

MEMBERSHIP GUIDE

ROTARY CLUB of ALLENTOWN-WEST



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INTRODUCTION & GOALS

These words describe the manner in which it is expected that the Membership Committee of the Rotary Club of Allentown-west will function. Rotary International publication 417 provides the overall framework. This document builds on 417 and customizes it to our Rotary Club's needs and traditions.

Membership development is one of the essential elements of an effective Rotary club. A well-crafted and positioned membership development strategy is essential for our club to operate successfully and fulfill the Object of Rotary. Without a constant emphasis on membership development, Rotary clubs and Rotary International cannot hope to keep pace with the growing need for service or to remain relevant to the needs and interests of Rotary club members. Membership in our club must provide value for the club members' money, time, and energy through programs and activities), and thoughts.

The goals of the membership committee are to:

- 1. Maintain and implement an ongoing recruitment strategy to meet the established size for the club, and**
- 2. Maintain and implement ongoing member retention strategies to meet the established size for the club.**

Specific activities and responsibilities of this committee include:

- a. Maintain and implement agreed upon orientation meetings and induction ceremonies as needed and in a timely manner**
- b. Maintain and implement a Mentoring program for new members**
- c. Foster member involvement in all club activities through established and traditional programs**

d. Maintain records of members classification talks, committee work and area, district and world-wide activities

e. Ensure that proper recognition of member achievements occurs in a timely manner

f. Conduct, analyze and report on member surveys and opinions as directed by the club President

TYPES of MEMBERSHIP

Rotary International recognizes two types of members: active and honorary.

Active member -- An active member of a club is a person who is elected to membership under a classification of business or profession and has all the obligations, responsibilities, and privileges of membership as provided for in the Constitution and Bylaws of Rotary International.

Honorary member -- An honorary member is a person who, by advancing Rotary ideals, is elected to membership in the club but does not have the obligations, responsibilities, and privileges of active members. Honorary members are exempt from paying fees and dues and cannot vote or hold office. The term of honorary membership is determined by the club board of directors.

COMMITTEE STRUCTURE

The Chair of the Membership Committee is expected to determine which club members will serve on the committee, and what duties and responsibilities each will be asked to take on. One possible allocation of duties is as follows:

MEMBERSHIP COMMITTEE CHAIR

Appoint committee members, each to serve on one or more sub-committees

Ensure all recruiting and retention efforts are performed

Liaison with the President and board of directors

Establish with the President and Program Chair the meeting dates for inductions and for classification talks

Conduct, or arrange for induction ceremonies to be conducted

Recruit and appoint mentors for new members

Work with the board of directors to address poor attendance by members. Use the “Buddy” system and follow-up

RESOURCES:

Maintain in inventory all required brochures, flyers, and related materials to be used for Recruiting and for distribution to new members. The club Secretary will order these items.

Ensure that member lapel pins and badges, both with and without red ribbons, are available as needed.

RECRUITING SUB-COMMITTEE

Develop and implement an ongoing strategy and tactics to attract additional members

Liaison with the club committee that establishes community needs and stay current regarding club projects

Track all classifications of the club membership; identify opportunities and needs

Ensure that “100% attendance” days are held at regular meetings at least twice each year

RETENTION SUB-COMMITTEE

Establish and implement a strategy and tactics to ensure member involvement and continuing education

Record all member headcount changes

Review monthly Attendance records from the Club Secretary

Secure feedback from Mentors

Informally track new members' achievements and involvement

Track who has given classification talks

Review all member opportunities for awards

QUALIFICATIONS & CLASSIFICATIONS

Qualifications for Membership

The identification and selection of qualified members are the first steps of a recruitment process. Proper selection will increase our club's rate of retention. Qualified potential members are:

*****Men and women of good character who possess an excellent business or professional reputation**

*****Individuals whose residence or place of business is in, or adjacent to, our club location.**

The Classification Principle

The classification principle is designed to ensure that our membership reflects the diversity of our community's professional and business interests. A member's classification covers the principal and recognized activity of the firm, company, or institution with which the member is connected, or the member's own principal and recognized business or professional activity.

The classification principle is a guide, not a rule. Qualified members may be admitted under new classifications that include new technologies as they emerge. Classifications need to be updated regularly to ensure that these new professions are represented in our club. Maintaining diversity in our classifications provides us a membership that is composed of different views, skills, and expertise.

Some sources of information that are available for updating our classifications include:

**The chamber of commerce
Business telephone directory
Community yellow pages
Networking**

RI CONSTITUTION MANUAL of PROCEDURE 2007

Section 2 - Composition of Clubs.

(a) A club shall be composed of active members each of whom shall be an adult person of good character and good business, professional and/or community reputation,

(1) engaged as a proprietor, partner, corporate officer, or Manager of any worthy and recognized business or profession;
or

(2) holding any important position in any worthy and recognized business or profession or any branch or agency thereof and have executive capacity with discretionary authority;
or

(3) having retired from any position listed in sub- subsection (1) or (2) of this subsection;
or

(4) being a community leader who has demonstrated through personal involvement in community affairs a commitment to service and the Object of Rotary;
or

(5) having the status of Rotary Foundation alumnus as defined by the board and having his or her place of business or residence located in the locality of the club or the surrounding area.

An active member moving from the locality of the club or the surrounding area may retain membership in the club where the member's board grants such permission and said active member continues to meet all conditions of club membership.

(b) Each club shall have a well-balanced membership in which no one business, profession or type of community service predominates. The club shall not elect a person to active membership from a classification if the club already has five or more members from that classification, unless the club has more than 50 members, in which case the club may elect a person to active membership in a classification so long as it will not result in the classification making up more than 10 percent of the club's active membership.

Members who are retired shall not be included in the total number of members in a classification. The classification of a transferring or former member of a club, or a Rotary Foundation alumnus as defined by the board, shall not preclude election to active membership even if the election results in club membership temporarily exceeding the above limitations.

If a member changes classification, the club may continue the member's membership under the new classification notwithstanding these limitations.

RECRUITING

HOW IS OUR PRODUCT?

We can have the best marketing and action plan in place to attract customers to our PRODUCT, which is our Club, with our customers being prospective new members. But, if our product isn't good, they won't become paying customers and come back. Simply bringing them in the door is not enough. We need to make them feel welcome and be impressed with what they see. If we can't accomplish those two things right now, it is best that we work on them first, before we start bringing in more new faces.

We must look at our Club as if we were a guest there for the first time. We need to look at our Club meeting as the PRODUCT we are trying to sell to prospective new members. What do we see? Is the meeting place open, warm, and inviting with Rotary banners and flags on display? Does the meeting start on time? Is the Rotary Bell rung, the pledge of allegiance recited, the Four Way Test spoken out loud? Is there an agenda, speakers, club reports prepared and given in a professional manner, and do people seem that they want to be there? Do we have worthwhile projects that the whole club supports, and successful fundraisers to support them?

Rotary is a great organization and is a great PRODUCT to offer others. We will make every effort to try to make it the best it can be, and share it with others. We should share the joys and rewards of being a Rotarian. It is our responsibility as Rotarians to help grow our organization.

THINGS TO CONSIDER

- Is our meeting place clean, welcoming, comfortable with room for expansion and do we have privacy?
- Is the room set up to encourage participation, or exclusion?

- **Does the meeting place display our sign out front? Are there club and Rotary banners on display? Are club members wearing name badges? Are we using the club bell?**
- **Is our meal appetizing, and served in a timely manner?**
- **Has the cost of meals become an issue?**
- **Do our meetings start and end on time every week?**
- **Do we have interesting speakers on a regular basis, or are our meetings turning into simple social gatherings or some form of a club assembly each week?**
- **Does the President seem prepared for the meeting with a well-planned agenda and program each week?**
- **Is time provided for fellowship, or is the whole meeting fellowship?**
- **Do we use a Sergeant-at-Arms and Greeters?**
- **Do we have cliques that sit in the same spot every week, or exclude people, especially newer members from their circle?**
- **Does the board meet every month and communicate their decisions to the club in a timely manner?**
- **Is the club newsletter well done and timely?**
- **Is there an up-to-date club web site?**
- **Is our leadership promoting District and RI events?**
- **Do our club members visit other clubs to see how they conduct their meetings?**
- **Is our club involved and active in the community?**

FINDING CANDIDATES FOR MEMBERSHIP

One method to identify candidates for membership in our club is to conduct membership surveys periodically during one of our regular club meetings. There is a sample survey in Appendix 10 of publication 417. Our club membership committee and board of directors will decide how many candidates to consider at a time.

The entire club must be informed and involved in member recruitment. Frequent membership discussions at regular club assemblies are useful. There is nothing better than having our members motivated to helping build the Club and taking an active part. The best recruiting tool is simply having members inviting people just like themselves to join Rotary.

Membership is a constant effort no matter how successful our club may be. Inactivity will generate problems.

RECRUITING IDEAS

Once we are sure that our club meetings are appealing to others, that is the time to try some of these recruiting ideas to attract new members. The key to recruiting new members is having current members inviting people they know to join them in Rotary and to share the joys and satisfaction of giving service to others.

In a survey it was discovered that over 80% of Rotarians have never approached another person about Rotary. We need to change those numbers. Rotarians need to understand that they are doing a good thing when they invite others to share in Rotary's benefits. It is not an imposition.

- Each member is given two invitation cards to give out each Rotary year to people they believe could be possible future members. The goal is not to just get rid of the cards, but to**

seek out people who would be good members. The goal is quality and not quantity. Lists could be kept as to what members invited, or did not invite new people during the Rotary year. For those who do not, the club can reach out to them to ask for help with the cause.

- **Consider forming “Recruiting Teams” made up of two or more members whose responsibility is to work together for a set period of time to locate and invite candidates to Rotary. Once that team has successfully recruited a new member, or whatever their set goal was, the next team takes over and does the same. Possibly it might be good to have teams competing against each other as well at the same time. Consider having a nice prize for the winning team.**
- **Another approach is to assign different members each month to bring in at least one prospect each for membership during their “Month of Rotary Recruiting”.**
- **Consider holding one special recruiting meeting each month during regular meeting times (e.g. MEET YOUR LOCAL ROTARY CLUB) inviting referrals, Interact and RYLA parents, alumni, parents of scholarship winners over the years, and others to showcase the club, its projects, its goals, and its past accomplishments. Each member is asked to bring at least one person and this is the meeting where members should use their invitation cards. Agenda could include not only the club’s activities, but also Rotary around the world. We can use speeches, videos, power point, and special speakers. They should be well publicized to the public. They would also serve as learning tools for current members and help build loyalty to the club and to Rotary.**
- **As a breakfast club we also should consider a special evening (MEET YOUR LOCAL ROTARY CLUB) event at least twice per year. The gathering should be a simple, relaxed wine and cheese type setting, but Rotary information is given out in the form of “Guest Packs” and a short talk given outlining what Rotary is, what the club has done in the community, and**

that the club is looking for qualified new members.

- **We are “The Family of Rotary.” Don’t overlook family members as potential members.**
- **Place club posters in local businesses highlighting club projects, accomplishments, and other activities. These posters don’t need to be expensive and should be displayed at each club meeting as well along with the club banners. Then each member can see every week this reminder of what the club has done, and is doing for the community and the world. During the placing of these posters, why not ask the owners or managers where you are placing the posters to look over the information, and then give them an invitation card.**
- **Our club should have a brochure developed to hand out to prospective members and members of the public at different events. The brochure should list the Four Way Test, RI Motto, History of Rotary, as well as information about club and its projects and members. This brochure can be done on a PC and printer eliminating the need to go to costly commercial printers.**
- **Develop and maintain a web site for our club to use as a marketing tool. Have it promote our club and make it a recruiting tool.**
- **Look into over age 55 communities in our area and start a recruiting program in these locations. Many people moving into these communities may be new to the area, may be Rotarians from other areas, may be former Masons, Lions, Kiwanis etc. looking for outlets in their new communities.**

These people are good candidates because they have time, resources, and may be looking for something to fill their time. Seek out the community leaders and see if our club can do a presentation about our club at one of their residents meetings, Put an ad in their community newsletter, invite their members to a special meeting in their honor.

- **Consider teaming up with and making our club known to other groups in the area such as Chambers, Business Associations, Masons, Knights of Columbus etc, and seek their members to join our club as well. Try to have a recruiting presence at Chamber, Community, Business Associations, Jaycees, and others functions and activities such as parades, nights out, street fairs.**
- **Put together a list of speakers, past and future, that our club may have asked or wants to ask to join the club. With past speakers that have impressed the club members, invite them back to see all that the club has to offer. For future speakers, seek out those in the community that we would like to consider as a member and ask them to speak to the club. Examples, local newspaper editors, heads of local charities or foundations, civic leaders, clergy, educators, etc. Don't forget to ask them to join.**
- **Be sure that our club has a "Public Relations spokesperson" who will keep local media informed of our club activities. They should make sure that any announcements or pictures of club activities are submitted to the press. Local newspapers are always looking for fillers to place in community section. If our club can somehow make public all of the projects we do for the community, it may catch the eye of a potential member who may want to participate.**
- **Consider developing a new club project and make sure it is well publicized to the public. It may be a project that catches the interest of someone who is not a member to seek out membership so they can participate.**
- **Work with our InterAct club and do a joint club meeting during their induction program at the school in the evening. Invite all of the parents and then conduct a shortened Rotary meeting for their behalf so that they can all see what a meeting is like and what goes on. Use this time to inform them of all of the projects and fundraisers the club is working on, as well as**

plans for the future. Have an “Invitation Package” prepared to give the parents that attend.

- **Send welcome letters to SELECT new businesses in our area on a regular basis to help fill classification voids.**
- **Make a strong effort to contact former members to try to get them back into the club. Also, ask them if they could recommend someone to be a member.**
- **Keep in contact with surviving spouses of deceased members. They should remain on the club mailing list and be invited to club social activities. This should be done not only as a common courtesy, but also as a tool to possibly bring that person into Rotary membership with our club.**
- **Watch “People in the News” for possible membership recruits that you feel would be a good addition to our club.**
- **Set up small recognition honors for current members who bring in new members.**
- **Develop a “Guest Packet” or a recruiting kit to be given to prospects that are invited to attend a meeting. Every member should have access to these packets to hand out along with invitation, or to be given to prospects at their first meeting. This gives prospects a chance to learn a little about Rotary and the club before attending the first meeting or something to take away from the first meeting to review.**
- **“Guest Packets” or recruiting kits can be as simple as a folder with two cut out sleeves inside and a Rotary or Club decal on the front. On one side of folder you can have a copy of the Four Way Test and the history of Rotary along with brochures and booklets such as The ABCs of Rotary, Rotary Basics, What is Rotary, etc., that can be purchased from RI web site or catalog. On the other side you can have our club brochure, a list of all the club's projects and fundraisers, names of past presidents, list of current members, list of**

different committees and committee heads, upcoming social and District events, past club or District newsletters, and club web site info, Invite someone you give an invitation to to go to the web site before attending a meeting. Also give them information about the RI web site as well.

- We may want to consider putting in the Guest Packet information about some of the responsibilities of being a member such as attendance requirements, dues, serving on committees, etc. We might as well let them know up front some of what will be expected.
- Someone from or Membership Committee or the proposer should contact each person who attends their first meeting as soon as possible thereafter to answer questions and to get a commitment to attend a second meeting while Rotary is still on their mind.
- A second kit could be available to give to prospects after attending a second meeting with more detailed info and costs, responsibilities, expectations, and procedures. Again, a follow up should be completed to answer questions and invite to a third meeting. A second kit will not be needed if the first kit contains the above information.
- Consider having a prospective new member attend at least three meetings before being asked to join. The first is to learn about Rotary, the second to get a feel of the club, and the third to make a commitment, assuming board approval has been given. This procedure also provides time to circulate the name through e-mail or our newsletter and other means to see if any objections surface before officially asking to join. Asking someone to join after a third meeting gives the club members the chance to review them, as well as for prospect to learn about costs, commitment, and expectations. Some members believe that this makes it too hard on new people to join by requiring them to come to three meetings, pay for at least two meals, and follow procedures. Well, if it is too hard to come to the first three meetings, pay for their meal, and

make a commitment, then it is better we find out sooner than later. Once they join, we will expect it of them every week.

- **When a membership form is completed and submitted, a member of the Membership Committee or the sponsor should keep in contact until the approval is official. They and the Mentor can then help with easing the new member into the routine the first few weeks.**
- **The club board of directors may wish to formulate a “MEMBER IN GOOD STANDING” letter that reviews the costs as well as what is expected of members of the club such as joining a committee promptly, involvement in fundraisers, or making up needs, time commitment for projects, attendance requirements, expectation for attending district functions, and expectations of recruiting new members.**

The “Members in Good Standing” commitment letter should be reviewed with each candidate and agreed upon before or at the time of asking a prospect to join. With agreement up front, we have a better chance of having a good Rotarian in our ranks for years to come.

- **And here it is, the MAGIC Bullet, the answer to all our membership problems. Each of us should reflect on why we became a Rotarian, why we stay a Rotarian, and how it makes us feel. Then we each must go out and find and recruit someone just like our self.**

WHY JOIN ROTARY ?

Every effort to attract new members to our Rotary club must include explanations of what Rotarians accomplish, AND of what Rotarians get back in return for their investments. Every member of our club is expected to be able to explain what Rotarians do locally and around the world, and also to state the objects of Rotary to potential members.

Some of the reasons we join and stay part of Rotary include:

The Opportunity to Serve

Rotarians provide service at both the community and international levels. Service programs address health-care needs, hunger and poverty, illiteracy, disaster relief, and environmental cleanups, to name a few. Members experience the fulfillment that comes from giving back to the community locally and abroad.

Professional Networking

A founding principle of Rotary is to provide a forum for professional and business leaders. Members are leaders in business, industry, the professions, the arts, government, sports, the military, and religion. They make decisions and influence policy. Rotary is the oldest, most prestigious service club organization in the world.

Personal Growth and Development

Membership in Rotary ensures continuing personal and professional development. Leadership, public speaking and communication, organization and planning, team-building, fundraising, and teaching are just a sampling of the skills that can be exercised and enhanced through Rotary.

Friendship

Fellowship was a primary reason Rotary was started in 1905, and it remains a major attraction. Today, with more than 31,000 Rotary clubs in over 172 countries, Rotarians have friends wherever they go. Rotary helps to build community as well as enduring friendships

Cultural Diversity

Rotary International is an association of local Rotary clubs in many countries. Clubs are open to members of every ethnic group, political persuasion, language, and religious belief. Rotary clubs contain a cross-section of the world's leaders. They practice and promote tolerance.

Good Citizenship

Membership in Rotary makes one a better citizen. Weekly Rotary club programs keep members informed about what is taking place in the community, nation, and the world. Rotary's expansive network of clubs and programs provides extensive opportunities for service and interchange.

World Understanding

Rotary members gain an understanding of humanitarian issues and have a significant impact on them through international service projects and exchange programs of RI and its Foundation. The promotion of peace is one of Rotary's highest objectives.

Entertainment

Every Rotary club and district hosts parties and activities that offer diversion from one's personal and business life. Conferences, conventions, assemblies, and social events provide entertainment as well as Rotary information, education, and service.

Family Foundations

Rotary sponsors some of the world's largest youth exchange and educational exchange and scholarship programs. Rotary clubs provide innovative training opportunities and mentoring for future leaders. They involve family members in a wide range of social and service activities.

Ethical Environment

Rotarians practice a 4-Way Test that measures words and actions by their truthfulness, fairness, goodwill, and benefit to all. Encouraging high ethical standards in one's profession and respect for all worthy vocations has been a hallmark of Rotary from its earliest days.

TIME LINE

The sequence of events involved from a candidate for membership's first meeting and right through the first year of membership is very important. For example, no candidate for membership shall be asked to be a member before attending an informal orientation about membership, NOR should the candidate be asked to join before the board of directors of the club has approved the candidate and the name is published.

See the chapter on How to Propose a New Member for the timing of that activity.

NEW MEMBER SEQUENCE

Find an eligible candidate. This may be a Recruiting Sub-Committee's assignment using the PR Committee and all club members must help.

Invite the candidate as our guest to a meeting or fund raiser or club event; it should include Rotary content, if possible.

The Member who is *planning to propose* the new candidate is to hold an informal (but structured) orientation explaining benefits and responsibilities and Rotary's reasons for being. If the proposer wants someone else to do this, the Membership Chair will determine that person.

Proposer fills out application; candidate signs it.

B.O.D. approves candidate as OK for membership.

Sponsor or club President then, and only then, asks candidate to join.

Candidate says “Yes.” Sponsor has candidate attend meetings upon payment of initiation fee and dues. Candidate wears a red ribbon on the badge at least until inducted; longer as needed.

A Mentor is assigned by Membership Committee. The Mentor determines the candidate's interests regarding club committees and events. The President agrees on recommended committee assignment.

The induction ceremony is to be held within 30 days, if possible. That date will be initiated by the Membership Chair. Induction materials come from our club Secretary. The proposer introduces the new member to the club; the Mentor stands up front with the new member during the induction ceremony. We encourage spouses/partners and other interested family members to attend the induction. Committee assignments will be announced after induction, if mutually agreed upon by then.

A formal orientation meeting for new members is to be held within 30 days of the induction. The club Membership Chair will initiate these meetings. If not done before, the Chair will discuss possible committee interests with the new member to get involvement.

The new member gives a Classification talk (10 to 20 minutes -- their choice) within three months after the date of induction. The Membership Chair will work with the Program Chair to schedule these talks.

PROPOSING NEW MEMBERS

The standard procedure for proposing a new member is as follows:

1. The prospective member's name is submitted to the club's board of directors for consideration.
2. The board ensures that the person is fully qualified and approves or disapproves the proposal within 30 days. The proposer is notified of the decision by the club secretary.

Note: Until approval is granted, prospective members should not be informed that they have been proposed for membership.

3. After approval has been announced, the prospective member is fully informed of the privileges, expectations and responsibilities of club membership through an informal meeting with the proposer, one or more club officers or other experienced member. He or she then is asked to complete the membership proposal form and give written permission to publish his or her name and proposed classification to the club membership.
4. If no objections to the proposal are received within seven days following the publication of the name, that person, upon payment of an admission fee and dues, is a new Rotarian in our club.
5. The club secretary will send a completed new member report form to Rotary International as recommended by our Rotary club bylaws, OR will submit the new member's name via the Rotary Business Portal at www.rotary.org.

See Rotary publication *How to Propose a New Member (254-EN)*.

6. At this time it is useful to determine from the newly approved member his or her areas of interest in our club activities. It is intended that each new member become part of one or more committees as soon as possible.

INDUCTIONS

The day that a person becomes a Rotarian can be the beginning of many years of involvement and achievement. Such an event warrants a special commemoration, one that will show new members just how important they are to our club. When holding an induction ceremony, the committee will invite the new member's spouse or partner and make sure the sponsoring Rotarian and the assigned Mentor attend as well. Other family members are welcome.

A meaningful ceremony also serves as a time for current members to reaffirm their commitment and pride in Rotary.

There is an excellent, established "new member" induction procedure (see Appendix 1) which our club has been using and will continue to use. It has been modified from the RI words to suit our club and its traditions. It can be conducted by the club President, the club Membership chair, or a visiting AG or DG or PDG, if one is available and willing to serve. The procedure is such that it will accommodate these other club or district leaders in the conducting of the ceremony. The handout materials must always be on hand and in the right quantities.

MENTORS

Our club has a mentoring program in which a new member is paired with an experienced Rotarian for at least six months and as long as they wish. This one-on-one approach provides our new member with a sense of support without categorizing them as part of a particular new member group or “class.”

Sponsoring a new member and mentoring a new member are two separate roles. Any Rotarian, not just a new member’s sponsor, can be a mentor.

The RI Mentor's worksheet is:

Welcome to Rotary Mentoring Worksheet

Name _____

The members of the Rotary Club of are pleased to help you learn and explore the many facets of Rotary. _____ has been assigned as your mentor and will answer your questions about procedures and dates and help you succeed in providing service to others.

Completion of items listed below within six months will expand your vision about opportunities for Rotary service.

1. Attend new member orientation meeting or meetings as prescribed by our club.
2. Read two or more of the following booklets (preferably all).
 - A. *Rotary Basics*
 - B. *The ABCs of Rotary*
 - C. *A Menu of Service Opportunities*
 - D. *The Rotary Foundation Quick Reference Guide*
3. Listen to the audiotope *Rotary in an Hour*.
4. Attend one or more of the following club functions:

- A. Fellowship activity such as dining out**
 - B. Board meeting; check the club Secretary for the time and place.**
 - C. Committee meeting agreed to**
 - D. Project activity such as dictionaries. club auction or meals-on-wheels**

- 5. Complete one or more of the following tasks:**
 - A. Serve as a greeter at a club meeting.**
 - B. Give a classification talk at a club meeting.**
 - C. Participate in a club service project.**

- 6. Make up a meeting at another club.**

- 7. Extend Rotary to others by:**
 - A. Inviting a guest to Rotary, or**
 - B. Proposing a new member.**

- 8. Experience the internationality of Rotary (at least one).**
 - A. Host a Youth Exchange student for a meal or other activity.**
 - B. Host a Foundation Scholar for a meal or other activity.**
 - C. Host a Group Study Exchange team member for a meal or other activity.**
 - D. Host a Rotarian from another country in your home.**
 - E. Invite a business or professional non-Rotarian to apply for Group Study Exchange.**
 - F. Invite a non-Rotarian to apply for a Foundation scholarship.**
 - G. Join a Rotary Fellowship**
 - H. Participate in a Rotary Friendship Exchange**

- 9. Attend one or more district meetings (listed in order of priority).**
 - A. District conference in late April, early May**
 - B. District assembly in early April**
 - C. Foundation seminar in the Fall**
 - D. Other district meetings of interest**

- 10. Choose a committee on which you would like to serve.**
- 11. Accept an assignment to serve on a club committee.**

ORIENTATIONS

Two key orientation sessions will be conducted by the membership committee or its designee. The first comes after the club's board of directors approves the candidate as being eligible. This informal session is to inform every candidate that might be asked to join Rotary -- *before asking* -- about the privileges, responsibilities and costs in time and money associated with being a Rotarian.

The second orientation is held for each new member shortly after induction. It is held to educate new members about how our club functions and how we fit into the district and RI.

Prospective Member Education/Preinduction Orientation:

Proper member education must begin before asking a candidate to become a Rotarian. Educating potential members about the basics of Rotary club membership provides them with realistic expectations about the benefits and obligations of membership.

An experienced member of our club will make a specific informal presentations to each candidate (with the spouse, if possible) approved by the board as eligible for membership to inform him or her of the structure and history of Rotary, RI and district activities, and our club's activities. The committee determines the content, presenters and time and place.

In general, an information program for candidates should cover the following subjects:

- The history and organization of Rotary International
- The two types of membership and the criteria for each
- The mission of Rotary

- Club projects past and present
- Financial and attendance obligations that come with membership

At this first orientation meeting handouts will be distributed including the club flyer, any current district flyer, and and the brochure *This Is Rotary* (001-EN). We also may show appropriate videos or DVDs.

New Member Education/Post-induction Orientation:

In order for new members to smoothly assimilate into our club, it is important they become connected to the other club members and the club's activities.

In order to provide the warm welcome essential for all new members, the membership committee will conduct an orientation meeting for new members and their spouses within two to four weeks after the induction. This two hour meeting will provide the first round of Rotary education.

APPENDIX - VIII of publication 417 describes the STAR program for new member orientation. The membership committee may follow all or part of this format as is appropriate.

Another orientation tool is a checklist for new members that outlines the many opportunities for gaining knowledge about Rotary and becoming involved in club activities. A sample checklist can be found in the chapter on Mentoring. A mentor will deliver the checklist to the new member soon after induction and provide guidance on completing as much as possible.

New member orientation also will include several opportunities for feedback on a wide range of issues, including the process and results of the orientation program itself.

The club's formal orientation program may be conducted in several sessions to enhance retention of information.

Topics to be covered in the new member orientation meetings include:

- The object of Rotary**
- Club and district structure and current officers; Zone information**
- Opportunities to serve on club and district committees**
- Opportunities to learn more through RLI.**
- The Rotary Foundation of RI its humanitarian and educational programs and how they are supported**
- RI programs, with information on how members can get involved**
- The elements of an effective club and how clubs fulfill the purpose of each element**
- The district conference and the international convention**

Also at this meeting any other available, applicable brochures will be distributed and reviewed.

The RI Membership Guide lists the following items to be covered during a new member orientation:

Rotary Policies and Procedures

- 1. How to propose a new member**
- 2. Club structure**
- 3. District structure**
- 4. Club meetings**

**Regular meetings
Committee meetings
Club assemblies
Board meetings
Fellowship events**

- 5. Attendance expectations**
- 6. Make-ups**
- 7. Finances (participation, contributions)**

Opportunities for Service (Club, district, and international)

- 1. Current club and district projects**
- 2. RI programs**
- 3. The Rotary Foundation programs**
- 4. An inventory of interests -- New members should consult with their mentors and choose a specific club committee in which to become personally involved. New members should also be introduced to Rotarians who have been active in programs of mutual interest.**

History and Traditions of Rotary International

- 1. Origin, growth and achievements of RI**
- 2. Tradition of high ethical standards**
- 3. History and achievements of our club**
- 4. Spouse/partner and family involvement**

Orientation materials should be presented in an engaging and accessible format. Interactive activities such as worksheets or question-and-answer sessions may help to keep participants interested.

RECORD KEEPING

Effective Administration

Maintaining accurate club membership records is a key activity of effective club administration. The Rotary Business Portal on the RI Web site was created to provide club Secretaries and Presidents an easy and convenient method for viewing and updating our club membership information. Regularly accessing and using the business portal will provides the club and district with current membership information and statistics. Membership data forms for reporting new members, terminated members and changes to member data are included in the *Club Secretary's Manual (229-EN)* and can be downloaded from the RI web site.

Membership changes also should be noted on our club's semi-annual report, which, along with payment of club dues, can be submitted through the Rotary Business Portal.

Successful club administration is vital to maintaining satisfied membership. As our club offers interesting programs on topics that are relevant to many members, more Rotarians will make an effort to attend every week. Our Program committee will solicit ideas for topics and speakers.

Similarly, our Service committee will evaluate our service projects in terms of interest, effectiveness, and community needs. The committee will work with those assessing our community needs and report to the board.

The following will be used to help evaluate the club's effectiveness in terms of membership:

1. The number of members as of June 30 and December 31 of each year compared to the prior 5 years,
2. Club members monthly attendance history,

APPENDIX -III of publication 417 provides a questionnaire to use with members leaving the club. The Membership committee will have these filled out and report the results to the board of directors within two weeks of the member's departure.

RETENTION

Retaining good members is as critical to Rotary's long-term success and health as is the induction of new members. Retaining current members while building our membership through recruiting is more productive and cost effective than continually replacing members lost to attrition. Additionally, our recruitment efforts are more effective when our club has a large number of experienced and informed Rotarians in its ranks.

Because Rotarians who are committed to and involved in the club are more likely to maintain their membership, involving members in the operation of the club is a successful retention tool and one that should be used as soon as a member is inducted.

Once the interests of each new member are determined, then that person is to be appointed to one or more committees. They also will be encouraged to get involved in club projects, and encouraged to hold future club and district leadership positions.

The committee also must not forget about other members who haven't had an opportunity to serve. They may need more encouragement. We should give special attention to members who have been Rotarians for less than three years.

When planning a member education curriculum, the committee will consider a variety of distribution modes or methods and select those that are most practical and effective for our club. Electronic distribution via the internet is an increasingly viable means of delivering member education.

Rotary Leadership Institute (RLI)

The RLI provides many training sessions around the mid-Atlantic states, and club members are encouraged to attend at club expense for the fee. Attending these sessions is a strong, effective member retention tool. See the district web site for more

information or go to www.rlinea.com.

Continuing Education for Members

A positive program of continuing education will help increase our club's overall retention rate. Such a program will include some of the following components:

Frequent communication of Rotary news and information

A set number of club programs focused on continuing education, per year

Attendance at multi-district meetings that address continuing education such as The Rotary Leadership Institute (RLI).

At least two informational club assemblies a year

Personal involvement of Rotarians in club and district projects and activities, particularly those that require hands-on action

District-level seminars on continuing education

Stimulating and efficiently run weekly meetings

Sharing of ideas and information on Rotary programs, projects, and activities at regular committee and informal meetings

Attendance at meetings of other clubs

Members will feel more a part of the club and Rotary's mission if they are kept abreast of changes and events. Refer to our club and district Web sites, weekly meetings and e-mails, and club and district newsletters to share information from our district governor or the RI Secretariat. Make sure everyone knows about such RI programs as Youth Exchange, Ambassadorial Scholars, and World Community Service. Becoming involved in one of these programs can spark a lifelong commitment to Rotary. Encourage all members to attend the district conference and the RI Convention as a way of meeting many Rotarians and learning more about

Rotary's activities worldwide.

RI publications also are excellent continuing education tools. By reading publications such as THE ROTARIAN, regional magazines, and *Rotary News Basket*, club members can stay up-to-date on Rotary activities worldwide. Members should be encouraged to access the RI Web site (www.rotary.org) to keep abreast of current events and resources.

Our club has established and maintains a club library of current RI materials that are available to all Rotarians. These include:

Official Directory (007-EN)

Catalog (019-EN)

Manual of Procedure (035-EN)

Rotary Fact Pack (267-EN)

The District Rotary Foundation Manual (300-EN)

This Is Rotary (449-EN) videotape or DVD

Rotary in an Hour (512-EN) audiotape

Rotary Basics (595-EN)

Take a Look at Rotary (867-EN) videotape

My Road to Rotary (922-EN)

Other fact sheets are available from the RI Public Relations Division at the World Headquarters or on the RI Web site at www.rotary.org.

SURVEYS

Assessing the Club

Regular assessment is essential to maintaining effective and successful club operations. Assessment tools that meet our specific needs will be used to help identify opportunities to make ourselves more relevant to our members and our community.

Our membership committee is assigned to assess the relevance of current club projects, efficiency of club administration, or amount of involvement with the district. Various tools are available to help identify opportunities to make clubs more relevant to members and to communities. Member satisfaction should be the goal toward which all changes are directed. These tools are also available for download from the RI Web site.

Once the assessment is completed and the results compiled, it is important to ensure that action is taken on the findings. The committee will construct a plan that comprises a list of strategies and resources that may include members of the district membership development committee, assistant governors, and past district governors as well as club leaders. A step-by-step action plan that includes goals, target completion dates, and follow-through procedures will be developed.

New Member Involvement Ideas

Just as in life, we get one chance to impress someone new. How a new member is introduced into our club will determine what kind of member we will have in the future.

- Our Mentor program is a good opportunity to get current members more involved in our club by helping the newer members.**
- The Mentor volunteers should help educate the new members in Rotary as well as guide the new member into our club activities and to a committee.**
- A new member package should be given to help in their learning process of the club and Rotary. This package might include items contained in our recruiting kits as well as videos on Rotary, Club and District Membership Directory, Dance Card (see below), Passport (see below), list of all committees and their functions and chairs, list of projects past, present,**

and future, copies of past club and District newsletters, welcome letter from the District Governor, information on the Rotary Foundation, introduction to Club, District, and RI web sites, and other needed items.

There should be a checklist in the kit (see Passport Program below) listing the different areas of Rotary that the new member should learn about. This information is then turned over to the Mentor. Also include a Prospecting Form for referrals of possible new members and the “Member in Good Standing” letter.

- The Passport Program asks members to volunteer to take a Rotary subject with which they are proficient and take time to meet with each new member and discuss their area of expertise. Topics such as Foundation, our Club activities, committees, The Four Avenues of Service, becoming a sustaining member, Rotary history, etc are listed in their new member packet. Each new member is to seek out each of the "expert" members listed and review their topic of information. Upon the completion of each topic listed the instructor signs off or stamps the new member’s checklist or passport.

Once the new member has completed the entire list of topics and their Passport is full, they should be recognized by the club as completing the program. If a new member does not seek out the instructors in a timely manner, the instructors should take the initiative. The goal should be to have the program completed within 60 days. The time in which the instructor and new member can meet can be before or after a weekly meeting, or meet separately outside of a regular meeting setting. Each segment of instruction should be limited to no more than 20 minutes. The Membership committee should be involved and help in the development of the instruction information and format.

- The “Dance Card Program” is simply a list of all the members in the club that the new member uses as a check list to help meet all the members of the club. The new member is

- instructed to try to sit with at least two new members each meeting and check them off of the “Dance Card.” When their “Dance Card” is full, again make it a club recognition event.
- **Get the new member’s family involved in both social and Rotary activities promptly. A special effort should be made to make family members feel part of the club as well.**

 - **The membership Committee Chair should inquire if a new member knows someone whom they believe also would be a good Rotarian and work with them to bring them in. It could be easier if a new member has a friend going through the process together.**

 - **Have our new member give a Classification Talk shortly after joining.**

 - **Have our new member serve as greeter for a set period of time asking the name of each person coming in the door and giving out their badge.**

 - **Introduce our new member each week for a period of time.**

 - **Upon completion of the Dance Card and Passport, consider holding a recognition ceremony and even give a prize. Again, invite family members.**

 - **Inform and make a special invitation to new members for club social functions.**

 - **Encourage and send new members to District and Zone functions and pay their costs. Make a special effort to have them attend the District Conference.**

 - **Hold an informal meeting with a new member about six months after joining to review where they are and seek their input into how to improve indoctrination of new members. Get new members to serve as Mentors after their first year.**

 - **Consider asking new members to serve first on the**

Membership Committee to seek their input on attracting and inducting new members. Their input will be valuable because it is fresh on their minds.

- **Consider setting up a “Buddy System.” This calls for each member of the club to have another member that they buddy up with for attendance purposes. If your buddy does not attend a meeting, it is the responsibility of the other buddy to contact them to make sure every thing is okay and try to get them back into attending.**

As an alternate, a system can be set up to have a committee review attendance records and assign members to contact those who may have missed meetings for a period of time to see if everything is okay and motivate them to start attending again.

- **Getting family involved is a good way to retain members. Get the membership’s family members involved in everything from projects to District and RI functions and events. Have the club hold regular family social events such as our annual Summer Picnic, and December holiday party. Make sure family members are invited to all of these special events including inductions, classification talks, participating in club projects, etc. Building strong relationships with family members makes our club strong and provides the extra hands needed to get the work of Rotary done.**
- **Hold m Club Assemblies at least quarterly in order to discuss projects, fund raisers, the need for volunteers; i.e. regular “State of the Club” meetings. This is where the need for help needs to be communicated, along with commitments, requirements and expectations. Also it is a time for open discussion on matters such as the setting up of the Mentor Program and other new programs as well. We must include the entire club in these matters and not rely on the same people all the time.**
- **Make sure all members have pins and wear them (fine each**

week for not), and encourage car window Rotary stickers.

- **Consider having all members review and agree to “Member in Good Standing” letter used with new members. Even consider having all members sign a copy to reinforce their commitment to Rotary and our club.**
- **Do some simple surveys with our membership seeking ideas for programs, social functions, new projects, fundraisers, and other club activities to help better understand the mood of the club. Keep surveys up beat and not a negative outlet for some.**
- **Conduct exit interview to obtain real reason members may be leaving.**
- **Through the Mentor and Passport program seek members who may have slowed down their activities and ask them to participate to get them involved again.**
- **Hold other "Fireside Chat" type meetings several times each year as programs in the clubs (at least once per quarter) or at an outside locations such as a member’s home, and invite new member’s families as well.**
- **Implement a RE-classification Speech Program where current members give a short talk about themselves. We also can have the new members identify an established member they would like to know more about to stand up and give a 3 to 5 minute talk about themselves.**
- **Have a “Rotary Minute” each week given by a select group, or assign someone new each week. Their responsibility is to find and report on interesting Rotary or club facts and relay the information to the club in a two-minute presentation.**
- **Consider introducing some NEW PROJECTS on a regular basis to get current and new members excited and involved in club activities on a continuous basis. New things generate**

new enthusiasm. Try to get our less active members to work on new project and not just the 20% already working on everything else.

The new projects don't need to be big or expensive, or take a lot of time. But they should help generate positive activity. Get our members involved in helping to decide some of the new projects to undertake.

- **Show Rotary videos/DVDs every once in a while to reinforce Rotary in the minds of all members. Most of these are impressive and emotional and can help solidify in the minds of older members why they are Rotarians.**
- **Inform and get feedback from all club members and introduce all of the new procedures being put in place for new member orientation step by step. It is a good way to educate them while informing them and seeking their input.**
- **Encourage members to visit other clubs, especially out of our District and ask them to report back and exchange banners. Many programs by members on their travels, etc. are good.**
- **Conduct programs on projects, fundraisers, and committees. Everyone doesn't know everything that is going on in the club all the time. For example, a program or short talk about what every club committee does and how they do it could work. These programs can be used to recruit new people to committee.**
- **Encourage participation in District functions by all members. We see the same faces every year at these events.**

AWARDS & RECOGNITION

Awards and other forms of recognition are vital to encourage member involvement in the many activities of our club and district.

BADGES:

No member shall be given a badge until that member has been approved by the board of directors and the club membership, and has paid all required fees and dues. The badge presented to the new members shall have a red ribbon affixed to it denoting the member is new to encourage other members to get to know them.

The red ribbon badge is to be used by the new member for three to six months while he or she is expected to to accomplished the following activities:

- 1. Attend the club's new member orientation meeting**
- 2. Attend a regular meeting of a different Rotary Club**
- 3. Learn Rotary's Four-way test**
- 4. Serve on at least one club or district committee**
- 5. Participate in at least one of the club's service projects**

With the completion of these activities the Membership Committee Chair, or the club President may make a special announcement in front of all attending a regular club meeting. Congratulations are in order.

OTHER RECOGNITION EVENTS:

- 1. The award of a Paul Harris Fellow, major donor, etc.**
- 2. The anniversary of 12 months of perfect attendance**
- 3. Certificates of achievement within Rotary; e.g. RLI training attendance**
- 4. Certificates or verbal recognition of member good deeds or accomplishments within Rotary or elsewhere in the community**

ATTENDANCE

As is stated in Article VIII of the constitution of the Rotary Club of Allentown West-Western Lehigh County, the club members support the Rotary International guidelines which state that every club member should attend, at a minimum, fifty percent of regular club meetings, counting approved make-ups, and be current with dues payments in order to remain in good standing.

A club member will be considered not in good standing:

1. When dues are not paid by the due date, or
2. When attendance falls below the rate of twelve meetings in a six-month time period.

When a members fails to meet either of these two requirements, the member will be notified, in writing, that the member has been placed on probationary status. Dues payments and/or attendance will then be monitored during the subsequent three-month period. If the deficiencies are not corrected, the member automatically will be dropped from the membership rolls at the end of the probationary period.

The Constitution of our Rotary club states:

"Section 4 - Terminations - Non-Attendance.

(a) Attendance Percentages. A member must

- (1) attend or make up at least 50% of club regular meetings in each half of the year;
- (2) attend at least 25% of this club's regular meetings in each half of the year. If a member fails to attend as required, the member's membership shall be subject to termination unless the Board consents to such non-attendance for good cause.

(b) Consecutive Absences. Unless otherwise excused by the Board for good and sufficient reason or pursuant to article VIII, sections 2 or 3, each member who fails to attend or make up four consecutive regular meetings, shall be informed by the Board that

the member's non-attendance may be considered a request to terminate membership in this club. Thereafter, the Board, by a majority vote, may terminate the member's membership."

REFERENCE MATERIALS

For Potential Members:

Take a Look at Rotary (867-EN) An eight-minute video designed specifically for prospective Rotarians in North America, provides an informative introduction to the many aspects of club membership

This Is Rotary (449) A six-minute video providing a comprehensive overview of Rotary, its goals and service programs, the Avenues of Service, and the diverse service projects sponsored by Rotary clubs and The Rotary Foundation (DVD - 449V - EN only)

This Is Rotary (001-EN) Brochure providing an overview of Rotary for prospective Rotarians and the public

What's Rotary? (419-EN) Handy, wallet-size card answering frequently asked questions about the organization and scope of Rotary; popular as a handout to non-Rotarians

The Allentown-west Rotary Club flyer

The d-7430 Activities flyer (available Summer 2008)

For Candidate Orientation:

See chapter on Orientation.

For For New Members at Induction:

Membership Identification Card (418-EN) Supplied to every Rotarian by the club secretary to verify membership

The ABCs of Rotary (363-EN) A compact guide through Rotary's history, customs, and traditions originating from a compilation of short articles first written by 1992-93 RI President Cliff Dochterman

Getting Started in Rotary (333-EN) Guide to sponsor's responsibilities and brief information for new members

For Continuing Education:

History of Rotary (921-EN) A seven-minute video that summarizes Rotary history

Rotary Basics (595) Eight-page overview of Rotary International and The Rotary Foundation

Rotary Fact Pack (267) A package of fact sheets on various aspects of Rotary, updated quarterly

Hour (512) A 60-minute audiotape of Rotary information presented by professional narrators

Rotary in Your Community (332) A 30-minute video overview of Rotary club service and members

APPENDIX 1

NEW MEMBER INDUCTION CEREMONY

[Are Mentors present? Have them stand with their new member and also do a 30 second introduction / Include new member's spouse?]

“ _____ ” , it is my great pleasure on behalf of the board of directors and members of the Rotary Club of Allentown-west to welcome you as a member .

We welcome you not only for the fine fellowship that we shall share, but also for your strong arm that will help us to carry out our many projects to make our community, our country, and the world a better place in which to live.

“Rotary is not a political organization, but all Rotarians are vitally concerned with everything pertaining to good citizenship and the election of good men and women to public office.

“Rotary is not a charitable organization, yet its activities exemplify the charity and the sacrifices that one should expect from people who believe that they have a responsibility to help others.

“Rotary is not a religious organization, but it is built on those eternal principles that have served as the moral compass for people throughout the ages.

“Rotary is an organization of business and professional people pledged to uphold the highest OF professional standards. Rotarians believe that worldwide fellowship and international peace can be achieved when business people unite under the banner of service.”

[REQUEST THOSE PRESENT TO STAND FOR THE DELIVERY OF THE CHARGE THAT FOLLOWS.]

“You, _____ , have been chosen for membership in the Rotary Club of Allentown-west because your fellow members

believe you to be a leader in your special line of activity and because you manifest those qualities of head and heart that fit you to interpret and impart the message of Rotary.

“You are the representative of your vocation in this club and any information of an educational value pertaining to your craft must naturally come to us through you.

“At the same time you become an ambassador from us to your classification, and we rely on you to carry the principles and ideals of service, which we here inspire, to those who share your professional activity.

“The community will know and judge Rotary by your embodiment of it in character and service, and we accept you as a member because we know our principles and organization to be safe in your keeping.

“We also expect you to give us the inspiration that will help us to become better Rotarians, and it is with this hope that I ask your sponsoring member to invest you with the distinguishing badge of a Rotarian, and gladly offer you the right hand of Rotary fellowship.”

[ASK THOSE PRESENT TO BE SEATED.]

“It is also my pleasure to present you with this folder of information pertaining to Rotary, which I hope you will read and think about.

“Your membership identification card shows that you are a member in good standing of the Rotary Club of Allentown-west. It is all the identification you need to visit any other Rotary club in the world.

“Fellow Rotarians, it is with great pleasure that I present to you Rotarian(s)_____ - _____.”

[The new member may address the club]

“I invite everyone to introduce yourselves to our new member(s) at the earliest opportunity.”