



Member Survey Results

Analysis and Recommendations

FEBRUARY 28, 2025

PETER J. SHERMAN, MEMBER

Background

- In October 2024, a working committee was formed to develop a strategic plan for the Club.

Name	Role
Louise Barden	President
Dave Burr	President-Nominee
Matthew Johnson	Vice President
Alison Noris	Secretary
Rick Otness	Advisor to President
Peter Sherman	Member, Facilitator

- As part of that effort, the committee developed a survey.
- The anonymous survey was distributed to the Club members on January 10, 2025.
- 32 members responded to the survey.
- The following pages summarize the results with analysis.

Agenda

- Member Demographics.
- Individual Personal Experience.
- Club Strengths and Weaknesses.
- How well we Plan, Implement and Sustain Projects / Activities.
- Key Themes and Recommendations.
- Addendum (comments)
 - Personal Experience
 - What do you enjoy MOST?
 - What do you enjoy LEAST?
 - Improvements / Suggestions

Demographics

I have been a member of the Rotary Club of Dunwoody for how many years.

Answer Choice	0%	100%	Number of Responses	Responses Ratio
Less than 1 year			3	9%
1 to 5 years			6	18%
6-10 years			3	9%
More than 10 years			20	62%
Total Responses			32	100%

MULTIPLE CHOICE

Describe your current working status.

Answer Choice	0%	100%	Number of Responses	Responses Ratio
Working full-time			11	34%
Working part-time			8	25%
Retired			13	40%
Total Responses			32	100%

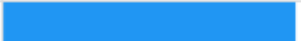
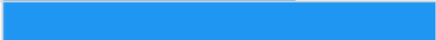
Key Takeaways

Need to grow membership to achieve sustainability.

With ~60% working part-time / full-time, we'll need to be sensitive to their working schedules.


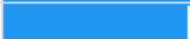
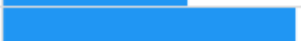
Demographics

Where do you live?

Answer Choice	0%	100%	Number of Responses	Responses Ratio
In Dunwoody			13	40%
Outside Dunwoody			19	59%
Total Responses			32	100%

MULTIPLE CHOICE

If you're working, where do you work?

Answer Choice	0%	100%	Number of Responses	Responses Ratio
In Dunwoody			11	34%
Outside Dunwoody			8	25%
Not Applicable if you're retired			13	40%
Total Responses			32	100%

Key Takeaways

We have an opportunity to attract more members outside of Dunwoody!

Demographics

How would you describe how you mostly participate in the Club?

Answer Choice	0%	100%	Number of Responses	Responses Ratio
Leading projects / sub-committees			8	25%
Volunteering on projects			6	18%
Attending meetings / social events			12	37%
Making business connections			1	3%
Contributing financially			5	15%
Total Responses			32	100%

Key Takeaways

- Fairly good balance between volunteering / leading and attending meetings.
- Opportunity to drive membership by enhancing Business Connections in the Club!

Where would you prefer to hold the weekly Club meetings?

Answer Choice	0%	100%	Number of Responses	Responses Ratio
Hotel			9	28%
Restaurant			14	43%
Company Headquarters			3	9%
Non-Profit (i.e., church)			6	18%
Total Responses			32	100%

Key Takeaways

- Our members prefer restaurants for our regular meetings. They create the right social setting.

Interpreting the Scores

Interpretation	Overall Probability of Success
<p>Results that are solidly green (scores between 4 and 5) indicate the change initiative has a high likelihood of success. Your culture of change is sustainable, so continue to include your change in new member orientation and leadership development to keep it alive and top of mind.</p>	<p>Excellent</p>
<p>If the majority of your scores are yellow (3), your odds of success are 50 / 50, the height of uncertainty. The change initiative is "stuck-in-the-middle". Stakeholders are along for the ride instead of behind the wheel. Mobilizing commitment is challenging and change efforts can easily slide into jeopardy (red). Consider strategic workout sessions with key stakeholders to gain clarity, alignment, and prioritization. Target areas for improvement by assessing and then working through resistance using team building techniques (i.e., Visioning, VOC, SWOT Analysis, regular de-briefs).</p>	<p>50/50</p>
<p>Scores that are solidly red (between 1 and 2) indicate your change initiative has a poor probability of success. Without strengthening the change management systems in your organization, you may not see the results you expect. The case for change cannot be fragile. It must be clear and direct with leadership out in front. And, it has to be communicated in an open and consistent manner. Consider how you can create the need for change (i.e., creating the sense of urgency)? How are you building a guiding coalition (shared vision, trust, right people)? What type of vision are you developing (i.e., what does success look like, communication plan)?</p>	<p>Poor</p>

Individual – Personal Experience

	Highly Dissatisfied	Dissatisfied	Neutral	Satisfied	Highly Satisfied	
	1	2	3	4	5	
Overall, how satisfied are you with the Club?			3.9			4.0
Overall, how satisfied are you with Rotary in general?			3.9			
I feel warmly welcomed when I attend my Club meetings.				4.2		
I feel safe and comfortable at Club activities.				4.2		
I feel well-informed about my Club's activities and plans.				4.2		
I feel that my Club's leadership listens to me.				4.2		
I have ample opportunities for leadership within the Club.				4		
The Club provides sufficient opportunities for personal growth.			3.8			
I feel my skills and expertise are valued within the Club.				4		
I actively participate in Club projects and activities.			3.9			
I feel that my Club's projects are effective in improving our community.				4.1		
How likely will you remain a member of Rotary for the next couple of years?				4		
I would recommend joining the Club to others.				4		

Key Takeaways

- The overall 4.0 score indicates members are satisfied with RCD.
- What's holding us back from creating a Highly Satisfied experience? Can we benchmark against other Clubs?
- Some uncertainty about the overall satisfaction with the Club and Rotary in general.
- How can the Club provide more opportunities for personal growth / project participation?
- How can we better leverage the Friday meetings to achieve this?

Club – Strengths & Weaknesses

	Major Weakness	Weakness	Neutral	Strength	Major Strength	
	1	2	3	4	5	
The Club members' overall commitment to service.				4.3		4.0
The Club's overall atmosphere of welcoming members.				4.2		
The Club's approach to onboarding and integrating new members.			3.7			
The Club's ability to promote fellowship among its members.				4.1		
The Club's meeting schedule and venue.			3.5			
The quality of the Club's speakers / programs.				4.2		
The Club's ability to raise funds for charitable giving (i.e., Polio Plus, Rotary Foundation).			3.9			
The effectiveness of the Club's projects in the community.				4.2		
The Club's reputation in the community.				4.2		

Key Takeaways

- Overall 4.0 score indicates members believe most aspects of the Club are a strength.
- Specific areas of uncertainty include *Onboarding New Members and Club Schedule / Venue*.

Ranking Strategic Priorities

The following strategic priorities were prioritized as follows:

Rank	Strategic Priority
1	Generate a Vibrant Membership (Recruiting, Retention, Participation Communication).
2	Significant Local Priorities (Fundraising, support for First Responders, Education, Health and Community Events).
3	Meaningful International Support (Fundraising, support for GRSP Student, Support for Rotary Exchange Program, International Projects).
4	Networking (Membership Professional).

Key Takeaways

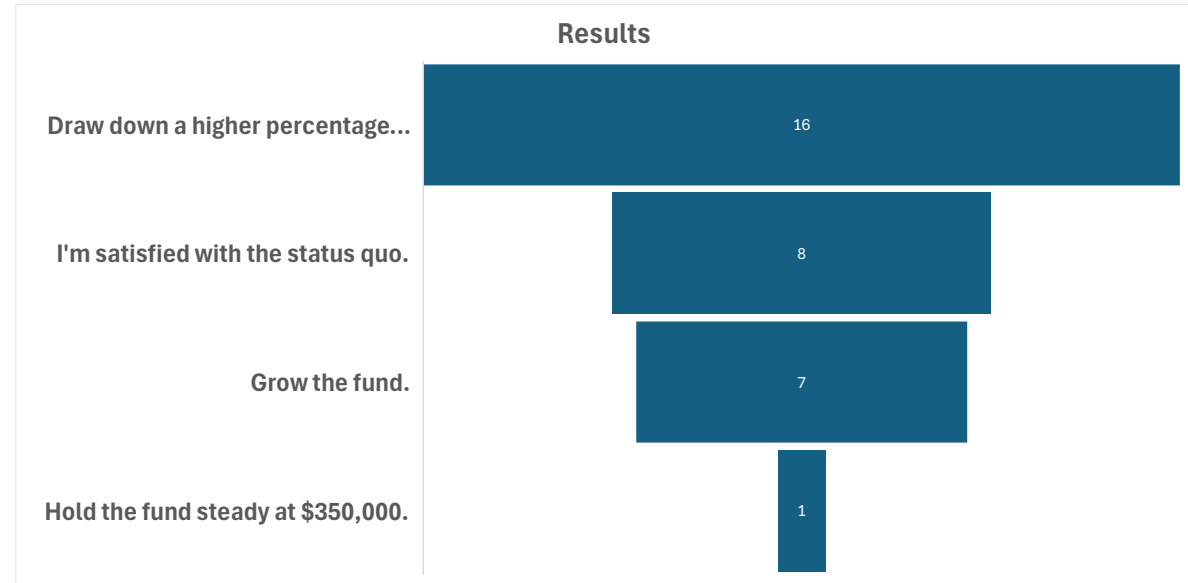
- Reinforces importance of growing membership and supporting local activities.

Please indicate where you feel the Club should spend its time and resources for projects?

Answer Choice	0%	100%	Number of Responses	Responses Ratio
In Dunwoody			26	81%
Neighboring communities outside of Dunwoody			3	9%
International			3	9%
Total Responses			32	100%

Addressing the Charitable Fund

- The Club's Charitable Fund has a current balance of approx. \$350,000. To partially fund our annual projects ranging from \$55,000 to \$80,000, we draw 5% from the Charitable Fund each year (~\$15,000). Please tell us how you feel about this budget allocation.



Key Takeaways

- Majority of members prefer to draw down a higher percentage of the fund. Other options include:
- **Balanced approach** – Focus on fewer initiatives while maintaining long-term sustainability of the fund.
- **Explore higher income-producing investments** while preserving the principle.
- **Explore alternative fundraising / endowment growth strategies** to grow the fund.

What's Important to You

The following activities were prioritized as follows:

Rank	Activity
1	Volunteering.
2	Attending meetings / social networking.
3	Leadership (Club, sub-committees, projects).
4	Making business connections.

Key Takeaways

- Reinforces our focus on volunteer programs and meetings / social networking.

How well we Plan Projects / Activities

How well we Plan Projects / Activities					Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	
Planning					1	2	3	4	5	Score
	1	People	Leadership	Are there champions within the Club for projects and activities?				4.3		3.9
	2	People	Leadership	Do the leaders provide the time, passion, and focus needed for the Club's projects and activities to happen?				4.1		
	3	Process	Vision	Have the reasons / rationale for these projects and activities been clearly articulated?			3.7			
	4	People	Communication	Could you explain the reason and why you support our projects and activities?			3.9			
	5	Process	Benefits	Are the desired outcomes from the projects and activities clear?			3.8			
	6	People	Benefits	Could you explain how the outcomes will impact the community?			3.7			

Key Takeaways

- Overall 3.9 score indicates borderline agreement on how projects and activities are planned.
- Specific areas to improve include Visioning, Communication and Explanation of Benefits. For example, strengthen the Vision of the Policy Foundation.

How well we Implement Projects / Activities

How well we Implement Projects / Activities					Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	
					1	2	3	4	5	Score
Implementing	1	People	Stakeholders	Have the Club's key stakeholders been identified and actions taken to gain their strong commitment to the projects and activities?			3.5			3.4
	2	People	Stakeholders	Are the Club's key stakeholder actions of commitment visible to all concerned?			3.5			
	3	People	Stakeholders	Have Community's key stakeholders been identified and actions taken to gain their strong commitment to the projects and activities?			3.3			
	4	People	Stakeholders	Are the Community's key stakeholder actions of commitment visible to all concerned?			3.1			
	5	Process	Standard Work	Have standard policies and processes for projects and activities (i.e., reimbursement, requesting a grant) been developed?			3.8			
	6	Technology	Systems / Tools	Do you have a My Rotary account?	81% surveyed have a My Rotary account					
	7	Process	Training	Are you able to navigate the websites to find information you need about the Club and District?			3.5			
	8	Process	Training	Are there appropriate resources (subject matter experts) to help you understand how to use the systems and technology (i.e., my Rotary Account, District and Rotary International websites)?			3.2			
	9	Technology	Systems / Tools	Are the Club's projects identified, evaluated and prioritized using a framework that aligns with the Club's goals?			3.5			
	10	Process	Project Management	Are the projects and grants actively managed throughout the lifecycle (planning, draft, authorization, submission, approval completion, evaluation and reporting)?			3.5			

Key Takeaways

- Overall 3.4 score indicates greater uncertainty of how projects / activities are implemented.
- Specific areas to improve include Stakeholder & Community Commitment, Project Prioritization, Training / Websites, and Managing Projects.

How well we Sustain Projects / Activities

How well we Implement Projects / Activities					Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	
					1	2	3	4	5	Score
Sustaining	1	Process	Benefits	Once a project has started, is it sustained and repeatable?			3.7			3.4
	2	Process	Communication	Are key outcomes of the projects / activities shared within the Club and the community stakeholders to consistently reinforce the value			3.4			
	3	Process	Reporting	Have meaningful Key Performance Indicators (KPIs) been established to measure progress of the projects / activities?			3.0			
	4	People	Governance	Are individuals held accountable for meeting the targets of the projects / activities and the progress toward them?			3.2			
	5	People	Governance	Are all management practices (committee members, training support, communications, resources) aligned to complement and reinforce the projects / activities?			3.3			
	6	People	Recognition	Are accomplishments / milestones celebrated and Club & community stakeholders recognized for achievements?			3.8			

Key Takeaways

- Overall 3.4 score indicates greater uncertainty of how projects are sustained.
- Specific areas to address include Communication, Reporting (KPIs) and Governance (accountability).
- For example, how are measuring the impact of the Tapestry Program or Kingsley Book Drive. The outcome was 100 backpacks, but how did we improve student performance?

Key Themes & Recommendations

#	Themes	Recommendations
1	Membership Growth & Engagement	<ul style="list-style-type: none">• Developing better recruitment strategies to attract new members outside of Dunwoody and retain engagement.• Strengthening new member onboarding and providing clearer information about club activities.• Encouraging greater participation beyond meetings, with more volunteer and leadership opportunities.
2	Business & Networking Opportunities	<ul style="list-style-type: none">• Several members highlighted the importance of professional networking and business connections as part of their Rotary experience. While this is not the club's primary focus, there is interest in creating more opportunities for members to connect professionally. Ideas include partnering with other local Rotary Clubs / professional associations (i.e., Rotary Club of Alpharetta, new Greater Perimeter Chamber, Buckhead Business Assoc., TAG, WIT).• Themes 1 and 2 are not mutually exclusive.

Key Themes & Recommendations

#	Key Themes	Recommendations
3	Project Selection & Funding Allocation	<ul style="list-style-type: none">• Improving how projects are identified, evaluated and prioritized (i.e., strong effort vs. impact, Project Life-Time Value, strengths vs. weaknesses, partnering with other clubs).• There is strong support for expanding and enhancing local community programs.• Developing a more robust / rational approach to funding allocation (i.e., ROI, impact ratios such as cost per unit – meal / book, etc.).
4	Financial Management	<ul style="list-style-type: none">• In conjunction with # 3, define financially sustainable ways to support efforts (see page 11).• Expand fund raising efforts such as Corporate Donors, cost sharing with other Rotary Clubs.• Increase membership, Club dues / reduce costs.
5	Communication & Transparency	<ul style="list-style-type: none">• Members want more visibility into Board decisions and greater input on club priorities before final decisions are made.• Improve how information can be aggregated, analyzed and disseminated for easier consumption (i.e., Communication Primer).

Next Steps

1. _____.
2. _____.
3. _____.

Addendum

Personal Experience Comments

Comments

- Re: where we hold meetings - don't care as long as space is nice/not claustrophobic and food is reasonably good.
- Club is friendly - used to be more so with more outgoing calls to people to invite participation.
- Love RCD members and mission.
- I plan on moving in the next few years and that would change my membership..
- The club's current meeting spot is a turnoff. No windows and too small. we should go back to considering the Country Club. Where you meet either impresses or turns off potential members! Please have speakers that are Atlanta metro area speakers.
- Club should reinforce frequently the "opportunities for personal growth.
- I recruit for our Rotary Membership at many Dunwoody events.
- The Club's reputation helps it get very well-placed, informed and active speakers from many subjects of interest.
- I really have enjoyed the fellowship of the Club and making an impact in the community.
- Enjoy helping on projects, supporting GRSP, hosting students.
- Change in meeting times.
- There are numerous legacy projects that continue year after year, but it seems like the club lacks a central focus that all members can rally around. As a result, I often find it challenging to determine where to direct my efforts.

What do you enjoy MOST?

I really like the energy in our club. I felt it from the first time I visited. People are energized in the morning, and I enjoy starting my Fridays with Rotary.

Long term friendships I have developed. Way club members support others on projects that are their passion - to make a difference in community and world. Hands on opportunities - local & international. GRSP. Anchor Place best new initiative in long time

Relationships w fellow Rotarians

Continuous opportunities to volunteer

Fellowship with fellow Rotarians and spouses

Making connections in the Dunwoody community (business and social) and giving back to the community through service projects.

It's a tie; serving the community and comradery

The community - **servng community**.

Being a part of a group that makes a difference

I am a committed member of Rotary International in spite of club changes.

Fellowship

Ability to **help (serve) people** in need in our State, National and international communities. Membership participation in the club projects/programs.

Friendships and Serving the Community!

What do you enjoy MOST?

1. Relationships with members. 2. Opportunities to "give"!
Meeting members and listening to speakers.
New friends with similar interest.
The fellowship and having an impact in the community.
Financial and volunteer opportunities making our community better. , safer and stronger
Being part of an international organization
Good group of people, genuinely good hearted, and strong intent to do good. Aligns with my values.
The friends made over the years; Projects supported; Speakers
Friendships
Connecting with other members at meetings and other occasions.
Unintended friendships.
Networking and hearing from engaging speakers.

Friendships and Serving the Community!

What do you enjoy LEAST?

N/A I have no complaints

NOTE: I have been a member of 3 Rotary Clubs, including Dunwoody, and this fall, I missed more meetings than I have in the 7 other years I've been a part of any Rotary Club. It's just unfortunate that it occurred that way.

When we shy away from initiatives because they're "too much work" or "we're poor"

Need more effort from members to build number of members. Grow membership in 40 to 55 age range

Not early enough notice on upcoming activities

Some leadership seems to forget that members work full time and cannot volunteer or meet during the day.

I don't know how to answer this because I don't feel there is anything I don't enjoy.

The amount of time the club needs.

The limitations put on fundraising for just alzheimer's - there are so many other important projects

Seeing the club become small and not a leading club like it used to be.

We should make more of an effort (have a plan) not to reflect a "cliquish" atmosphere with new members at meetings. Being transparent about members leaving and reason why they leave.

Some venues have been good and some menus have been good. Food at current venue is yuky.

Making friends and staying in touch.

Fund raising

Having to navigate through all the information.

Friday early meeting time

What do you enjoy LEAST?

Lack of engagement by many club members

Being asked for money / contributions. Makes me uncomfortable. Giving should be encouraged always.

No dissatisfaction

Time of day the meetings are held

Some members belong in other clubs because of age & interests

I often find it challenging to determine where to direct my efforts.

All good!

If we can get more member participation.....maybe the time commitments can be alleviated.

Improvements

Business Connections, I guess. I am still working, so I'd love to be able to connect more. I also try and make Rotary Means Business every couple of months, so I know that is not our club's focus.

We don't do as much internationally or as much hands-on as we used to do. Would like to see us actively complete a community assessment to identify new big areas where we can make a difference - education, health. Get club involved in deciding.

Increase impact of programs. More \$\$\$

Local community programs, **business connections**

I think we have members who only attend meetings, they don't volunteer or participate in events. The club would be improved if everyone participated but I know of no way to achieve this.

Building a way to **recruit** members.

working with other clubs on significant projects in the area

Place emphasis on **new members** to take leadership roles in the Rotary ongoing projects. This should start when interviewing potential new members and making announcements at meetings. Announcing birthdays, anniversaries, members reaching milestones

International social networking.

Social Networking.

Business Connections, New Member Recruiting.

Improvements

Members would like to hear the priorities and projects the Board is considering before the decision is made.

Exciting international project we could visit

New Member Onboarding and Information about the club.

Stronger international charitable funding of international projects

Networking and business connections

Local Community Programs, Visibility, Business and Social Connections

Feel the club does a great job in all areas. Focus on fun and supporting community

Expand on local community programs

New venue with better food

We do a good job here

Increased meaningful community programs or reallocate efforts and funds giving more support to Anchor place.

Business connections if anything

Community Programs, Business Connections, New Member Recruiting.

Improvements

Ones that benefit Dunwoody

Continued GRSP and Rotary Youth EXchange involvement.

Help Anchor Place expand its work/footprint - in Dunwoody and across Georgia.

hands on international project

The board needs to be strong enough to do research and make decisions.

New member sponsor to introduce the member to BOD and enable BOD to pick the new member and get a better understanding of the new member's interests.

Develop plan to market Rotary Brand in community.

New members should select projects of interest.

Whatever the Board decides.

The club is doing a lot. We need corporate engagement as a cornerstone corporate engagement. Will make everything easier - membership, projects, volunteering, and such.

Promote club activities and contributions to community

We do a good job here

I would like to see the club spend more time focused on the youth in our community and developing future community leaders.

Community Programs, New Member Recruiting.