



Priority # 1

Workbook

Priority #1

Priority #1 is a production based on four key concepts gleaned from the siegel + gale report. That report has fundamentally changed traditional thinking about members in Rotary.

Priority #1 introduces some very basic, simple tools that District and Club leaders can adopt with immediate actions to attract and retain members consistent with the siegel + gale concepts.

More Information —

- **No Cost to you:**
 - A team of trainers representing the Zone Membership Committee will bring the **Priority #1** production to your District seminar.
 - **Requirements:**
 - A 2-hour session devoted entirely to the **Priority #1** production.
 - An appropriate training location and A/V equipment.
 - A Saturday or Sunday training date.
 - An audience of district and club leaders representing all clubs plus all others interested.
 - **Zone Team Provides:**
 - Experienced, high motivational trainers (a team of two).
 - Exciting “hand-on exercises” that involve the entire audience.
 - Session workbooks, handouts and take-away materials.
-

To Schedule a presentation: Contact a Rotary Coordinator

- RC Steve Lemmon ♦ slemmon@lawtml.com ♦ 916-925-2787
- RC Rod Belton ♦ rodb1st@gmail.com ♦ 831-229-0528

You'll be glad you did!

Table of Contents

Title	Page #
Organization Life Cycle graph	5
siegel + gale finding (Familiarity with Rotary)	6
siegel +gale graph (Why join - Why stay)	7
siegel + gale key points (What Our Customers Value)	8
Attractive, Relevant & Involving Indicators	9
Preparing Our Club To Grow - Survey	11
What’s Rotary? The “Better Answer”	13
Why Rotary? Examples	15
Outward facing website key components	18
Four tips to improve retention	19
Personalized Induction - Sample Script	20
Know names, occupations, skills & passions — Ways	21
Where to find information	22
Action Items: Now, 30-days 90-days	23
Take Away Concepts	24

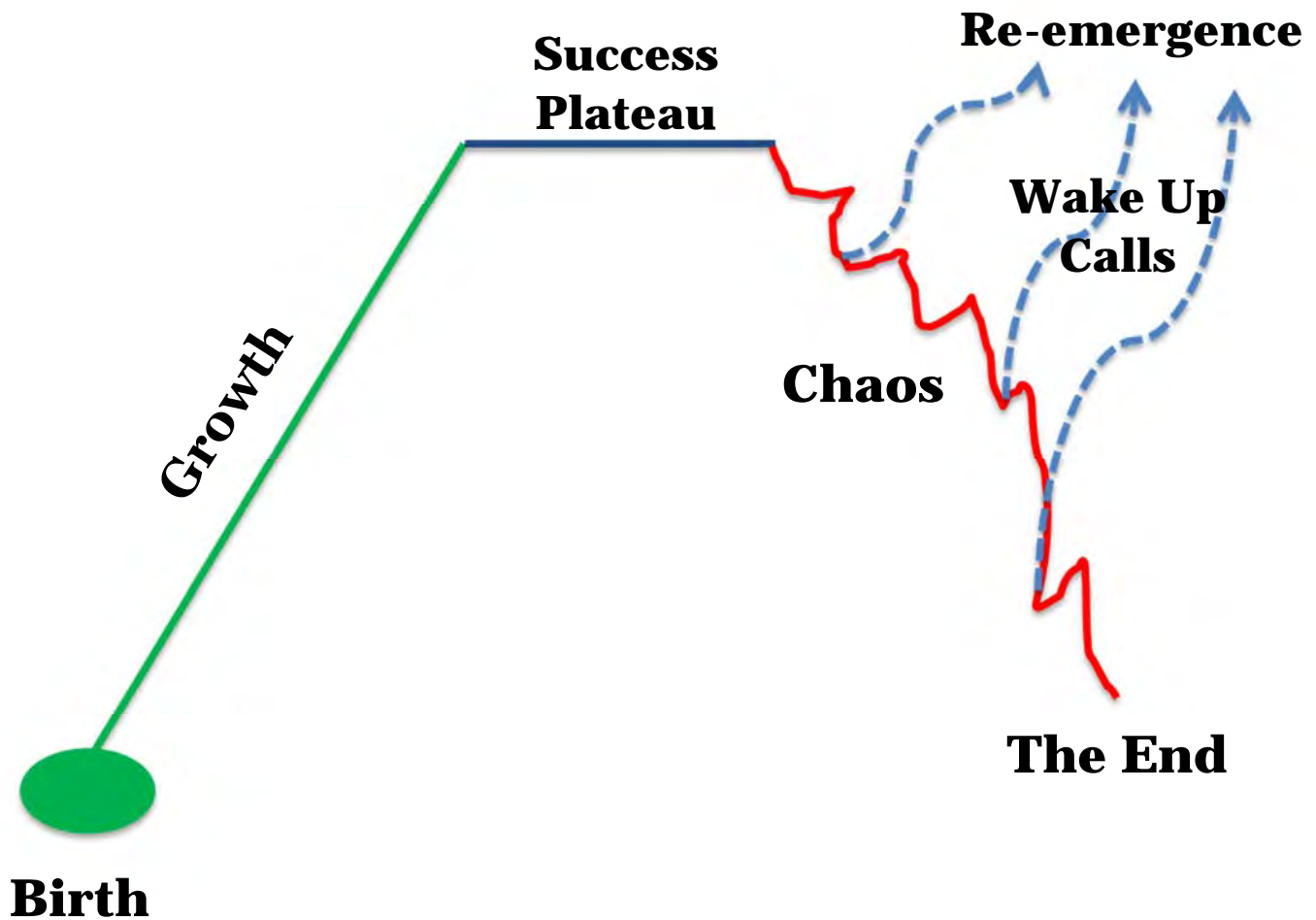
My Notes

COPIES OF DOCUMENTS AVAILABLE ON THE ZONE WEBSITE

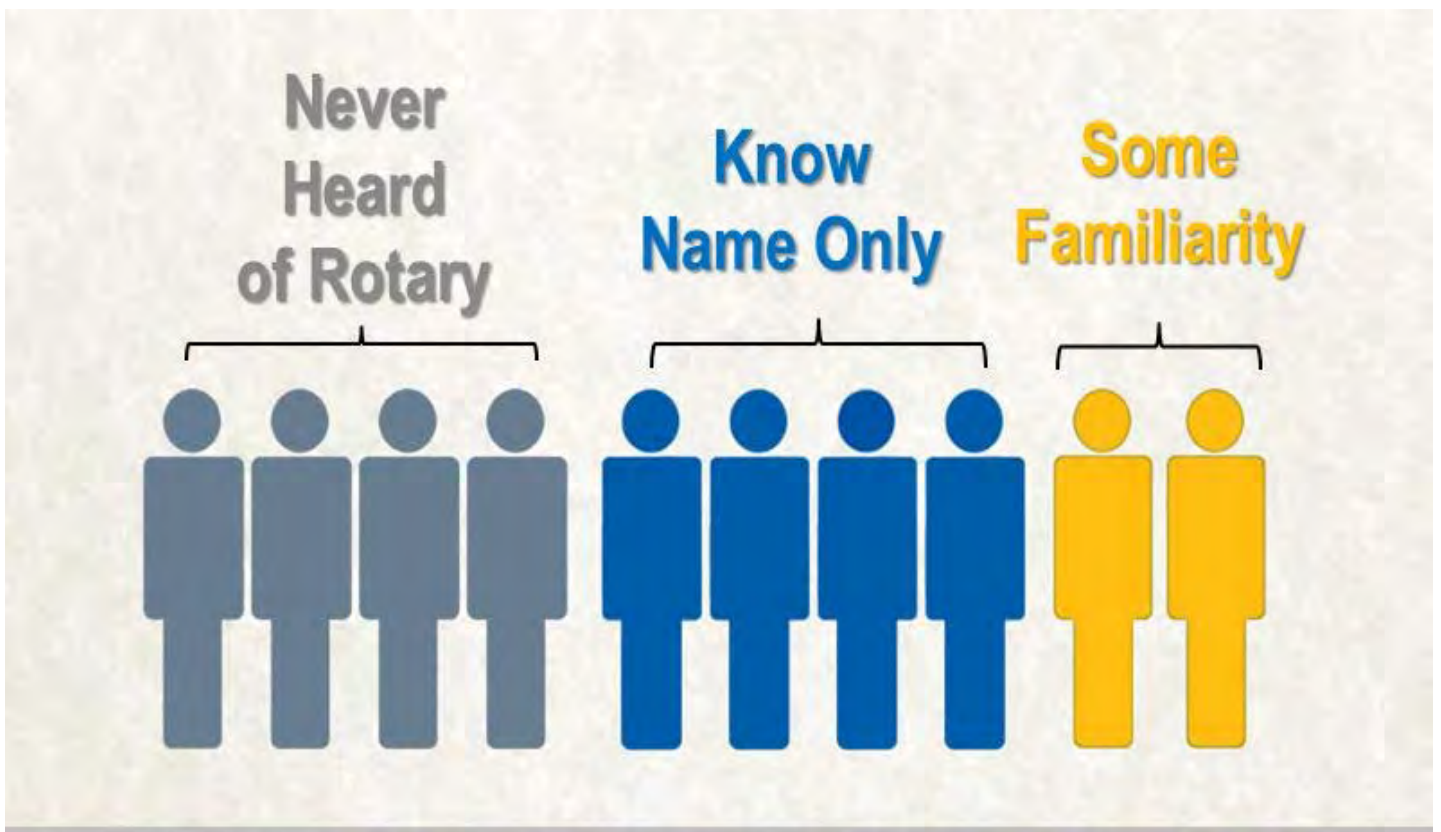
Most documents used in the Priority #1 Production can be downloaded in PDF format from the Zone 25/26 website. Go to www.zone2526.org.

Under “Strengthen Clubs” > click “Membership” > click “Membership Resources”

Organization Life Cycle



Familiarity With Rotary



siegel + gale Findings

Why Join?...Stay?

Friendship	30.0%	38.4%
Local Impact	35.5%	36.1%
Networking	18.7%	5.2%
Recognition	4.3%	2.3%
Training	3.3%	3.5%
Global impact	8.2%	14.5%

"Our organizational priority is, and must be, membership ... without members, there would be no Rotary. If we can achieve so much with the clubs and members we currently have, what could we do if we had more?"

John Hewko, General Secretary of Rotary International

What Our Customers Value

- 1. Friends and Contacts**
- 2. Local Impact**
- 3. Engagement of skills and passions**
- 4. Worth their time**

Attractive, Relevant & Involving

Key Indicators

Providing what members (“customers”) value:

- FRIENDS and CONTACTS
- Ability to have LOCAL impact
- ENGAGEMENT of skills and passion
- WORTH THEIR TIME

Having a variety of effective and “similar message” communications:

- Website
- Facebook page
- Bulletins and brochures

Demonstrating positive club atmosphere & environment:

- All members feel welcome and are involved
- All guests feel welcome and included
- Strong camaraderie (Having fun!)
- Interact and Rotaract members welcome
- And much more

My Notes

COPIES OF DOCUMENTS AVAILABLE ON THE ZONE WEBSITE

Most documents used in the Priority #1 Production can be downloaded in PDF format from the Zone 25/26 website. Go to www.zone2526.org.

Under “Strengthen Clubs” > click “Membership” > click “Membership Resources”

Preparing Our Club to Grow

To sustain growth, clubs need to know why business and professional people join and why they stay. If invitees don't join or members don't stay, our club is not meeting or exceeding their expectations. To ensure our club is worth belonging to, start by answering the following questions. This will give us a starting point for improving our club.

Evaluate Your Club by Taking This Survey

A - First Impressions:

- 1) Are all guests and visitors greeted warmly and introduced to officers and members?
Yes ☐ No ☐
- 2) Do we have a weekly greeter at the front door?
Yes ☐ No ☐
- 3) Does our club keep a guest book with addresses and contact information?
Yes ☐ No ☐
- 4) Is the meeting room arranged in a professional manner?
Yes ☐ No ☐
- 5) Are guests and visitors introduced at the meeting?
Yes ☐ No ☐
- 6) Are guests & speakers considered and treated as if potential members?
Yes ☐ No ☐

B - New Member Induction:

- 1) Does our club hold formal induction, including presentation of a member pin?
Yes ☐ No ☐
- 2) Are inductees' partner and/or children invited to the induction?
Yes ☐ No ☐
- 3) Are inductions "personal" so they focus on telling the club a lot about the new member?
Yes ☐ No ☐
- 4) Is the new member's sponsor recognized?
Yes ☐ No ☐

C - New Member Orientation:

- 1) Are new members made to feel welcome?
Yes ☐ No ☐
- 2) Does the President (or other officer) personally send welcome letters & information to new members' home address?
Yes ☐ No ☐
- 3) Are new members' needs assessed for involving them in club activities?
Yes ☐ No ☐
- 4) Do we explain the benefits of membership to new members?
Yes ☐ No ☐
- 5) Are new members given an opportunity to do something?
Yes ☐ No ☐
- 6) Do we use an objective means or practice of measuring if new members are satisfied?
Yes ☐ No ☐
- 7) Has our club reviewed its "Blue Badge" requirements in the last two years?
Yes ☐ No ☐

D- Friendship, Variety and Communications:

- 1) Are our meetings typically enjoyable and educational?
Yes ☐ No ☐
- 2) Does our club have regularly scheduled social events?
Yes ☐ No ☐
- 3) Are inter-club events encouraged and planned?
Yes ☐ No ☐

Any NO answers?
How can we Turn NOs into YESs?



- 4) Do all members participate in club, district, and/or international events?
Yes ☐ No ☐
- 5) Is a club newsletter issued on a regular basis?
Yes ☐ No ☐
- 6) Is our website kept up to date (weekly or more)?
Yes ☐ No ☐
- 7) Are all members "friends" on our Facebook page?
Yes ☐ No ☐

E - Program Planning and Meeting Organization:

- 1) Are the programs and speakers publicized in advance?
Yes ☐ No ☐
- 2) Do members know their program responsibilities?
Yes ☐ No ☐
- 3) Are member prepared to carry out their assignments?
Yes ☐ No ☐
- 4) Do our meetings begin and end on time?
Yes ☐ No ☐
- 5) Are members asked to fill out a club evaluation form each year?
Yes ☐ No ☐
- 6) Does our club promote ongoing Rotary education? (Webinars, Conferences, etc.)
Yes ☐ No ☐

F - Membership Strength:

- 1) Does our club really want to expand and attract new members?
Yes ☐ No ☐
- 2) Does our club grow each year in membership?
Yes ☐ No ☐
- 3) Is our club promoted in the community?
Yes ☐ No ☐
- 4) Are club meetings varied and exciting?
Yes ☐ No ☐
- 5) Does our club hold a regular (quarterly) member development program?
Yes ☐ No ☐
- 6) Do we explain and feature the benefits of membership to existing members?
Yes ☐ No ☐

- 7) If asked by anyone, can all members explain what Rotary is?
Yes ☐ No ☐
- 8) Do all guests and members feel welcome at our meetings?
Yes ☐ No ☐
- 9) Does our club have a protocol for following up with members not involved in club activities?
Yes ☐ No ☐
- 10) Does our club make adjustments to the needs of members to keep them in the club?
Yes ☐ No ☐

G – Occupations, Skills, Passions

- 1) Do all other members know your name, occupation, skill, and passion?
Yes ☐ No ☐
- 2) Do you know the name, occupation, skill, and passion of all other members?
Yes ☐ No ☐
- 3) Do you do business with fellow Rotarians?
Yes ☐ No ☐
- 4) Does our club put adequate emphasis on members' professions and abilities?
Yes ☐ No ☐

H - Recognizing Accomplishments:

- 1) Does our club have recognition awards?
Yes ☐ No ☐
- 2) Is a progress chart displayed and maintained for projects?
Yes ☐ No ☐
- 3) Are member achievements formally recognized with ceremony?
Yes ☐ No ☐
- 4) Are club leaders recognized?
Yes ☐ No ☐
- 5) Are club and member achievements publicized?
Yes ☐ No ☐

Any NO answers?
How can we Turn NOs into YESs?



What's Rotary?

The “better answer”

We're a leadership organization of local business, professional and civic leaders.

We meet regularly, get to know each other, form friendships, and through that, we're able to get things done in this community.

My Notes

COPIES OF DOCUMENTS AVAILABLE ON THE ZONE WEBSITE

Most documents used in the Priority #1 Production can be downloaded in PDF format from the Zone 25/26 website. Go to www.zone2526.org.

Under “Strengthen Clubs” > click “Membership” > click “Membership Resources”



Why Rotary?

What Our Members Receive

1. Friendship

Membership in Rotary fulfills the basic human need of friendship. In fact, it was one of the primary reasons Paul Harris started Rotary in 1905. We create lifelong friendships in our local and international communities. The relationships created in Rotary's are with a network of local and international leaders whom we address by name and are considered our equals and peers.

2. Professional Development

Rotary is a network of business, professional and community leaders, who have a culture of high level of integrity and purpose. Our members are exposed to people, every week, in a vast range of vocations that can provide assistance to our business and professional development. Although we are not a business networking organization, we afford our members to be identified to the leaders in their local community. By this association, our members not only enhance their business, they learn from and identify with the leaders in their community. It was once said, "Rotary allows me to sit next to people every week that I would otherwise have to pay \$250 an hour to meet."

3. Personal Growth

Rotary takes ordinary individuals and puts them into extraordinary circumstance. Every week, you are exposed to new thoughts, new professions and new opportunities to learn. Our members develop broad social skills. A key part of Rotary is its internationalism, which gives our members to broaden their international scope, living and expression. Simply stated, membership in Rotary helps to make our members better – better individuals, community leaders, internationalists, and humanitarians.

4. Leadership Development

A core value of Rotary is that we develop leaders and leadership skills. We provide leadership training at all levels of our organization. Rotary's brand of leadership is distinctive. We teach how to lead leaders in the context of a volunteer organization. If you can be an effective leader in Rotary, you will be a better can be an effective leader in your business. Serving in Rotary positions is like a college education in leadership.

5. Community

Rotary clubs give our members a way to get involved in making their local communities better. Membership and involvement in a Rotary club makes an individual a better community citizen and more connected with community leaders and the needs of the community.

6. Continuing Education

Involvement in Rotary allows our members to broaden their perspective and improve their business skills. Attendance at the weekly meeting exposes our members to the meeting's program which include speakers talking on a variety of topics. Further, training is available for Rotarians who take on responsibility in the organization. Training in fund raising, non-profit management, event production, communications, etc. will help you to grow in Rotary and develop additional business skills.

7. Fun

Rotary is fun. The club projects are fun. Social activities are fun. And the service is fun. Our club meetings and other events are filled with fellowship, humor and entertainment. Every Rotary club and district has parties and activities that provide social fun and camaraderie. Our members are friendly, welcoming and engaging.

8. Public Speaking Skills

Rotary club meetings and events place a high value and regard on effective public speaking. Participating in a Rotary club helps our member to develop confidence and skills in public communication, and the opportunity to use it. Rotarians who get more involved will be exposed to higher levels of public speaking training.

9. Global Citizens

Rotary is in over 200 countries and geographical regions. There are few places on the globe which do not have a Rotary club. This global presence gives our members the exclusive opportunity to create friends in both the local community and the world community. This global connection gives you the opportunity and vehicle to be a better global citizen. Members who are involved in international businesses will find access to global business, professional and community leaders a valuable asset.

10. Unique Travel Experience and Assistance

Members who travel will find that being a Rotarian will open doors throughout the world. "The Pin Gets You In!" Visiting a Rotary club while you are traveling will give you immediate access to local resources and information. Also, Rotary clubs everywhere can provide quick assistance in obtaining services of a doctor, lawyer, dentist, etc., while traveling.

11. Next Generation Programs

Rotary provides one of the world's largest, most structured and responsible youth program. Our youth exchange program, both our academic year and short-term, summer exchange are recognized as one of the best and most cost efficient available. We also have clubs in high school and college that help students develop their leadership, social, organizational and communication skills. These youth programs are available to the family members of our Rotarians.

12. Develop Social Skills

Every week and at various events and functions, Rotary develops one's personality, social and people skills. Engagement with Rotary during international travel helps introduce Rotarians to new cultures and languages.

13. Opportunities for the Family

Involvement in a Rotary club immediately integrates the family into a community's support network. Lifelong relationships and friendships are created that can support a family for years. Rotary service projects are an ideal opportunity for working with your children to teach them the value of helping others. Finally, Rotary's Next Generation programs can help the children of Rotarians to develop special skills and experiences that can distinguish them as they apply to colleges and universities.

14. Vocational Skills

Rotary fosters growth and development in each person's profession or vocation and encourages sharing this development with others.

15. Ethics Treatment

One of Rotary's core principles is the "4-way Test" which governs ethical standards. Rotarians are expected to be ethical in business and personal relationships. Further, Rotary presumes an ethical relationship between its members. Rotarians presume the goodness in one another, in both a business or volunteer capacity.

16. Cultural Awareness

Rotary is a cross section of the world's most prominent citizens from every background. Rotarians learn to love and work with people everywhere.

17. Prestige

Rotary is the oldest and most prestigious civic organization in the world. Membership in Rotary is by invitation only. Worldwide, Rotarians are recognized as some of the most prominent individuals in business, professions and the community. Being a Rotarian give you instant access these people, and helps to identify you as one of these individuals.

18. Community Connections

Membership in Rotary immediately connects you with a broad range of professions and professionals, in your club, city, region or globally. We encourage our members to do business with each other because we trust the members in Rotary. Vocational diversity is one of Rotary's core values. Because of this diversity and our ethical treatment of one another, our members can have confidence in creating long term business relationships.

19. The Opportunity to Serve

Service is what Rotarians do. We change the lives of others in need. Your membership in Rotary gives you the opportunity, structure, knowhow and resources to provide service to others. The benefit a Rotarian receives by helping someone else is extraordinary and life affecting.

20. You Can Make a Difference - Locally or Globally

Rotary gives our members the ability to make a difference, and provides an exclusive benefit to our members to follow their passion in helping others. Rotary empowers our membership to dream large in addressing needs in local and international communities. There is no other organization that has the structure, the network and resources that are available to its membership. Individual members create our projects – from the global eradication of polio, to a local beautification project, our members determine our action. What you can dream, you can create. What you can dream, you can be.

Outward Facing Website

Four Key Components

1. Who are we?
2. What do we care about?
3. When / where we meet— Join us
4. What's in it for the reader?

Retention Keys

1. Introduce them

Personalized Induction

2. Get to know them

Occupation, Skills, Passion

3. Involve them

Engage in activities

4. Teach them

What's happening

New Member Induction: Personal Approach

(To audience) Today, I have the pleasure of inducting our newest member, Mary Smith. With her today is her husband, Bill, a chemical engineer with Beckman Industries, and their son, Greg, and their daughter, Melissa, who are both students in Livingston Middle School. Also with her today is her Sponsor, Chuck Williams.

(To Mary) Mary, we are looking forward to you joining our Rotary club. You'll find that the Club can be a cheering section when things are going well and a support system when they're not. You'll also find that our families are an integral part of our Rotary experience. So, Bill and Greg and Melissa are always welcome to join us, have breakfast, share news, participate in projects.... and be a part of the Family of Rotary.

(To audience) As you all may know, Mary owns **Smith's Stationery** store that she opened six months ago, and she's been an active member of the Chamber of Commerce. Now, let me tell you a few things you may not know about Mary. She graduated with honors in her class from the University of Texas, with a major in business administration. Before relocating here and opening her stationary store, Mary worked as a business representative and then department manager at the Apple division offices in Austin, Texas. She is an avid hiker. She holds airplane pilot's license and owns a Cessna 172 that she has flown across the country, and that she has used to transport medical patients as part of the *Angel Wings* program. She says that she is a bad skier, but a good golfer...and with a 10 handicap, that should really help our club in next month's golf tournament with the other Rotary clubs in the area.

(To Mary) Mary, I'm presenting you with some key Rotary documents, including the 4-Way Test and the Object of Rotary. Mary, I've given you a "Sponsor" pin that I'd like you to pin on Chuck to signify that he has sponsored you. *[she pins it on him]*.

(To Sponsor) Chuck, as her sponsor, would you please pin the Rotary pin on Mary. *[done]*

(To Mary) And Mary, here is an additional Rotary pin. In order to share the Rotary experience, can you within at some point bring in a new potential member "of the same quality and caliber" as yourself? *[Mary – Yes]*

Mary, welcome to the Rotary Club of New Town. You are now the newest Rotarian in the World.

[To the audience] May I present Mary Smith, the newest member of our Rotary family.

[Members all stand and applaud...in smaller clubs, come forward to personally welcome Mary and her family].

Know Occupations - Skills - Passions

Make it fun - Examples

- Distribute a list with 10 members on it and have people write down the occupation of each person on the list. For each person have someone describe what they do. At the end, poll the membership and see how many got 10 right, 9 right, etc.
- Have 5 members stand up with number and have the other members write their name, occupation, skill and passion. Can be a show of hands – how many got 5 right; 4 right; etc. Then have each of the 5 people give their name and a 1 minute personal talk to identify their occupation, skill, and passion.
- President announces a particular business or profession (e.g., real estate). Then ask which members are in that occupation. Members call out the names. (Option – Do several businesses / professions so more members can be spotlighted since there may often be only 1 person in a particular profession or business.
- Remove all badges from the badge box. Hand them out randomly, and, during the social time, have each person find the person whose name badge they were given and find out the person's occupation, skill or passion. Can be fun as members are roaming the room exchanging badges.
- Cover the name on each badge – but not the classification. Hand them out randomly. During the social time, have each member find a person with classification of the badge they have. Then uncover the name. (If more than one person in a club has the same classification – the hunt continues.)
- Develop your own idea

Where to find Information



COPIES OF DOCUMENTS AVAILABLE ON THE ZONE WEBSITE

Most documents used in the Priority #1 Production can be downloaded in PDF format from the Zone 25/26 website. Go to www.zone2526.org.

Under “Strengthen Clubs” > click “Membership” > click “Membership Resources”

Priority #1 Action Items

Date Complete	Easy Now Action Items
	1. Identify members in club for 24 months or less
	2. Schedule occupation/personal talks for newer members
	3. President/designee personally meets with new members re: their interests
	4. Start activities so all members can answer “What’s Rotary” / “Why Rotary”
	5. Start program for all members to know names/occupations of all others
	6. Start personalized inductions
	7. Start using New Member letters
	8. Identify top 3 NO’s on survey to be quickly turned into YES’s

Date Complete	Easy 30-Day Actions & Results
	1. All members develop a “What’s Rotary” & “Why Rotary” response
	2. All members begin knowing names/occupations of all others
	3. Continue occupation/personal talks by all members
	4. If you use Greeters, evaluate their success
	5. Review website/Facebook/brochures for desired & consistent message.
	6. Turn top three NO’s into YES’s — Celebrate

Measured By	90-Day Results
	1. All members know names/occupations of all others
	2. All members comfortable with questions “What’s Rotary?” & “Why Rotary?”
	3. Continue having personal, skills, & passion talks by all members
	4. All members involved & engaged
	5. Guests and Visitors all feel welcome
	6. A vibrant club culture has developed
	7. Most NO’s are turned into YES’s

TAKE-AWAY CONCEPTS

1. Provide **Friends and Contacts**

- * It's the #1 reason people stay in Rotary

2. Think **Local**

- * International will come.

3. Know the **Occupation, Skills** and **Passions** of each member

- * You can't have friendship with other members if you don't even know their names.
- * You can't have pride in the club and in members if you don't even know what they do.

4. Be **Worth the Time** -

- * A Rotary Club is a leadership organization,
not just a friendship or service club -
that's what makes us special & different from other groups.

We are helping members become better leaders,
and in that process,
we are helping communities become better communities.