



Creating the Best Rotary Brand Experience
to Improve Club Culture and Retention



Priority #1 Plus Workbook



Cover Photo Credit - © Rotary International / (T) Alyce Henson; (M) James S. Woods; (B) Alyce Henson

Priority #1 Plus Workbook

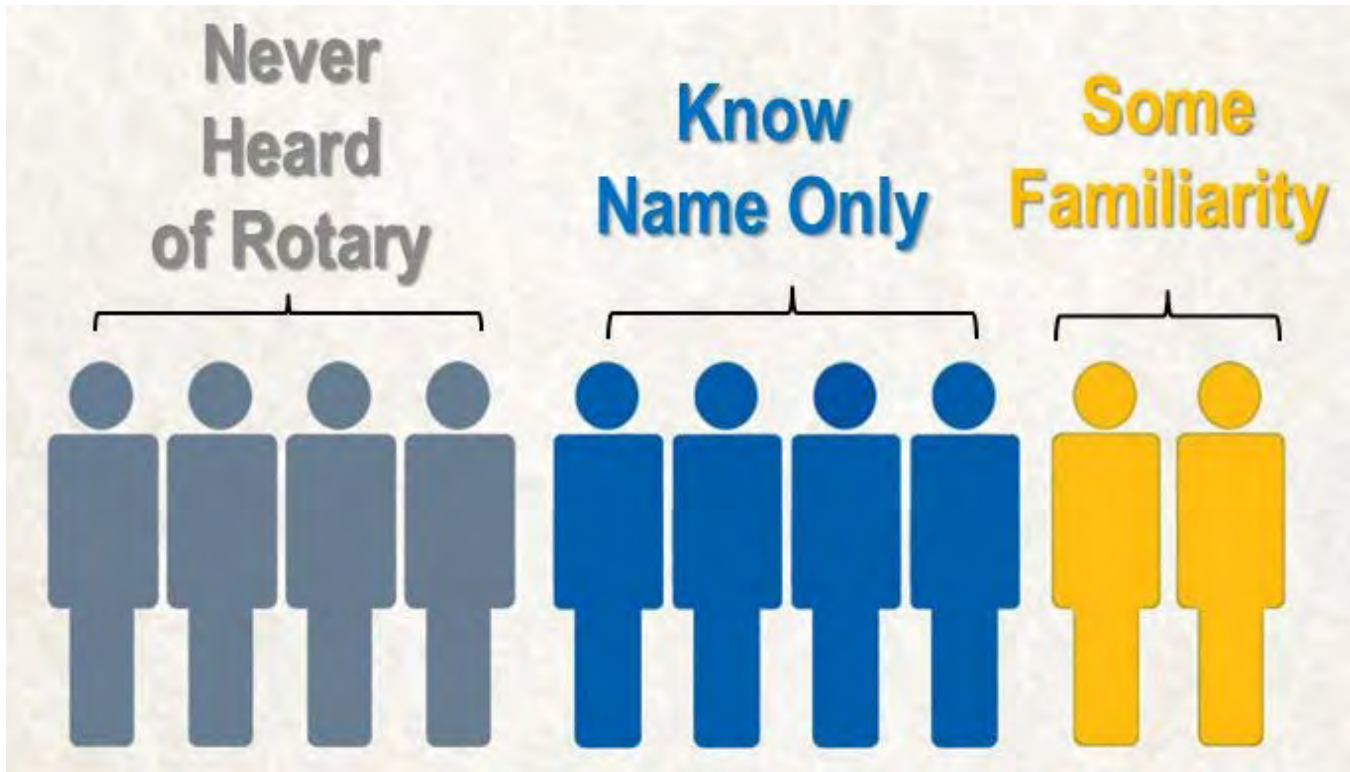
Ver. 1.4

TABLE OF CONTENTS

TITLE	PAGE
Familiarity with Rotary - siegel+gale Findings	1
Why Join? - Why Stay? - siegel+gale Graph	2
Our Customers' Values - siegel+gale Key Points	3
Building Blocks of Rotary's Brand	4
Summarizing Rotary's Brand	5
Rotary's Values	6
The Attributes of Rotary's Voice	7
Evaluate Your Rotary Brand Experience	8
What's Rotary? The "Better Answer"	10
Why Rotary? What Our Members Receive	11
Club Website and Social Media Checklist	14
Retention Keys	15
New Member Induction: Personal Approach	16
New Member Induction: Personal Approach - Sample Template	17
Have Fun Learning About Your Members	18
Service Projects and The Rotary Foundation	20
Where to Find Information	21
Discovering Club Culture and Identifying Areas to Revitalize!	22
Suggested Action Items	24
My Action Items	25
Key Moments	26
Appendix	27
Appendix 1 - Be a Vibrant Club - Your Club Leadership Plan North America	29
Appendix 2 - Brand Assessment Checklist	37
Appendix 3 - How to Build Your Logo	38
Appendix 4 - Membership Resource Guide	39
Appendix 5 - Sample Rotary Club New Member Info	43
Appendix 6 - Sample Rotary Club Mentor Guide	49
Appendix 7 - Essential Changes for Clubs and Districts	53
Appendix 8 - Keep Your Members and Make Your Club Stronger	56
Appendix 9 - The Rotary Foundation - A Member Benefit!	58

FAMILIARITY WITH ROTARY

SIEGEL+GALE FINDINGS



Many people **do not know Rotary**. Those who do, only know our name or only have a general idea of what Rotary is and does.

Rotary's Public Image Surveys in 2006 and 2010 reached a wide cross-section of prospective members around the world.

The research found:

- Four in ten have never heard of us.
- Another four in ten have heard of our "name only."
- Only two in ten claim to have "some familiarity" with Rotary. Unfortunately, what much of this group knows is often colored by misperceptions and half-truths.

WHY JOIN? - WHY STAY?

SIEGEL+GALE GRAPH

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

OUR CUSTOMERS' VALUES

SIEGEL+GALE KEY POINTS

1. **FRIENDS** and **CONTACTS**
It's the #1 reason people stay in Rotary.
2. **LOCAL** Impact
International will come.
3. **ENGAGEMENT** of Skills and Passions
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. **WORKING WITH LEADERS**
A Rotary club is a leadership organization, not just a friendship or service club - that's what makes us special and different from other groups.

"WORTH MY TIME"

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

BUILDING BLOCKS OF ROTARY'S BRAND

REINFORCE OUR REASON FOR BEING

Essence

Rotary **joins leaders** from all continents, cultures and occupations to **exchange ideas** and **take action** for communities around the world.

REFLECT OUR BELIEFS/BEHAVIORS

Values

- We build lifelong relationships.
- We honor our commitments.
- We connect diverse perspectives.
- We apply our leadership and expertise to solve social issues.

DELIVER IN OUR VOICE

Voice

- Smart
- Compassionate
- Persevering
- Inspiring

SUMMARIZING ROTARY'S BRAND

Rotary's brand pillars clarify what Rotary does, and more importantly, the ways in which people can engage with us, our communities and the world around us. Taken together, they summarize Rotary's distinct approach and invite people to learn and do more.

JOIN LEADERS EXCHANGE IDEAS TAKE ACTION

With Definitions

Connect with leaders from all continents and cultures.

Celebrate diverse perspectives and build lifelong friendships.

Create enduring change in communities around the world.

As Calls-to-Action

Join leaders. Exchange ideas. Take action.

In a Sentence

Rotary **joins leaders** from all continents and cultures to **exchange ideas** and **take action** for communities around the world.

“Brand is a guide or a lens for the way you think, the way you act, and the way you communicate brought to life at every point of interaction with your audiences, both internal and external.”

Hayley Berlent, Senior Strategist for siegel+gale

ROTARY'S VALUES

Values drive our behavior. They represent our beliefs, what we do, and how we act. Our values are rooted in guiding principles that have always defined Rotary. Now, we want to bring our values to life by showing how we demonstrate them in our actions.

OUR VALUES

HOW WE LIVE OUR VALUES

**Fellowship and
Global Understanding**



**We build lifelong
relationships**

Ethics and Integrity



**We honor our
commitments**

Diversity



**We connect
diverse perspectives**

**Vocational Expertise,
Service and Leadership**



**We apply our leadership
and expertise to solve
social issues**

THE ATTRIBUTES OF ROTARY'S VOICE

Our voice attributes guide how we speak, write and design. By using a unified voice across all points of interaction, our communications will look, feel and sound unmistakably like Rotary.

Smart	We look at problems from different angles and apply our expertise to solve social issues in ways others cannot. Our communications are insightful and discerning.	We are... Knowledgeable Perceptive Confident	But not... Obscure Disconnected Arrogant
Compassionate	Tackling the world's toughest challenges requires empathy. Our communications champion real people, stories and conversations that are relatable and universal.	We are... Thoughtful Sincere Engaging	But not... Lofty Sentimental Weak
Persevering	We find lasting solutions to systemic problems at home and abroad. Our communications express our commitment when we speak with clarity and conviction.	We are... Bold Purposeful Courageous	But not... Reckless Close-minded Stubborn
Inspiring	Motivated by the enduring connections and positive change we bring to communities and the world, we encourage others to take action. Our communications convey hope, enthusiasm and passion.	We are... Upbeat Hopeful Visionary	But not... Hyper Zealous Impractical

EVALUATE YOUR ROTARY BRAND EXPERIENCE

The Rotary Brand Experience is part of everything we do!
The following questions are a starting point to help you better understand your club's Rotary Brand Experience and opportunities that may exist to strengthen your club.

First Impression:

1. Do you have signage with clear Rotary club identity inside and outside the meeting? **Yes / No**
2. Are all guests warmly greeted? **Yes / No**
3. Are all guests introduced to officers and members? **Yes / No**
4. Does your club track guests with contact info and have a process to follow up with them? **Yes / No**
5. Would business, professional, and community leaders want to meet in your room? **Yes / No**
6. Is the meeting conducted in a professional manner? **Yes / No**
7. Are guests invited to introduce themselves to the group? **Yes / No**
8. Are guests and speakers considered as potential members? **Yes / No**
9. Do you explain the benefits of membership to potential members? **Yes / No**
10. Are your website and social media pages up-to-date, including clear Rotary identity and an easy way to contact club leadership? **Yes / No**
11. Has your club been recognized in local media in the last year? **Yes / No**

New Member Orientation:

1. Does your club hold a personalized induction, including presentation of a membership pin and Rotary and club information for new members? **Yes / No**
2. Does your club assign a mentor for each new member? **Yes / No**
3. Does your club have a written mentorship plan? **Yes / No**
4. Are new members' needs assessed for engaging them in club activities? **Yes / No**
5. Do you use an objective way to measure new member satisfaction? **Yes / No**
6. Are new members given an opportunity to get involved in club activities? **Yes / No**
7. Are new members personally encouraged to get involved in club activities? **Yes / No**
8. Has your club updated new member orientation in the last two years? **Yes / No**
9. Do you explain the benefits of membership to your new members? **Yes / No**
10. Does the club president meet personally with new members at least once to assess satisfaction and engagement? **Yes / No**
11. Does the club president (or other officer) personally send welcome letters and information to new member's home address? **Yes / No**

Fellowship, Variety and Communications:

1. Are members and guests greeted warmly and made to feel welcome? **Yes / No**
2. Are enjoyable, interesting and educational meetings planned? **Yes / No**
3. Does your club have regularly scheduled social events? **Yes / No**
4. Do all members participate in club, district and international events? **Yes / No**
5. Are interclub events encouraged and planned? **Yes / No**
6. Does your club issue a newsletter on a regular basis? **Yes / No**
7. Are your website and social media pages updated regularly (at least weekly)? **Yes / No**
8. Does your website and social media include photos of local Rotarians in action? **Yes / No**
9. Have all your members "friended" your club Facebook page? **Yes / No**

EVALUATE YOUR ROTARY BRAND EXPERIENCE

Program Planning and Meeting Organization:

1. Are the meeting programs, agenda and speakers publicized in advance? **Yes / No**
2. Do meetings begin and end on time? **Yes / No**
3. Are club meetings varied and exciting? **Yes / No**
4. Are members asked to complete a club evaluation at least each year? **Yes / No**
5. Does your club promote ongoing Rotary education? **Yes / No**
6. Do you request your members to sit at different tables each week? **Yes / No**

Membership Strength:

1. Does your club want to attract new members? **Yes / No**
2. Is your membership application process documented and readily available? **Yes / No**
3. Does your club membership grow each year? **Yes / No**
4. Do you know your club's membership retention percentage for the last two years? **Yes / No**
5. Do long-term members stay active in the club? **Yes / No**
6. Is your club promoted in the community? **Yes / No**
7. Are new member sponsors recognized? **Yes / No**
8. Does your club hold a regular membership-building program? **Yes / No**
9. Are benefits of membership explained to your existing members? **Yes / No**
10. Does your club have a membership retention program? **Yes / No**
11. Does your club have a protocol for following up with members who are not engaged in club activities or have missed several meetings in a row? **Yes / No**
12. Are club members' needs and wants assessed to determine club projects and activities? **Yes / No**
13. Is your club flexible to help members stay in the club? **Yes / No**
14. Do you know all the members of your club? **Yes / No**
15. Do you know the names, occupations and passions of all your club members? **Yes / No**
16. Does your club encourage annual participation in The Rotary Foundation? **Yes / No**

Recognizing Accomplishments:

1. Does your club have recognition awards? **Yes / No**
2. Does your club share progress reports and impact of projects to keep all members informed? **Yes / No**
3. Are member's personal and vocational achievements recognized at the club? **Yes / No**
4. Are club leaders recognized and thanked? **Yes / No**
5. Are club and member achievements publicized outside the club? **Yes / No**
6. Are Rotary Foundation contributions recognized at the club? **Yes / No**
7. Does your club participate in district or Rotary recognition programs? **Yes / No**

HOW CAN WE TURN NO TO YES?

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**.

Notes:

WHY ROTARY?

WHAT OUR MEMBERS RECEIVE

Friendship

Rotarians create lifelong friendships. The relationships created are with a network of local and international leaders whom we address by name and are considered our equals and peers.

Professional Development

Rotary is a network of business, professional and community leaders, who have a culture of high integrity and purpose. Our members are exposed to people in a vast range of vocations; by this association, our members not only enhance their business, they learn from and identify with the leaders in their community.

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 skills that help to make them better - better individuals, community leaders, internationalists, and humanitarians.

Leadership Development

Membership in Rotary develops 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 a volunteer organization. If you can be an effective Rotary leader, you will be a better business leader.

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.

Continuing Education

Involvement in Rotary allows our members to broaden their perspective and improve their business skills. For Rotarians who take on responsibility in the organization, we provide training in fund raising, nonprofit management, event production, communications, etc., which helps our members grow and develop additional business skills.

Fun

Rotary is fun. Our club meetings, projects, social activities and gatherings are filled with fellowship, humor and entertainment. Our members are friendly, welcoming and engaging.

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.

WHY ROTARY?

WHAT OUR MEMBERS RECEIVE

Global Citizens

Rotary is in over 200 countries and geographical regions. There are few places which do not have a Rotary club. This global presence offers an exclusive opportunity to create relationships in both the local and world communities and allows our members to be better global citizens. Members find access to global business, professional and community leaders a valuable asset.

Unique Travel Experience and Assistance

Members who travel find that Rotary opens doors throughout the world. “The Pin Gets You In!” Members who visit a Rotary club while traveling have immediate access to local resources and information, including assistance in obtaining services of a doctor, lawyer, dentist, etc., during travel.

Next Generation Programs

Rotary provides one of the world’s largest, most structured and responsible youth programs. Our youth exchange programs are recognized as one of the best and most cost efficient available. We have clubs in high school and college that help students develop their leadership, social, organizational and communication skills.

Opportunities for the Family

Involvement in a Rotary club 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.

Ethical Principles

One of Rotary’s core principles is to maintain high ethical standards. Rotarians are expected to be ethical in business and personal relationships. Rotarians presume the goodness in one another, in both a business and volunteer capacity.

Prestige

Rotary is one of the oldest and most prestigious civic organizations. Worldwide, Rotarians are recognized as some of the most prominent individuals in business, professions and the community. Being a Rotarian gives you instant access to these people and helps to identify you as one of these individuals.

WHY ROTARY?

WHAT OUR MEMBERS RECEIVE

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.

The Opportunity to Serve - You Can Make a Difference

Service is what Rotarians do. We change the lives of others in need. Your membership gives you the opportunity, structure, know-how and resources to provide service to others. The benefit you get helping someone else is extraordinary and life affecting. Furthermore, 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.

Notes:

CLUB WEBSITE AND SOCIAL MEDIA CHECKLIST

Is your club ready to grow? Use the tools of the web and watch member inquiries develop. This simple checklist will help your club to know how well your website and your social media are performing.

YOUR Club Website

- Updated club logo
- All information is current
- Answers "What's Rotary?"
- Pictures of local Rotarians in action
- Pictures of local Rotarians having fun
- Describes what your club is doing in the community
- Leadership page with current club leaders
- Testimonials from groups or individuals club supports
- Links to district and Rotary International sites
- Blog to highlight recent events, corresponding Facebook post
- Contact for more information
- Invitation to a club meeting (ideally updated to this week)
- Information on how to become a Rotary member



YOUR Club Facebook Page

- Mark of Excellence is the profile picture
- New posts at least every week
- Promote upcoming meeting
- Highlight members in vocations
- Highlight service projects
- Pictures of local Rotarians in action, having fun
- Pictures demonstrating diversity of your club
- Include videos (make your next event go live)

RETENTION KEYS

Personal induction

Skills and passions

Engagement

Being “in the know”

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 stationery 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 an 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) In order to share the Rotary experience, can you 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]

NEW MEMBER INDUCTION: PERSONAL APPROACH

SAMPLE TEMPLATE

Before the induction, gather some information from your inductee.

- Identify family members and a personal fact about each one.
Make sure he/she knows family members are invited to the induction.
- Who is his/her sponsor? Can they attend the induction?
- Know the occupation of the inductee and where they work.
- Find out background on college and prior places lived.
- What are his/her hobbies and passions?
- Other service work?

Use this information to fill out the template below.

(Invite the inductee and their family members/special guests to join you at the front of the room.)

(Looking into the crowd) Good morning/afternoon!

Today I have the pleasure of inducting our newest member, (Name of inductee). With him/her is (Names of family members/special guests). (Name of spouse/partner) is a/works at (Provide occupation/business and children's names; mention something about school or work). Also with (Name of inductee) is his/her sponsor, (Name of sponsor).

(Looking primarily at the inductee) (Name of inductee) we are looking forward to having you join (Name of Rotary Club). You will find that the club can be a cheering section when things go well and a support system when they're not. We often talk about the Family of Rotary; you are now part of our Rotary family. Our families are an integral part of our Rotary experience. (Names of family members) are always welcome to join us at a meeting, a social event, or participate in a project.

(Looking back at the crowd) As you probably already know, (Name of inductee; provide brief comment on occupation and business). What you may not know is that (Name of inductee) (Provide personal information: schooling, prior occupations, hobbies/passions, service work).

(Looking at the inductee) In order to help you learn more about Rotary, (we have a mentoring committee that will reach out to you and a book for you called the ABC's of Rotary). I am also presenting you with your red badge. Now I would like (Name of sponsor) to present you with your Rotary pin. This pin is a symbol that you adhere to ethical business practices, that you are committed to service above self, and that you are part of a leadership and service organization creating positive change in the world every day. (Name of inductee) you are now an official member of (Name of Rotary Club).

(Looking back at the crowd) Please join me in welcoming the newest member to our Rotary family, (Name of Inductee). (All members stand and applaud)

HAVE FUN LEARNING ABOUT YOUR MEMBERS

Work and Fun Fact Game

Depending on the size of your club, select 5-10 members to participate. Each will provide their occupation and a fun fact (prior to the meeting). Provide stickie notes to tables, one with an occupation and one with a fun fact.

Participants come to the front. Tables discuss which of the participants fit the occupation and fun fact (two different people). Call for time and have one person from each table run up and place the stickie note on the people they think are correct.

When finished, the participants go down the line and read the stickies on them and then tell their true occupation and fun fact.

Five Word Intro

(For smaller clubs) Have everyone in the room write down in exactly five words what they do. Then go around the room and have each person provide their name, business and their five word intro out loud.

Example:

Megan Hernandez, Happy Smile Dental, “polishing teeth for professional glow.” They can be funny or serious, straightforward or quirky.

Another example:

“Making smiles brighter every day.” ONLY 5 WORDS.

Three Truths and a Lie

Choose a member ahead of time and ask them to give you three interesting things about themselves that people may not know, and to create one lie. Call them to the front and have them share the four “facts.”

Example:

- I climbed Mt. Everest when I was 24.
- I have four brothers and two sisters.
- My dream was to become a pilot.
- My nickname when little was “Tiger.”

Ask the membership, by table, to guess the lie. Then have the member reveal the lie and expand a bit on the three truths.

HAVE FUN LEARNING ABOUT YOUR MEMBERS

Fun with Occupations

Select an occupation that is the same for several members (accountant, electrician, dentist . . .). Ask all of those people, prior to the meeting, to answer the question, “In high school, what would you have been awarded?” (Best Athlete, Most Likely to Succeed/Fail, Nicest Hair . . .). Invite the (accountants) up to the front. Read each of the responses out loud, and then ask the membership to determine which one fits. Ask one table to make one connection.

Example: “We think Adam was voted Best Athlete.” The next table: “We think Susan was the most likely to have 10 kids.” Then ask the members to tell the correct answer.

Think of your own. The idea is to learn about your members: their occupation, passions, skills, hidden talents . . .

Notes:

SERVICE PROJECTS AND THE ROTARY FOUNDATION

Our customers' values come together in service and in Rotary Foundation Projects . . . Projects created, designed, funded, and delivered by Rotarians.

Benefits are many and include:

- Building friendships as we work side by side
- Making a difference in our local communities and in local communities around the world
- Engaging our skills and following our passions
- Working with other leaders to create solutions to important community needs
- Engaging, rewarding, worth my time!

What are your club's service projects?

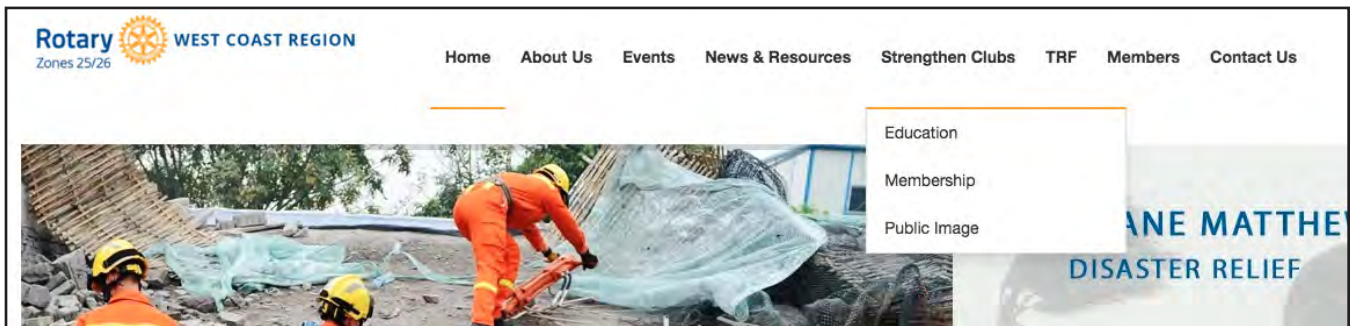
How do service projects serve our members?

How do service projects support our Rotary Brand Experience?

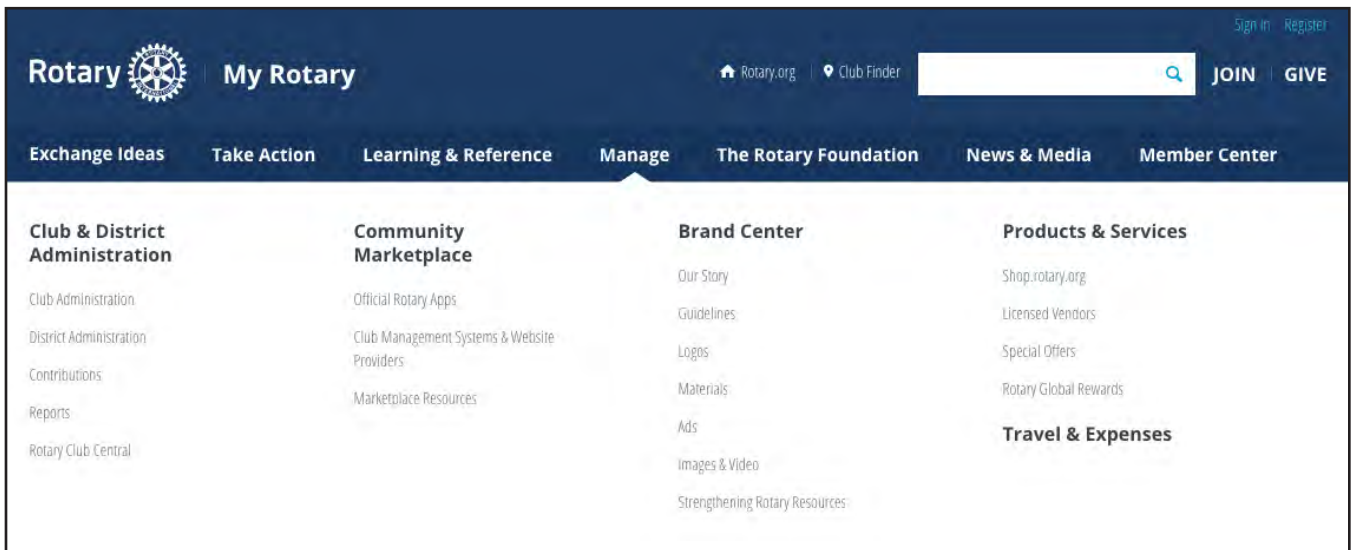
What are the membership benefits of participating in The Rotary Foundation?

WHERE TO FIND INFORMATION

Go to Zone2526.org > **Strengthen Clubs**



Go to MyRotary.org > **Manage**



COPIES OF DOCUMENTS AVAILABLE ON THE ZONE WEBSITE

Most documents used in the Priority #1 Plus 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”

DISCOVERING CLUB CULTURE AND IDENTIFYING AREAS TO REVITALIZE!

Read the left and right side of the chart and determine where on the spectrum (5-1) your club would land. Look at the areas you rated lower. These are your targets to change in order to revitalize your club culture.

Going well because...		Struggling because...
Engaged, satisfied members	5 4 3 2 1	Disengaged, dissatisfied members
Diverse membership	5 4 3 2 1	Not representing community
Growing membership	5 4 3 2 1	Stale or declining
Positive public interest	5 4 3 2 1	No interest from public
Relevant to community needs	5 4 3 2 1	What community needs?
Community awareness	5 4 3 2 1	What do you do?
Trying new things	5 4 3 2 1	Doing the same thing over and over
Awesome signature event/program	5 4 3 2 1	We do nothing significant
Great leadership	5 4 3 2 1	What leadership? Led by the same group
Engaging speakers	5 4 3 2 1	Dry politicians and perceived leaders
Meetings are FUN!	5 4 3 2 1	I laugh at a meeting or two
Members are FUN!	5 4 3 2 1	Most members are boring

DISCOVERING CLUB CULTURE AND IDENTIFYING AREAS TO REVITALIZE!

What do your members **love** about your club?

What turns members off?

What **3 things** could be improved to enhance the club experience?

EXAMPLES OF ACTION ITEMS

Date Complete	Immediate Action Items
	1. Identify members in the club for 24 months or less.
	2. Schedule occupation/personal talks for newer members.
	3. President/designee personally meets with new members regarding their interests.
	4. Start activities so all members can answer “What’s Rotary?” and “Why Rotary?” questions.
	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 three NO’s on survey to be quickly turned into YES’s.

Date Complete	30-Day Action Items & Results
	1. All members develop a “What’s Rotary?” and “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 and consistent message.
	6. Turn top three NO’s into YES’s - Celebrate!

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

MY ACTION ITEMS

Date Complete	Immediate Action Items
	1.
	2.
	3.
	4.
	5.
	6.
	7.
	8.

Date Complete	30-Day Action Items & Results
	1.
	2.
	3.
	4.
	5.
	6.

Date Complete	90-Day Results
	1.
	2.
	3.
	4.
	5.
	6.
	7.

APPENDIX

TITLE	PAGE
Appendix 1 - Be a Vibrant Club - Your Club Leadership Plan North America	29
Appendix 2 - Brand Assessment Checklist	37
Appendix 3 - How to Build Your Logo	38
Appendix 4 - Membership Resource Guide	39
Appendix 5 - Sample Rotary Club New Member Info	43
Appendix 6 - Sample Rotary Club Mentor Guide	49
Appendix 7 - Essential Changes for Clubs and Districts	53
Appendix 8 - Keep Your Members and Make Your Club Stronger	56
Appendix 9 - The Rotary Foundation - A Member Benefit!	58



**BE A
VIBRANT
CLUB**

YOUR CLUB LEADERSHIP PLAN
NORTH AMERICA

BE A VIBRANT CLUB

YOUR ROTARY CLUB

Is your club vibrant? Does it engage its members, conduct meaningful projects, and try new ideas? Your club's activities should reflect the diversity and personality of its members. As you develop a plan for your club, use these tips and ideas, and be open to letting your club evolve. Remember, if you try something new and it doesn't work, you can always try something else. **Every member should feel empowered to shape your club's future and make it outstanding.**

BE A VIBRANT CLUB

MEET MY VIBRANT CLUB

When I became the president of my Rotary club, we had nine members. We were a dinner club and had two-hour-long meetings at a children's restaurant.

The first thing we did to reinvigorate the club was move our meetings to a golf and country club in our area. This was a venue where professionals would want to gather for a meeting — and it was free.

We then changed the format of our meetings from dinner to a cocktail-and-appetizer style of meeting. This enabled us to keep our meeting to one hour long, was cost-effective, and allowed our younger members to get home to their families for dinner.

Finally, we added variety to the structure of our weekly meetings. Week one includes a vocational talk, so members know about each other's businesses. Week two is a Rotary information session. Week three is where we feature a guest speaker, and week four is our club assembly, where the entire club is updated on projects and fundraisers.

We asked club members to make a list of potential members and then phoned them and personally invited them to join the club. This resulted in 11 new members, 90 percent of whom were under the age of 40. Then we made sure that each new member joined a committee based on their interest. Finally, we make sure that we have a lot of fun at every one of our meetings. This has been a crucial element for us, as it has led to camaraderie and enhanced fellowship.

Nick Krayacich
Rotary Club of LaSalle-Centennial
Canada



BE A VIBRANT CLUB

1 Decide where your club wants to be in three to five years.

Your club includes an array of community leaders who share a passion to make a positive impact. Together, decide what you want your club to be like in three to five years. Then determine what you need to do to attain your club's vision. Your long-range goals should address your club's membership, service projects, public image, leadership development, and involvement in The Rotary Foundation. Update your strategic plan as needed, and determine how all club members can contribute to achieving long-range goals.



Ideas to try

- Devote a month of club meetings to developing a strategic plan using the Strategic Planning Guide.
- Hold a club meeting in a new location to inspire members to be creative and voice their opinions.
- Develop a strategy for increasing member engagement over the next five years.

Resource on My Rotary:

Strategic Planning Guide

2 Set annual goals and enter them into Rotary Club Central.

Once you set your long-range goals, you'll need to set annual goals that support them. Be sure your goals are achievable and measurable. Annual goals can be entered into Rotary Club Central, where they can be tracked and updated. Encourage all club members to view your club's goals in Rotary Club Central and provide input. Update your goals regularly so Rotary Club Central always shows the most current information.



Ideas to try

- Focus on something your club is good at and make it something you're great at.
- Ask club committees to propose annual goals that address community needs.
- Have a goal check-in on your meeting agenda once a month to update members.

Resources on My Rotary:

Rotary Club Central
Rotary Club Central
Resources course in the
Learning Center

All resources are available at www.rotary.org/myrotary.

BE A VIBRANT CLUB

3 Hold club assemblies regularly to keep members engaged and knowledgeable.

Club assemblies help all members feel connected. When all members have the opportunity to voice their ideas about club goals and activities, your club can maximize its collective expertise to address a local need. Many clubs use assemblies as a chance to inspire their members and fuel their shared passion to make a difference. An environment such as a club assembly that welcomes diverse perspectives is the perfect place to channel enthusiasm into action.



Ideas to try

- Exchange club presidents with a nearby club for a meeting. After the exchange, schedule an assembly to talk about the experiences of the president and members.
- Designate time in an assembly for new members to share their first impressions of the club and for members to share new ideas.
- Once a month, include a 10-minute open forum at the end of a club meeting and encourage members to present new ideas or a topic for discussion.

Resources on My Rotary:

Club President's Manual

Club Administration Committee Manual

4 Communicate openly in your club.

Communication should go two ways in your club. Club leaders should be transparent in communications with members, and members should feel free to communicate openly with club leaders. Your communication plan should include relaying information at club meetings, on your club website, and through social media.



Ideas to try

- Frequently update your club website and social media accounts; separate members-only information from information intended for the public.
- Pair Internet-savvy members with those who are less experienced to help them navigate the website and social media.
- Share information with members and check in regularly to see how members are feeling.

Resource on My Rotary:

Rotary Brand Center

BE A VIBRANT CLUB

5 Prepare members for future roles to maintain a smooth leadership transition.

Annual leadership changes provide opportunities for members to take on new roles. It is helpful for members to understand the leadership roles and get involved early in the transition process. There are many ways to achieve continuity, including making appointments for multiple years; having a current, incoming, and past chair on each committee; and having the current club president work closely with the president-elect, president-nominee, and immediate past president. Thinking ahead will help ensure that there are enough volunteers to fill new leadership positions each year.

Ideas to try

- Have club leaders find their own successors during their terms of service. They are the most familiar with what the job requires and who would succeed in that role.
- Learn more about members' talents and interests, and assign them to roles they would enjoy and excel in.
- Conduct on-the-job training for incoming club officers at least one month before they take office.

6 Adapt your club's bylaws to support the way your club works.

As your club evolves, so should your bylaws. The Recommended Rotary Club Bylaws are a starting point for outlining your club's practices. Consider the recommended bylaws as a template that your club can edit and revise to reflect new practices and procedures.

Ideas to try

- Check that your club is using the latest version of the Recommended Rotary Club Bylaws.
- Put your club's bylaws on your club website or distribute them at club assemblies so members can offer suggestions.
- Review them once a year as a club and share them with new members.
- Consider running pilot tests of new club procedures to see if they work before amending your bylaws.

All resources are available at www.rotary.org/myrotary.

Resources on My Rotary:

Leadership Development: Your Guide to Starting a Program

Club President's Manual

Club Secretary's Manual

Club Treasurer's Manual

Club Administration,

Membership,

Public Relations,

Service Projects,

and Rotary Foundation

Committee Manuals

Resources on My Rotary:

Recommended Rotary Club Bylaws

Standard Rotary Club Constitution

BE A VIBRANT CLUB

7 Develop strong relationships within your club.

Connect with other members in your club and find common interests. When you enjoy your Rotary club, you will likely stay involved. When families are invited to join club events, younger members are more likely to attend. Provide opportunities for club members to make connections with one another, especially when a new member joins the club.



Ideas to try

- Sit with different people at every meeting and get to know them better.
- Consider forming a satellite club to meet the needs of members who commute or have young families.
- Invite friends and families to meetings, service projects, and events. Show them how wonderful volunteering is, and encourage them to join or help out regularly.
- Survey club members to find out what kinds of social events they would like to attend and days of the week and times that are convenient for them.

Resources on My Rotary:

Rotary Fellowships Handbook

Rotarian Action Groups

Convention registration at www.rotary.org/convention

8 Make sure all members are involved in activities that genuinely interest them.

Rotarians join clubs to create a positive impact in their communities and to make new connections, and that's why they stay. Club involvement keeps new and long-time members engaged. Active members feel ownership of and dedication to their clubs' projects. Consider asking members to volunteer to support service projects and other club initiatives.



Ideas to try

- Get new members involved early in meaningful ways. Find out why they joined the club, and ask them to take on roles or help with projects or events related to whatever convinced them to join.
- Conduct a member interest survey, and use the results to plan projects and activities and to develop weekly programs.
- Have members introduce themselves to the club, including information about their background, talents, and interests to make other members aware of the club's talent pool.
- Consider ways that members can learn and gain experience from club activities. These new experiences can translate into professional and personal development.

Resources on My Rotary:

Communities in Action

Membership Assessment Tools

Project Lifecycle Resources

BE A VIBRANT CLUB

9 Coach new and current members in leading.

Rotary clubs are full of professionals and leaders. With extra training about Rotary and useful leadership skills, members will be well equipped to lead your club one day. Prepare future club leaders by providing an orientation for new members and leadership development opportunities for all members. Current club leaders should be sure to attend district training meetings and apply what they learn to their work in the club.



Ideas to try

- Appoint a club trainer or training committee to oversee the training plan for your club.
- Let young and newer members take on leadership roles. They can apply their existing knowledge and experience while also honing skills for their careers.
- Ask members what leadership skills they would like to learn.

Resources on My Rotary:

Connect for Good

New member information

Trainer's Toolkit in the Learning Center

New Member Orientation

Leadership Development: Your Guide to Starting a Program

10 Create committees that are practical for your club.

Your club should have committees that help the club run well. Recommended committees include:

- Club administration
- Public relations
- The Rotary Foundation
- Membership
- Service projects

Create other committees, such as Rotary grants or youth service, if you need to. Whichever committees you choose, they should help your club take action to achieve its goals.



Ideas to try

- Small clubs: Consider how you can combine the work of committees.
- Large clubs: Create additional committees to get all members involved.

Resources on My Rotary:

Club Committee Structure

Club Administration, Membership, Public Relations, Service Projects, and Rotary Foundation Committee Manuals

BRAND ASSESSMENT CHECKLIST

Your Rotary brand is part of everything you do! Consider how club members and others are experiencing your Rotary club's brand by assessing the elements of your club meetings, other club events, and how you create awareness and engage the public.

Club Meetings

- Regular communications to club members are a positive part of Rotary club brand
- Speakers and club programs are promoted to members and public in advance
- Clear signage and easy access to meetings
- Greeters who welcome members, visitors and guests
 - Aid visitors and guests in connecting with members
 - Members are recognized and welcomed
- Clear Rotary identity with up-to-date logo and visuals
- Acknowledgment and warm welcome for visitors and guests (including speakers)
- Information on Rotary and the club is provided to visitors and guests
- Club meeting
 - Quality of program
 - Quality of meal
 - Quality of venue
 - Look and feel of the meeting is consistent with your Rotary club brand
- Members give feedback and suggestions for improvement regularly
- Appropriate follow-up with guests

Club Events

- Clear Rotary identity on publicity and at the event with up-to-date visuals and voice
- Greeters who welcome members, visitors and guests
- Information on Rotary and the club is provided to visitors and guests
- Invitation to learn more and to engage with the club
- Quality and tone of event is congruent with your Rotary club brand

Public Facing

- Digital media and social media are up-to-date, including clear Rotary identity
- Descriptions of club activities focus on the “why”
- Photos show Rotarians in action, impacting the community
- Clear description of what the club does and why it matters
- Clear description of how to contact club leadership
- Invitation to learn more and to engage with the club

HOW TO BUILD YOUR LOGO

Rotary's Brand starts with your club.

You don't have to be a graphic designer to give your club a Rotary logo with your club identifier.

Working through Rotary Brand Center, you can move awareness of your club and Rotary's image to the forefront of your community, creating a personalized Rotary club logo that highlights your club and also identifies your club as part of our incredible worldwide organization.

It's as easy as 1-2-3:

1. Go to myrotary.org and sign in. Find the "Manage" drop-down menu and click on "Logos." The template for your Rotary club will guide you through the process. Just click "View."
2. In the description box, click "Create." The template will open and look for the directions on the right side. Type your club name into the "Insert Text" field. Click "Save."
3. You can download three versions of your club logo for use in your promotional materials, including a PDF for large-size printing; a JPEG for Word documents, presentations and web use; and a PNG file, which will allow you to place the file over an illustration.

The Brand Center offers a simple and intuitive way to customize your club logo, create a marketing brochure, or give your newsletter a fresh look. You'll also find guidelines and answers to frequently asked questions as well as information about why telling our story is important.

Spread the word about the impact you are making with your personalized Rotary club logo!

MEMBERSHIP RESOURCE GUIDE

The names of hyperlinked resources appear with an underline and usually in a blue font and can be downloaded on www.rotary.org by clicking on the hyperlink, or ordered on shop.rotary.org with the SKU number provided. If you experience any trouble when placing your order, please email membershipdevelopment@rotary.org or shop.rotary@rotary.org.

PUBLICATIONS			
Name	Description	Audience	Available
<u>Strengthening Your Membership</u>	This guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members.	Club presidents and membership committees, and district membership chairs	http://shop.rotary.org/ (SKU: 417)
<u>New Rotary Clubs Quick Start Guide</u>	This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond.	District governors	N/A
<u>Introducing New Members to Rotary</u>	Utilize this guide to develop a process for engaging new members from the start by helping them get involved, connecting them with a mentor, and by pacing the learning over time.	Club leadership	http://shop.rotary.org/ (SKU: 414)
<u>Be A Vibrant Club</u>	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture. Versions are available for fifteen different regions, each featuring its own club success story.	Club leadership	http://shop.rotary.org/ (SKU: 245A)
<u>Connect for Good</u>	Eight-page guide shows how to get involved and connect with Rotary. Provides an updated overview on Rotary for all members.	Current members	http://shop.rotary.org/ (SKU: 595)
<u>Membership Assessment Tools</u>	Learn how to evaluate and improve your membership development plan with these tools. Complete with sample surveys and information on organizing new clubs, recruiting and retaining members, this is an all-encompassing tool	Current members	http://shop.rotary.org/ (SKU: 801)
Impact Begins With You	This prospective member brochure explains who we are and what sets us apart from other organizations.	Prospective members	http://shop.rotary.org/ (SKU: 001)

MEMBERSHIP RESOURCE GUIDE

Five Year History of Member Start Figures	Shows membership numbers for 1 July by region, for the year specified in the report name.	District and zone leadership	Rotary Club Central
Membership Comparison to 1 July	Monthly report that shows a comparison of current year club and member totals with previous year club and member totals for selected district(s).	District and zone leadership	Rotary Club Central
District Progress to Goal	Shows progress towards membership goals for selected district(s) or club.	Zone leadership	Rotary Club Central
Clubs in My District	Shows club and member totals for district, member totals by club, and lists newly chartered and terminated clubs for selected districts.	District and zone leadership	Rotary Club Central
Alumni Report Guide	Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members.	District and zone leadership	http://www.highroadsolution.com/file_upload/er2/files/how+to+use+the+program+participants+and+alumni+report.pdf

TOOLS

Name	Description	Audience	Available
Rotary Club Central	Track your goals and activities in membership, service, and foundation giving.	Club and district leaders	https://www.rotary.org/myrotary/en/secure/13301
Rotary Showcase	Post and share club or district service project information.	Rotary members	http://map.rotary.org/en/project/pages/project_showcase.aspx
Rotary Ideas	Post your projects and ideas and ask for partners, volunteers, funding, or other support.	Rotary members	http://ideas.rotary.org/
Membership Best Practices Discussion Group	This discussion group provides a forum for leaders at all levels to share best practices for recruiting, attracting, engaging, and retaining current and prospective members.	Rotary members	https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices
Rotary Club Health Check	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders	N/A

RESOURCES

Name	Description	Audience	Available
Understanding Membership Reports: Getting Started	This guide lists each membership report available, explains the information it provides, and steps on how to find them.	Rotary members	N/A
How to Create a My Rotary Account	Directions on how to create a My Rotary account	Rotary members	N/A
Proposing New Members	Best practices for proposing new members to your club.	Rotary members	N/A
How to Manage Membership Leads	Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level.	Club leaders	https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs

MEMBERSHIP RESOURCE GUIDE

How to Manage Membership Leads	Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level.	District leaders	https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts
New Member Welcome Kit	Welcome new members to your club with pre-packaged Rotary essentials: Connect for Good brochure, What's Rotary? card, RI/TRF Annual Report, and Proud Member window cling.	New members	http://shop.rotary.org/ (SKU: 426)
Membership Minute e-newsletter	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders	www.rotary.org/en/news-features/newsletters
Young Professionals Summit Report	A report that shares strategies, ideas, and key findings from the Young Professionals Summit held in Chicago September 2014.	Rotary members	http://www.highroadsofolution.com/file_upload/er2/files/ypps+summit+report_final.pdf
How to Lead a Young Professionals Summit Guide	Learn how to plan, organize, and lead a young professionals summit to energize and engage your members as you discuss how to create a more appealing and engaging Rotary experience for all members.	Rotary members	http://www.highroadsofolution.com/file_upload/er2/files/ic15+breakout_how+to+lead+a+young+professionals+summit.pdf
Strategic Planning Guide	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club and district leaders	https://www.rotary.org/myrotary/en/document/strategic-planning-guide
Club Brochure Templates	Use this online tool to customize your club's logo and create a brochure. To access the templates, you'll need to sign in to your MyRotary account.	Rotary members	https://brandcenter.rotary.org/en-GB/Materials

WEBINARS

Name	Description	Audience	Available
Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience	Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members.	Rotary members	https://vimeo.com/180066536
Membership: It's Now or Never (Part 1 of 5)	An international membership expert discusses new ways of thinking about membership and innovative tactics in part 1 of this "Membership Matters" webinar series.	Rotary members	https://vimeo.com/103365589
Perception vs. Reality: Club Evaluation and Visioning (Part 2 of 5)	Focuses on the steps clubs should take to ensure a clear club vision and plan for the future.	Rotary members	https://vimeo.com/108381769
Simple Steps to Innovate Your Club (Part 3 of 5)	Focuses on the steps clubs can take today to stay relevant and appeal to new and potential members.	Rotary members	https://vimeo.com/118740192
Membership Engagement: The Key to Retention (Part 4 of 5)	Focuses on member engagement as a path to member retention.	Rotary members	https://vimeo.com/123234534
How to Recruit New Members and Strengthen Your Club (Part 5 of 5)	Focuses on growing and strengthening clubs by inviting new and diverse groups of professionals to club	Rotary members	https://vimeo.com/127084618

MEMBERSHIP RESOURCE GUIDE

	meetings, asking friends and colleagues to participate in service projects, and reaching out to Rotary program alumni.		
Understanding Young Professionals	Led by Rotary staff and a market research professional, this webinar is intended to help members better understand the perceptions and needs of young professionals. Password: YPC	Rotary members	https://vimeo.com/89536946
Alumni Reports and Awards	Outlines the new district alumni reports.	Rotary members	https://vimeo.com/123449923
PILOTS			
Name	Description	Audience	Available
2011-2017 Pilot Clubs	List of Rotary clubs currently in the pilot program.	Club, district, and zone leaders	https://rotary.qualtrics.com/CP/File.php?F=Fbvo7B5lWCHgEQPX
2015-2017 Innovative and Flexible Rotary Club Pilot Expansion	List of Rotary clubs currently in the Innovative and Flexible Rotary Club Pilot Expansion program.	Club, district, and zone leaders	https://rotary.qualtrics.com/CP/File.php?F=F8icMSdlcseArJoF
Pilot update	An update on the 5 membership pilot projects that are testing new membership types or club operation innovations.	Club, district, and zone leaders	https://rotary.qualtrics.com/CP/File.php?F=FoB8WRNiaNPuoY5f
CLUB ADMINISTRATION			
Name	Description	Audience	Available
Standard Rotary Club Constitution	Required bylaws to be adopted by every Rotary club.	Club leaders	https://www.rotary.org/myrotary/en/document/standard-rotary-club-constitution
Recommended Rotary Club Bylaws	Recommended bylaws for administering and operating Rotary clubs.	Club leaders	https://www.rotary.org/myrotary/en/document/recommended-rotary-club-bylaws
Rotary Code of Policies	Provides information on club and district administration, RI, programs, communications, events, and finances.	Club and district leaders	https://www.rotary.org/myrotary/en/document/rotary-code-policies
TRAINING MANUALS			
Name	Description	Audience	Available
Lead Your Club: Membership Committee	Describes the responsibilities of the chair and committee, and identifies resources that may be helpful relating to increasing the club's membership.	Club leaders	http://shop.rotary.org/ (SKU: 226)
<p>Questions? Please contact Regional Membership Officer for Zones 25 & 26 Nicole Jones Email nicole.jones@rotary.org +1-847-866-3407</p>			

SAMPLE ROTARY CLUB NEW MEMBER INFO

Welcome!

We are glad you joined us! Rotary is an amazing organization and our club is a fantastic place to be a Rotarian!

In the following pages, we have provided information that will help you to learn more about Rotary and our club.

Read them at your leisure or turn to this information when you have a question. Lots of answers are provided.

Some Rotary Basics

The Rotary pin tells the world that you are a Rotarian; wear it with pride! It symbolizes good business ethics and a commitment to service.

Anywhere you travel, if you see a Rotary pin, you have a friend. It unlocks many doors.

Meeting Fun!

Our regular meeting time is _____ at _____.

Generally, we follow this pattern:

.:_-:.- social time

.:_-:.- “business meeting.” This is the time we go over upcoming events, talk about fundraising, have skits, and touch base with our club activities.

.:_-:.- program/speaker. Our Program Committee does a great job of finding a wide variety of speakers, and we always learn something new.

Getting Involved

Jump in! The sooner you get involved, the more you will love Rotary.

You will automatically be enrolled in the New Member Committee for your first year as a Rotarian (more later).

In addition, you will have the opportunity to join two other committees (more later).

Your Mentor

When you join, you will be assigned a Mentor. This person helps you to learn about Rotary and is available when you have questions.

They will take you out for coffee and usually take you to another club to visit (one of your blue badge requirements).

Generally, they have been in Rotary for quite a few years, so they should be a good guide for you.

SAMPLE ROTARY CLUB NEW MEMBER INFO

Red and Blue Badges

Your name badge will look different from other badges. This is to indicate that you are a newer member. It lets our long-term members know they should introduce themselves and get to know you.

There are several things you need to do to move from a red badge to a blue badge. This can take anywhere from 3 months to 1 year, ideally about 6-9 months.

Blue Badge Requirements*

- Update your profile on our database. Add a photo and more info about yourself.
- Be a door greeter, twice. One time, you will deliver the invocation/thought for the day and lead the pledge. The other time, you will introduce visiting Rotarians and guests.
- Attend a board meeting.
- Attend New Member meetings.
- Do a make-up at another club.
- Join two committees.
- Participate in a club project.
- Give a classification/vocational talk.
- Bring a guest to a club meeting.

*Your mentor can explain each of these in more detail.

Attendance

We want you to regularly attend meetings and hope that you want to, but sometimes you can't, and that's okay. (If the club has specific requirements, they could add them here.)

You can 'make up' meetings by visiting another club, helping with a project, or attending a fellowship event or board meeting. We track attendance to report to our district, so if you do a make-up, please record it (on our website) or advise the Club Secretary.

SAMPLE ROTARY CLUB NEW MEMBER INFO

Projects

There are many opportunities for hands-on projects. Some of our projects include:

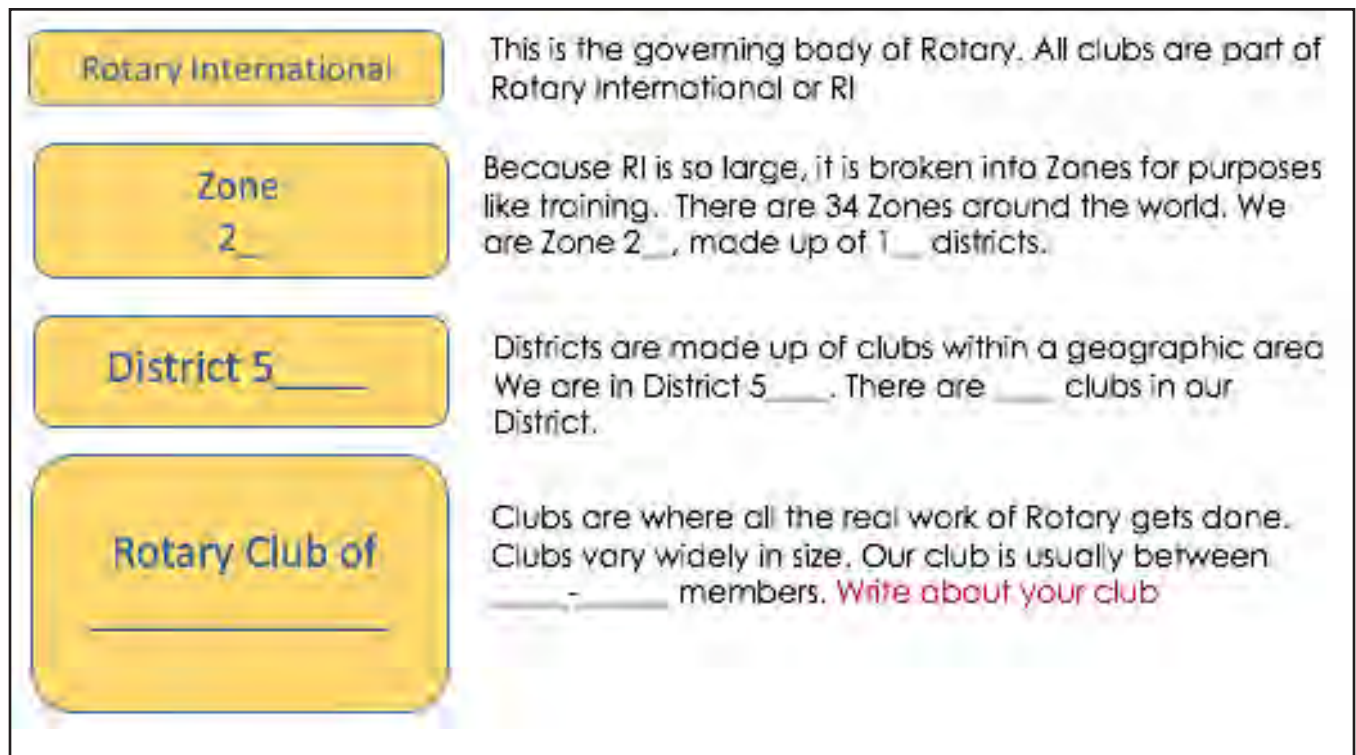
Fellowship (also called FUN!)

Our club loves to have fun! You can see it at our weekly meetings and with all the outside activities we plan. Some of our fellowship activities include:

Involving Your Family

- Your family members are always welcome to join us at a meeting.
- We love to have spouses/significant others attend: _____.
- Some meetings and activities are great for kids too, such as the holiday party and hands-on projects.

The Rotary Org Chart



SAMPLE ROTARY CLUB NEW MEMBER INFO

RI's Six Areas of Focus

Rotary International has six Areas of Focus (categories) that the good work we do falls into:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

The Four-Way Test

- Is it the truth?
- Is it fair to all concerned?
- Will it build goodwill and better friendships?
- Will it be beneficial to all concerned?

Rotarians apply The Four-Way Test in all the things we think, say and do.

Rotary's Motto: "Service above Self"

This is representative of what Rotary is about and the mindset of Rotarians.

Early Rotary History

- Founded February 23, 1905, by Paul Harris.
- Chicago was the first club created for men who had good business ethics (not common in Chicago at the time).
- It was a networking group that emphasized fellowship.
- Everyone was called by their first name.
- It was a men's club at the time; that changed, but not until 1987!

SAMPLE ROTARY CLUB NEW MEMBER INFO

The Rotary Foundation

This is a BIG topic! For now, here are the basics . . .

The Rotary Foundation is a 501c(3) nonprofit corporation, our charitable arm.

- TRF (as we call it) is supported by Rotarians around the world and funds educational and humanitarian projects. Our #1 worldwide program priority is the eradication of polio.
- We make a contribution; it is invested for three years so the interest can help cover administrative expenses; then it becomes available for projects, both local and international.
- You will hear the term EREY (ee-ray). It stands for Every Rotarian, Every Year . . . giving to The Rotary Foundation. It is something we encourage all members to gladly do as an investment in the future.

Paul Harris Fellow

- When you give \$1000 to TRF (The Rotary Foundation), you become a Paul Harris Fellow.
- It may take you several years to achieve your first (and subsequent) Paul Harris Fellow recognition, and that's okay.
- You will see people receiving sapphire or ruby pins. That means they are multiple Paul Harris Fellows, and their cumulative giving is several thousand dollars over their Rotary lifetime.

OUR CLUB

Rotary Club of _____

- Founded in _____ by local community leaders.
- Our membership is usually between ____-____ members.
- We are known as “a fun club,” which can be seen and felt at weekly meetings and our fellowship events.

Our Mission and Vision

Our Mission:

The Rotary Club of _____ changes lives in our local and world communities through service and financial support.

Our Vision:

To cultivate a dynamic membership that enhances our values to serve our local and world communities, providing systemic and enduring change for the better.

SAMPLE ROTARY CLUB NEW MEMBER INFO

Our Value Statement

The Rotary Club of _____ ...

- Is an inclusive, fun-loving, caring group of community leaders...
- That comes together to share a common sense of service to others...
- To positively impact lives locally and abroad.

Club Fundraising

- (Set forth the history of past fundraising and current activities.)

Fundraising Participation

- As a member of our club, there is an expectation that you will help in our fundraising efforts.
- There are many ways to contribute your time, talent and treasure:
 - Recruit people to participate in events
 - Get sponsors for either event
 - Serve on a fundraising project committee
 - Assist with marketing, get the word out
 - Write a check
 - Participate yourself...

Club Projects

- Our club is proud to work locally and internationally.
- The money we raise is given back to the community both locally and internationally.
- We also donate our time and talent for hands-on projects.
- Go to our club website at www._____ to learn about the organizations/projects we support.

The End of The Beginning

- You're finished! This is by no means a complete look at Rotary or our Rotary Club, but at least you are on your way!
- Never hesitate to ask questions.
- Remember, the more you put in, the more you get out!
- Rotary comes down to two things... Relationships and Experiences!
- Have fun!!

SAMPLE ROTARY CLUB MENTOR GUIDE

Rotary is an amazing organization and our club is a fantastic place to be a Rotarian! As a mentor, you will help a new member to understand more about Rotary and to engage in our club. Thank you for your participation; a mentor is an important role in the long-term retention of a new member!

Getting a new member fully engaged in Rotary is an important job. This guide should provide you with the information you need to be a successful mentor.

Objectives of the Mentoring Committee

The primary objective is to help new members engage in the club, so they move from new member to long-term member.

You do this by:

- Sharing knowledge
- Helping them get involved
- Guiding them from red to blue badge
- Being a resource
- Being a friend

The Mentor Committee

You were asked to be a part of the mentor committee because of your knowledge and enthusiasm for Rotary and a willingness to pass it on.

The 4 to 5 mentors on the committee work together to share the tasks associated with bringing in a new member and making them a long-term member.

Getting a new member fully engaged in Rotary is an important job. This guide should provide you with the information you need to be on the mentor committee.

The New Member Guide

All new members receive a New Member Guide that outlines many Rotary and club basics. You are receiving a copy of this too for future reference. Click through it so you are familiar with the information your mentee received.

SAMPLE ROTARY CLUB MENTOR GUIDE

Tasks for Mentors

Here are the primary tasks for the Mentoring Committee members:

- One mentor should be present for the new member induction.
- One mentor should schedule a coffee or lunch with the new member in the first three weeks of their membership.
- One mentor should take them to another club.
- All mentors should help the new member through the red badge process and keep track of their progress.

First Coffee/Lunch

It is important that this meeting happens within the first three weeks of their membership! The goals are:

- Review their New Member Guide and answer any questions.
- Get to know them personally.
- Share your Rotary story. Why did you join, and why do you stay?

The Induction

It is an important day when a new member is inducted into the club. It is a special occasion. A representative from the Mentoring Committee should be present, at the front of the room, with the new member.

Club Meetings

For the first 4 to 6 weeks, the Mentoring Committee should make sure one mentor is sitting with the new member. Introduce them to a couple of new people at each meeting. Make a point of introducing them to committee chairs and project leads.

Red to Blue Badge Help

There are several activities that we all did to move from a red badge to a blue badge. New members are often unsure about these requirements (see next page for list).

Example: They know they have to do a classification talk, but they don't know what that means. Walk them through the list and help them get everything checked off within 6 to 9 months.

SAMPLE ROTARY CLUB MENTOR GUIDE

Blue Badge Requirements* (for new members)

- Update your profile on our database. Add a photo and more info about yourself.
- Be a door greeter, twice. One time, you will deliver the invocation and lead the pledge. The other time, you will introduce visiting Rotarians and guests.
- Attend a board meeting.
- Attend New Member meetings.
- Do a make-up at another club.
- Join two committees.
- Participate in a club project.
- Give a classification talk.
- Bring a guest to a club meeting.

*Your mentor can explain each of these in more detail.

Blue Badge Requirements

New Member requirement is in black; Mentor role is in **gold**.

- Update your profile on our database. Add a photo and more info about yourself.
The Club Secretary will enter them upon induction. Make sure they know how to access the database and that they develop their profile, including a picture, within the first three weeks.
- Be a door greeter, twice. One time, you will deliver the invocation/thought for the day and lead the pledge. The other time, you will introduce visiting Rotarians and guests.
Connect your mentee to get them on the schedule to greet. Explain to them what an invocation or thought for the day is and how to greet visiting Rotarians and guests.
- Attend a board meeting.
Since meetings only happen once a month, try to get the board meeting on their schedule right away. If possible, attend the board meeting with them.
- Attend New Member meetings.
Contact the person in the club responsible for new member training/meetings and the new member and get them involved. Encourage them to attend each meeting as they will learn a lot about Rotary and our club. You do not need to attend these meetings (but you can).
- Do a make-up at another club.
If possible, invite them to go to another club with you. If you can't go, be sure they know the days, times, and location where other clubs meet, so they can go. Don't forget to let them know about e-clubs.

SAMPLE ROTARY CLUB MENTOR GUIDE

- Join two committees.
When you have coffee, find out about their interests. This will help you to get them on the right committee. It is always nice if the committee chair personally invites them to join the committee. Example: If you know they are interested in international service, connect them with Director for International Service, so they can invite them to be on their committee.
- Participate in a club project.
Club projects don't happen every day, so be sure they know what is happening. Projects are hands-on events. See if there is a project in the works created by new members, too.
- Give a classification/vocational talk.
Sometimes they will get to see someone else give a classification/vocational talk, but not always. Be sure they know it is a time for them to share a bit about their work, hobbies and family. Let them know visuals are great, but not required, humor is always good, and keep it under five minutes. Talk to the President to get them on the agenda a week or two ahead of time.
- Bring a guest to a club meeting.
Ideally, we want them to bring a guest they think might be interested in Rotary. It is okay for them to ask a friend to come "as a favor to meet their blue badge requirement" if that's what it takes to get it done.

Thank you!

Please keep track of your mentee's progress. When they have completed everything, let the President and Secretary know, so they can present them with a BLUE BADGE!

Being a mentor is an important role. Thank you for your participation!!

ESSENTIAL CHANGES FOR CLUBS AND DISTRICTS

2016 Council on Legislation

(The numbers in parentheses identify the relevant legislative enactments.)

Attendance

Ability to change rules. Clubs may relax or tighten attendance requirements and termination policies for nonattendance. However, clubs are still expected to forward attendance reports to the governor. Any club that wishes to continue adhering to the traditional attendance requirements may do so. (16-21)

Rule of 85. Rotarians can be excused from attendance if the combined total of their years of membership in one or more clubs plus their age equals at least 85, with their years of membership totaling at least 20. (16-35)

Club Board

Treasurer. A club treasurer is now a permanent member of the club board. (16-02)

Board meeting minutes. Written minutes should be prepared for all club board meetings and be made available to members within 60 days of that meeting. (16-01)

Club Finances

Admission fees. New members can be admitted without paying admission fees. However, clubs may also choose to retain these fees, and they have the flexibility to add admission or other fees to their bylaws. (16-07)

Club dues increased. To address both financial challenges and the need to improve service to clubs, RI semiannual dues were increased by \$4 for each of the next three years – to US\$30.00 per half year in 2017-2018, US\$32.00 per half year in 2018-2019, and US\$34.00 per half year in 2019-2020. (16-99)

Club Meetings

Ability to change meeting schedules. Clubs can now vary their meeting days and times, and can cancel meetings, as long as they meet at least twice a month. However, any club that wishes to adhere to the traditional requirements regarding meetings and cancellations may do so. (16-21)

Canceling a meeting. Clubs can cancel a meeting if it falls during a week that includes a holiday. (16-26)

In-person and online meeting participation. Clubs can have in-person meetings, online meetings, allow online participation for an in-person meeting, or switch between any of these formats. (16-30)

Council on Legislation

Proposed legislation. Only two types of proposals will be considered: enactments, which seek changes to RI's constitutional documents, and position statements from the RI Board. (16-113)

ESSENTIAL CHANGES FOR CLUBS AND DISTRICTS

Council representatives. Representatives will serve for three years, starting on 1 July of the year following their selection. For example, the 2019 Council representative would take office on 1 July 2017 and serve until 30 June 2020. (16-114)

Council on Resolutions. A Council on Resolutions consisting of Council representatives will meet online annually to consider recommendations. Resolutions may be proposed by a club, district conference, the RIBI general council or conference. Those resolutions adopted by a majority vote of council representatives must be submitted to the general secretary by 30 June of the year prior to the Council on Legislation. (16-113)

District Changes

Moving clubs into adjacent districts. The Board can merge a district with fewer than 1,100 members, or divide districts with more than 100 clubs by moving clubs into adjacent districts. (16-84)

Two years for districting changes to take effect. Any decision by the Board to eliminate or change district boundaries won't become effective until at least 24 months after it is made. (16-86)

District Leadership

Vice governors. Having a vice governor is no longer mandatory. This role replaces the governor in case of that person's inability to perform their duties. If the district uses a nominating committee, the committee selects a past governor proposed by the governor-elect. If the nominating committee doesn't receive a nomination, or if a nominating committee was not used, the governor-elect may choose a past governor as vice governor. The vice governor serves in the year following his or her selection. (16-74, 16-76, 16-77)

Procedures for failing to adopt the annual statement and report of district finances. The statement and report of finances must be discussed and adopted within three months of the conclusion of the district conference or at the next district meeting to which all clubs are entitled to send a representative and for which 30 days' notice has been given. If no district meeting is held, the governor must conduct a ballot by mail within 60 days of the end of that three-month period. (16-88)

Mishandling of district finances. Anyone who fails to follow Rotary's financial requirements, including improperly administering the district fund, is prohibited from holding any Rotary or district office until the irregularities are resolved. (16-89)

E-clubs

E-clubs and Rotary clubs. The distinction between traditional clubs and e-clubs was eliminated. While references to e-clubs have been removed from Rotary's constitutional documents, e-clubs may continue to name and promote themselves as Rotary clubs that meet exclusively or primarily on-line. (16-82)

Elections

Concurring with a governor selection challenge. The number of clubs that must concur with a club's challenge to the nominated candidate has been increased to 10 other clubs, or 20 percent of the total number of clubs in the district, whichever number is higher. Only clubs that are at least one year old as of 1 July of that year are counted in the total and may concur with a challenge. (16-71)

Special elections nominating procedure streamlined. If a district restarts the governor selection process due to special circumstances, the governor does not need to repeat the request for suggestions from clubs if there were none made during the first nominating process. (16-72)

ESSENTIAL CHANGES FOR CLUBS AND DISTRICTS

Magazines

Joint magazine subscriptions. Two Rotarians residing at the same address may choose to subscribe jointly to *The Rotarian* or to the regional magazine prescribed for their club. (16-96)

Membership

Rules and qualifications. Clubs may determine their own rules or requirements for transferring members, dual membership, and honorary members. They're also free to continue following the traditional provisions for these members. The only mandatory qualifications for membership are that Rotarians must be adults who have demonstrated good character, integrity and leadership; have a good reputation in their business, profession and community; and are willing to serve in their community and around the world. (16-36, 16-38)

New membership types. Clubs may offer associate, corporate, family, or other membership types. Clubs offering these additional types would report these members to Rotary as "active" for purposes of inclusion on the club invoice. Other financial obligations (club dues, meal costs, etc.), attendance requirements, and service expectations for these members are determined by the club. However, only active members may be considered for office and count in determining a club's voting strength. (16-36)

Dual membership in Rotary and Rotaract clubs. Rotaractors can simultaneously hold separate membership in a Rotaract club and a Rotary club. (16-40)

Transferring member statement. Potential members who owe money to another club are ineligible for membership. Clubs must seek confirmation that a former Rotarian does not have any outstanding debt to their previous club. When a club requests a statement from the club of a member who wishes to transfer, or who was previously a member, as to whether that person owes money, the request must be responded to within 30 days. If no response is provided, it is assumed that the member doesn't owe anything. These changes are in the RI Bylaws but are no longer repeated in the Standard Rotary Club Constitution. (16-51)

New Clubs

Charter member minimum. New clubs need at least 20 members to be chartered. (16-83)

Suspension

Suspension of membership. Clubs may now suspend a member for a maximum of 90 days. At the end of that time, they must either terminate or reinstate the member. A suspended member has the right to appeal the suspension or request mediation or arbitration. (16-49, 16-50)

Suspension or termination of clubs because of litigation. Clubs can be suspended or terminated if one of their members takes legal action against RI or The Rotary Foundation — including action against directors, trustees, officers, and employees — before exhausting all Rotary remedies. The Council also clarified the conditions under which the RI Board may take action against districts with repeated election complaints. (16-81)

KEEP YOUR MEMBERS AND MAKE YOUR CLUB STRONGER

Are your members still tuning into Rotary's **WIIFM?** (**W**hat's **I**n **I**t **F**or **M**e)

When a Rotary club provides **value**, a “return on the member’s investment,” members stay and they bring their friends, associates and colleagues into Rotary. Most members leave Rotary when they perceive it is no longer worth it.

You can keep members interested and engaged in Rotary.

Look at everything your club does. Examine your club’s culture and brand experience – from programs and activities to meeting times and locations, dues, etc. – to make sure your club is providing the value your members seek.

What are some of the ways our members get value from Rotary? There are so many reasons! To name just a few:

- Friendship and relationships
- Professional Development
- Personal Development
- Public Speaking
- Relationships
- Family Experience

We Change Lives! It starts with the way we change the lives of our members. Service is what Rotarians do and local impact is one of the top reasons people join Rotary. Does your club provide meaningful service opportunities?

How do you keep your members, and what are some of the reasons for leaving a Rotary Club, that you may be able to control?

1. Not receiving value for membership
2. Not fully informed about the responsibilities of membership, including attendance and financial expectations
3. Feel unconnected to club’s activities
4. Networking expectations not met
5. Not interested in current club programs
6. Retirement, family obligations
7. Financial constraints and health problems
8. Feel unappreciated or no longer needed
9. Rotary experience did not meet their expectations

KEEP YOUR MEMBERS AND MAKE YOUR CLUB STRONGER

Are Your Members Satisfied with their Club Experience? How do you know?

Don't wait until a member leaves to find out why.

What can a Club do? Be proactive!

- Find out what your members want. Regularly, use a Club Satisfaction Survey or evaluate your Club's culture with tools that are ready for you to use.
 - A Satisfaction Survey: [Enhancing Club Experience Survey*](#)
 - [Discovering Club Culture*](#)

Check with members who do not respond.

- Identify and personally talk with “at risk Rotarians” to find out what is going on and then address needs. “At risk Rotarians” are those who do not attend meetings or participate in projects of social activities, do not pay their dues.
- Show that you care for your members. Reach out to those who miss a meeting or event to make sure they are okay and to ask them what the club could do to make it easier for them to participate.
- Establish an effective new member orientation and involvement.
 - [New Member Information template*](#)
- Conduct professional development events.
 - [Mentor Guide*](#)
- Rotary grows leaders, so help your members grow. Get your members on committees and in leadership positions that meet their interests, skills and passions. Get them involved!
- Provide continuing member education or revitalizing club activities.
- If cost is a factor, work with membership to lower costs, provide alternative billing (monthly or quarterly), or even provide short term financing.
- If a member desires to leave, remember they are our friends. Offer other alternatives that may work for them, like a Passport or E-Club option, or a club that meets at a different time. Keeping a Rotarian, even if they go to another club, is a win for all. Keep them on the bulletin mailing list and invite them to service and fellowship projects/events.

Take action now to provide value and keep your members.

** Resource materials can be found at www.Zone2526.org:
Strengthen Clubs > Membership > Membership Resources*

THE ROTARY FOUNDATION – A MEMBER BENEFIT!

Being a Vibrant Club and offering an exceptional Rotary Brand Experience, is all about delivering on the promise of Rotary membership:

- Creating friendships
- Working together, appreciating our individual and collective strengths
- Having fun
- Honoring our commitments
- Engaging our skills and passions to tackle critical needs
- Enjoying leadership opportunities
- Taking action to have a positive impact

The Rotary Foundation is an excellent vehicle to achieve all of those! It is a special part of the promise of Rotary.

Making a difference: Project possibilities are as diverse as our members' interests. Each project begins with an idea but transforming that vision into reality takes our coming together as leaders, sharing our skills, diverse perspectives, individual passion and determination, our collective commitment. Powerful and fun!

Leveraging our resources: Foundation-funded projects enjoy the benefit of matching funds, allowing our projects to be larger and more impactful. Projects encourage partnerships between people, clubs, districts, supporting organizations and beneficiaries. Working through our Rotary Foundation gives us the ability to do so much more.

Building friendships: Think of the friendships both made and deepened while sharing a vision and working to making it a reality - friendships both here at home and in communities around the world, friendships that can last a lifetime. Developing projects, finding solutions, getting to know each other in ways we might not have before, appreciating each other – what a gift!

Enriching our lives: Think of those moments when you have been part of making a difference in someone's life – moments that touched your heart. Maybe it was seeing the joy in the eyes of child receiving a backpack filled with school supplies, or experiencing a community celebrating clean water pouring from a newly constructed well, or sharing the wonder of books while reading to a kindergartner, or being part of the team delivering those precious polio drops - so many possibilities!

We have the ability to change lives for the better, and one of those lives is always our very own.

Being part of our Rotary Foundation: When we are present in person or in spirit, working hands-on or making an investment through a contribution, we are making a significant and lasting difference in our communities. We create community impact on a global scale. The Rotary Foundation, powered by our members, our vision, our gifts, our commitment, is a powerful force for good in the world.

PRIORITY #1 PLUS

Membership is priority number one! Learn how to create the best Rotary brand experience to improve club culture and retention. This three-hour presentation is based on four key concepts gleaned from the siegel+gale report. That report has fundamentally changed traditional thinking about members in Rotary.

Priority #1 Plus introduces simple tools that district and club leaders can adopt to immediately improve their Rotary brand experience 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 Plus presentation to your district seminar.

Requirements District Provides:

- A 3-hour session devoted entirely to the Priority #1 Plus.
- An appropriate training location and A/V equipment.
- A Saturday or Sunday training date.
- An audience of at least 50 district and club leaders representing all clubs plus all others interested.

Zone Team Provides:

- Experienced motivational trainers (a team of two).
- Exciting “hands-on exercises” that involve the entire audience.
- Session workbook and take-away materials.

To Schedule a Presentation:

Contact Steve Lingenbrink, Zone 25 & 26 Membership Chair

- Phone: 206-276-5553
- Email: steve@lingenbrink.com

YOU'LL BE GLAD YOU DID!



Our Causes

Rotary is dedicated to six areas of focus to build international relationships, improve lives, and create a better world to support our peace efforts.

Find the Support Your Club Needs Online at MyRotary.org / Zone2526.org



ROTARY INSTITUTE 2017

Get a sneak peek at the 2017 Institute, taking place at the Peppermill Resort in Reno, Nevada from November 9-12, 2017 by [clicking here](#).



END POLIO NOW

Learn how the Global Polio Eradication Initiative will use the funds in the fight against polio.



GLOBAL POLIO ERADICATION INITIATIVE

Global Polio Eradication Initiative provides information about poliomyelitis, the global situation, research, news, funding, publications and meetings.



2017 RI CONVENTION

Join us in Atlanta. Experience the hospitality of the American South.



MEMBERSHIP



PUBLIC IMAGE



THE ROTARY FOUNDATION



INTERACTIVE ZONE MAP



MEMBER DATABASE

SUBSCRIBE TO RECEIVE ZONE 25/26 NEWS AND UPDATES

First name

Last name

Email

[Subscribe!](#)

Share this:

