

# Club Assessment Tools

A Companion Piece to the  
*Membership Development Resource Guide*



ROTARY INTERNATIONAL®

Club membership assessment is an ongoing — and vital — part of every club’s operations. Uncovering your club’s strengths and weaknesses is an essential step in creating an effective plan for membership development.

*The Membership Development Resource Guide (417-EN)* provides the framework for building, supporting, and sustaining a strong Rotary club. Recruiting new members, retaining existing members, and organizing new clubs remain the three vital components of membership development. The assessment tools presented here complement the material in the guide.

# Assessment Tools

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# Chapter 1

## ***Planning Guide for Effective Rotary Clubs: Membership***

Assessing the current state of membership in your club and planning for the year ahead is an important first step toward successful membership development. To begin, complete this worksheet by 1 July each year. If appropriate, alter the procedures to fit the needs of your club. For example, smaller clubs may want all members involved in the completion of the worksheet; larger clubs might want the membership committee to complete the worksheet and report to the club about the action plan they have developed. The version included here is a shortened (membership only) section of the complete *Planning Guide for Effective Rotary Clubs*.

### **Objectives**

- Determine the club's current membership state.
- Establish ambitious but attainable membership goals for the upcoming Rotary year.

### **Time**

45-50 minutes

### **Preparation**

- Ask a club officer with access to membership data to obtain statistical information about current members from Member Access at [www.rotary.org](http://www.rotary.org).
- Fill in any numerical data available on the worksheet.
- Choose a meeting date to discuss open-ended questions and action steps with your club members.
- Tell members when this discussion will take place and give them the worksheet in advance so that they can come prepared to discuss their ideas.

### **Materials**

- Planning guide worksheets for your club members and/or membership committee members
- Pens or pencils

## Procedure

1. Explain the purpose of the assessment and encourage club members to voice their ideas. (2 minutes)
2. Hand out blank copies of the worksheet to members if they have not already received it, and ask them to either make their own comments on the sheet (if you wish to collect written ideas from club members) or to simply use the worksheet to follow along with the discussion. (5-10 minutes)
3. Read the answers to closed-ended questions aloud and facilitate a discussion based on this data. Have members discuss the open-ended questions and work together to answer them. (15-20 minutes)
4. Facilitate an idea-generating discussion about possible action steps to take for membership development in the next year. (15-20 minutes)
5. Complete one master worksheet that includes agreed-upon ideas and action steps. This worksheet should be given to the assistant governor by 1 July.

**Note:** The Classification Survey, a key step to complete during this activity, appears on page 5.

# Planning Guide for Effective Rotary Clubs

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in this section are common ways clubs might choose to pursue membership goals. Clubs are encouraged to develop alternative strategies to achieve their membership goals when appropriate.

Download a Microsoft Word version at [www.rotary.org](http://www.rotary.org).

## MEMBERSHIP

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### Current State

Current number of members: \_\_\_\_\_

Number of members as of 30 June last year: \_\_\_\_\_ 30 June five years ago: \_\_\_\_\_

Number of male members: \_\_\_\_\_ Number of female members: \_\_\_\_\_

Average age of members: \_\_\_\_\_

Number of Rotarians who have been members for 1-3 years: \_\_\_\_\_ 3-5 years: \_\_\_\_\_ 5-10 years: \_\_\_\_\_

Number of members who have proposed a new member in the previous two years: \_\_\_\_\_

Check the aspects of your community's diversity that your club membership reflects:

☐ Profession

☐ Age

☐ Gender

☐ Ethnicity

Our classification survey was updated on \_\_\_\_\_ and contains \_\_\_\_\_ classifications, of which \_\_\_\_\_ are unfilled.

(number) (date) (number)

Describe club's current new member orientation program:

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Describe club's continuing education programs for both new and established members:

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Our club has sponsored a new club within the last 24 months. ☐ Yes ☐ No

Number of Rotary Fellowships and Rotarian Action Groups members participate in:

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What makes this club attractive to new members?

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What aspects of this club could pose a barrier to attracting new members?

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### Future State

Membership goal for the upcoming Rotary year: \_\_\_\_\_ members by 30 June \_\_\_\_\_  
(number) (year)

Our club has identified the following sources of potential members within the community:

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### How does the club plan to achieve its membership goals? *(check all that apply)*

- ☐ Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- ☐ Ensure that the membership committee is aware of effective recruitment techniques
- ☐ Develop a recruitment plan to have the club reflect the diversity of the community
- ☐ Explain the expectations of membership to potential Rotarians
- ☐ Implement an orientation program for new members
- ☐ Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- ☐ Assign an experienced Rotarian mentor for every new club member
- ☐ Recognize those Rotarians who sponsor new members
- ☐ Encourage members to join a Rotary Fellowship or Rotarian Action Group
- ☐ Participate in the RI membership development award programs
- ☐ Sponsor a new club
- ☐ Other (please describe): \_\_\_\_\_

### Action Steps:

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# Chapter 2

## Conducting Your Club's Annual Classification Survey

Your club should strive to create a roster of classifications that reflects your community, broadening the interpretation of classifications to match today's business and professional environment.

### Background Information

The Rotary Code of Policies states that clubs should maintain and use up-to-date classification surveys to develop and strengthen membership (4.050.1.). The classification requirement is described in article 8 of the Standard Rotary Club Constitution and in the *Manual of Procedure* (035-EN). The facilitator for this exercise should read the classification sections of these three publications before conducting the exercise.

Business and professional activities vary from community to community, as does terminology. This is especially true in an international organization such as Rotary. For this reason, a definitive list of classifications from RI does **not** exist.

### Objectives

- Identify the professional makeup of the local community.
- Review classifications of current members.
- Create new classifications and modify existing ones to better reflect the community.
- Set or adjust recruiting efforts, as needed.

### Time

- Individuals: 20-60 minutes outside of the club meeting (depending on whether individual is on the membership committee)
- Club: 40 minutes

### Preparation

- Prepare a current classification list in advance.
- Print instructions/worksheet as handouts for club members, or display them in a format and place that everyone can see during the explanation of the exercise.
- Have the facilitator review information about the classification principle and the composition of clubs, as stated in the current *Manual of Procedure* and the Standard Rotary Club Constitution. The facilitator may wish to photocopy relevant pages to distribute to club members.

## Materials

- Paper
- Pens or pencils
- Photocopies of worksheet
- Most recent copy of the local business telephone directory or other local business directories
- Internet access (for optional online research)
- *Manual of Procedure*
- Standard Rotary Club Constitution

## Procedure

1. Ask the facilitator or club president, secretary, or membership committee chair to compile a current roster of members and their classifications. (10-15 minutes)
2. Calculate the percentage of your total membership for each classification and create a visual representation (e.g., graph, pie chart) of your current classification makeup. (5-10 minutes)
3. Photocopy the information you have just compiled in steps one and two to distribute to your club members. (2 minutes)
4. Introduce the classification principle during a club meeting, highlighting the goal of a balanced membership across classifications (see the *Manual of Procedure* or Standard Rotary Club Constitution for guidelines). (5 minutes)
5. Assign club members to conduct research at home by going through a local phone or chamber of commerce directory to determine which (if any) classifications are underrepresented in your club. You may wish to use the suggested worksheet questions provided with this exercise.
  - Assign a member or group of members to contact a local business association such as the chamber of commerce to gather statistical data about the local business community. (20 minutes outside of meeting)
  - Ask a member or members to research local employment statistics online. Many chambers of commerce also publish employment statistics by industry online. (20 minutes outside of meeting)
  - Divide remaining club members into groups to compile lists from local phone or business directories (have several people look at classifications that begin with A-G, H-P, or Q-Z). (20 minutes outside of meeting)

Ask members to report their findings at the next meeting and provide written answers to a set of questions that you determine are relevant to your region (a sample worksheet of suggested questions is provided).



6. Ask individuals to share their findings with the club by a specified date.
7. Collect hard copies of the findings/recommendations/suggestions made by club members.
8. Have the membership committee consider the collected data and compile it into one master list of filled *and unfilled* classifications. Any discrepancies in classification wording or categories should be discussed, and the committee should determine the final list. Changes to current classifications should also be adjusted. (25-30 minutes)
9. Print a list of your filled and unfilled classifications for all of your club members (sample classification survey follows this exercise). You may want to indicate how many potential spots exist for each open classification. If you found published employment statistics by industry for your community, include this data on your list for comparison. (5 minutes)
10. Hand out the final list at a club meeting and discuss the opportunity that your unfilled classifications create for new member recruitment. (10-15 minutes)

Every club will likely have some unfilled classifications. Your goal is to recognize opportunities that exist within the professional community — in the form of unfilled classifications — to determine areas of focus for increased recruitment efforts.

Rather than opening the research to the entire club membership, you may wish to make this a membership committee exercise. If club members aren't included in the process, distribute the final list of filled and unfilled classifications and discuss its purpose. This exercise works best when done concurrently, or in conjunction with, the Membership Diversity Assessment and the 25-Minute Membership Survey.



# Classification Worksheet

Rotary Year 20\_\_ - \_\_

Rotary Club of \_\_\_\_\_

1. What classifications exist in our locality and surrounding area that are either not represented or underrepresented in our club? What source(s) did you use?

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2. Have any business developments in the past year had a significant impact on the local economy or business environment? If so, how do these developments affect any potential or existing classifications?

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3. What modifications to current classifications do you recommend? Please explain your reasoning.

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4. Which potential classifications that you listed in response to question 1 should our club focus on filling? Why?

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5. Do the classifications held by our current club membership accurately reflect the makeup of our local business community? Why or why not? If not, what specific suggestions do you have to remedy the situation?

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# Classification Survey

Rotary Year 20\_\_ - \_\_

Rotary Club of \_\_\_\_\_

Classifications Represented	Percent of Total Membership	Full? Yes or No
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		

**Top 10 classifications in our community that are *not* currently represented in our club membership:**

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

Survey Completion Date: \_\_\_\_\_



# Chapter 3

## Membership Diversity Assessment

With clubs in more than 200 countries and geographic areas, one of Rotary's greatest assets is the diversity of its over 1.2 million members. The aggregate skills, talents, and experiences of Rotarians worldwide enable clubs to better serve their communities and the world. The variety of cultures and countries represented in Rotary also strengthens the organization's ability to work for world understanding and peace.

Choose a facilitator for this exercise who is very comfortable talking about diversity and is passionate about the need for greater diversity in Rotary. You may also consider asking a district-level representative to speak.

This exercise works best when done concurrently or in conjunction with the Classification Survey and the 25-Minute Membership Survey.

### Objectives

- Gather demographic data (gender, age, religious affiliation, ethnicity, profession) on your local community's professional population.
- Create member awareness of the goal of diversifying across these categories.

### Time

- Individuals: 20-60 minutes (outside of the club meeting, depending on whether the individual is on the membership committee)
- Club: 45 minutes

### Preparation

- Distribute a copy of the completed classification survey as a reminder that the first step toward examining club diversity has already been completed.
- Photocopy instructions/worksheet to distribute to club members.

### Materials

- Paper
- Pens or pencils
- Worksheets
- Local phone directory
- Internet access

## Procedure

1. Have the facilitator (or club president, membership committee chair or committee member) open with a discussion of diversity. Hand out the completed classification survey.
2. Distribute the membership diversity worksheet to be completed outside of the club meeting. The research that is necessary for this exercise should be done by club members so that they have a stake in the process; greater inclusion of all members helps create broader awareness. A sample worksheet is included, which you can customize to better fit the needs of your club.
3. Assign club members to different groups and instruct each group to conduct research from one of the following sources in the community:
  - Local business association, such as the chamber of commerce, to gather demographic data
  - Local tourism bureau, to gather information about the community's cultural, historical, and demographic composition
  - Local economic development experts or city government departments, to gather socioeconomic statistics
  - Most recent census results, which may include information on the age, gender, ethnic, and religious makeup of your areaHave the groups meet for a few minutes to discuss their assignment and select a spokesperson who will report the findings of his or her group.
4. Give the groups a specific club meeting date for making their reports. The spokesperson will spend approximately five minutes of club time reporting the group's findings. (5 minutes per group; 20-30 minutes total)
5. Facilitate a discussion about the reported material and its relevance to your club. (15-30 minutes)
6. Distribute copies of the membership diversity checklist (or a customized version that you create yourself). This exercise should get members thinking about what they have researched and discussed, and it should indicate their attitudes toward diversity.
7. Collect the checklists and remind all club members of their responsibility to propose new members.



# Membership Diversity Worksheet

Rotary Year 20\_\_ - \_\_

Rotary Club of \_\_\_\_\_

1. What source(s) did you contact in your search for data on your community's demographic composition?

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2. What data did you find for your community in respect to

Age:

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Gender:

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Religious affiliation:

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Ethnicity:

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3. Does this data correspond to the makeup of working professionals in your community?  
Please explain your reasoning.

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4. What data did you find the most interesting?

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What surprised you most?

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What surprised you least?

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5. How can your findings be incorporated into a strategic action plan for membership development?

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# Membership Diversity Checklist

Rotary Year 20\_\_ - \_\_

Rotary Club of \_\_\_\_\_

Yes	No	Not Sure	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The ages of the members of my Rotary club reflect the ages of the professional population in my community.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	My Rotary club's membership represents the gender composition of working professionals in my community.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The religions represented in my community are equally represented in the religious affiliations of my club members.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The members of my Rotary club reflect the true ethnic diversity of the community in which I live.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The professional classifications represented in my club membership reflect the business and professional population of my community.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I believe my club is diverse.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I believe my club needs to continue its efforts toward greater diversity in membership.

Please include any comments or suggestions about your club's diversity:

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# Chapter 4

## 25-Minute Membership Survey

Surveying your club members about prospective members they know in the community is an important step toward active recruiting of new members. This simple activity provides a pool of potential members for your club that can also be cross-referenced against the results from your classification survey and diversity profile to help your club create a truly diverse membership.

Clubs around the world approach membership recruitment in very different ways. If this tool, or any other that RI produces, isn't regionally appropriate or doesn't meet your club's needs, you may choose to customize it to make it more relevant to your region, or implement another method for finding potential candidates for Rotary membership.

### Objectives

- Develop a database or pool of potential candidates for membership.
- Create awareness among club members of their responsibility to introduce Rotary to others.

### Time

20-25 minutes

### Preparation

The facilitator should choose an appropriate club meeting to distribute the worksheet. Typically, this exercise works best at the beginning of a Rotary year when annual membership goals have just been established. Clubs are encouraged to complete this survey in conjunction with the *Planning Guide for Effective Rotary Clubs*, classification survey, and diversity assessment so that members can better understand how these activities work together.

The facilitator (or chair / member of the membership committee) should make copies of the survey to distribute to club members. You may wish to customize the survey as regionally appropriate, using the sample that follows as a guide.

### Materials

- Pens or pencils
- Worksheets

## Procedure

1. Have the facilitator explain the purpose of the exercise and how it relates to the activities that your club has already completed. Discuss any membership initiatives the club is actively involved in, such as membership award programs. (5-10 minutes)
2. Distribute the exercise materials to the club members, and answer any questions. Explain that participants will have 15 minutes to fill out the worksheet.
3. During the last five minutes, ask club members to do the following:
  - a. Circle the names of five individuals who you think should be asked to attend a club meeting.
  - b. List the phone numbers of each individual, if known.
  - c. Mark a star next to one of the five circled names to indicate who you will personally invite to attend a meeting. Suggest a few specific dates when your program might be particularly interesting for potential members.

Remind club members of the results of the classification survey and diversity profile, and suggest that they consider qualified individuals from underrepresented groups.
4. Have the facilitator collect the surveys and give them to the club membership committee to compile a master list.
5. Ask the club membership committee to break down the list by starred names, circled names, and others and to devise an action plan to make sure these individuals are invited as guests to club meetings. The committee should cross-reference the list with the underrepresented groups on your classification survey and diversity profile and create a priority list.
6. Keep the worksheets for future recruiting efforts.

# 25-Minute Membership Survey

Your Name \_\_\_\_\_ Date \_\_\_\_\_

Your Phone \_\_\_\_\_

Your E-mail \_\_\_\_\_

Consider professional colleagues, community leaders, and acquaintances who might qualify as potential Rotarians.

Your neighbor(s):

1. Male \_\_\_\_\_ Occupation \_\_\_\_\_

2. Female \_\_\_\_\_ Occupation \_\_\_\_\_

3. Male \_\_\_\_\_ Occupation \_\_\_\_\_

4. Female \_\_\_\_\_ Occupation \_\_\_\_\_

Your immediate manager (if applicable):

5. \_\_\_\_\_ Job Title \_\_\_\_\_

Another business professional within your company or organization:

6. \_\_\_\_\_ Job Title \_\_\_\_\_

Community leaders with a commitment to service:

7. \_\_\_\_\_ Occupation \_\_\_\_\_

8. \_\_\_\_\_ Occupation \_\_\_\_\_

RI or TRF program alumni your club maintains contact with:

9. \_\_\_\_\_ Occupation \_\_\_\_\_

Professional business association colleagues:

10. \_\_\_\_\_ Occupation \_\_\_\_\_

11. \_\_\_\_\_ Occupation \_\_\_\_\_

Consider your professional acquaintances:

12. Physician \_\_\_\_\_
13. Dentist \_\_\_\_\_
14. Financial Manager/Planner \_\_\_\_\_
15. Religious Leader \_\_\_\_\_
16. Attorney \_\_\_\_\_
17. Business Consultant \_\_\_\_\_
18. CPA \_\_\_\_\_
19. Veterinarian \_\_\_\_\_
20. Internet Technology Consultant \_\_\_\_\_
21. Public Relations Manager \_\_\_\_\_
22. Entrepreneur \_\_\_\_\_
23. Non-profit Executive Director \_\_\_\_\_
24. School Administrator \_\_\_\_\_
25. Other \_\_\_\_\_

Professional acquaintance (not named above) that you have done business with in the last week:

26. Name \_\_\_\_\_ Occupation \_\_\_\_\_

Professional acquaintances (not named above) that you have done business with in the last month:

27. Name \_\_\_\_\_ Occupation \_\_\_\_\_

28. Name \_\_\_\_\_ Occupation \_\_\_\_\_

Personal acquaintances who have volunteered with you (for a Rotary or a non-Rotary event/service project):

29. Name \_\_\_\_\_ Occupation \_\_\_\_\_

30. Name \_\_\_\_\_ Occupation \_\_\_\_\_



# Chapter 5      Retention Model

Keeping current members is just as necessary as recruiting new members if clubs are to remain viable and effective. Many clubs don't realize they have a retention problem because the number of members in their club has remained relatively steady. However, clubs that are routinely losing members (for reasons other than relocation) and making up for this by inducting an equal number of new members are not effectively managing their club's growth.

## Objectives

- Determine club's ability to retain members. Calculate a club's net membership gain (or loss) over a specified time period and determine its source: existing or new members.
- Determine a club's ability to retain members, and establish ways to address retention weaknesses and maintain strengths.

## Time

30-45 minutes for person completing model; 1 hour of discussion (club membership committee); 20-30 minutes of discussion during a club meeting

## Preparation

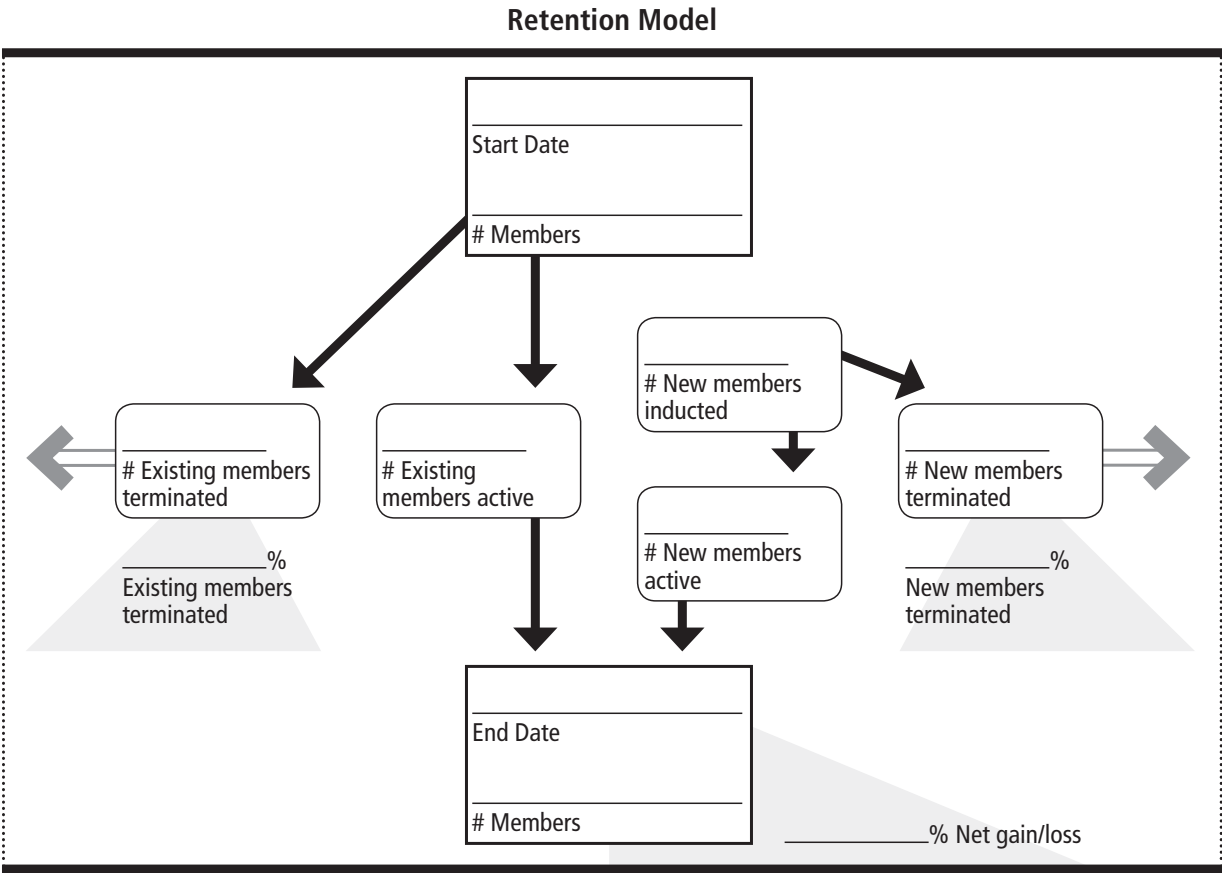
- Have a club leader with access to membership records review those records and determine whether they provide the necessary information for this exercise.
- If induction and termination dates are missing, access a more detailed retention model at [www.rotary.org](http://www.rotary.org).

## Materials

- Membership records
- Calculator
- Computer

Procedure

This model is to be completed by a member of the club leadership team with access to membership records. The club membership committee and all club members should be included in a discussion of what the *completed* model illustrates.



# Creating Your Retention Model

1. Establish the time frame you wish to study by entering a **Start Date** in the top box of the retention model and an **End Date** in the bottom box. (We recommend a time frame between three and five years.)
2. In the **Start Date** box, enter the number of active members who were in the club on that date.
3. In the **End Date** box, enter the number of active members who were in the club on the end date and calculate the \_\_\_\_% **Net gain/loss** by:

$$\frac{(\text{End Date number of members} - \text{Start Date number of members}) * 100}{\text{Start Date number of members}} = \text{____\% Net gain/loss}$$

4. In the **Existing members terminated** box, enter the number of members who were active on the start date but terminated before the end date and calculate the \_\_\_\_% **Existing members terminated** by:

$$\frac{\text{Existing members terminated} * 100}{\text{Start Date number of members}} = \text{____\% Existing members terminated}$$

5. Calculate the number of **Existing members active** by:

$$\text{Start Date number of members} - \text{Existing members terminated} = \text{Existing members active}$$

6. In the **New members inducted** box, enter the number of new members inducted between the start date and end date.
7. In the **New members terminated** box, enter the number of new members who were terminated before the end date and calculate the \_\_\_\_% **New members terminated** by:

$$\frac{\text{New members terminated} * 100}{\text{New members inducted}} = \text{____\% New members terminated}$$

8. Calculate the **New members active** by:

$$\text{New members inducted} - \text{New members terminated} = \text{New members active}$$

9. Once you know who constitutes your club's net membership gain or loss, you can begin to identify the club's retention strengths and weaknesses.
10. Photocopy your completed retention model, and take it to a club membership committee meeting to discuss. Following that discussion, hand out copies of the model to all club members during a meeting and facilitate a discussion about ways to address weaknesses and maintain strengths.

*Note:* The number of members at the **End Date** should equal the number of **Existing members active** plus the number of **New members active**.



# Chapter 6 Termination Profile

The Termination Profile is an assessment tool that illustrates when (in terms of length of Rotary membership tenure) the majority of a club's terminations are occurring. Completing this exercise can help your club identify its retention strengths and weaknesses and better focus its retention efforts.

## Objectives

- Determine the average length of time that members stay in your club before terminating their memberships.
- Identify membership retention and development areas that need more emphasis. Identify tenure groups that might be especially vulnerable in a club.
- Identify membership development and retention areas that need more emphasis.

## Time

15-20 minutes for compiling the data for the model, *preferably by someone with a strong working knowledge of Microsoft Excel*; at least 1 hour for the club membership committee to evaluate and discuss the findings; 20-30 minutes of discussion during a club meeting

## Preparation

Part of this activity requires the club president or secretary to retrieve membership data from Member Access at [www.rotary.org](http://www.rotary.org). To register for Member Access:

1. Go to [www.rotary.org](http://www.rotary.org) and click on Member Access.
2. Click on Register Now.
3. Enter your e-mail address, and follow the appropriate verification steps.

## Materials

- Computer with Internet access and Microsoft Excel software
- Access to club membership records
- Paper

## Procedure

1. Have the club president or secretary log in to Member Access.
2. Retrieve your membership information as follows:
  - a. Click **Update Membership Data** on the left toolbar.
  - b. Click **Terminated Members** (next to **View**) to view a list of your former club members.
  - c. Place the cursor to the left of the statement **The following are terminated members**. Click and drag the list down to the bottom right corner of the page, highlighting all of the entries in every column.
  - d. Copy this highlighted information to the clipboard.
  - e. Open a blank Microsoft Excel spreadsheet.
  - f. Paste the highlighted information from Member Access into the blank spreadsheet. **Note:** You may want to resize the columns to view all of the information.
  - g. Delete the row labeled **The following are terminated members** (at the top of the list).
  - h. Delete column A (labeled **View**). To ease viewing, remove the shading on the page.
3. Confirm the information. Check your list for duplicate entries and **delete them from your list of members**. Also look for any discrepancies in induction and termination dates, and delete any entries in which the termination date occurs on or before the induction date.

Carefully review the remaining club data to confirm its accuracy. If you notice any inaccuracies, contact RI Data Services at [data@rotary.org](mailto:data@rotary.org) or +1-847-866-3000 to resolve them before proceeding with the Termination Profile.

4. Complete your Termination Profile.
  - a. Insert a new column between the columns labeled **Terminated** and **Member Type** and label it **Days in Rotary**. Format the cells in this column as numbers, not dates, and create a calculation that subtracts the admission date from the termination date (= [Termination Date] – [Admission Date]). This calculation will show you the number of days each member spent in the club before termination. The spreadsheet should look like this:

D2		=C2-B2					
	A	B	C	D	E	F	G
1	Name	Admitted	Terminated	Days in Rotary	Member Type	Member Status	
2	Doe, John	02-Jan-01	19-Apr-04	1203	Active	Terminated - Attendance	
3	Smith, Jane	01-Feb-95	30-Jun-01	2341	Active	Terminated - Moved	

- b. Next to the **Days in Rotary** column, insert a new column and label it **Years in Rotary**. Format the cells as numbers, not dates, and show at least one decimal place. Then, create a calculation that divides the **Days in Rotary** number by 365 ( $= [\text{Days in Rotary}] / 365$ ). This calculation will show the number of years each member spent in the club before termination. The spreadsheet should look like this:

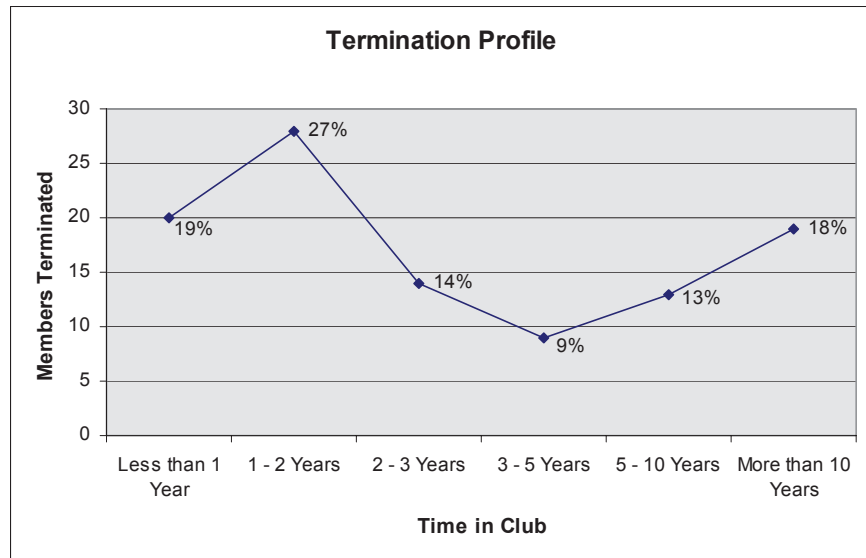
E2		=D2/365					
	A	B	C	D	E	F	G
1	<b>Name</b>	<b>Admitted</b>	<b>Terminated</b>	<b>Days in Rotary</b>	<b>Years in Rotary</b>	<b>Member Type</b>	<b>Member Status</b>
2	Doe, John	02-Jan-01	19-Apr-04	1203	3.3	Active	Terminated - Attendance
3	Smith, Jane	01-Feb-95	30-Jun-01	2341	6.2	Active	Terminated - Moved

- c. Sort the membership roster by the **Years in Rotary** column. Highlight all information before sorting to avoid cross-threading the data.
- d. Add a new worksheet in the Excel workbook and label the tab at the bottom **Summary**. On this sheet, create the following column headings for the amount of time members spent in the club before termination: **Less than 1 Year**, **1-2 Years**, **2-3 Years**, **3-5 Years**, **5-10 Years**, and **More than 10 Years**.
- e. Go back to the club roster, count the number of members who were in the club for each of these time frames, and enter the appropriate number in the **Summary** table. The final table should look like this:

	A	B	C	D	E	F	G
1	<b>Less than 1 Year</b>	<b>1 - 2 Years</b>	<b>2 - 3 Years</b>	<b>3 - 5 Years</b>	<b>5 - 10 Years</b>	<b>More than 10 Years</b>	
2	20	28	14	9	13	19	
3							

- f. Highlight the column headings and corresponding values on the **Summary** table, and then either click the Chart Wizard button on the toolbar or choose **Chart** from the **Insert** menu.
- g. Follow the steps that the Chart Wizard leads you through.  
**Note:** Selecting the line graph option is recommended.

- h. When the preferred chart options and formats have been selected, the chart should look like this (of course, the trend line for your club will be unique):



**Note:** Your chart won't automatically show the percentages as in the samples above. Because percentages can be very helpful, it's recommended that you calculate the percent terminated in each tenure group and insert the numbers manually.

5. Photocopy your completed Termination Profile, and distribute it to all members of the club membership committee.
6. Have the club membership committee spend a minimum of one hour evaluating the data and determining how to apply the findings to your membership development action plan. Instructions for evaluating the termination profile follow:

### Evaluating the Termination Profile

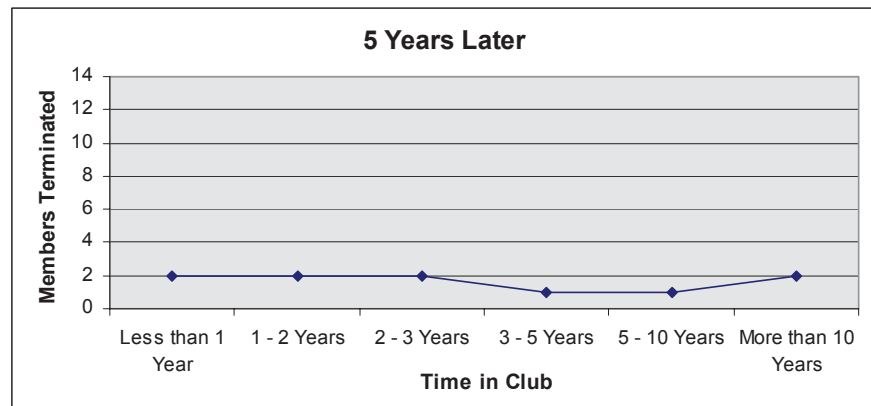
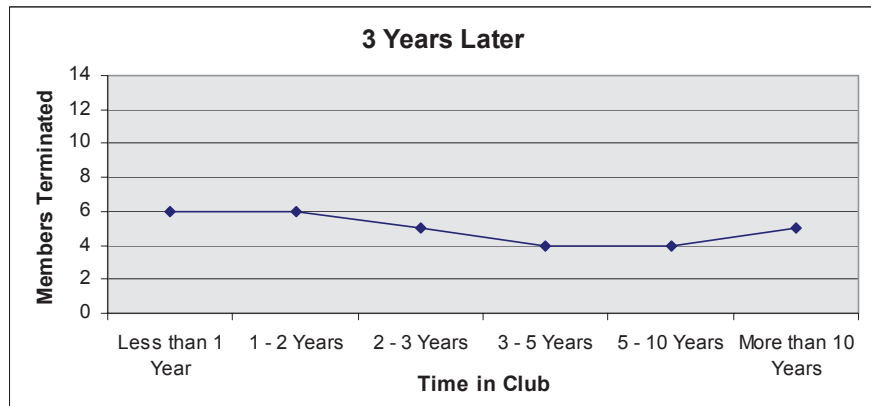
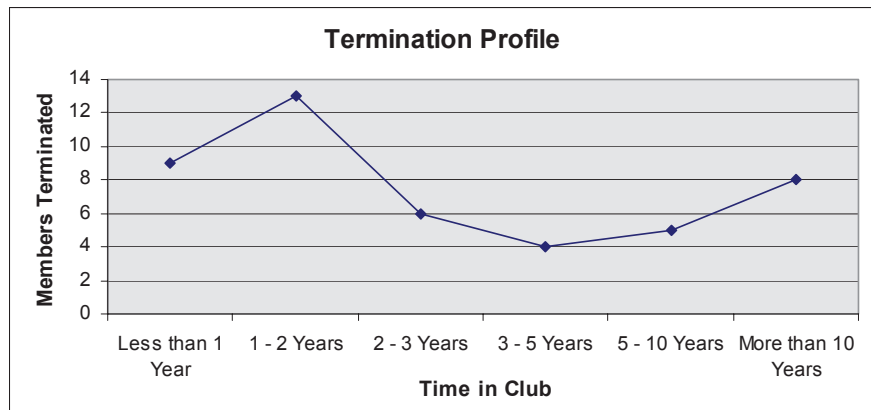
To view a club's termination profile, look for spikes, or high points, in the chart. Any tenure group in the club where the chart spikes is a group to which extra retention efforts should be focused.

### Setting Goals

Ideally, you want to lower the chart's highest peaks to the level of the chart's current valleys. The first goal is to equalize the Termination Profile to a straighter line.

Once the chart line is flattened, focus on lowering the overall chart line to reflect a reduction in members from all tenure groups terminated each year. A certain amount of loss due to external factors, such as relocation, can be expected in each tenure group; however, the goal should be to improve your club's retention in all tenure groups. The next three charts demonstrate how achieving these goals should change your Termination Profile over time:





### Stabilizing the Profile

In working to equalize and lower a club's Termination Profile, you will need to identify the reasons club members are leaving. One way to do this is to conduct a resigning member survey. See pages 41-47 for survey instructions and a sample questionnaire. Once you've identified the reasons members of each tenure group are leaving the club, you should consider strategies to better retain members in all tenure groups.

RI has compiled a large amount of survey research data on the reasons members leave their clubs. The primary reasons for each tenure group are listed below, as well as some retention strategies to consider as your club addresses each group.

### *Less than 1 Year and 1-2 Years*

Many members who leave within the first two years do so because they weren't fully informed about the responsibilities of membership before joining or fully educated about Rotary after joining. Many have trouble meeting the attendance requirements and financial expectations. Still others feel unconnected to the club's activities and their networking expectations aren't being met.

If a club loses many members within the first two years, focus on preinduction education and new member orientation. Make sure prospective members are fully informed of both the responsibilities of membership and its personal and professional benefits. Establish an effective new member orientation program, and encourage new members to get involved in club activities and projects immediately. Conducting professional development events and pairing younger members with older mentors might help address new members' networking expectations.

### *2-3 Years*

Many members who leave after spending two to three years in a club do so because they feel unconnected to the club's events and activities and their fellowship expectations aren't being met. They also have difficulty meeting the attendance requirements because of competing priorities.

Encourage members who have been in your club for two to three years to get involved in more club committees and take on more club leadership positions. By being more involved in the leadership of the club, these members will feel more control over and connection to the club's activities and will have more incentive to meet the attendance requirements and keep Rotary as a top priority. They may also have ideas for revitalizing the club's fellowship activities. Consider involving this tenure group in the club's youth programs by hosting a Youth Exchange student or serving as a liaison to your Rotaract or Interact club.

### *3-5 Years*

Many members who leave after spending three to five years in a club do so because their fellowship expectations aren't being met and they're frustrated with the club's leadership. Others have difficulty meeting the attendance requirements because of competing priorities.

Encourage members who have been in a club for three to five years to get involved in the highest leadership levels of the club (president, secretary, committee chair). This involvement will help them feel more control over club activities and more connected to club members. Those who have already been involved in club leadership might be interested in participating in more district-level activities. Also consider focusing on continuing member education or revitalizing club activities so that members remain engaged in the club, excited about attending each week, and satisfied that their fellowship expectations are being met.

### *5-10 Years*

Some members who leave after spending 5-10 years in a club note that their fellowship expectations weren't met and they were frustrated with the club's leadership. Others leave because of retirement and relocation.

Encourage members who have been in a club for 5-10 years to get involved in more district activities. Perhaps they would be interested in helping to plan the district conference or serving on a district committee. District involvement might help them meet more people and experience Rotary beyond the club level. These members may also be interested in joining a Rotary Fellowship to interact with other Rotarians who share their interests. If many members are leaving due to retirement, remind them that retired members are still welcome in the club. If many members are relocating, be sure to forward their contact information to the clubs in their new area or have them fill out the Rotarian Relocation Form, found in the Members section of [www.rotary.org](http://www.rotary.org).

### *More than 10 Years*

Many members who leave after spending more than 10 years in a club say they aren't interested in the club's current programs. Others leave because of retirement and family obligations. Many also leave because of financial constraints and health problems.

Encourage members who have been in a club for more than 10 years to take on more leadership positions at the district level (assistant governor, district governor, district committee chair). Retired club members might have more time to take on the responsibilities of a district position, which in turn may help to reignite their passion for Rotary's mission and interest in its programs. The club may also want to consider easing some of the financial expectations for the members of this tenure group who may be under financial strain because retirement or other factors. If many members are leaving because of health problems or death, consider bringing in more younger members to keep the club active.

Using this Termination Profile is one way to better understand a club's unique retention patterns. With this historical information, a club can more effectively develop and implement tailored strategies to improve member retention.

7. Distribute the completed graph to your club members during a weekly meeting, and facilitate a discussion on the findings with club members. Use the ideas generated during the discussion as you continue to develop your action plan.

## **Variation**

Following the directions under Procedure (page 28) produces a chart for the entire history of the club. Depending on the age of your club, you may want to create a chart that shows your more recent termination history, for example, within the past five years. To do this, after retrieving your membership information from Member Access, choose the time frame you wish to study (e.g., terminations from 2004 to 2007) and delete all members who were not terminated during that period. Then follow the directions above.

# Chapter 7

## Membership Satisfaction Questionnaire

If members aren't satisfied with certain aspects of your club, they may not continue their membership. Interviewing current members each year can help you determine your club's strengths and weaknesses. Take their suggestions for improvement seriously, and work to implement them as appropriate.

### Objectives

- Identify what club members like and dislike about your club.
- Develop an action plan for membership development that better meets the wants and needs of current members.

### Time

- Club member: 15 minutes to complete questionnaire
- Club membership committee: At least 60 minutes to review results and discuss an action plan

### Preparation

Print copies of the questionnaire for all of your club members.

### Materials

- Paper
- Pens or pencils
- Computer

## **Procedure**

1. Explain to your club members during a club meeting that you will use their responses to the questionnaire to develop your club's retention strategy. Stress that the survey is anonymous; they need not put their names on it.
2. Hand out the questionnaire, and tell club members they have 15 minutes to complete it. Collect the completed questionnaires.
3. Discuss the results during a membership committee meeting. If the suggestions warrant changes in your retention strategy (i.e., if a majority of people are unhappy with certain aspects of your club), discuss the types of changes that could be implemented as well as the process for implementing them.
4. Talk to the members about any changes you intend to implement in response to the questionnaires. Don't violate the anonymity of the survey by identifying any one individual's suggestions or complaints, but do explain that any changes you intend to implement are based on many similar responses.

## **Variation**

E-mail the survey to your club members, so that they can key in their responses and complete it on their own time. To ensure anonymity, provide a collection box at club meetings where members can submit a printout of their completed questionnaire, rather than sending it in electronically.

# Membership Satisfaction Questionnaire

This survey is intended for use by the club. All club members should complete it to help assess member satisfaction with club activities and projects. Please return your completed form as directed by the club secretary. All responses are confidential.

**Do you feel welcome in our Rotary club?** ☐ Yes ☐ No

If no, why not? *(check all that apply)*

☐ Compared to me, other members are *(check all that apply)*:

☐ Older ☐ Younger ☐ Different gender ☐ Different ethnicity ☐ Other \_\_\_\_\_

☐ Club members haven't made an effort to interact with me.

☐ Other \_\_\_\_\_

**Do you feel comfortable sharing concerns with club leaders?** ☐ Yes ☐ No

If no, why not? *(check all that apply)*

☐ Club leaders have so many responsibilities; I don't want to burden them.

☐ Club leaders have their own agenda and aren't interested in other ideas.

☐ I haven't been a member long enough to feel comfortable approaching club leaders.

☐ I don't want to be perceived as a complainer.

☐ Other \_\_\_\_\_

**How would you rate the level of our club's involvement in the following types of activities?**

	Excellent	Adequate	Insufficient	Not Aware
Membership development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Have you participated in club projects and activities?** ☐ Yes ☐ No

If yes, how did you become involved? ☐ I volunteered ☐ I was asked

If no, why not? \_\_\_\_\_

**Please indicate your involvement in the following types of activities:**

	<b>Currently Involved</b>	<b>Would Like to Be Involved</b>
Membership development	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>

**How would you rate your level of satisfaction with your participation in club activities and projects?**

☐ Very satisfied    ☐ Satisfied    ☐ Dissatisfied

If dissatisfied, why? (*check all that apply*)

- |  |   |
|--|---|
| <input type="checkbox"/> Insufficient knowledge  | <input type="checkbox"/> Lack of quality service projects   |
| <input type="checkbox"/> Personality conflicts   | <input type="checkbox"/> Lack of support from other members |
| <input type="checkbox"/> Cost                    | <input type="checkbox"/> Insufficient family involvement    |
| <input type="checkbox"/> Personal time conflicts | <input type="checkbox"/> Other _____                        |

**How would you rate the following costs associated with membership in our club?**

	<b>Excessive</b>	<b>Reasonable</b>
Club dues	<input type="checkbox"/>	<input type="checkbox"/>
Weekly meetings	<input type="checkbox"/>	<input type="checkbox"/>
Club fines/assessments	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to service projects	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>



**How would you rate the following aspects of our weekly meetings?**

	Excellent	Adequate	Insufficient
Amount of Rotary content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Convenient	Inconvenient	
Location	<input type="checkbox"/>	<input type="checkbox"/>	Suggested location: _____
Meeting time	<input type="checkbox"/>	<input type="checkbox"/>	Suggested time: _____

**Which aspects of our meeting place do you find unsatisfactory? (check all that apply)**

- ☐ Service
- ☐ Décor/atmosphere
- ☐ Meal quality
- ☐ Meal cost
- ☐ Parking availability
- ☐ Other \_\_\_\_\_

**Which of the following changes would improve our club meetings? (check all that apply)**

- |  |   |
|--|---|
| <input type="checkbox"/> Better speakers                     | <input type="checkbox"/> More focus on fellowship                     |
| <input type="checkbox"/> Increased variety of program topics | <input type="checkbox"/> Increased emphasis on vocational information |
| <input type="checkbox"/> More involvement of family          | <input type="checkbox"/> Better time management                       |
| <input type="checkbox"/> More service opportunities          | <input type="checkbox"/> More leadership opportunities                |

**How would you rate the amount of our club's fellowship activities?**

- ☐ Too many      ☐ Right amount      ☐ Too few

**How would you rate the amount of Rotary information provided through our club Web site/newsletter?**

- ☐ Excessive      ☐ Adequate      ☐ Insufficient

**Which of the following words would you use to describe our club Web site/newsletter?**

*(check all that apply)*

- ☐ Interesting
- ☐ Useful
- ☐ Informative
- ☐ Boring
- ☐ Limited
- ☐ Uninformative

**Is there anything else you'd like to see changed?**

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**What response does your spouse/partner/family have to your involvement in Rotary?**

*(check all that apply)*

- ☐ Feels proud of my involvement
- ☐ Wants to know more/be involved
- ☐ Wants to meet/interact with other Rotary spouses/partners/families
- ☐ Would be interested in becoming a member
- ☐ Other \_\_\_\_\_
- ☐ Thinks Rotary takes too much of my time
- ☐ Thinks Rotary is too expensive

**Thank you for taking the time to complete this questionnaire.**

**We appreciate your candid and honest answers.**

**Please submit it as directed by your club secretary.**

# Chapter 8

## Resigning Member Questionnaire

This exit-interview assessment can provide information on why people are leaving your club. Use the findings to address issues that are raised and improve your retention rates.

### Objective

Determine why resigning members are leaving your club.

### Time

10 minutes (resigning member to complete survey); 30 minutes (club membership committee to review results and discuss an action plan)

### Preparation

- Have your club membership committee review the questionnaire annually and customize it as needed to fit your club's needs.
- Print copies of the questionnaire or store the file in a location where it can be easily accessed.

### Materials

- Paper
- Computer
- Envelopes
- Stamps

### Procedure

1. Ask resigning member to complete a confidential exit-interview survey and thank him or her for agreeing to do so.
2. Send the resigning member the survey and request that it be returned by a specific date. Provide a self-addressed, stamped envelope in which to return the survey.
3. Have the club membership committee discuss the results of the completed survey during a committee meeting. If the reasons for leaving warrant changes in your retention strategy (i.e., if the resigning member left for a reason other than relocation), discuss the types of changes that need to be made and how to implement them.
4. Update your club's Membership Satisfaction Questionnaire based on the responses from resigning members over the previous year. Modify or add questions to determine whether the reasons others left your club are also negatively affecting current members.

## **Variation**

This exit interview may take many forms. You may alternately choose to create an online survey, or you may conduct an in-person interview.

## Resigning Member Questionnaire

We regret that you have terminated your membership in our Rotary club. To help us assess your satisfaction with your experience as a Rotarian, please take a few minutes to answer the following questions. The information you provide will benefit current and future club members. Please return the completed survey to your club secretary or president. Your responses will be entirely confidential.

1. Are you leaving your Rotary club because you are relocating to a new community? ☐ Yes ☐ No

2. Did you enjoy our club's weekly meetings? (circle one)

1	2	3	4	5	6
Not at all					Completely

## Meeting Logistics

	Yes	No	Not Applicable
Convenient meeting location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enjoyable meeting location (décor, service)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenient meeting time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appropriate meeting length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well-managed and organized meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Meeting Activities

	Excessive	Reasonable	Inadequate
Length of weekly programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RI Program Education (Rotaract, Youth Exchange, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRF Program Education (GSE, Scholarships, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club Public Relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Were club meetings a valuable use of your time? (circle one)

1	2	3	4	5	6
Not at all					Completely

**4. Did you feel welcome in our Rotary club?**

1	2	3	4	5	6
Not at all					Completely

**If you didn't feel completely welcome, why not?** *(check all that apply)*

- ☐ I felt demographically isolated
- ☐ Other members were OLDER / YOUNGER / DIFFERENT GENDER / DIFFERENT ETHNICITY  
(circle all that apply)
- ☐ Other demographic reason
- ☐ Other members did not make an effort to interact with me.
- ☐ Other reason: \_\_\_\_\_

**5. Did you feel comfortable sharing concerns with club leaders?**

1	2	3	4	5	6
Not at all					Completely

**If you didn't feel completely comfortable sharing concerns, why not?** (*check all that apply*)

- ☐ Club leaders had so many responsibilities that I did not want to burden them.
- ☐ Club leaders had their own agenda and were not interested in other ideas.
- ☐ I was not a member long enough to feel comfortable approaching club leaders.
- ☐ I did not want to be perceived as a complainer.
- ☐ Other \_\_\_\_\_

6. Did you participate in club projects and activities? ☐ Yes ☐ No

**If no, why not?** (check all that apply and skip to question 9))

- ☐ Type and quantity of projects
 ☐ Quality of projects  
☐ Personality conflicts
 ☐ Cost  
☐ Personal time conflicts
 ☐ Other \_\_\_\_\_

7. How did you become involved? ☐ I volunteered ☐ I was asked

8. How satisfied were you with your participation in club activities and projects? (circle one)

1	2	3	4	5	6
Not at all					Completely

**If you weren't completely satisfied, why?** *(mark all that apply)*

- ☐ Type and quantity of projects
  - ☐ Personality conflicts
  - ☐ Cost
  - ☐ Personal time conflicts
  - ☐ Quality of projects
  - ☐ Lack of support from other members
  - ☐ Insufficient family involvement
  - ☐ Other \_\_\_\_\_







**20. Which aspects of our meetings did you find unsatisfactory? (mark all that apply)**

- ☐ Program content
- ☐ Networking opportunities
- ☐ Meeting location
- ☐ Meal quality, cost
- ☐ Fellowship
- ☐ Other \_\_\_\_\_

**21. Which aspects of our meetings do you find most enjoyable or beneficial? (mark all that apply)**

- ☐ Program content
- ☐ Networking opportunities
- ☐ Meeting location
- ☐ Meal quality, cost
- ☐ Fellowship
- ☐ Other \_\_\_\_\_

**22. In addition to your responses above, is there anything else the club could have done differently to meet your needs?**

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*Thank you for completing this survey. We appreciate your candid and honest answers.*



ROTARY INTERNATIONAL®

One Rotary Center

1560 Sherman Avenue

Evanston, IL 60201-3698 USA

[www.rotary.org](http://www.rotary.org)