting, sometimes called a town hall or public forum, is either a formal or informal public gathering that brings together local residents to discuss issues, voice concerns, and express preferences for community priorities.

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

Consider appointing a respected community member or a representative from a local organization to facilitate the meeting, particularly if cultural or language barriers are an issue.

Before organizing a meeting, define your objectives and provide training for your facilitator. Knowing what you hope to achieve will help you plan and host a successful meeting.

Advantages of community meetings include:
- Give people of diverse backgrounds a chance to express their views
- Allow participants to build upon one another's responses
- Can involve a fairly large group of people at one time
- Can help identify respected community leaders to involve in a project
- Can help discern the significance of a variety of issues
- Can help explore potential solutions

Challenges with community meetings may include:
- Can be difficult to maintain an open, comfortable, relaxed environment
- Can be difficult to keep the conversation on topic
- May be influenced by social constraints including gender disparities, power dynamics, cultural norms, etc.
- May be dominated by one or two vocal participants to the exclusion of others

TIPS FOR HOSTING A COMMUNITY MEETING

☐ **Identify your goals.** What insight do you hope to gain from this meeting? Are there specific issues in the community that you want to better understand? Design questions that will provoke constructive answers.

☐ **Select an accessible location and convenient time.** Host the discussion at a venue that is easy to find and easy to access. Consider the participants' schedules when determining a time.

☐ **Promote the event throughout the community.** Be mindful of cultural values and norms that may affect responses (for example, in some communities, women may not feel empowered to talk openly and honestly in the presence of men). Factor in the level of literacy in the community and how residents normally receive information (e.g., flyers, radio, announcements at schools or houses of worship).

☐ **Prepare a list of questions.** Keep your questions simple and concise. If you hear new concerns or the same issues being raised by participants, follow up on their responses with more questions.

☐ **Set and follow a schedule.** Decide how much time to spend on each question, factoring in follow-up questions based on issues and ideas identified during the discussion.

☐ **Set and state ground rules.** Share ground rules with participants before the meeting to prevent people from monopolizing the forum, to help engage every member in the discussion, and to keep the conversation on track.

☐ **Take notes.** Write down ideas, making sure everyone can see the notes during the discussion. Enlist one or two other people to help you keep track of the conversation.

☐ **Be an active listener.** Let all participants know that you're engaged and interested in what they have to say. Be considerate of their time.

☐ **Ask participants to elaborate.** Ask follow-up questions if you don't understand their feedback.

☐ **Allow for small group discussions.** Small groups provide more speaking opportunities for attendees. Ask each group to record its notes, and have a designated group member briefly summarize its discussion for the larger audience. To help make people feel comfortable participating, consider creating groups composed entirely of community members who might be less likely to speak out (e.g., a group of all women, young people, people with disabilities, ethnic minorities, etc.).

ADDRESSING CHALLENGES IN COMMUNITY MEETINGS

- If certain participants are dominating the conversation, make a point of asking others for their ideas.
- Watch body language and make adjustments as necessary. Maybe the facilitator needs a break, or you need to stop someone from speaking too much. A quick five-minute break can help refocus the discussion.
- Use encouraging body language and tone of voice, as well as words. For instance, lean forward when people are talking, keep your body position open and approachable, and be attentive to everyone, not just those who are most articulate.
- Pay attention to group dynamics. Be aware of emotional reactions participants may have to others' comments, particularly if they appear to be upset, hurt, angry, or defensive. A trained facilitator should encourage participants to follow ground rules and express themselves without making personal accusations or embarrassing others. If participants seem puzzled or confused, revisit the comments or points that caused the confusion or try to restate them more clearly.
- Keep the meeting on topic. If you need to refocus the discussion, summarize the points that have been made and ask if anyone has additional thoughts about the original question.

FOLLOWING UP AFTER A COMMUNITY MEETING

- Thank participants for attending and sharing their feedback.
- Summarize key findings and outline any action plans moving forward.
- If a project is identified, consider inviting key stakeholders to assist with the initiative.

Asset inventory

An asset inventory identifies the types of resources in a community, including its physical environment, institutions, services, events — and especially its people. To conduct the inventory, participants highlight the individuals, places, and things they find valuable and then document and analyze their findings. The results can help a community explore how its assets are connected and how it can use them to create positive change.

Advantages to using asset inventories include:
- Maximize available resources
- Encourage the creation of broad, inclusive networks to effect change
- Help identify areas of community member interest
- Can be maintained, expanded, and used repeatedly

Challenges with asset inventories may include:
- Data analysis can be time consuming.
- Organizing assets and identifying connections can be difficult.
- Interests, skills, and other nonphysical assets can be easily overlooked.

TIPS FOR CONDUCTING AN ASSET INVENTORY

- ☐ Determine what you want to inventory, and identify potential participants.

- ☐ Invite a small, diverse group of community members to conduct the inventory in one or more sessions.

- ☐ Use strong group facilitators to ensure that all participants have an opportunity to contribute and that each discussion group stays on task and on time.

- ☐ Analyze the results. Organize assets by category and document connections among them.

- ☐ Use available assets to create coalitions and networks to address community issues.

- ☐ Update and maintain the inventory regularly.

SUGGESTED INVENTORY QUESTIONS

▶ What is special about your community?

▶ What products are made in your community?

▶ What events take place in your community?

▶ When and where do people gather, and what do they do together? Include religious, social service, sporting, entertainment, and other types of gatherings.

▶ Who do you know? What skills do they have? What do they own? What knowledge might they share with others?

▶ Is there an enterprising spirit in your community, either in business or civic/cultural activities?

▶ What topics or issues interest a significant number of community members?

▶ What institutions exist in the community, both private and public?

▶ Who are the formal and informal leaders of the community? Who do people listen to?

▶ How does information spread in your community?

▶ What services are provided in your community? Who provides them?

▶ What natural resources are found in your community? Which areas have open space?

▶ What skills or knowledge in your community should be passed down to the next generation?

▶ What businesses exist in your community?

▶ What volunteer activities exist in your community, both formal and informal?

▶ How do community members demonstrate that they care for and trust their neighbors?

▶ What utilities and services are available in the community or institution? What payment or financing systems are in place to pay for goods and services?

▶ Does a governing body help manage services, create and enforce rules, and perform other critical functions?

VARIATIONS

☐ Divide participants into groups by gender, age, or profession to reveal how different groups view the community.

☐ Instead of a broad-based inventory, choose a specific community issue such as education or health and create an inventory of only those assets.

☐ Incorporate a walk or drive around the community to encourage an expansive approach to identifying assets.

Survey

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

Advantages to using surveys include:
- They can be administered remotely.
- They can be repeated.
- They can be completed anonymously, encouraging candid responses.
- They're generally inexpensive to administer.

Challenges with surveys may include:
- Identifying prospective respondents and obtaining their personal contact information can be difficult.
- Emailed surveys are ineffective in places where internet access is limited.
- Phone surveys may be subject to sample or interviewer bias.
- Response rates for remote surveys are generally low compared with in-person assessments.
- Written surveys are ineffective with illiterate populations.
- Written surveys don't allow for follow-up questions.

Types of survey questions

☐ **Multiple choice questions.** Respondents select one or more options from a list. Multiple choice questions work best when you have a fixed number of options.

Example:
What do you feel are the most pressing needs in your community (select two):
- ○ *Health care*
- ○ *Quality of education*
- ○ *Employment opportunities*
- ○ *Public safety*
- ○ *Other (please describe):* _____

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

Example:
Please respond to each statement about your school:

	1 Strongly Disagree	2 Somewhat Disagree	3 Neither Agree or Disagree	4 Somewhat Agree	5 Strongly Agree
The number of teachers is sufficient.					
Our teachers are well-qualified.					
Our school provides a safe environment for our children.					
Our classrooms are well-equipped.					
I am familiar with my child's curriculum.					
I regularly help my child with homework.					
Our school provides nutritious meals.					

☐ **Open-ended questions.** Respondents answer questions in their own words. This format can elicit more nuanced responses, but survey results aren't as easily quantifiable and must be individually analyzed.

Example:
If you could improve one aspect of your community, what would it be and why?

_____

_____

☐ **Demographic questions.** Demographic information (e.g., gender, education, income level) can add context to responses that will reveal trends within a larger population.

Example:
What is your age?
- ○ *18-24*
- ○ *25-34*
- ○ *35-44*
- ○ *45-54*
- ○ *55-64*
- ○ *65+*

TIPS FOR DESIGNING A GOOD SURVEY

☐ **Explain why you're asking the questions.** Participants are more likely to respond if they feel there will be a valuable outcome, such as the possibility of a future project.

☐ **Keep it short and simple.** If your survey is too long, respondents may rush their responses or even drop out of the survey before completing it. Make sure your questions are brief and specific.

☐ **Make sure your questions are unbiased.** Avoid leading questions such as "Would you like to see a new library in the vacant lot instead of a playground?" in favor of more neutral wording: "What would you like to see developed in the vacant lot? a) library b) playground c) other (please describe)."

☐ **Conduct a small pilot of the survey.** Testing your survey can reveal whether your questions are clear and specific.

Interview

Interviews are one-on-one conversations between a facilitator (the interviewer) and a community stakeholder (the respondent). Interviews allow you to gain a deeper understanding of the respondent's ideas and feelings. Unlike surveys, interviews give the facilitator the freedom to veer off script and ask follow-up questions. And unlike group assessments, such as community discussions and focus groups, the respondent has the facilitator's sole attention and is more likely to share personal opinions freely.

Advantages to using interviews include:
- They allow the facilitator to follow the flow of conversation and ask spontaneous questions.
- They encourage the respondent to speak freely and give spontaneous answers.
- They're the most accurate and thorough way to obtain qualitative data from your respondents.
- They're effective with illiterate populations.

Challenges with interviews may include:
- They're time consuming.
- They reach only one respondent at a time.
- Conducting a good interview requires practice and some degree of skill.
- Finding willing respondents for impromptu interviews can be difficult. (It's better to schedule phone interviews in advance.)

TIPS FOR DESIGNING AND CONDUCTING A GOOD INTERVIEW

☐ **Identify your goals.** What insight do you hope to gain from this interview? Are there specific issues in the community you want to better understand? Design questions that will provoke constructive answers.

☐ **Identify your target respondents.** Whose opinions are you interested in understanding? Will you identify specific individuals to invite to appointments, or will you seek out random participants in a public place?

☐ **Prepare your interview questions.** Keep your questions as simple and concise as possible. If you have complex questions, ask them toward the end of the interview. If you have sensitive questions, be sure to conduct your interview in a private place. Keep your choice of words at a basic level.

☐ **Practice.** Conduct some mock interviews with your colleagues and solicit their feedback.

☐ **Establish rapport.** Make your respondent feel comfortable before you start asking questions.

☐ **Conduct your interview like a real conversation.** It's best to have your questions committed to memory so you can ask them naturally, changing the order and adding impromptu follow-up questions as needed.

☐ **Take accurate notes.** If you're recording audio of your conversation, get the respondent's consent beforehand.

☐ **Be an active listener.** Show your respondent that you're engaged and interested. Be considerate of the person's time. After all, this may be the first conversation in a long and productive service partnership.

☐ **Ask respondents to elaborate.** Simple yes/no answers won't yield much useful information. Probe further with follow-up questions and ask respondents to clarify if you don't understand. You may want to prepare specific prompts for drawing out additional information. For example:
Question: *How easy is it to get health care in your community?*
Prompts:
  ○ *Is it easy to get to a hospital in your community? Is it easy to get medical treatment at the hospital?*
  ○ *Do you visit the hospital for check-ups, or only for emergencies?*
  ○ *In your experience, is medical care affordable? Do you need to have insurance?*
  ○ *What happens to uninsured people? Where do they go?*
  ○ *Have you or anyone you know gone without medical treatment due to the cost?*

☐ **Offer to follow up with respondents.** Ask your respondents if they'd like to be contacted about future assessments or community improvement activities. Be sure to follow through on these commitments.

Focus group

A focus group is a carefully guided discussion used to determine a target group's opinions on a particular idea. It can help you determine how the stakeholders believe community issues should be addressed.

Conducting a focus group requires careful planning and a skilled discussion facilitator. Most focus groups consist of six to 12 diverse stakeholders. Participants are asked a series of carefully worded, open-ended questions on different issues in the community. This approach promotes self-disclosure.

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

Although you will need to hear from a diverse group of participants, keep cultural beliefs and community structures in mind. In some communities, women may not feel comfortable expressing their opinions in front of male facilitators or other men. Similarly, young people may not feel comfortable expressing their opinions in front of adults. You may need to host a number of focus groups with different participants based on occupation, age, gender, family structure, or other factors.

Advantages to using focus groups include:
- They're quick and easy to set up.
- Group dynamics can provide useful information that individual data collection doesn't.
- They're useful for gaining insight into a topic that's not easily quantifiable.
- They're effective with illiterate populations.

Challenges with focus groups may include:
- Facilitators are susceptible to bias.
- Discussions can be dominated or sidetracked by a few individuals.
- Analyzing data can be time consuming.
- They provide information about the group, not individual participants. The participants may not represent the whole community, so additional focus groups may be necessary.

PREPARING QUESTIONS

Develop a list of concepts you wish to discuss. These could include issues your club thinks might exist in the community, ideas for projects, or people's perceptions of community resources. Make sure your questions will help guide the discussion and encourage participants to share their ideas. Here are some common types of focus group questions:

- ▸ **Opening questions** get participants talking and feeling comfortable. They should be easy to answer.
  - ○ *How long have you worked at the school?*
  - ○ *What do you teach/which position do you hold?*

- ▸ **Introductory questions** get the group thinking about the topic and focus the conversation.
  - ○ *If you could change three things at the school, what would you change and why?*

- ▸ **Transition questions** prepare participants for the in-depth conversation.
  - ○ *Why do you think 50 percent of girls stop attending the school after their second year?*

- ▸ **Key questions** focus on major areas of concern and guide the majority of the discussion.
  - ○ *What resources and training does the school need to encourage girls to return after their second year?*
  - ○ *What resources and training do families need to send their daughters back to school after their second year?*

- ▸ **Closing questions** wrap up the discussion and allow participants to voice any final thoughts.
  - ○ *Do you know any parents who would be interested in sharing why they didn't send their daughters to school after the second year?*
  - ○ *Do you know any parents who want their daughter to return to school but are unable to send her?*

TIPS FOR CONDUCTING A FOCUS GROUP

☐ Select a location that's convenient, private, and comfortable for a small group discussion, and choose a time when participants can attend.

☐ If your facilitator is a community member, provide training beforehand.

☐ Arrange for another facilitator to record the focus group session or take notes on the group's responses, making sure participants can see them. Periodically ask the group if the notes are accurate.

☐ Invite Rotary Community Corps members to participate in focus group activities.

☐ Invite six to 12 participants, an ideal size for a focus group. Make sure they're representative of the community and are willing to provide feedback.

☐ Explain the purpose of the focus group, and state your goals openly. Establish simple ground rules to promote positive interaction and confidence in the process.

☐ Introduce the main topic, and guide the discussion using your prepared questions. Establish a schedule beforehand, such as 10-15 minutes per question.

☐ Allow each person time to answer. Listen carefully to the ideas expressed and ask for clarification if needed, but avoid confrontations or debates.

☐ Allow participants to respond to comments. Make sure the discussion and comments stay on topic.

FOLLOWING UP WITH PARTICIPANTS

After completing the focus group, thank participants for their time and input. Consider how you'll follow up with them and maintain relationships. Share your conclusions with participants and, if appropriate, invite them to be involved in the project.

VARIATIONS

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

☐ Separate groups according to subgroup characteristics, such as gender, age, education or literacy, disability, ethnicity, etc.

Community mapping

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

In this facilitated activity, individuals or groups draw a map of their community, marking certain points of importance and noting how often they visit these places. A facilitator leads a discussion about the maps, while another facilitator records the discussion. A successful community mapping exercise will get participants to:
- Identify how they use community resources and any barriers to accessing them
- Compare perceptions of the importance of various community resources
- Generate ideas for community improvement

Advantages of community mapping include:
- It's a lively and engaging activity.
- It encourages participants to discuss how they might improve their community.
- It can be broken up into multiple sessions with different community stakeholder groups.

Challenges with community mapping may include:
- Analyzing results can be a difficult process, because the information is gathered in a visual format.
- Drawing conclusions from the maps and determining next steps may require additional assessment activities.

TIPS FOR COMMUNITY MAPPING

☐ Keep groups small — ideally no more than 20 participants, divided into subgroups of four to six.

☐ Help each subgroup draw a map based on its own perceptions of the community. The variety of maps will yield a wealth of information.

☐ In the large group, discuss all the maps:
- ○ What are the differences between the maps?
- ○ Why might the differences be important?
- ○ What are the similarities between the maps?
- ○ What important aspects of the community are implied by the similarities?
- ○ What are some suggested additions to the community? How would these places improve the community?
- ○ Do the maps indicate any specific activities or projects that might improve the community?

☐ Ask participants to volunteer to join a committee to further analyze the maps and identify next steps.

WHAT TO MAP

▸ Places of residence

▸ Places of importance to participants, such as markets, religious centers, schools, community centers, parks, businesses, fields, water sources, government offices, health clinics, police stations, and recreational areas

▸ Places used for defecation, especially in relation to institutions, areas where people congregate, and water sources

▸ Places where participants spend the most time, using different colors to indicate daily, weekly, monthly, or yearly visits

▸ Places where they enjoy and don't enjoy spending time, indicated by different colors

▸ Places they'd like to add to the community, indicated by sticky notes or small squares of paper

VARIATIONS

☐ Separate participants into small groups by gender, age, ethnicity, profession, etc., to encourage diversity among the maps.

☐ Have groups tour the community before drawing their maps.

☐ Ask participants to identify a central place in the community to help orient everyone's maps.

Peace and conflict prevention/ resolution
- Victims of violence, refugees, or internally displaced people
- Perpetrators of violence
- Factions that are at odds with each other
- Civil society organizations
- Schools and educational institutions
- Local government and law enforcement authorities

When you're assessing sensitive populations such as trauma victims or communities in conflict, it is crucial that you work directly with individuals or organizations that understand the dynamics of the situation. These collaborations will ensure that the assessments are conducted appropriately, with the best possible outcome.

Water and sanitation
- Community leaders, particularly women
- Ministries of water, sanitation, or environment
- Ministries of education, along with students, teachers, headmasters, and parent associates (WASH in Schools)
- Ministries of health (WASH in health care facilities)
- District/local government representatives
- Private utility companies
- Service providers (hand pump mechanics, community outreach workers, etc.)

- Farmers (irrigation)
- WASH advocacy associations
- WASH organizations working in the area

Basic education and literacy
- Teachers
- Parents
- Students
- Youth who do not attend school
- School administrators
- School management committees
- Ministries of education
- Adult education institutes
- Vocational training institutes
- Community and technical colleges
- Libraries and librarians

Disease prevention and treatment & maternal and child health
- Individual health care recipients:
    - Pregnant women
    - At-risk children
    - Adults at risk for noncommunicable and communicable diseases
    - At-risk aging population
- Community health centers and hospitals
- Mobile outreach systems
- Community health care workers
- Skilled birth attendants
- Health care professionals (nurses, doctors, midwives, technicians, specialists, etc.)

- Access and continuum of care structures:
    - Prevention, primary care, and referral systems
    - Transportation providers
    - Hospitals
    - Follow-up and rehabilitation services
    - Chronic care support and palliative/hospice care systems

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

CLUB MEMBERSHIP COMMITTEE CHECKLIST

The role of the club membership committee is to write and follow an action plan to attract and engage members. An effective committee should be composed of five to 15 motivated members to guide the implementation of your membership plan. The committee's composition should allow for continuity from one year to the next and should represent the full diversity of your club's membership and your community.

1. **Identify:**
   ☐ Complete the member diversity and classification assessments, found in Membership Assessment Tools, yearly. Identify individuals in the community who fill gaps in the club's membership or exhibit interest in Rotary's ideals.
   ☐ Ask all members to complete the Identifying Prospective Members Worksheet at least yearly.
   ☐ Regularly go to the Club Administration area of My Rotary to manage the member leads assigned to your club.
   ☐ Meet at least monthly to review prospective members and their status in the membership process.
   ☐ Ask current members who are assigned to each prospective member to move them to the next step of the membership process.

2. **Introduce:**
   ☐ Select the most appropriate club members to engage prospective members. Keeping each prospective member's particular interests in mind, explain how your club can help them pursue their passions.
   ☐ Periodically hold events for prospective members to introduce them to Rotary, your club, and our core values.
   ☐ Invite the people you identified as prospective members to attend a service project or meeting.
   ☐ Tell qualified prospective members about your club, what to expect at meetings, and the networking, social, and service opportunities your club offers.

3. **Invite:**
   ☐ Designate the appropriate club member to invite each prospective member to join.
   ☐ Hold a meaningful ceremony to induct new members. Include their families and involve the entire club.
   ☐ Give new members a welcome kit that includes club and Rotary resources that they will find useful.
   ☐ Celebrate the addition of new members to your club. Announce it on your club's website, social media pages, and newsletter.

4. **Engage:**
   ☐ Welcome new members both through an orientation program and by involving them in the club.
   ☐ Assign a mentor to each new member to share professional expertise, community knowledge, and Rotary information.
   ☐ Engage each club member in a service project or club committee.
   ☐ Check in with all current members using the Member Satisfaction Survey at least yearly.

GUIDE TO SATELLITE CLUBS
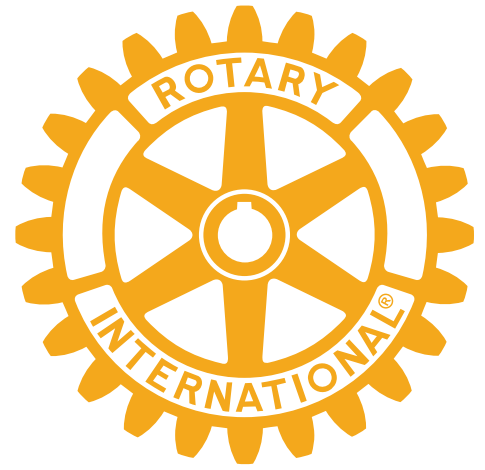
Do you want to start a Rotary club but don't have enough members? Are you in a Rotary club that isn't meeting your or your members' expectations? Are there members who love your club but can't keep attending when it meets? Would you like to start a new club with a small, energetic group committed to community service? If you answered yes to any of these questions, starting a satellite club might help.

WHAT IS A SATELLITE CLUB AND HOW DOES IT WORK?

Rotary has had satellite clubs since 2013. At first, satellite clubs were for people who wanted to join Rotary but didn't have a large enough group to start a club. Unlike regular Rotary clubs, which require 20 members to start, a satellite club can form with just eight members. Satellite clubs also give community members and Rotarians the chance to make a positive difference in a club environment that often differs from their local Rotary club.

Like all Rotary clubs, satellite clubs hold regular meetings, have bylaws and a board, and get involved in community service projects. A local Rotary club sponsors the club and provides advice and support. Satellite club members are Rotarians. Officially, they are members of the sponsor club.

When a satellite club grows to 20 members or more, it can choose to remain a satellite to its sponsor club or it can apply for a charter to become a standalone Rotary club. Some clubs prefer to continue as satellite clubs regardless of their size and enjoy the benefits of being tied to their sponsor club. You decide what's right for your members.

SATELLITE CLUBS ARE NOT:

- A substandard form of a Rotary club. (Satellite club members are Rotarians.)
- A separate club. (Satellite clubs must have a sponsor Rotary club.)
- A Rotaract club. (Rotaract members, however, can form or join a satellite club.)
- A solution for a struggling club. (Ask your district governor if you need help.)

WHY START A SATELLITE CLUB?

Just like starting any Rotary club, forming a satellite club brings community and business leaders together to exchange ideas and take action to improve people's lives. Satellite clubs can also:

- Attract members who have different vocations or service interests
- Be a more affordable club experience. All members pay the same amount of dues to Rotary International, but clubs can choose to lower club dues. Districts also set their own dues.
- Provide an alternative meeting experience or format where members can experiment with different forms of club organization

- Allow Rotary clubs to offer service opportunities and membership experiences that appeal to a smaller, focused group
- Bring Rotary to communities that might not be able to support a standalone club
- Serve as transitional Rotary clubs

Starting a satellite club offers the additional benefits of expanding project possibilities, visibility, and the impact of Rotary in your community. It also develops more leaders in your community and the Rotary district.

HOW DO YOU START A SATELLITE CLUB?

Starting a satellite club begins at the club level, but the process can vary depending on the club and its circumstances. Unlike starting a standalone Rotary club, the process does not require approval from the district governor. Use the steps below as a guide, but remember that your process may differ.

① **PREPARE.** Review the **frequently asked questions** about satellite clubs before you proceed.

② **FIND A SPONSOR CLUB.** Ask a Rotary club to sponsor your satellite club. Talk to the club's leaders and get their support. Inform other clubs in your area and your district about the new club so they can offer help and send interested members your way.

③ **FIND MEMBERS.** You'll need at least eight members to start. Good prospects can come from groups in the community who are underrepresented in nearby Rotary clubs, retired people, young professionals, community interest organizations, Rotary program **alumni**, former and current members, and friends and family.

Your satellite club can be a new group with a different variety of vocations and interests. Rotarians who are disenchanted in their current club might also want an opportunity to bring their skills and knowledge to a new satellite club.

④ **GET ORGANIZED.** Meet with the sponsor club to decide:
- How the new club will make a difference in the community
- How the satellite club experience will differ from that of the sponsor club
- Whether the goal is for the satellite club to eventually become its own club
- How club and district dues will be structured and whether the district will subsidize initial membership fees or offer other financial support
- Where and how the satellite club will recruit members
- What membership types the satellite club will offer
- Membership criteria
- How both boards will work together
- How disagreements or disputes will be resolved

Having an experienced member who is knowledgeable about Rotary and committed to supporting the formation of the satellite club will help the new club succeed.

These steps may not always take place in this order. You may discover that finding members first and then approaching your sponsor club as a group works better for you.

WHAT'S NEXT

① HOLD AN INFORMATIONAL MEETING. Invite prospective members to a meeting to explain what your club has to offer and how members will benefit from being involved in Rotary. Avoid discussing Rotary's structure or using jargon. Here are some topics you might discuss:

- What attendees want from their club experience
- Their role in crafting the new club
- Rotary's mission and commitment to service
- The causes or types of projects attendees are passionate about
- How Rotary can fit into and enhance their lives
- Where, when, and how often the club will meet
- Membership requirements
- Club dues and any other financial or time commitments
- The next steps, such as completing the Satellite Club Member Information Form

Use Rotary resources to inspire participants:

- **Impact Begins With You** — Distribute this **prospective member brochure** to people at the meeting. It explains what Rotary is and how it's different from other organizations.
- **Connect for Good** (**purchase** or **download**) — Either hand out this short publication or provide the link to the download. It explains how prospective members can get involved.
- **Discover Rotary** — Show this **PowerPoint presentation** at your meeting to highlight the value club membership offers.
- **Power in Our Connections** — Share this video, found on the **Brand Center**, that shows the impact that people of action can have.

② SET YOUR SATELLITE CLUB BYLAWS. The satellite club determines its own bylaws in collaboration with its sponsor club, which approves them. Make sure your bylaws address who participates in elections.

③ SUBMIT THE FORMS. When your prospective members and your sponsor club are ready, complete the **Satellite Club Application** and **Satellite Club Member Information Form** and send them to your Club and District Support representative.

④ CELEBRATE AND PUBLICIZE YOUR NEW CLUB. Tell other clubs in your area and your district governor about your satellite club. Promote it in your community.

When your eight prospective members and your sponsor club are ready, you can elect your officers: chair (instead of a president), vice chair if it's helpful, secretary, and treasurer.

Create a My Rotary account to access information and resources:

- **Learning Center courses**
- **Sponsor Clubs**
- **Informational Meetings**
- **Club Meetings**
- **Online Club Meetings**
- **Brand Center**

YOUR SPONSOR CLUB RELATIONSHIP

Satellite clubs that are successful have regular meetings with their sponsor clubs. Developing this connection helps both clubs work together to offer members unique experiences and service projects. You can hold these meetings online using apps that make remote gatherings convenient.

The regular meetings should include discussions about whether or when the satellite club intends to become a separate club and how this would affect both clubs. If a satellite club has enough members and chooses to become independent, the members who charter the new club will no longer be counted as members of the sponsor club.

Other best practices include:
- Having a member of the sponsor club attend satellite club meetings for the first year
- Creating a committee in the sponsor club that focuses on supporting the satellite club and its new members
- Focusing on service rather than protocol
- Holding joint meetings quarterly, with any meal being optional for satellite club members
- Inviting the chair of the satellite club to attend board meetings of the sponsor club
- Encouraging new satellite club members to attend other Rotary events to expand their networks and learn more about Rotary's impact worldwide
- Working together to carry out service projects in your community

Members of satellite clubs have access to My Rotary just like any Rotary club member. But only the sponsor club can report changes in satellite club membership. The relationship between the sponsor club and the satellite club is considered permanent until the satellite club dissolves or becomes a standalone club.

A thriving club, whether a sponsor or satellite, is relevant in its community and assesses its strengths and challenges every year. The **Rotary Club Health Check** can help.

Both the sponsor and satellite clubs should promote both clubs to prospective members and guests. Having brochures ready can help you show prospects their options. Find a customizable brochure on the **Brand Center.**

WHERE CAN WE LEARN MORE?

Rotary has many resources to support satellite clubs.

RESOURCES ABOUT SATELLITE CLUBS:
- **Satellite Club Frequently Asked Questions**
- **Satellite Club Application**
- **Satellite Club Member Information Form**
- **Learning Center course: Practicing Flexibility and Innovation**

Find a Listing of Sponsored and Satellite Rotary Clubs in the reports tab of Rotary Club Central.

Find your Club and District Support representative to help with any additional questions you might have.

Resources for new members and leaders:
- **How to Create a My Rotary Account**
- **Rotary Basics publication**
- **Rotary Basics online course**
- **Introducing New Members to Rotary: An Orientation Guide**

From:	RI Membership
To:	SCBrennanRotary@gmail.com
Subject:	Membership Minute: Keep goals simple
Date:	Thursday, December 9, 2021 11:17:38 AM
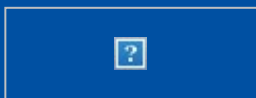
Membership Minute

December 2021   Ideas for strengthening membership

Keep goals simple

The pandemic has created difficulties in many parts of our lives, but within every challenge lies an opportunity to grow and become more resilient. It's a good time to think about setting and achieving goals. Whether you're starting a new hobby or trying to reduce waste, the key to attaining your goals is keeping them simple.

Here are several club-related goals you can set for the second half of the Rotary year:

1. Update your member data in My Rotary (learn how to add or manage a member).
2. Update your club meeting information (time; place; meeting language; and whether your club meets in person, online, or both) so fellow Rotary members and other clubs can easily find you.
3. Consider pairing your less engaged members with Rotary mentors. Take the Best Practices for Engaging Members course to develop strategies for engaging people at all stages of membership. You'll learn how to energize the club experience, keep members interested, and prevent your club from becoming stale.

Good luck as you work to achieve all of your goals!

Engage members, deliver value

Throughout 2021-22, Rotary is hosting webinars that explore creative ways to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.

Join us on Thursday, 13 January, for Expanding Our Reach, the third webinar in our Engaging Members + Delivering Value series. In this webinar, we'll learn how to think beyond traditional partnerships and build connections with people who share our commitment to service. Two sessions, at 11:00 and 18:00 (UTC-6), will be offered.

You can watch recordings of the first two webinars in the series here:
•   The State of Membership
•   Enhancing Participant Engagement

Connect with prospective members

Every January, we see a big increase in inquiries about joining Rotary. District and club leaders, remember to follow up with these prospective members to ensure that they have a positive experience. You can gain a better understanding of how to turn leads into members by taking the Online Membership Leads course. And it's now much easier to view candidate details in the newly revised mobile layout. It only takes a moment to follow up with the candidates from your mobile device and assign them to a club.

RI President Shekar Mehta's Each One, Bring One initiative encourages all members to share Rotary with others. Use the Refer a new member form if you know someone who might be interested in joining. The updated form allows all Rotary members to refer a prospective member to their own club or to a different club.

Recognize exemplary service to The Rotary Foundation

The Distinguished Service Award honors individual Rotarians and Rotaractors who have demonstrated exemplary service to the Foundation and who received the Citation for Meritorious Service at least four years previously. Do you know someone who fits this description? Any Rotarian or Rotaractor can nominate a candidate. The nomination period is from 1 January to 28 February. Questions? Write to riawards@rotary.org.

Bring in new members

The Membership Society for New Member Sponsors recognizes members who have expanded Rotary's reach by sponsoring 25 or more members. Read about how Tom Gump, past governor of District 5950 (Minnesota, USA), brought in more than 50 members and achieved the gold level of recognition.

Engage with alumni

Each year, thousands of people become part of the family of Rotary by participating in Rotary programs. After their positive experience in these programs, Rotary alumni often want to join a Rotary or Rotaract club. Read about how several members in District 4340 (Chile) recognized this opportunity and engaged with Rotary Youth Exchange alumni to start the Rotary Club of Sin Fronteras.

Membership Minute is a bimonthly newsletter that provides the latest membership trends, strategies, best practices, and resources to help strengthen membership in your clubs. The newsletter is sent to Rotary coordinators, district governors, district membership chairs, club membership chairs, club presidents and subscribers. Please forward this

to anyone who may be interested.

One Rotary Center, 1560 Sherman Ave., Evanston, IL 60201-3698, USA

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MEMBERSHIP RESOURCE GUIDE

The resources below can be downloaded through www.rotary.org by clicking on the hyperlink (underlined in a blue font). If you experience any trouble when downloading resources, please email [membershipdevelopment@rotary.org.](mailto:membershipdevelopment@rotary.org)

PUBLICATIONS		
Name	**Description**	**Audience**
[Strengthening Your Membership](#)	This guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members.	Club presidents, membership committees, and district membership chairs
[Starting a Rotary Club](#)	This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond.	District governors
[Introducing New Members to Rotary](#)	Utilize this guide to develop a process for engaging new members from the start by helping them get involved, connecting them with a mentor, and by pacing the learning over time.	Club leadership
[Be A Vibrant Club](#)	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture.	Club leadership
[Connect for Good](#)	This eight-page guide shows how to get involved and connect with Rotary.	Current members
[Rotary Basics](#)	This comprehensive guide to all things Rotary covers everything from how Rotary began to how you can optimize your membership experience.	New members

LEARNING CENTER: ONLINE COURSES (My Rotary login required)		
Name	**Description**	**Audience**
[Leading Change](#)	Learn the basics of change management, including how to succeed in leading change, how to assess people's readiness to make changes, how to plan for change, and how to respond to any resistance.	Rotary members
[Essentials of Understanding Conflict](#)	Learn the essentials of how to understand, manage, and resolve conflict.	Rotary members
[Preventing and Addressing Harassment](#)	Take this course to learn how you can create a harassment-free environment in your club.	Rotary members
[Rotary Basics](#)	Meet members around the world, watch videos, deepen your understanding of Rotary, and test your Rotary knowledge in this course. While designed for new members, it's a good refresher for long-time members.	Rotary members
[Starting a New Rotary Club 101](#)	This 15-minute video outlines the 9-step process of establishing a new club, from the initial idea to the charter celebration and beyond.	Rotary members
[Club Membership Committee Basics](#)	Learn more about your responsibilities in developing your club's strategic membership plan to attract and engage members.	Club membership committee members
[Your Membership Plan](#)	Create a step-by-step plan to strengthen your membership and keep your club vibrant and relevant.	Rotary members
[Best Practices for Engaging Members](#)	Is your club losing more members than it's gaining? It's time to get serious about engaging members.	Rotary members

[Kick-start Your New Member Orientation](#)	Are new members leaving within a year or two? Learn how to better connect with them and help them get involved from the start.	Rotary members
[Practicing Flexibility and Innovation](#)	If you find that your club's rules are preventing members from getting the experience they want from Rotary, try changing them.	Rotary members
[Building a Diverse Club](#)	A diverse club reflects the make-up of its community, has a greater impact, and is more attractive to prospective members.	Rotary members
[Online Membership Leads](#)	What's all this talk about membership leads? This course will clear up the mystery behind these online leads.	Rotary members
[Is Your Club Healthy?](#)	Take this course to help your club stay valuable to your members and your community.	Rotary members
[Strategies for Attracting New Members](#)	Are guests of your club not interested in joining? Learn how to improve the club experience to make it attractive to visitors.	Rotary members
[Develop a Speech](#)	Learn how to organize a speech that leaves a lasting impression on your audience.	Rotary members
[Deliver a Speech](#)	Explore and practice the effect your voice and body language can have when giving a speech.	Rotary members
[Inspirational Speech](#)	Learn how to engage, persuade, and inspire your audience. This course focuses on providing you with the knowledge needed to succeed in persuasive speaking and motivational speaking.	Rotary members
[Interpersonal Communication and Networking](#)	Learn techniques for building and maintaining professional relationships and networks. Topics introduced in this session include creating beneficial relationships, maintaining and building a network, and recognizing the point of view of others.	Rotary members
New! [Starting a Club](#)	Learn the process of starting a Rotary, Rotaract, or satellite club, get tips for talking to prospective members, and find out how you can maximize your new club's success.	Rotary Members

TOOLS		
Name	Description	Audience
[Club Planning Assistant](#)	Answer questions about your club and get links to specific resources to address your club's challenges.	Rotary members
[Membership Best Practices Discussion Group](#)	This discussion group provides a forum for leaders at all levels to share best practices for recruiting, attracting, engaging, and retaining current and prospective members.	Rotary members
[Rotary Club Health Check](#)	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders
[Membership Assessment Tools](#)	Learn how to evaluate and improve your membership development plan with these tools, complete with sample surveys and information on organizing new clubs, recruiting and retaining members.	Current members
[Customizable Rotary Club Brochure](#)	In this template, clubs can upload their own photos, edit text, list dates of upcoming events, and share member testimonials.	Prospective members
[How to Delegate Your Online Access](#)	As a club or district officer, you can temporarily delegate your level of access in My Rotary to another member for assistance in managing Rotary business online.	Club & district leaders
[How to Use the Program Participants and Alumni Report Guide](#)	Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members.	District & zone leadership

RESOURCES		
Name	Description	Audience
[Starting a Club webpage](#)	Find information and resources about the process of starting a Rotary club.	Rotary members

[Meeting Online](#)	Visit this learning topic to explore and share resources, best practices, and ideas for moving meetings online.	Rotary members
[Guide to Corporate Membership](#)	This guide describes the benefits of corporate membership and how to use it in your club.	Rotary members
[Guide to Satellite Clubs](#)	This guide describes the benefits of a satellite club and how to start one.	Rotary members
[Guide to Passport Clubs](#)	This guide explains how passport clubs work, the benefits it offers, and how clubs can get started. It also includes different models structures, a template that can be used when connecting with local businesses and organizations about this opportunity, and sample bylaws.	Rotary members
[Rotary Club Models](#)	Find examples of various club types linked, model descriptions, and their target demographics	Rotary members
[Club Membership Committee Checklist](#)	Keep your membership committee on track with this checklist covering assessments, attraction, and engagement initiatives.	Rotary members
[Engaging Younger Professionals Toolkit](#)	This online toolkit can help clubs connect with Younger Professionals by first understanding them. Topics included are characteristics of your audience, your club's culture, ideas for outreach and engagement, and the long-term benefits of becoming a Rotarian.	Rotary members
Updated! [State of Rotary's Membership power point](#)	Understand the current State of Rotary's Membership: how we got here, who is joining, who is leaving — and the opportunities that exist to strengthen membership.	Rotary members
[Club Flexibility web page](#)	This web page offers ways clubs can implement flexible membership options and includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats.	Rotary members
["Discover Rotary" Power Point](#)	Show this presentation at prospective member or other events to introduce Rotary to the public. It covers Rotary's values, history, and the benefits of membership.	Prospective members
[Understanding Membership Reports: Getting Started](#)	This guide lists each membership report available, explains the information it provides, and steps on how to find them.	Rotary members
[Creating a Positive Experience for Prospective Members](#)	Find tips and ideas for connecting with prospective members, and what you can do to ensure they have a positive experience.	Rotary members
[Proposing New Members](#)	Best practices for proposing new members to your club.	Rotary members
[How to Manage Membership Leads (Clubs)](#)	Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level.	Club leaders
[How to Manage Membership Leads (Districts)](#)	Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level.	District leaders
[Membership Minute e-newsletter](#)	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club & district leaders
[Strategic Planning Guide](#)	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club & district leaders

WEBINARS		
Name	**Description**	**Audience**
[Courageous Leadership](#)	Using stories of transformation from Rotary and in their professional careers, hear trainers Louisa Horne and Doug Logan outline strategies for clubs on creating a vibrant membership experience.	Rotary members
[Membership Models for the Future of Rotary](#)	Associate and corporate memberships, passport, satellite, and hybrid clubs: these are just some of the innovative, flexible models that clubs have designed recently. Panelists on this webinar discuss the challenges, benefits, and lessons of designing a club experience that works for every member	Rotary members

|		
[Building New Clubs Together](#)	This webinar will be helpful if you believe that adding a new Rotary club in your community will broaden your capacity for service, think a satellite club may allow more prospective members to engage with Rotary, or want tips on how to charter a Rotaract club, or encourage Rotaractors to start their own clubs.	Rotary members
[First Impressions Matter webinar: The Membership Experience](#)	Find out what happens when Rotarians use every interaction to engage, educate, and inspire fellow Rotarians and the community. Moderated by Jennifer Jones, Past Rotary Vice President.	Rotary members
[Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience](#)	Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members.	Rotary members
[We Are Rotary: Advancing Women as Leaders](#)	Less than 25 percent of Rotary's members around the world are women, and women are underrepresented in leadership positions at every level. Watch this presentation to learn the benefits of being a diverse, equitable, and inclusive organization and the barriers that women face when they consider leadership positions.	Rotary members
[Connect with the (Online) Rotary World](#)	The world has changed in response to the COVID-19 pandemic making the need for Rotary more relevant than ever. Hear from a panel of Rotarians who have led their clubs and districts in the move to virtual connection including meetings, social media, fun ways to engage, and local and global service opportunities.	Rotary members
[DEI in Rotary: How are we Doing?](#)	The COVID-19 pandemic and anti-racism solidarity demonstrations are calling out global inequities and the need for social justice. It is even more important that Rotary be an organization inclusive of all cultures, experiences, and identities. Hear from Rotarians at the forefront of change, learn about Rotary's diversity, equity, and inclusion (DEI) progress, and be equipped with tools to create a more diverse, inclusive, and equitable organization.	Rotary members
[Connecting with Prospective Members in Your Community](#)	Now more than ever, people are yearning to connect with others and find ways to help others and give back to their communities. During the past several months, we've heard incredible stories of how Rotary clubs around the world are coming together to take care of each other, their neighbors, and those in need during this difficult time. Watch this recording to view a demo of how to effectively use Rotary's membership leads platform to connect with prospective members, and a Q&A with Rotary staff from the Membership Development team.	Club Leaders

TRAINING MANUALS & DOCUMENTS		
Name	**Description**	**Audience**
New! [District Vibrant Club Workshop Leader's Guide](#)	This guide provides you with speaking points, PowerPoint templates, and exercises to show how membership, the Foundation, and public image can work together to fulfill Rotary's action plan.	District leaders
[District Membership Committee Terms & Responsibilities](#)	This sheet explains the district membership committee's purpose, chair appointment, qualifications, duties, and responsibilities.	District leaders
[Lead Your District: Committee Chair](#)	Use this information to set up and run an effective district committee	District leaders

Questions? Please contact Regional Membership Officer for zones 33 and 34

Audley Knight | audley.knight@rotary.org | +1-847-866-3095

Membership – Nothing Else Matters

Business Development 101
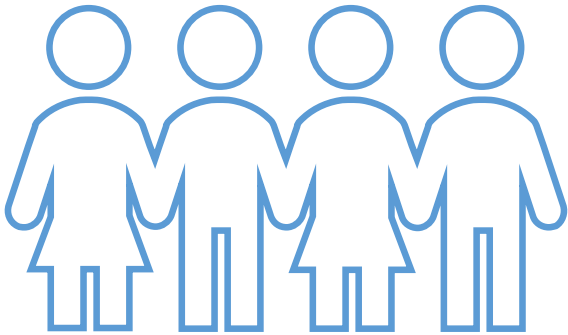
Remember the 10:3:1 Rule -- It takes about 10 names or referrals (suspects) to get 3 prospects to a Rotary Information Hour or Rotary club meeting, to get one new member proposal. Lack of sufficient "lead generation" is a root cause of low rates of new member flow.

Chris Jones Rotary Coordinator, Zone 33

Attrition is Real

The 5-year average annual termination rate for Zone 33 clubs is fourteen percent (14%) annually.

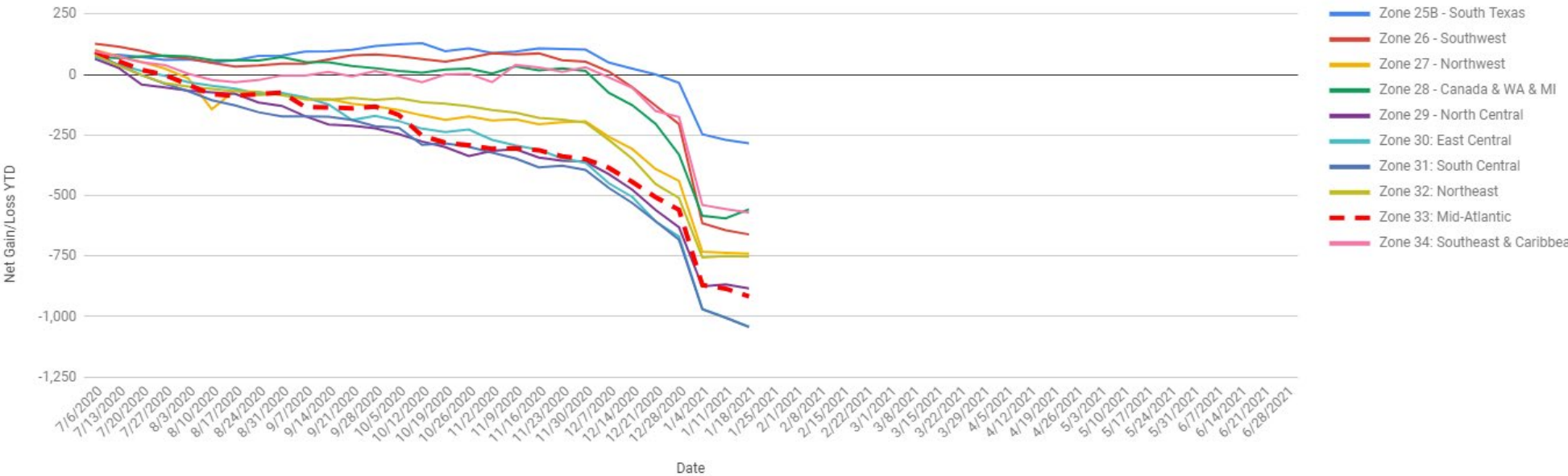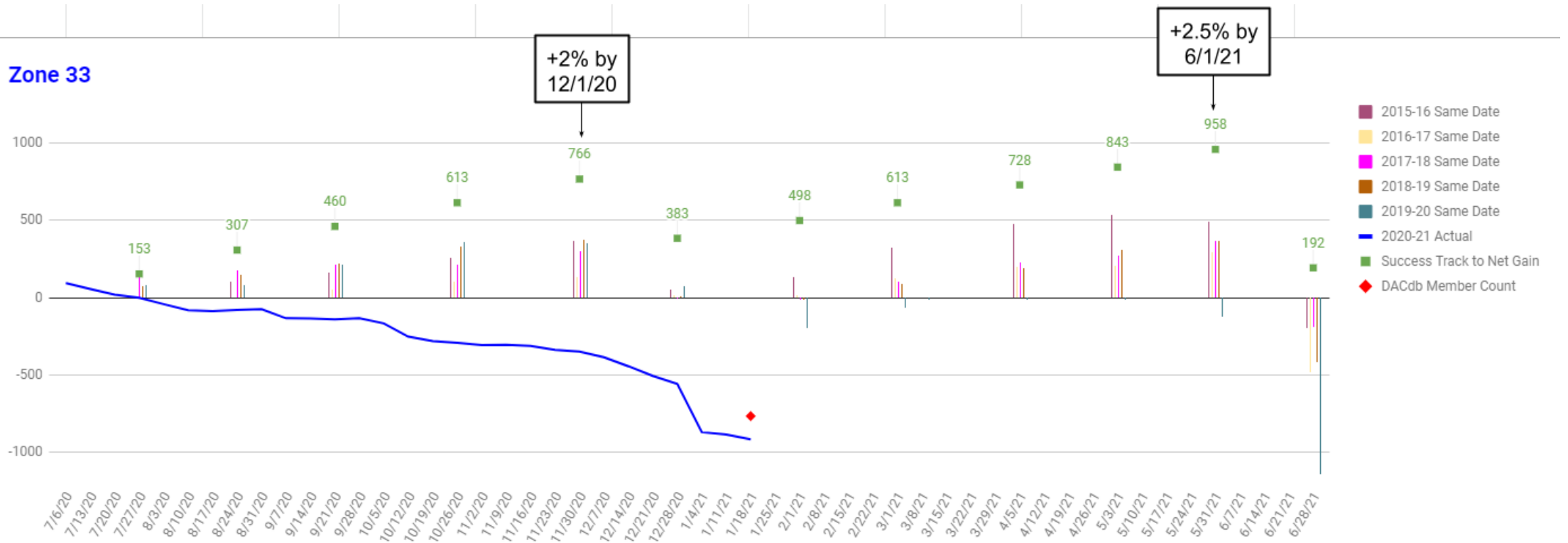Chris Jones Rotary Coordinator, Zone 33
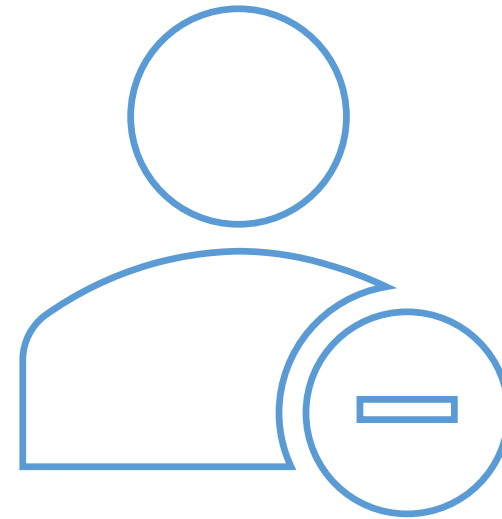
Retention is Important for the Long Term
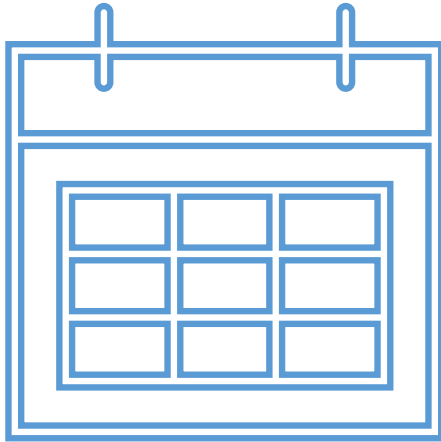
Most attrition casualties have been members less than 1, 2 or 3 years (< 1 year = highest attrition)
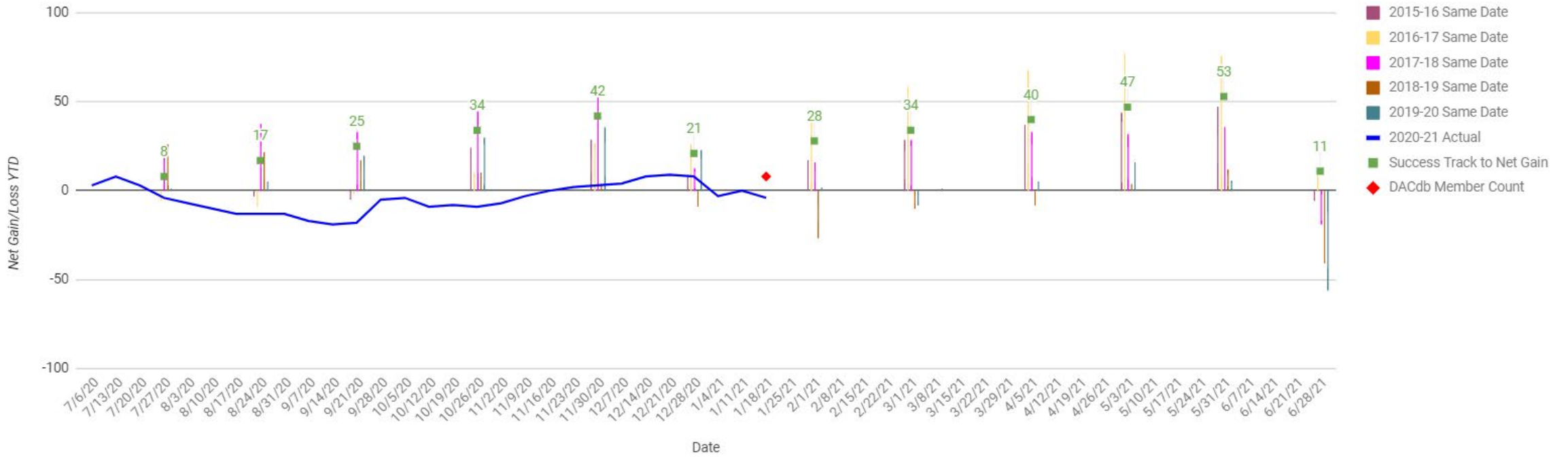
Chris Jones Rotary Coordinator, Zone 33
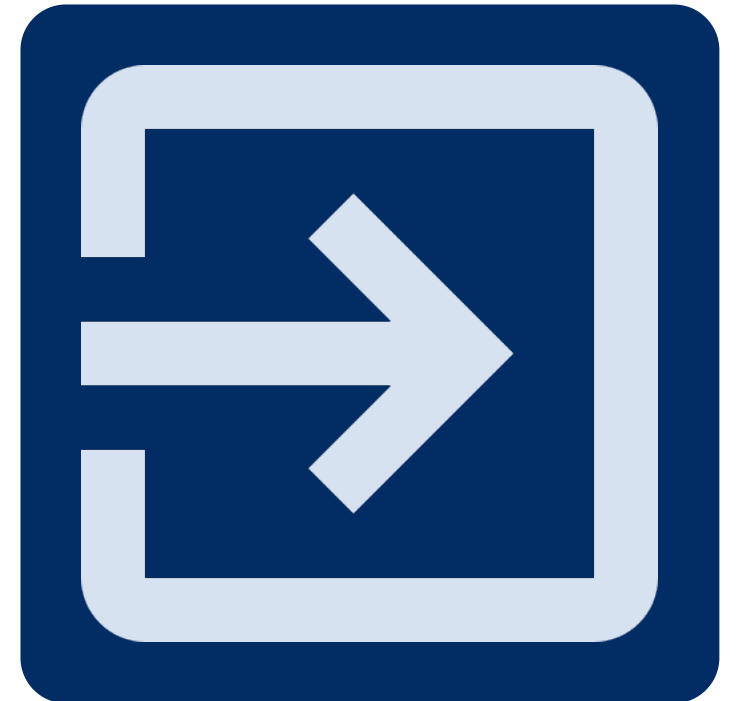
Membership – North American Zones

Membership – Zone 33

Membership – D7610

Tailored Engagement

WITHOUT INNOVATIVE CLUB MODEL OPPORTUNITIES

Types of Innovative Models: Empowerment of the Individual to Sustain the Collective

SATELLITE CLUBS

- Only 8 members required
- Meet at a time that is separate from the sponsor Rotary club
- Can be passion-based
- Asset Potential:
  - Growth for sponsor club
  - Increased engagement
  - Doubled impact

ECLUBS

- Standalone club
- Great for hectic schedules, working professionals, and those looking for increased flexibility
- Asset Potential:
  - Can be satellite option
  - Appeals to wide audience

Scope of Innovative Models: Allowing All the Chance to Bring Rotary to Their World

CAUSE-BASED/NICHE

- Family clubs
- Assisted living facility
- Healthcare centers/organizations
- Teachers
- Veterans
- Strictly service

Growth Model Continuum

FOCUS ON DIVERSE DEMOGRAPHICS

FOCUS ON UNIQUE PROFESSIONAL PROFILES

IMPACT ON ROTARY

UNIQUE EXPERIENCES

Jonathan Lucus – District Membership Chair/Zone 33 Innovative Club Advocate

Phone: 443.326.0244

Email: 1920gov7610@gmail.com

Satellite Club FAQ

What is a satellite club?
Satellite clubs provide another option for creating Rotary clubs. A satellite club functions as a short-term, transitional step on the way to becoming a full, independent Rotary club.

This allows interested persons to become Rotarians without meeting the requirement of having at least 20 persons to organize a separate Rotary club. Rotarians who are absent from regular Rotary club meetings can make these up by attending satellite club meetings.

STARTING A CLUB

How does a club apply to have a satellite club?
The sponsor club president sends an application to Club and District Support.

Is there a minimum or maximum number of members for a satellite club?
New satellite clubs must have at least 8 members at the time they form in order to satisfy the requirements of Article 13, Section 6(b) of the Standard Rotary Club Constitution. There is no maximum number of members.

Is there a minimum number of members for the sponsor club?
No. Clubs with fewer than 20 members can form a satellite club.

Is a satellite club sponsor the same as a new club sponsor?
No. The role and responsibilities of a new club sponsor are different.

Can a weak club convert to a satellite club and retain its charter and history?
If the members of a weak Rotary club want to become a satellite club, they must first resign their charter. They would then be free to form a satellite club and become members of the sponsor club. However, satellite clubs are not intended to strengthen weak clubs. If a club needs extra guidance and support, a district governor may assign a stronger club or a special representative to mentor the weak club.

Can Rotaract clubs be converted into satellite clubs as a transition to becoming a full Rotary club?
Yes. Some or all of the members of a Rotaract club may form or join a satellite club.

How are satellite clubs named?
Satellite clubs have the same name as the sponsor club plus a qualifier that distinguishes it from the sponsor, for example:

If the sponsor and satellite clubs meet at different times
Sponsor: Rotary Club of Bangkok North
Satellite: Rotary Satellite Club of Bangkok North Evening

If the sponsor and satellite clubs have different meeting locations

Sponsor: Rotary Club of Chicago Lakeview
Satellite: Rotary Satellite Club of Chicago Lakeview Broadway

How do satellite clubs change their names?

The sponsor or satellite club should contact [Club and District Support](). The CDS representative will confirm the name change in writing with the sponsor club president and satellite club chair. No change will be made unless they are in agreement.

BOARD AND GOVERNANCE

Can satellite clubs create a separate board with a different set of officers from the sponsor club?

Satellite clubs set up their own board and have their own officers. However, instead of a president, a satellite club has a chair.

If there are two boards, how are disagreements handled?

The board of the sponsor club has the final authority when there are disagreements.

Does the leadership of the satellite club have a position on the sponsor club's board?

This is not required, but is highly recommended.

Can a satellite club have separate bylaws?

Yes. The satellite club determines its own bylaws in collaboration with its sponsor club.

Who decides where and when the satellite club meets?

The satellite club determines its meeting place and time in consultation with its sponsor club.

Does the satellite club meet together with the sponsor club?

The satellite club should have a separate meeting, although it may meet jointly with the sponsor club from time to time.

Can satellite clubs sponsor Interact or Rotaract clubs?

No. But if the satellite's sponsor club sponsors an Interact or Rotaract club, it may appoint a satellite club member to serve as the Rotarian contact and mentor for the Interact or Rotaract club.

Do satellite clubs need to set goals? Can they set goals in Rotary Club Central?

All clubs, including satellite clubs, are strongly encouraged to set goals to achieve success. However, Rotary Club Central can't accommodate satellite club goals at this time.

Does someone who has only served as the chair of a satellite club meet the qualifications for district governor-nominee?

No, only Rotary club presidents can be nominated for district governor. However, the district can ask the Rotary International president to waive this requirement.

MEMBERSHIP AND DUES

Are satellite club members Rotarians?

Yes, they are members of the sponsor club.

Does the sponsor club need to approve new satellite club members?

The sponsor and satellite clubs should work out a process for adding new satellite club members at the time the satellite is being formed. The sponsor club should also add that process to its bylaws. If a conflict arises with satellite club membership, the sponsor club has the final say. As members of the sponsor club, satellite club members are ultimately subject to the authority of the sponsor club's board.

Do satellite club members pay Rotary dues?

Yes. Satellite club members are Rotarians and pay the same Rotary dues as the sponsor club's members.

Do satellite clubs receive a dues invoice?

No. The satellite club members are included on the sponsor club's dues invoice.

Can a satellite club have a separate dues structure?

Yes. The satellite club determines its dues structure in collaboration with its sponsor club.

CHANGES IN CLUB STATUS AND SPONSORSHIP

How long can a satellite club exist?

Satellite clubs are intended as a temporary step on the way to becoming a full, independent Rotary club. However, there is no time limit on the life of a satellite club.

How does a satellite club apply to become a new, independent Rotary club?

The satellite club works with the sponsor club and district governor to complete Rotary's new club application.

Can a satellite club transfer to a different sponsor club?

No. The sponsor and satellite clubs are permanently linked. The satellite club would need to be terminated and the members would have to start a new satellite club with a different sponsor club.

How does a sponsor club terminate a satellite club?

The sponsor club president or secretary terminates each satellite club member as provided for in Article 15 of the Standard Rotary Club Constitution. Next, the sponsor president or secretary removes the terminated members from the sponsor club roster, either in My Rotary or by emailing Data Services (data@rotary.org). Finally, the sponsor club president notifies Club and District Support. The CDS representative will confirm that the satellite club no longer has any members, request termination, and notify the sponsor club president when the process is complete.

How does a sponsor club resign?

The sponsor or satellite club should contact Club and District Support. The CDS representative will confirm the resignation in writing with the sponsor club president and satellite club chair. No change will be made unless they are in agreement.

If the sponsor club is terminated, can the satellite club continue on its own?

No, the satellite club is terminated with the sponsor club.

If an existing weak club becomes a satellite club, can it revert to autonomous club status?

Satellite clubs are a new way to start a Rotary club. When a satellite club is ready, it may apply to become a full Rotary club.

ROTARY'S VISION STATEMENT

Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

INCREASE IMPACT	EXPAND OUR REACH	ENHANCE ENGAGEMENT	INCREASE ABILITY TO ADAPT

Rotary
Club (of/at) Location
Optional text here

ASSESSMENT

Club's strengths and weaknesses:

- Strengths:

  •

- Weaknesses:

  •

Member satisfaction needs/opportunities:

  •

Strategic issues we'd like to address:

  •

Opportunities and challenges in community:

-

VISION:

Where do we want the club to be in 5-10 years? What characteristics will describe us?

-

Who is our ideal member?

-

Which demographics are we hoping to attract?

-

What is our value proposition? What do we offer that people can't get elsewhere?

-

Goal value proposition:

-

Are we reflecting Rotary's core values: Fellowship, Integrity, Diversity, Service, Leadership?

-

PLAN TO ACHIEVE VISION:

How will we communicate our value proposition to our desired demographics?

-

How can we include more community members in our club activities?

-

How will we keep new members and existing members engaged?

-

How can we re-activate un-engaged members or former members?

-

How will we ensure continuity from year to year?

-

STRATEGIC PRIORITIES:

What are our **strategic priorities**? How will we succeed? These priorities will help us achieve our above identified vision of our club.

Things to consider:

- Resources (District Membership Chair, RI staff resources, membership resources on My Rotary, club funds, people-power)
- Goals (SMART – Specific, Measurable, Achievable, Relevant, Time Bound)

Strategic Priority 1: **Increase our Impact**

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

Strategic Priority 2**: Expand our Reach**

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

Strategic Priority 3: **Enhance participant Engagement**

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

Strategic Priority 4: Increase ability to Adapt

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

MEASURING AND TRACKING PROGRESS:

How often will we monitor our progress and adjust targets?

What tools and reports will we use to know we're on track?

How will we communicate our progress to club members?