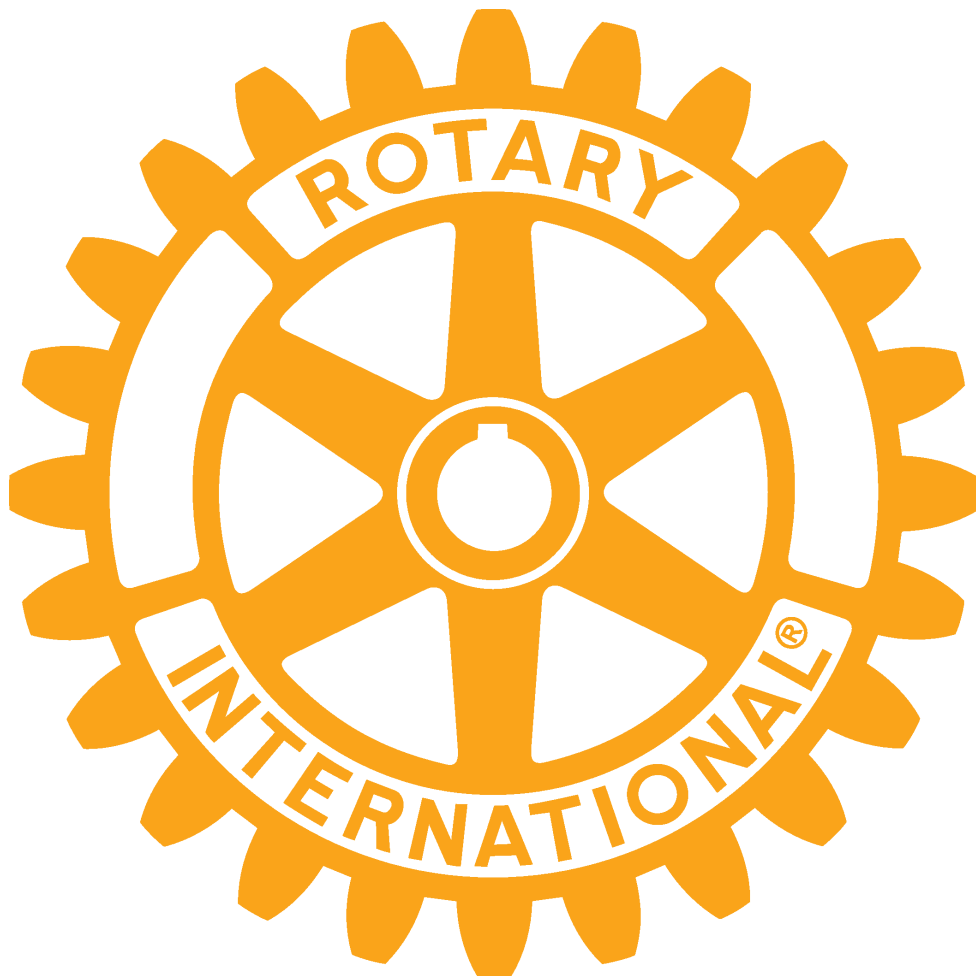


**ALL OHIO PRESIDENT ELECT  
LEARNING SEMINAR (AOP)  
WORKBOOK  
MARCH 13-14, 2026**



Your Name

Club

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# The ROTARY ACTION PLAN



**TOGETHER** WE SEE A WORLD  
WHERE **PEOPLE** UNITE AND TAKE ACTION  
TO **CREATE** LASTING  
**CHANGE** ACROSS THE GLOBE  
IN OUR COMMUNITIES AND IN OURSELVES

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. **The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.** To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the coming years.



# SESSION 1: INCREASE OUR IMPACT

## LEARNING OBJECTIVES

At the end of this session, you will be able to:

- Identify new ways to involve more Rotary members in projects
- Involve the community in planning and conducting a project

## ROTARY ACTION PLAN: INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

## RESOURCES

- Learning Center Course: [Rotary's Areas of Focus](#)
- [Community Assessment Tools](#)
- [Our Causes](#) page on Rotary.org
- [Project Lifecycle Resources](#) page on My Rotary
- [Rotary Showcase](#) of projects and partners on My Rotary

## ROUNDTABLE DISCUSSION

Use this space to capture key ideas, strategies, and insights from the group discussion.

### **Discussion Question 1: Member Involvement**

*How do you currently involve members in projects, so they're invested in success? What strategies have worked well, and what challenges have you faced?*

**Key ideas I heard:**

**Strategies I want to try:**

### **Discussion Question 2: Partnerships**

*What partnerships with community organizations, businesses, or other service groups have increased your project impact? How did you establish these partnerships?*

**Key ideas I heard:**

**Potential partners for my club:**

### **Discussion Question 3: Attracting New Members**

*How do your projects attract new or potential members? What makes a project appealing to prospective Rotarians?*

**Key ideas I heard:**

**How I can make our projects more appealing:**

### **Discussion Question 4: Innovation**

*What innovative project ideas do you want to try in the coming year? What resources or support would help you implement them?*

**Key ideas I heard:**

**Innovative ideas I want to explore:**

## **ACTION PLANNING ACTIVITY**

Work with your partner to develop a concrete plan to increase your project impact.

### **My Current or Upcoming Project**

**Project name/description:**

**Current status/timeline:**

### **My Focus Area (check one)**

Option A: Involve MORE MEMBERS in this project

Option B: Involve COMMUNITY MEMBERS OR ORGANIZATIONS in planning or conducting this project

### **My Action Plan**

**Specific people, roles, or organizations I will engage:**

**How I will reach out to them:**

**What tasks or roles I will offer them:**

**Resources or connections I already have:**

**Partner Feedback & Suggestions**

## **MY 90-DAY ACTION PLAN**

Identify ONE specific action you will take in the next 90 days to increase your club's project impact.

**My specific action:**

**Timeline/target completion date:**

**Resources or support I need:**

**How I will measure success:**

## CONTACT INFORMATION EXCHANGE

Exchange contact information with participants you'd like to stay connected with for follow-up, collaboration, or accountability.

**Name:**

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**Email:**

**Phone:**

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**Phone:**

## **PARKING LOT: IDEAS TO EXPLORE LATER**

Capture ideas, resources, or follow-up items that you want to explore after the session.

## NEXT STEPS & FOLLOW-UP

**Remember:** Help is available at many levels of the organization:

- Your Assistant Governor
- District leadership and committees
- Fellow club presidents from this training
- Rotary Learning Center and My Rotary resources

**My follow-up actions:**

# SESSION 2: EXPAND OUR REACH

## LEARNING OBJECTIVES

At the end of this session, you will be able to:

- Identify areas of your club you need to focus on to create an inclusive environment
- Develop strategies to attract new and diverse members

## ROTARY ACTION PLAN: EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new ways for participants to experience Rotary
- Increase club flexibility and appeal
- Build understanding of our impact and brand

## RESOURCES

### Learning Center courses:

- [Strategies for Attracting New Members](#)
- [Diversify Your Club](#)
- [Online Membership Leads](#)

### Worksheets and resources:

- Diversifying Your Club: Member Diversity Worksheet
- Finding New Club Members: Identifying Prospective Members Worksheet
- [Engaging Younger Professionals](#) page on Rotary.org
- Creating a Positive Experience for Prospective Members PDF

## ROUNDTABLE DISCUSSION

Use this space to capture key ideas, strategies, and insights from the group discussion.

### **Discussion Question 1: Creating an Inclusive Club**

*How can you make your club more inclusive so that it appeals to new members? What specific barriers might prevent people from different backgrounds from joining or feeling welcome?*

**Key ideas I heard:**

**Barriers in my club to address:**

### **Discussion Question 2: Attracting Diverse Members**

*What strategies have you used or seen to attract diverse members (considering gender, age, ethnicity, ability, profession)? What has worked well, and what challenges have you faced?*

**Key ideas I heard:**

**Strategies I want to try:**

### **Discussion Question 3: Engaging Prospective Members**

*How do you engage prospective members without pressuring them? What methods help build authentic relationships and ensure they understand your club?*

**Key ideas I heard:**

**Engagement approaches to implement:**

### **Discussion Question 4: Social Media & Community Connections**

*How can you use social media and community connections to attract prospective members? What has your club tried, and what could you improve?*

**Key ideas I heard:**

**Social media/outreach improvements to make:**

## DIVERSITY READINESS ASSESSMENT

Complete this assessment to identify areas where your club can improve its inclusivity and ability to attract diverse members. Mark YES or NO for each statement.

### Club Culture & Environment

Our club actively works to make people of all backgrounds feel welcome.

YES      NO

We have examined our club traditions and practices to identify potential barriers for diverse members.

YES      NO

Our meeting times, locations, and format accommodate diverse schedules and needs.

YES      NO

### Membership Analysis & Strategy

We regularly review our membership demographics and compare them to our community.

YES      NO

We have a strong, diverse membership committee with clear goals.

YES      NO

We use tools like the Member Diversity Worksheet to identify gaps in our membership.

YES      NO

### Outreach & Engagement

We actively build relationships with diverse community groups and organizations.

YES      NO

Our club's social media and marketing materials reflect the diversity we want to achieve.

YES      NO

We follow up on online membership leads assigned to our club.

YES      NO

We have a welcoming process that helps prospective members understand our club without pressure.

YES      NO

### Leadership & Recognition

Our club leadership reflects diverse perspectives and backgrounds.

YES      NO

We recognize and celebrate members who bring in new, diverse members.

YES      NO

We intentionally develop diverse members for leadership roles.

YES      NO

## **SMALL GROUP DISCUSSION NOTES**

Share your assessment results with your group and identify common areas for improvement.

**Common challenges identified in our group:**

**Priority areas we want to address:**

## **ACTION PLANNING**

Work with your group to develop concrete action steps for ONE priority area.

**Our priority area to address:**

**Specific actions we could take:**

**Who needs to be involved:**

**Resources or tools we can use:**

**How we'll measure success:**

## **MY 90-DAY ACTION PLAN**

Identify ONE specific action you will take in the next 90 days to expand your club's reach and create a more inclusive environment.

**My specific action:**

**Timeline/target completion date:**

**Resources or support I need:**

**How I will measure success:**

## CONTACT INFORMATION EXCHANGE

Exchange contact information with participants you'd like to stay connected with for follow-up, collaboration, or accountability.

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## **PARKING LOT: IDEAS TO EXPLORE LATER**

Capture ideas, resources, or follow-up items that you want to explore after the session.

## NEXT STEPS & FOLLOW-UP

**Remember:** Help is available at many levels of the organization:

- Your Assistant Governor
- District leadership and committees
- Fellow club presidents from this training
- Rotary Learning Center and My Rotary resources

**Important:** Discuss the readiness assessment with your entire club to build shared ownership of diversity and inclusion goals.

**My follow-up actions:**

# SESSION 3: ENHANCE PARTICIPANT ENGAGEMENT

## LEARNING OBJECTIVES

At the end of this session, you will be able to:

- Involve members in ways that make them feel valued for the unique skills they bring
- Create strategies to engage members

## ROTARY ACTION PLAN: ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Improve understanding and support for individual participants
- Offer new opportunities for personal and professional connection
- Provide learning opportunities for leadership development and skill building

## RESOURCES

### Learning Center courses:

- [Best Practices for Engaging Members](#)
- [Creating an Inclusive Club Culture](#)

### Tools and resources:

- Connect for Good PDF
- Entrance Survey
- Improving Your Member Retention PDF

## ROUNDTABLE DISCUSSION

Use this space to capture key ideas, strategies, and insights from the group discussion.

### **Discussion Question 1: Understanding Member Needs**

*How do you learn about your members' interests, skills, and what they want from their club experience? What tools or processes help you understand member needs?*

**Key ideas I heard:**

**Tools/processes I want to use:**

### **Discussion Question 2: Engaging Longtime & New Members**

*What does your club do to engage both longtime and new members? How do you ensure both groups feel valued and involved?*

**Key ideas I heard:**

**Strategies to better engage both groups:**

### **Discussion Question 3: Accessibility & Inclusion**

*How do you ensure your meetings, events, and activities are accessible and inclusive to all members, including those with vision, hearing, cognitive, or physical impairments?*

**Key ideas I heard:**

**Accessibility improvements to make:**

### **Discussion Question 4: Flexibility**

*How can your club be more flexible to accommodate members' varying schedules, interests, and needs? What traditions or practices might need to change?*

**Key ideas I heard:**

**Changes I want to explore:**

## MEMBER ENGAGEMENT ACTION PLANNING

Develop a concrete plan to better engage your club members by understanding their needs and creating meaningful opportunities for involvement.

### My Club's Engagement Challenge

Identify ONE member engagement challenge your club currently faces. Examples: inactive longtime members, new members not connecting, low meeting attendance, limited volunteer participation, lack of member input in decisions.

### Small Group Discussion

Share your challenge with your group and select ONE common challenge to develop an action plan together.

**Our group's selected challenge:**

## **Our Engagement Action Plan**

Work with your group to develop a comprehensive plan using this template.

### **1. Root Cause Analysis: Why is this challenge happening?**

### **2. Data Gathering: How will we understand member perspectives?**

(Consider: entrance surveys, satisfaction surveys, one-on-one conversations, focus groups)

### **3. Specific Strategies: What will we do differently?**

### **4. Implementation Steps: Who does what and when?**

### **5. Success Measures: How will we know it's working?**

## **Ensuring Implementation**

### **Who needs to be involved in implementing this plan?**

(membership committee, board, members themselves, etc.)

### **How will we ensure this plan actually gets implemented?**

### **Ideas from Other Groups**

Capture useful strategies and insights shared by other groups during presentations.

## **MY 90-DAY ACTION PLAN**

Identify ONE specific action you will take in the next 90 days to enhance member engagement in your club.

**My specific action:**

**Timeline/target completion date:**

**Resources or support I need:**

**How I will measure success:**

## CONTACT INFORMATION EXCHANGE

Exchange contact information with participants you'd like to stay connected with for follow-up, collaboration, or accountability.

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## **PARKING LOT: IDEAS TO EXPLORE LATER**

Capture ideas, resources, or follow-up items that you want to explore after the session.

## NEXT STEPS & FOLLOW-UP

**Remember:** Help is available at many levels of the organization:

- Your Assistant Governor
- District leadership and committees
- Fellow club presidents from this training
- Rotary Learning Center and My Rotary resources

**Important:** Engaging members is an ongoing process. Regularly seek feedback, adjust your strategies, and work with your membership committee to create a culture where all members feel valued for their unique contributions.

**My follow-up actions:**

# SESSION 4: ADAPT

## LEARNING OBJECTIVES

At the end of this session, you will be able to:

- Discuss ideas for meeting formats that will keep members engaged
- Identify ways to improve the meeting experience for members

## ROTARY ACTION PLAN: ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Foster more diverse perspectives in decision making

## RESOURCES

Learning Center courses:

- [Best Practices for Engaging Members](#)
- [Creating an Inclusive Club Culture](#)
- [Vibrant Clubs in Action](#)

## ROUNDTABLE DISCUSSION

Use this space to capture key ideas, strategies, and insights from the group discussion.

### **Discussion Question 1: Meeting Format Innovations**

*What meeting formats have you tried or seen that keep members engaged? How have you varied format, frequency, or location to meet member needs?*

**Key ideas I heard:**

**Format ideas I want to try:**

### **Discussion Question 2: Meeting Attendance**

*Are your meetings well attended? If yes, what makes them successful? If not, what do you think is preventing members from attending?*

**Key ideas I heard:**

**What I learned about my club's attendance:**

### **Discussion Question 3: Gathering Member Feedback**

*How does your club gather member opinions about meeting format and content? What methods work well for getting honest feedback?*

**Key ideas I heard:**

**Feedback methods I want to use:**

### **Discussion Question 4: Diverse Perspectives & Accessibility**

*How do you ensure diverse perspectives are considered when making decisions about meetings? How do you accommodate families with young children, people with disabilities, and varying schedules?*

**Key ideas I heard:**

**Ways to improve accessibility and inclusion:**

## MEETING INNOVATION PLANNING

Develop a concrete plan to innovate your club's meeting format, creating a more engaging and accessible experience for members.

### Current Meeting Assessment

Rate your current club meetings on each dimension. Use this honest assessment to identify areas for innovation.

**Member Engagement:** Members are actively engaged and find meetings valuable.

Strong    Good    Needs Improvement    Unsure

**Accessibility:** Meetings are accessible to people with disabilities, families, and various schedules.

Strong    Good    Needs Improvement    Unsure

**Format Variety:** We vary our meeting formats to keep things fresh and interesting.

Strong    Good    Needs Improvement    Unsure

**Member Input:** We regularly gather and act on member feedback about meetings.

Strong    Good    Needs Improvement    Unsure

**Attendance:** Meeting attendance is consistently strong.

Strong    Good    Needs Improvement    Unsure

**Time Management:** Meetings are a good use of members' time.

Strong    Good    Needs Improvement    Unsure

### My Meeting Innovation Focus

Based on your assessment, identify ONE specific aspect of your meetings you'd like to change or improve.

**The aspect I want to improve:**

**Why this is important for my club:**

## **My Meeting Innovation Plan**

Work with your partner to develop a detailed plan for implementing your meeting innovation.

### **1. The Specific Change:**

What exactly will you change or implement?

### **2. Why This Will Improve Member Experience:**

### **3. Member Feedback That Supports This Change:**

(Have members asked for this? What data or observations support this need?)

### **4. How to Pilot/Test This Change:**

(Can you try this for 3 months before making it permanent? Start with one meeting per month?)

### **5. Potential Barriers and Solutions:**

### **6. Who Needs to Be Involved:**

Board Approval

Bylaws Committee

Membership Committee

Other:

### **7. How I'll Measure Success:**

(Attendance numbers? Member survey? Engagement levels?)

## **Partner Feedback & Suggestions**

### **Meeting Innovation Ideas from Other Participants**

Capture innovative ideas shared by other participants that you might want to explore.

## **MY 90-DAY ACTION PLAN**

Identify ONE specific action you will take in the next 90 days to adapt your club meetings to better meet member needs.

**My specific action:**

**Timeline/target completion date:**

**Resources or support I need:**

**How I will measure success:**

## CONTACT INFORMATION EXCHANGE

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## **PARKING LOT: IDEAS TO EXPLORE LATER**

Capture ideas, resources, or follow-up items that you want to explore after the session.

## NEXT STEPS & FOLLOW-UP

**Remember:** Help is available at many levels of the organization:

- Your Assistant Governor
- District leadership and committees
- Fellow club presidents from this training
- Rotary Learning Center and My Rotary resources

**Important:** Clubs have flexibility in meeting format and frequency. Be bold in trying new approaches, but remember to gather member feedback before and after implementing changes. Work with your board to ensure any necessary bylaw updates are made. View this as an ongoing process of adaptation—what works today may need adjustment tomorrow as member needs evolve.

**My follow-up actions:**

## NOTES AND IDEAS

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