



Rotary's **Young Professionals Campaign**, made possible by a generous anonymous gift, is a unique opportunity for our organization to learn innovative strategies to attract and engage younger professionals and to equip and empower Rotary clubs to put those approaches into action. Through research, social media outreach and testing of new creative concepts, Rotary is learning more about how young professionals view Rotary, why they volunteer and how they make meaningful connections with other leaders.

## YOUNG PROFESSIONALS SUMMIT

Younger Rotarians, Rotaractors, and Rotary alumni are already leaders in their communities. They take action, energize their clubs, and are catalysts for change. The *Young Professionals Summit* held 26-27 September 2014 in Chicago, Illinois, gave 32 of these leaders the chance to share their thoughts, reflect on their stories, and exchange ideas. Through facilitated discussions inspired by the Appreciative Inquiry approach, we discovered what's working now, identified solutions to challenges, and talked about opportunities to amplify their positive experiences so that even more young professionals can discover Rotary.



## **Agenda**

### **Day One**

#### Rotary Peak Experiences (Rotary moments)

- Setting intentions
- Improvisation
- All about You
  - What attracted you to Rotary?
  - What do you value most about Rotary?
  - What has Rotary contributed to your life?
- Empowering Young Professionals
  - What does Rotary do well to empower young professionals?
  - How can Rotary and your club better engage young professionals?
- What's Working
  - Creating an open/innovative club culture
  - Attracting young professional members
  - Engaging young professional members
  - Building awareness in my community and network
- Prospective member focus group findings and town hall discussion
- Dream: Visioning the future of Rotary
  - It is 5 years from now. Your club is engaging young professionals more successfully than you ever imagined.
  - What does that look like?
  - What does that feel like?
  - What are you doing as a club to make that happen?
- Dream to Reality: What practical steps are you taking to accomplish that dream?

### **Day Two**

- Immediate action steps
- Improvisation (building on ideas, ad agency exercise)
- Social Media (Zocalo Group)
  - Developing a content and engagement strategy
  - Social best practices by channel
  - Using your personal brand to promote Rotary
- Influence and Control
- Personal intentions/Chicago postcards
- Calls to action
  - Membership
  - New Generations
  - Alumni
  - Public Relations

## **KEY SESSION FINDINGS**

**Background:** *In phase one of the campaign, we used social media to connect with young professionals and worked with districts to modify existing service projects and events to create opportunities where prospective members could experience Rotary outside of a traditional club meeting. During phase two, we worked with an advertising agency to create advertising concepts and utilized non-Rotarian focus groups to see how they resonated with young professionals. Phase three of the campaign, the Young Professionals Summit, was an opportunity to hear about Rotary experiences, ideas, and strategies from young professionals affiliated with or in Rotary*

- In earlier phases of the campaign, we learned that younger Rotary members, Rotaractors, and Rotary alumni are looking for more opportunities to connect with others in their peer group. Summit participants also discussed the importance of connecting and establishing relationships with Rotary and Rotaract clubs to network, socialize, collaborate, and to maximize their positive

impact in their communities. Younger professionals want to connect to the larger Rotary organization through district leadership, events, and international meetings like the Convention.

- Rotary’s value proposition is not effectively marketed to younger professionals. The fact that Rotary combines local and global service opportunities with the ability to make professional and social connections is a unique characteristic when compared with other organizations.
- Perceptions of Rotary are not always accurate, particularly among younger people, and we need to find a way to change this. In the process, we can set Rotary apart from other organizations that are competing for this age group’s time and resources.
- Younger professionals are looking to be a part of a club that represents the diversity of their community. They want a club that looks like their workplace, their network of friends, and their social media pages. They value the mentorship and intergenerational interaction available in clubs with older, more experienced members. They see this as a way to energize clubs as well as cultivate Rotary leadership for the future.
- Social media: One of Rotary’s assets is that each Rotary or Rotaract club is made up of social media influencers with networks of friends, family, and coworkers who are prospective members. By empowering members with shareable content and offering “get to know us” events at the local level, Rotary can encourage authentic peer-to-peer marketing on social media. Young professionals looking for a club for “someone like them” will be more likely to attend a service project based on a friend’s recommendation than on a paid advertisement.
- Younger professionals believe that implementing new and more relevant service projects is vital to attracting their peers and retaining them as long-term members. They believe that creating service projects that address critical needs in the community will help attract ideal prospects for Rotary membership.
- Rotary clubs’ current dues structures and attendance policies may make it difficult for younger people to join and remain members. Young professionals are already balancing the demands of a career, family, and other volunteer or professional associations. Rotary should make it easy to discover Rotary, to bring family and friends to Rotary events, and provide on/off ramps during this dynamic time.
- There is too much emphasis on membership *numbers*, and competition between area clubs is counterproductive and can even be a negative factor. To ensure that members join Rotary—and stay in Rotary—we should offer a number of different Rotary experiences. Clubs should consider the best fit for a new member, even if that is another Rotary club, Rotaract club, or Rotary experience in the area.
- Many attendees felt that the biggest challenge they encountered when taking action is lack of support and even some resistance at the district level.
- At the club and district level, funding support is crucial for the implementation of the ideas and strategies discussed at the summit.

## **STRATEGIES & IDEAS FROM SUMMIT PARTICIPANTS**

- Maintain connections and relationships with summit participants to share ideas, updates, and challenges they come across.
- Share findings from summit with our district governor and incoming district governor and utilize their influence and expertise to trickle down to the club level (RI staff will share findings with Rotary leaders worldwide).
- Summit participants should serve as a facilitator at membership summits in other districts and share ideas that can be taken back to clubs. Make it cost-effective (inexpensive or free).
- Use the format of this meeting to hold a young professionals summit as part of district conference, or create a training session for club meetings and/or district conference that covers best practices for attracting and retaining young professionals. Hold an evening Young Professionals session at district conference and invite Rotarians and non-Rotarians (through friends and social media) where they can discuss the benefits of membership beyond business networking.
- Have more events open to non-members in the community. Work with the local newspaper, city, and chamber of commerce to survey the community about service project needs because we're doing the same things over and over, and they may not be as relevant now as they were years ago. What kind of service projects can we do to get people excited about Rotary and help them understand the good we can do?
- Reach out to sources of new members by partnering with community-based organizations, professional associations, and businesses. For instance, a Rotary club that wants to connect with more Latino members can partner with a community-based organization that serves that community, identifying collaborators, sponsors, and volunteers from local businesses.
- Refocus marketing and social media efforts to send a clear message about who we are and what we do. Explain to young professionals why Rotary is a great organization to be a part of and the many benefits that membership offers. Based on what their interests are, promote Rotary clubs in terms of the opportunities that are available to them. We need to tell a younger Rotary story in our marketing.
- Ensure that each club has an external Facebook page to generate awareness for those audiences that are not already involved. People outside of Rotary are going to search for a club in a community, not in the district. The district should maintain a simple website page that lists clubs with contact information, but a Facebook page is much more beneficial at the club level. Make sure members get recognition for what they're posting. Building excitement for what you're doing is what social media channels are all about.
- Determine a social media team (one to three people who are going to be responsible for managing the channels and flow of information), as well as empower all members of your club to use social media to share Rotary content (photos from the service project, livetweets from the event, and promotion of upcoming events). Create a reference guide to clearly outline responsibilities and guidelines about what you should and should not say, and make club contact information easily accessible. Use a contact management tool like Hootsuite that allows you to schedule content in advance so you can easily see what's in the pipeline and avoid duplication of information. Find a way to better engage inexperienced social media users.
- Use LinkedIn to find prospective members or speakers, create a presence in the community, and share updates/events and content that resonates with Rotary's core values. It also helps you find individuals (Rotary alumni) and reconnect with them.
- Recognize that one size does not fit all – your club might not be able to have multiple social media platforms.

- Conduct a five-year vision plan exercise with your club or use a visioning process already in place to attract younger members: Get all members (young, old, existing, and new) together for a 4-hour session to talk about what is and isn't working. Identify someone to facilitate the process within the club. This will generate a lot of random ideas that can be used to develop a new mission statement to define what your club stands for or should stand for in the community. Then develop an action plan that you can use to set goals for the next five years. Reach out to your district to see if a program like this is already in place.
- Reach out to Rotaract clubs, get members involved with your club, and keep them in the Rotary family. Ask Rotaractors about their plans for transitioning into Rotary and ask Rotarians about their plans for integrating them. Educate Rotarians about Rotaract and create a movement under #WeAreRotary as well as a toolkit and template. Have a Rotaract session at district conference run by Rotaractors (rather than a Rotarian) to empower them to be very candid.
- Keep track of Rotary alumni (GSE, Ambassadorial Scholars). Search for alumni from Interact, RYLA, and other programs by emailing [alumni@rotary.org](mailto:alumni@rotary.org).
- Create a “yes and ...” environment and encourage members to bring in new ideas. Identify the influencers in your club and bring them on-board with you. Identify the naysayers and re-engage older members who may be open to attracting more young professionals and changing the culture of the club.
- Bring young professionals and seasoned Rotarians together to launch some brand-new projects based on ideas already out there on social platforms. Be mentors in Rotary both through formal relationships and informal ones, keeping each other connected and growing. Cultivate leadership so that the club's future is secure. Providing leadership opportunities in your club's events gives young professionals a voice in planning activities.
- Establish a Rotary Community Corps to be more service-based. Rotary Community Corps is a great way to engage people and can be used as a bridge to membership.
- Restructure/change club culture; reduce dues and meal fees for younger members. Restructure strict attendance policies (be flexible and creative) and make dues more affordable. Create club dues payment options for members based on their circumstances such as “pay as you go” meal plans that encourage visitors to the club.
- Evaluate club traditions and culture to make it more welcoming: What things must be done according to the constitution? What things are being done out of habit (tradition) that may be keeping people away from Rotary? How can we maintain traditions and respect the culture of Rotary while introducing some new traditions that may open the door for more members across age groups and experiences?
- Organize events for new clubs to meet and socialize with well-established area clubs (regional mixers, retreats, etc.)
- Set up sister clubs and virtual meetings.
- Invite potential members to an event, not to a meeting. Hold events (social, brainstorming, etc.) in the district specifically for young professionals.
- Stay relevant, but not just for the younger people in the club. Ask young people in your clubs to recommend speakers that would be interesting to them and their peers.
- Provide members with challenging tasks to keep them engaged and active. They need to know that they're making a valuable contribution to the club and its activities.

## **FEEDBACK FROM SUMMIT PARTICIPANTS**

**Why were these sessions, discussions, or activities valuable for you?**

- *The Rotarian Focus Group Findings were an eye opener in how potential Rotarians view Rotary. It's really hard to recruit new people without understanding where they're coming from. The Dream and Influence and Control presentation gave me a lot of information on what to do about the problems addressed in the Focus Group Findings. Those three areas provided information about the problem and what to do about it/how to make steps in the right direction.*
- *All About You - Having this introspective moment brought into focus the influence of Rotary on my personal growth and the import of staying in this space of service. All About Young Professionals - Being able to share my own personal frustrations of integrating Rotary in my professional life was very refreshing because I realized that I am not the only one experiencing these issues. Additionally getting feedback and suggestions on how to address these barriers were very helpful. I know I was representing my friends and many others in this discussion. Dream....: I left this discussion inspired and with a new commitment on to Rotary.*

**What new perspective have you gained from participating in the Young Professionals Summit?**

- *I was very happy to learn that RI is figuring out the challenge is not a PR challenge, where we just have to market Rotary in a better way. The success strategy for attracting younger members is actually a culture shift from within.*
- *We need to do a better job of bridging the gap between the older and younger Rotarians. There needs to be a happy medium of not focusing too much on young professionals that it alienates those who have already given Rotary so many years of service, but enough so the young professionals feel there's a place for them in Rotary.*
- *It was great to hear that there are others like me, those interested in making Rotary the best it can be. It's also helpful to hear how other people have addressed challenges in their clubs or districts and the ongoing discussion that we've had since the summit have been very helpful and allowed me to stay focused on achieving the YP mission.*
- *The access to other Rotarians and Rotaractors across the USA was phenomenal. The follow up on Facebook and the Rotary website have been fantastic, and the file system we have created through Google Drive has been most helpful in preparing presentations and sharing further ideas. I fully believe this summit will be something we remember for many years and it will guide us in our efforts to expand Rotary to a younger audience.*

**How can Rotary support you as you move forward?**

- *Being able to "phone a friend" in Rotary's Membership, Public Relations, Alumni, and Programs areas*
- *Support from other members of the Young Professionals Summit cohort*
- *Information from Rotary International (e.g. webinars, e-newsletters, email resources)*

## **RESOURCES**

- [Young Rotary Leaders Exchange Ideas at Two-Day Summit](http://rotary.org) (rotary.org)
- [Invite Young Leader to Speak Out](#) (2015 January issue of Rotary Leader)
- [Rotary Young Professionals Summit](#) video
- Young Professionals Summit [sound recordings](#)
- Ink Factory [image boards](#)