SESSION 3:
LEADING ROTARIANS
(45 minutes)

Rotary

RELEVANCE: Club presidents motivate members to reach goals, recognize club leaders and members with awards, communicate with club and district leaders, and listen to all members to ensure that their needs are met.

IDEA EXCHANGE

- Best for discussing topics that are familiar to participants
- Guided by a trainer to keep discussion on topic and give everyone a chance to speak
- Activities allow participants to apply ideas
- Seating arranged in a U shape
- Maximum group size: 30

Learning objectives

After this session, participants will be able to:

- Identify the skills needed for an effective club leader
- Analyze potential challenges in leading fellow Rotarians and develop strategies for handling them

Before the session

- Get input from assistant governors on leading volunteers, or consider asking them to lead the session.
- Consider any district or regional issues related to this topic.
- Choose the key messages, discussion questions, and activity, and plan your session based on the needs of participants.
- Decide whether you will use the PowerPoint template or a flip chart.
- Review the resources listed below.

Resources

- [Lead Your Club: President](#), Chapter 2, Leading Rotarians
- [Be a Vibrant Club: Your Club Leadership Plan](#)
- [Rotary Citation page](#) on My Rotary

During the session

- Welcome participants and introduce yourself.
- Review the learning objectives.
- Highlight these key messages:
    - One of your key responsibilities is motivating others to reach club and district goals.
    - You're also responsible for appointing club leaders and ensuring that the leadership team carries out its duties.
    - Share the Rotary Citation goals with club members before the year starts so you can plan how you'll achieve them as a group.
    - Plan a committee structure that works best for your club.
    - Assign your members to tasks and committees that draw on their skills and interests to keep them engaged.
    - Delegate tasks to your club leadership team.
    - Meet with your club board monthly to review progress on goals and tasks.
    - Hold those who agree to work on goals accountable and be prepared to reassign tasks if needed.
    - What motivates your members will vary from person to person. Be prepared to use different methods of motivation during the planning stage, implementation, and celebration of achievement.
    - Work with your assistant governor and other district leaders to help your club succeed.
- Use these discussion questions to get the conversation going:
    - What leadership skills are important for your role?
    - How will you keep club members motivated?
    - How will you select and prepare your club leadership team?
    - What committees does your club have?
    - What tasks can be delegated to committees?
    - What concerns do you have about working with other club leaders?
    - How will you handle disagreements between club leaders?
    - What will you do to ensure continuity in leadership during your term?
    - How do you communicate with district leaders? How do district

leaders communicate with your club?

- Lead one of the activities below.
- At the end of the session:
    - Review the learning objectives.
    - Ask participants to write down one idea they'll use from the session.

Activities

Choose an activity:

1. Strategies to manage change
   - Allow 25 minutes for this activity.
   - Divide participants into small groups.
   - Explain that influencing change in the club will be an important part of the president's job. Present one of the following scenarios to each group for discussion:
     - **Scenario 1: opposing board members —** Reginald will begin his term as president in three months and wants to make club flexibility changes to reverse declining club membership. He wants to change the meeting types and offer a new membership type. Two of his incoming board members are opposed to any change. How can Reginald persuade them to consider his changes?
     - **Scenario 2: dominant past president —** Your past president has a dominant personality and tries to impose her will on your decisions. Although a few of your members agree with her, many do not. How do you work with your past president?
     - **Scenario 3: social member —** Josh comes to club meetings regularly and is great at social events. He is a corporate accountant, and his skills could be used in the club. But Josh has never volunteered to be a club officer, run a committee, or chair a club event. What do you do?
   - Have groups generate solutions for 10-15 minutes.
   - Ask each group to discuss their solutions with the whole group.

2. Leadership qualities role-play
   - Allow 25 minutes for this activity.
   - Have participants form small groups.
   - Ask participants to choose an example of a challenge they might face in leading volunteers.
   - Ask each group to think of a creative way to overcome the challenge, including how they will motivate others to help them overcome the challenge, and then demonstrate it through role-play.
   - Allow 10 minutes for participants to discuss and plan their role-play demonstration.
   - Give each group a turn to act out its scenario and solution.
   - Ask participants what leadership qualities they noticed and any other observations they made.

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

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Home   Resources   **Assess Your Capacity for Business Innovation**

Assess Your Capacity for Business Innovation

October 20, 2020
By: Keith Skillman, CAE

To create breakthrough association business ventures, you need an empowered culture and agile systems, according to an

ASAE Research Foundation study. Where do you start? By assessing your organization's readiness and charting a path to improvement.

To identify and capitalize on opportunities to create value and nontraditional revenue sources, associations should start by evaluating their systems and cultural elements that empower—or impede—innovation, according to an ASAE Research Foundation study reported in ***Advancing Business-Venture Innovation****,* released last month*.*

The study centered on readiness assessment, validating a first-generation model originated by principal researcher Association Ventures. Applying the tool, association leaders can self-assess readiness against eight relevant business-venture-innovation capacities, or domains, and compare themselves to peers represented in the study and best-practice references.

The research defined two areas in which association leaders might seek to build capacity as "empowerment culture" and "operational agility":

- On empowerment culture, participating association executives gave their organizations an overall mean performance score of 77 percent, considered to be "progressing," versus the overall mean score of 66 percent. Associations valued constructive internal exchange but lacked ability to test ideas as paths to learning.
- On operational agility, participating executives gave an overall mean score of 60 percent—the lowest of all capacity scores and considered lagging—due to lack of process, metrics, and budget linkage to project.

Culture Counts

Organizational cultures that reflect widely shared beliefs "that ideas should be openly shared and challenged, people should take smart risks, and failures should be valuable learning opportunities" are closely correlated with innovative organizations. According to the study, participating associations are generally at a "progressing" level of maturity on this capacity.

In innovative organizations, it is less likely that small, sequestered groups create breakthroughs than it is that business innovation results from unsiloed and trusting collaboration across units, debate and experimentation, and fluid information exchange. "Fostering codesign and cocreation of new venture ideas is best created through networks: groups of people working in concert with a common purpose," according to the study.

Agility Matters

Innovation success relies heavily on responsive decision making by boards and staff. That's why breakthrough business-venture ideas will flounder in organizations that tend to over-rely on slower-moving committees and task forces when confronted with disruption. The study found that most participating associations have significant room to grow their capacity for agility.

The study report offers background on internalizing and scaling operational agility, which has cultural and operational elements.

Read the Research

Advancing Business-Venture Innovation is a five-part resource. It includes an overview of the research results, reports covering each of the eight capacity areas, self-scoring assessments, and considerations and resources for charting change pathways.

"Culturally the organization must nurture collective ideation and experimentation—an attitude that embraces curiosity as the pathway to learning," according to the report. "Operationally, the organization must adopt agile project management to accelerate prototyping and continuous improvement. And organizationwide, the board and staff must agree on a standard set of metrics to optimize workflows and make budgeting choices."

The maturity model's other readiness domains, to be covered in subsequent articles, are

- digital practices
- catalytic leadership
- foresight governance

- engaged ecosystems
- collective purpose
- diverse talent

The foundation's study focused healthcare associations. However, the results and the self-assessment tool should appeal to the wider universe of association leadership.

Tags: 🏷 **ASAE FOUNDATION**   🏷 **ASSOCIATION INDUSTRY**   🏷 **INNOVATION**

Keith Skillman, CAE

Keith Skillman, CAE, is senior research and content advisor for the ASAE Research Foundation.

Email (mailto:kskillman@asaecenter.org)

READ THESE NEXT

Is Your Association a Digital Co-Creative?

CEOs Drive Innovation

Boards and CEOs Drive Innovation Success

Keys to Innovation Success

John Maxwell—The 21 Irrefutable Laws of Leadership: Follow them and People will follow You

1The Law of the Lid—Leadership ability, which one can work on developing, determines a person's level of effectiveness.

2The Law of Influence—If you don't know how to influence, you will never be able to influence others—Character, relationships, knowledge, intuition, experience, past success are important in being influential.

3The Law of Process—Leadership develops daily, not in a day. Leadership is a journey

4.The Law of Navigation—Anyone can steer the ship, but it takes a leader to chart the Course—spotting problems, obstacles and trends that will impact the org. Knowing the pathway for implementing the vision-,--process, people and resources, planning

5The Law of Addition—Leaders add value by serving others

6The Law of Solid Ground—build trust, exhibit competence, connection, and character

7. The Law of Respect—leadership ability, respect for others, courage, success record, value added to others

8 The Law of Intuition—read books on relationships, engage more people, engage more people in conversations, become a people watcher

9.The Law of Magnetism—Who you are is who you attract

10—The Law of Connection—Leaders touch a heart before they ask for a hand—developing personal connection, knowing your peoples' stories

11. The Law of the Inner Circle—A leader's potential is Determined by those Closest to Him—be strategic and highly selective about the people closest to you

12 The Law of Empowerment—Secure people give power to others/embrace change—give people you work with the authority to make decisions and take risks

13 The Law of the Picture

Check for undesirable behaviors in a team member in yourself; actions consistent with words; Do what you should rather than what I want. The leader is always s setting an example

14—The Law of the Buy In—People buy into the leader, then the vision

15—The Law of Victory---Leaders find a way to win—Winston Churchill—during the darkest days of the war for Europe—What is our aim? I can answer in one work: Victory—Victor at all costs, victory in spite of all terror, victory, however long and hard the road may be: for without victory, there is no survival"

16—The Law of the Big Mo—Momentum is a Leader's Best Friend— begins with the leader, motivation important in developing momentum

17 The Law of Priorities—Activity is not necessarily accomplishment—A leader is the one who climbs the tallest tree, surveys the entire situation and yells 'wrong jungle'—Stephen Covey

18 The Law of Sacrifice—Leadership will cost you; leaders must give more than the followers to accomplish the vision

19,The Law of Timing—When to lead is as important as what to do and where to go—understanding, maturity, confidence, decisiveness, experience intuition

20—The Law of Explosive Growth—to multiply- lead leaders; invest time in the top 20% of followers

21-The Law of Legacy—A leader's Lasting Value is measured by Succession

Leading Change

Overcoming barriers to change and development

Rene' Laws - Facilitator
AG Area Four
District 7610, Virginia

Pre-CPETS Leadership Institute
District 7610
December 21, 2020 6:30-7:30pm

About Me

Military Spouse

Mother of Six

Rotarian

Volunteer

"

This is a changing world;
we must be prepared to change with it.
The story of Rotary will have to be written again and again.

~ Rotary Founder Paul Harris - 1935

"

"If Rotary is to realize its proper destiny it must be evolutionary at all times, revolutionary on occasions."

If our Founder recognized this almost 100 years ago, it can be recognized today.

Transformational Leadership

- Idealized Influence
- Inspirational Motivation
- Intellectual Stimulation
- Individual Consideration
- Servant Management

OUTCOME

By completing Zoom Leadership Session 2 of the Pre-CPETS Institute, you will have a working knowledge of:

- The basics of how to manage change
- How to assess your members' readiness to make changes
- How to plan for change
- How to respond to resistance

CHANGE IS CONSTANT

What is a Change Leader?

What qualities does a Change Leader possess?

Assessment of Readiness for Change
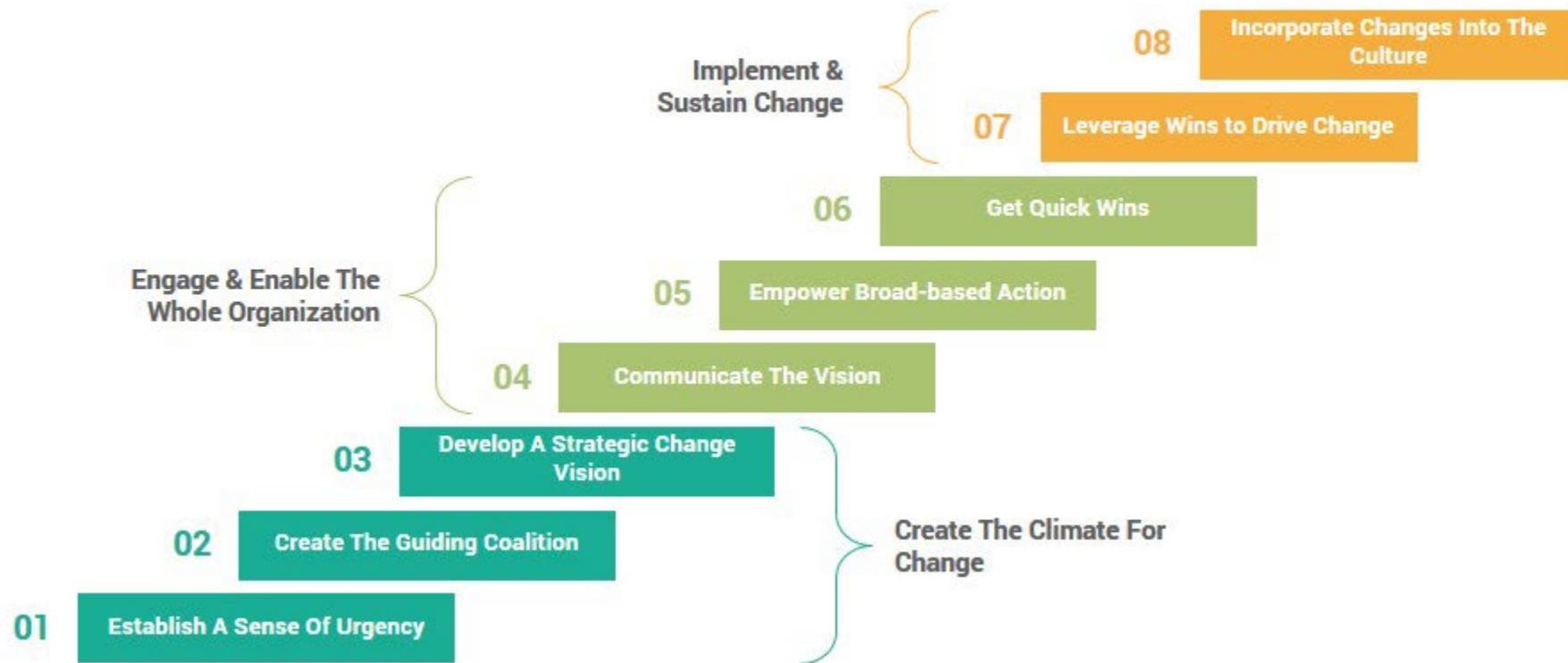
Are WE ready for Change?

"Change is the only constant."

– Heraclitus

Am I ready for Change?

Listen and Learn – Identify Barriers to Success – Talk to Everyone – Expect Pushback

- Leading change is a challenge because humans are wired to resist it!

- Good Leaders recognize this and lead in ways that help their people overcome resistance.

- It's all about engagement and understanding WHY!

- Leaders who fail to recognize the human and cultural aspects of change invariably fail.

Components of Results and Change

Vision → Skills → Incentive → Resources → Action Plan

- Ambrose, D. (1987). Managing complex change. Pittsburgh, PA: The Enterprise Ltd.

Planning for Change

There are six key elements, and you've seen them before:

- Vision

- Collaborative Commitment

- Skills

- Rewards

- Resources

- Action Plan

"THE SECRET OF CHANGE IS TO FOCUS ALL OF YOUR ENERGY, NOT ON FIGHTING THE OLD, BUT ON BUILDING THE NEW."
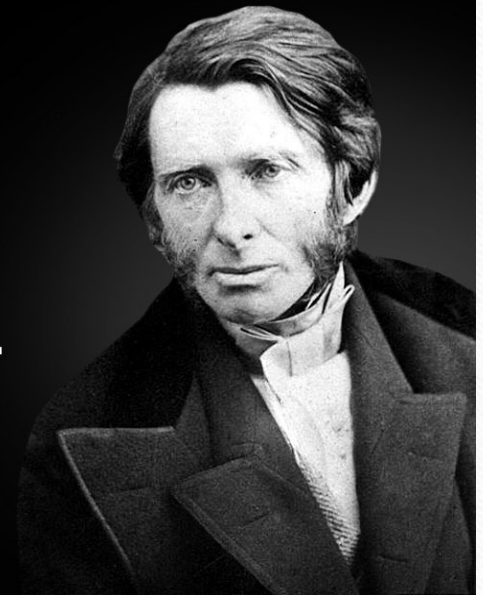
— SOCRATES

Collaborative Commitment

Skills

Rewards

The highest reward
for a person's toil
is not what they get for it,
but what they become by it.

— *John Ruskin*

Resources

Action Plan

Moving Ahead with Your Plan

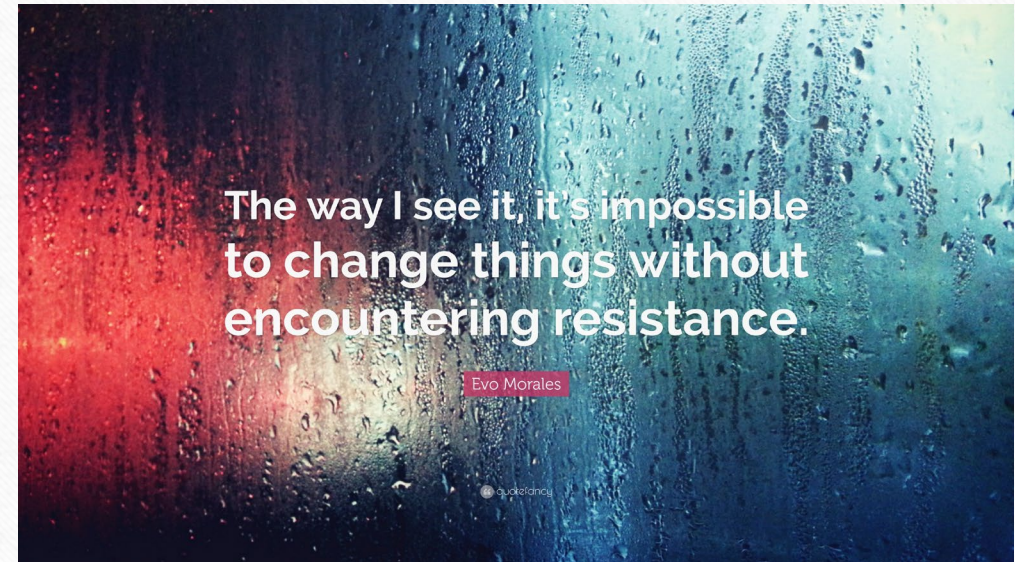## Status Check: Reflect & Evaluate Before Moving Ahead

- Change Leader Characteristics
- Assess how ready club is for change
- Review your six key elements
- Examine the effects of removing one or more elements
- Consider WHY some might resist change

Moving Ahead with Your Plan
Encountering Resistance

- Why?
- It's moving too fast!
- I have questions!
- No one asked me.
- It's hard!

The way I see it, it's impossible to change things without encountering resistance.

Evo Morales

Moving Ahead with Your Plan
Responding to Resistance

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- Collaborative Commitment

- Skills

- Reward

- Resources

- Action Plan

Leadership in Action

Final Thoughts

- Communication is key
- Involve Stakeholders
- Feedback is Imperative
- Four Way Test is a Valuable Tool
- Celebrate!

THE FOUR-WAY TEST
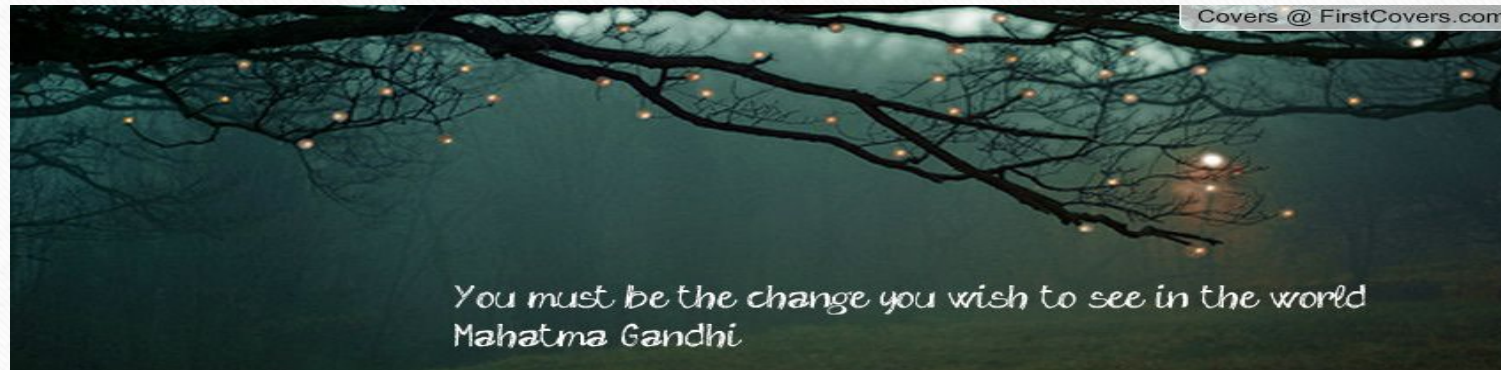OF THE THINGS WE THINK, SAY, OR DO.

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Rotary

See you at the 1st Virtual Chesapeake-President-Elects Training Seminar (C-PETS) March 5-6, 2021

Leadership is an action, not a position

Donald McGannon

Good Luck on Your Leadership Journey!

You must be the change you wish to see in the world
Mahatma Gandhi

Covers @ FirstCovers.com

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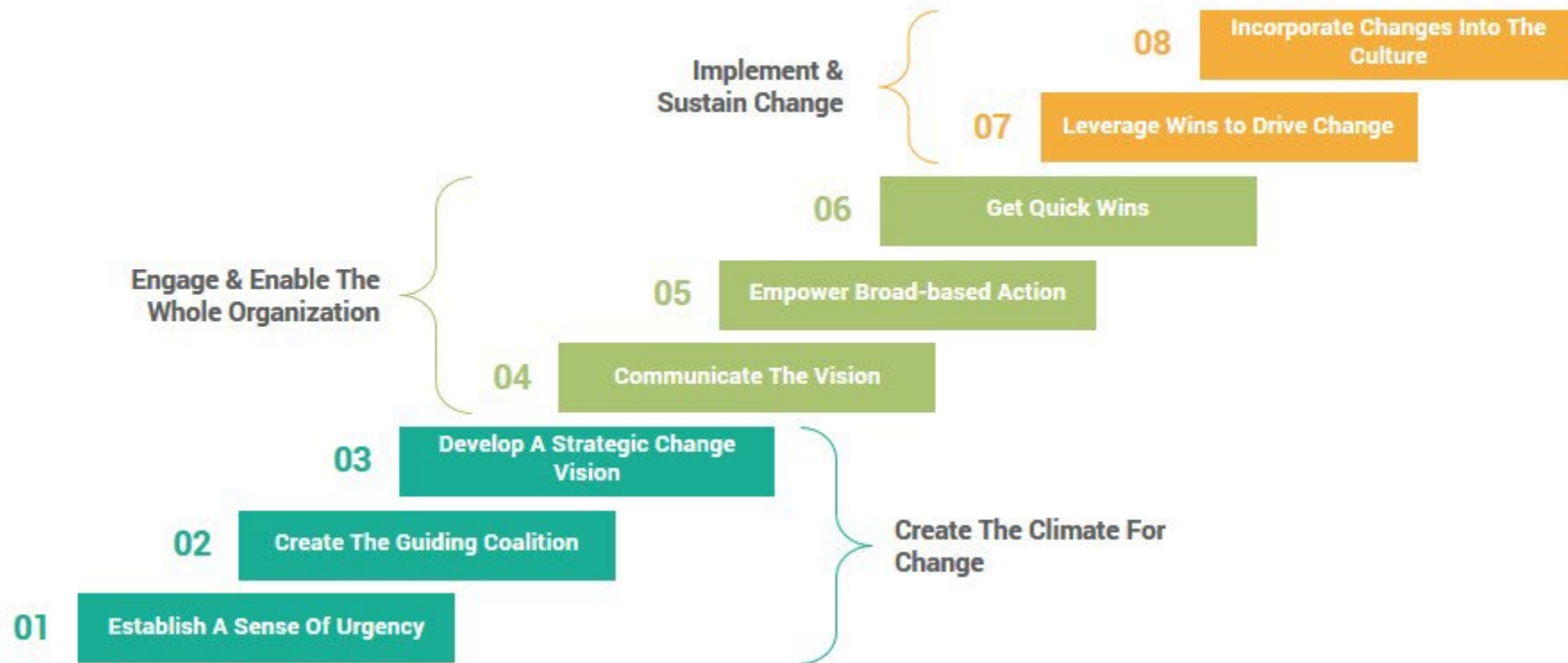
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8 Steps of John Kotter Model of Change

Phase Model According to John Kotter

Implement & Sustain Change

08 **Incorporate Changes Into The Culture**

07 **Leverage Wins to Drive Change**

06 **Get Quick Wins**

Engage & Enable The Whole Organization

05 **Empower Broad-based Action**

04 **Communicate The Vision**

03 **Develop A Strategic Change Vision**

02 **Create The Guiding Coalition**

Create The Climate For Change

01 **Establish A Sense Of Urgency**

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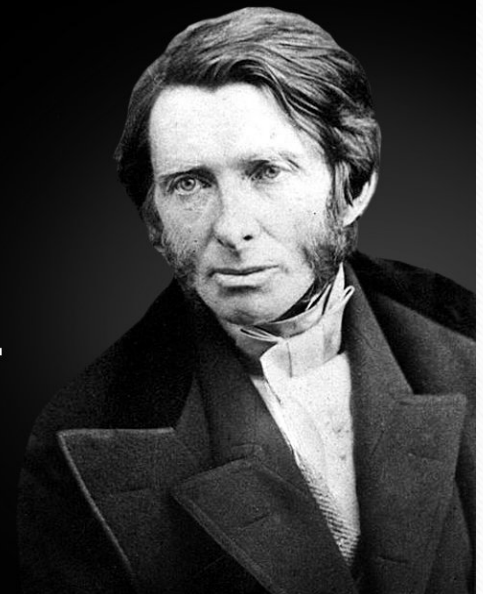
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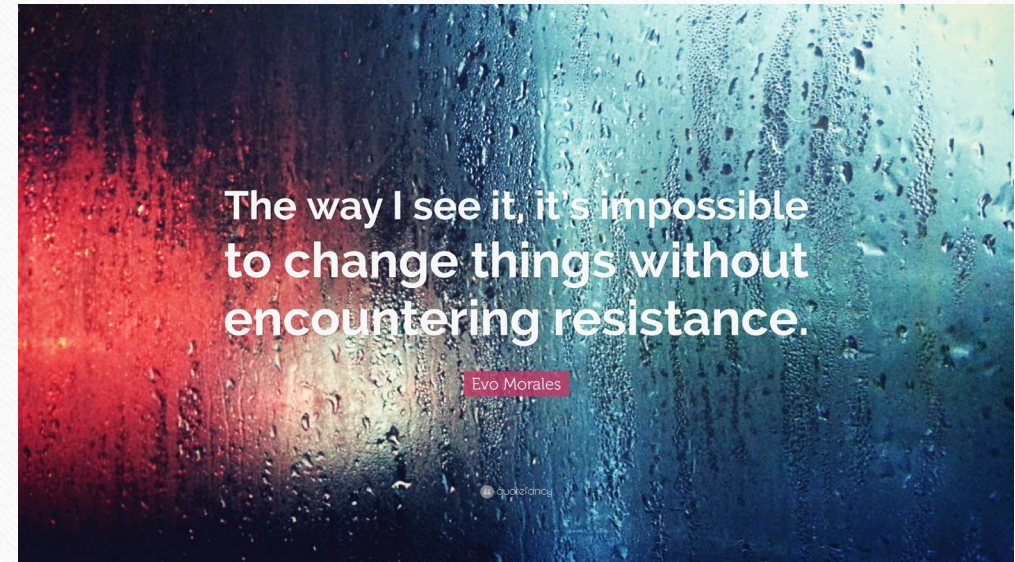## Status Check: Reflect & Evaluate Before Moving Ahead

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KEEP CALM AND TAKE SOME TIME TO REFLECT

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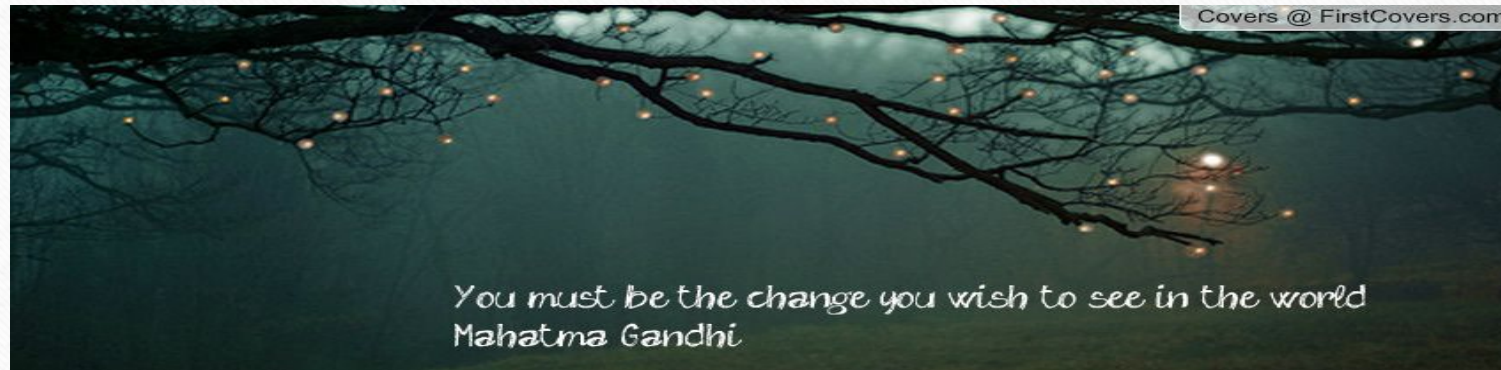THE FOUR-WAY TEST
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Home   Resources   Your Most Important Measurement: Impact

Your Most Important Measurement: Impact

April 30, 2019
By: Sheri Jacobs, FASAE, CAE

Associations tend to pay more attention to how much their resources are used than to the impact those resources have on

their community. Instead, focus on impact to better assess— and improve—your value proposition.

What will the world look like in three years? While the future is uncertain, every professional needs to be prepared, regardless of career stage or industry. And while many associations promote their education, information, networking opportunities, and advocacy as elements of their value proposition, what may be more important to future members is the ability to improve outcomes in their work.

Consider these questions:

- Are you having the same impact on your members as you did when your annual meeting, journal, or industry standards were first created?
- Does participating in your educational programs or accessing your content have the desired impact?
- Have members' roles, responsibilities, or work environments shifted in recent years due to regulatory changes, technological advances, or consumer demands?
- Does your organization review, assess, and gather feedback on the impact of its offerings, or do you primarily measure importance and satisfaction?

Many industries are facing significant changes, and associations are caught in the upheaval. The programs, products, and services created 10, 20, or 30 years ago may no longer solve members' problems if the problems themselves are changing.

To address challenges and leverage opportunities in a changing landscape, associations must be nimble and member-centric. They must be willing to test new ideas and allow for failures. Innovation and relevancy happen when organizations believe it is riskier to stay the course than to make changes to programs and products that have a successful track record.

Association leaders should ask themselves, "What impact do we want to have on our members or the community we serve?" An association's mission statement acts as an overarching guide, but association leaders should go through the exercise of articulating the specific impact they hope to achieve through provision of programs, products, and services. By articulating the

desired impact (or impacts), an association will be in a better position to evaluate its achievement toward its mission and assess where it should increase (and sometimes decrease) its investment.

> " **By articulating the desired impact, an association will be in a better position to evaluate its achievement toward its mission and assess where it should increase (and sometimes decrease) its investment.**

The first step is to go beyond just measuring the use of your offerings to evaluating the impact on the community you serve. For example:

- Are members who attend your annual meeting more likely to say they have improved decision-making skills?
- Do members who earn your association's certification find they are more influential in their workplace?
- Are certified members more likely to advance their careers within their chosen field?
- Do employers value the knowledge, information, and education you provide?

Even relying on self-reporting from members, answering questions like these will help your association evaluate its mission achievement and will offer guidance on how to adjust to improve performance.

To begin the process of evaluating the impact of your offerings and to remain relevant for years to come, it's important to prioritize and incorporate the following activities:

Track changes in behaviors. Preferences may tell you more about desires than behaviors. Asking members how they wish to access information and education will not provide you with the data needed to track how behaviors have changed within your community. Instead, ask

about the types of specific resources they regularly access and how often they consult your organization's resources in specific situations.

Re-examine existing solutions. Is your association providing solutions but not delivering them at the point of need? Even if your solutions are superior in quality, members may turn to other sources if their resources are more accessible and affordable and can be delivered exactly when needed.

Innovate. Is your association too afraid of failure to try new ideas? Too often, associations operate as if accountability precludes innovation. Associations should be transparent and should evaluate their efforts honestly, but there should also be room to experiment with new ideas, learn from mistakes, and adapt rather than give up on an idea just because it didn't work in its first iteration.

These recommendations do not suggest abandoning the core strengths organizations bring to the table. Rather, if they wish to have an impact on members and achieve their mission, it is time for associations to understand and respond to the market forces driving the decisions to join and engage.

Tags: 🏷 **CEOS/EXECUTIVE MANAGEMENT**   🏷 **INNOVATION**

Sheri Jacobs, FASAE, CAE

Sheri Jacobs, FASAE, CAE, is president and CEO of Avenue M Group and is currently serving on the ASAE Board of Directors. She is the author of "Pivot Point: Reshaping Your Business When It Matters Most" (ASAE Association Management Press, 2018).

Email (mailto:jacobs@avenuemgroup.com)

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