

# Membership Development

## Resource Guide



ROTARY INTERNATIONAL®



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# Introduction

Every Rotary club needs a well-crafted membership development action plan to stay dynamic and effective. This guide provides a wealth of information to help your club attract new members and keep current ones active and involved. It serves as the primary resource for the club membership chair, committee, and any and all club members interested in building a stronger Rotary membership. Your club membership committee can use it as a workbook to evaluate current practices and to construct and implement an action plan for membership growth.

Each chapter concludes with a checklist of recommended action steps for the club membership committee. Together, the completed checklists will create a picture of your club's current membership practices and provide ideas for the future.

The online companion to this guide, *Club Assessment Tools*, offers activities designed to help clubs evaluate their current membership practices and tailor their membership development action plan to capitalize on their strengths and address any weaknesses. These activities should be used as a component of a club's continuing education series.

Recognizing that membership recruitment and retention strategies may vary from one part of the world to the next, the online *Regional Membership Supplements* provide an analysis of regional membership trends and offer recommendations based on survey results that RI has received from each region. The club membership committee should use the benchmarks for its region to set goals. The committee should also keep members informed of the club's success in meeting and exceeding the benchmarks.

## Resources Key

As you work your way through the guide, look for these symbols:



Prompts readers to complete an assessment activity using *Club Assessment Tools* at [www.rotary.org](http://www.rotary.org)



Prompts readers to consult their *Regional Membership Supplement* at [www.rotary.org](http://www.rotary.org)



Indicates an RI publication available as a free download at [www.rotary.org](http://www.rotary.org)



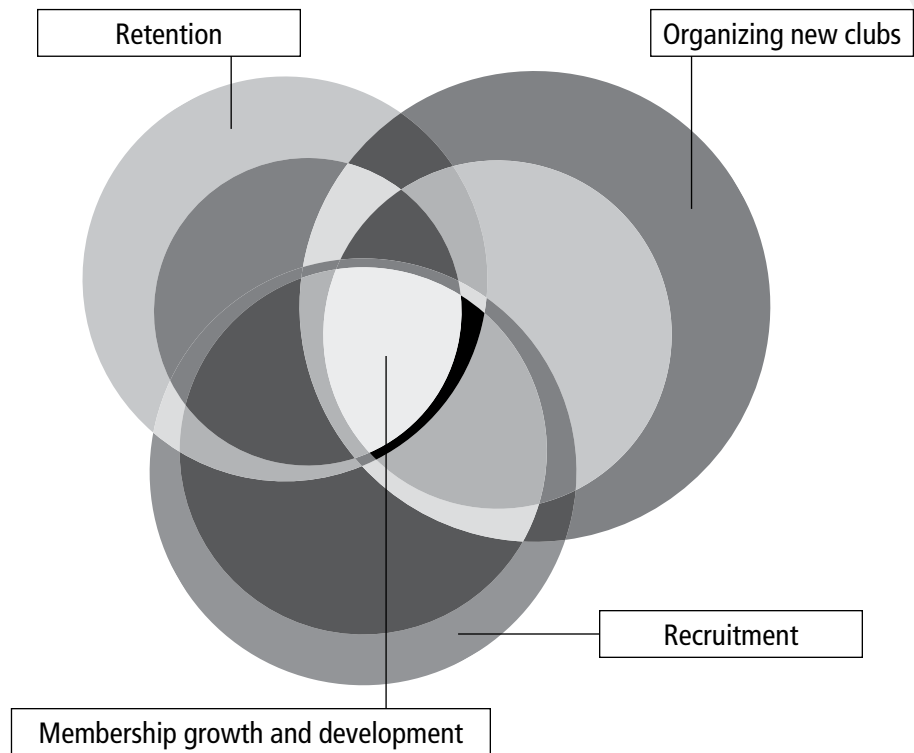
Indicates an RI publication available for purchase through [shop.rotary.org](http://shop.rotary.org) or the *RI Catalog*



# Chapter 1

# Preparing to Develop an Action Plan for Membership

Recruitment, retention, and the organization of new clubs are the three essential components of a successful membership development action plan, as illustrated below. In developing your plan, consider the many resources available to support your efforts.



## Club Membership Committee

The club membership committee — one of the five committees recommended by the Club Leadership Plan — is responsible for developing and implementing an action plan for recruiting, retaining, and educating club members.

To achieve continuity in the club's membership development efforts:

- Make committee appointments for multiple years.
- Include a current, incoming, and past membership chair on the committee.
- Maintain open lines of communication between committee members and the club president, president-elect, president-nominee, and immediate past president.

For a comprehensive description of the roles of the committee chair and members, see the *Club Membership Committee Manual*.



*Club Membership  
Committee Manual*

## Club Leadership Plan



### Club Leadership Plan (245-EN)

Guide to implementing the  
Club Leadership Plan

The Club Leadership Plan outlines the recommended administrative structure for effective Rotary clubs. Member education and involvement in fellowship and service are key aspects of the plan, as are standard procedures for continuity and communication. Based on the best practices of effective clubs, this plan is flexible enough to support clubs' needs worldwide. And although it isn't mandatory, it is highly recommended.



### Planning Guide for Effective Rotary Clubs

### Planning Guide for Effective Rotary Clubs

The *Planning Guide for Effective Rotary Clubs* can help you assess your club's current status and establish goals for the coming year. Although it's based on the Club Leadership Plan, this guide can serve as a valuable tool even if your club hasn't implemented the plan. See the membership section of the guide in *Club Assessment Tools*.

## CLUB MEMBERSHIP COMMITTEE **ACTION STEPS** FOR CHAPTER 1

**Yes**   **No**

Our club membership committee has downloaded *Club Assessment Tools*.

Our club membership committee has read the Club Leadership Plan, learned about the recommended administrative structure for Rotary clubs, and discussed the plan with other club leaders.

*If yes, check one of the following:*

\_\_\_ Our club has implemented the Club Leadership Plan.

\_\_\_ Our club has decided against implementing the full Club Leadership Plan but will implement sections of it.

\_\_\_ Our club has decided against implementing the Club Leadership Plan.

Our club has an active club membership committee that regularly communicates its goals and activities to members.

Our club does not have an active club membership committee but has taken action to establish one.

Our club has completed, in conjunction with the club's leadership, the *Planning Guide for Effective Rotary Clubs*.

Our club has downloaded the appropriate *Regional Membership Supplement* to help develop our membership development action plan.



# Chapter 2

## Getting Serious about Membership Growth and Active Recruiting

Social, political, and economic conditions affect the way people perceive volunteering and what they hope to gain from a volunteer experience. When developing recruitment strategies, consider these questions:

- What are volunteers looking for when they choose an organization?
- What volunteer options are available in your community?
- Is your club offering prospective members opportunities that match their expectations?
- How do the benefits of Rotary club membership compare with those of other organizations or volunteer opportunities?
- What can be done to help prospective members choose Rotary over other organizations?

Use these questions as a springboard for a discussion among your members to determine the best way to position your club as the preferred option for service in your community. Also focus on the benefits of Rotary club membership that extend beyond service opportunities, for example:

- Camaraderie, fellowship, and friendship with like-minded people in the community
- Business networking
- Opportunity to develop leadership skills within a well-established, international service organization

If you know the competition, you can better position your club as an appealing option and effectively communicate the expectations and benefits of Rotary club membership to qualified prospective members.

Also realize that Rotary isn't for everybody. Some people may prefer to focus on short-term volunteer opportunities or want to work for a specific cause.

### Identifying Qualified Prospective Members

Careful selection of active members will increase your club's retention rate and reinforce positive attitudes toward new member induction.

Qualified potential members are either

- Currently working in professional, proprietary, executive, or managerial positions or retired from such positions; or
- Community leaders who have demonstrated a commitment to service through personal involvement in community affairs; or
- Rotary Foundation alumni, as defined by the RI Board.

They must also

- Be able to meet the club's weekly attendance and community project participation requirements
- Live or work within the club's area
- Fit into a classification that is not overrepresented in your club (exception: Rotary Foundation alumni)

The two types of Rotary club membership are active and honorary. For recruitment purposes, seek active members who fulfill the criteria listed above.

The *Manual of Procedure* (035-EN) provides detailed information on types of membership and Rotary's classification system. Club leaders should review the most current edition of this publication, paying particular attention to chapter 1.

## Starting the Conversation

Once you've identified someone as qualified, how should you initiate a dialog on the benefits of Rotary club membership? One way is by highlighting an aspect of membership that matches the individual's interests or goals. Keep it simple in the beginning. Don't try to tell prospective members everything there is to know about Rotary before they've visited a club meeting or service project. The important first step is to get the person to attend a meeting or event.

### Three Scenarios

The following scenarios show how you can use prospective members' interests as a starting point for promoting Rotary.

#### International Service

A professional acquaintance has mentioned in passing that she has just returned from volunteering abroad. Your club has a speaker scheduled to talk about an international service experience in the coming weeks. Invite your acquaintance to attend the meeting, explaining that your Rotary club has many opportunities for participation in meaningful local and international service projects.

#### Community Service

You've noticed several newspaper reports on community service events coordinated by one particular individual. Your club is organizing a new project that you think might interest this person. Contact him, introduce yourself, and explain that you've read about his community service work in the local press. Then invite him to participate in your club's upcoming project, and follow up with a personal note.

#### Networking and Fellowship

Your neighbor has mentioned that she or someone she knows is starting a new business. You're a business owner yourself, so you know the importance of networking to expand your client base. Tell your neighbor that you believe your membership in Rotary has helped you make business contacts in the community. Invite her to attend a meeting, or ask her to tell her friend about Rotary.



### ***What's Rotary?* (419-EN)**

Order these handy, wallet-size cards for your club members.



### **Start with Rotary *Postcards* (614-EN) or *Wallet Cards* (613-EN)**

Mail or hand out these cards to invite prospective members to attend a meeting.

## **Suggestions for Approaching Prospective Members**

- Think about what kind of event would be most effective for introducing the prospective member to your club and to Rotary. Some people would be more comfortable attending a weekly meeting or club social event, whereas others might want to learn about Rotary by working on a service project.
- Review your club's meeting agenda for the coming weeks, and invite the prospective member to attend a meeting focused on topics of potential interest.
- Don't be discouraged if someone doesn't show an immediate interest. It's good to be persistent, but give prospective members some space to make a decision on their own time.
- Exchange business cards, and make a note to yourself about your conversations with prospective members on the back of their cards.
- Give a copy of *What's Rotary?* to anyone you speak to about Rotary. Carry several of the cards in your wallet.
- Follow up every conversation about Rotary club membership by mailing a personal note and invitation to a club event.
- Include references to [www.rotary.org](http://www.rotary.org) and your club or district Web site in any correspondence.

## **Assessing Your Club for Targeted Recruitment**

Ideally, Rotary clubs represent the demographics of the professional communities they serve. Clubs may need to diversify their membership to include more women, younger professionals, members of various ethnic groups, and people involved in new and emerging occupational fields.

Recruiting and retaining a diverse membership offers many benefits to the club:

- Greater credibility within the community
- Broader perspectives, ideas, talents, and skills
- Expanded volunteer resources
- Endless opportunity for leadership at the club, district, and zone levels
- Enhanced fundraising potential

Rotary's founding members set rules limiting membership to one representative from each business and profession with the intention of enlarging the circle of business and professional acquaintances. Although these limits have been expanded considerably over the years, this classification system laid the groundwork for developing a diverse professional membership.

The workforce looks considerably different today than it did a century (or even a decade) ago, thanks to social, economic, and technological advances. To make sure that your club's membership accurately reflects the community in terms of profession, gender, age, ethnicity, and religion, use the classification survey and membership diversity assessments in *Club Assessment Tools*.



### ***Club Assessment Tools***



Find important guidelines for club policies and procedures, including classification requirements, in the *Manual of Procedure* (035-EN).



Annual classification survey



See the *Regional Membership Supplement* for gender, age, and other demographics for your area of the world.

## Recruiting across Classifications

The classification principle limits the number of individuals in a club to either five per classification or 10 percent of the total membership if the club has more than 50 members. This system helps the club, the district, and Rotary International develop a pool of expertise to implement successful service projects locally and internationally and to administer club operations effectively.

Technological developments have created many new occupational fields that would not have appeared in a classification list of 10 or 20 years ago. Does your club have any members in the fields of software engineering or Web development? What about genetic counseling or videography? These are just a few of the newer fields in the continuously evolving workforce that should be included on your classification survey.

Also, keep in mind that more and more individuals are becoming entrepreneurs and running home-based businesses. Does your Rotary club reflect this segment of the business population?

The 2007 Council on Legislation opened up two additional classifications: Rotary Foundation alumnus/alumna and community service leader. Make sure to include them on your classification survey.

To make optimal use of the classification system, conduct an annual classification survey to determine your club's open classifications.

## Inviting More Women and Younger Professionals

According to a 2006 demographic survey conducted by RI, 15 percent of all Rotarians worldwide are women. In many regions, this percentage is far lower than the actual rate of women's participation in business leadership positions and community service. Female professionals and community leaders represent an important demographic segment that should be targeted for membership.

Younger members are another underrepresented group in Rotary. According to the 2006 survey, only 34 percent of members worldwide are under the age of 50. Younger members offer a host of benefits for your club. They bring fresh ideas for weekly programs, fellowship events, and service projects. They also provide a continuing source of energetic, enthusiastic members who can eventually serve as committee members, chairs, and club officers, ensuring your club's longevity and relevance.

Because qualified younger men and women may have hectic schedules, family obligations, or financial limitations, consider making special provisions or offering incentives to make club membership more attractive and feasible:

- Waive or reduce fees for a period of time.
- Reduce club meal expenses.
- Create club fellowship and networking activities that are convenient for younger professionals.
- Invite a small group of younger individuals to join at the same time so they feel more comfortable.
- Highlight alternative meeting arrangements that can help young professionals meet the obligations of membership (such as e-clubs for make-up meetings).

Did you know that clubs can allow make-up meetings at online e-clubs? Search “e-club” for more information, or find e-clubs using the club locator at [www.rotary.org](http://www.rotary.org).



### Membership diversity assessment



### Spread the Word

Download the *Spread the Word* image, and take it to your local print shop to create a color poster. Display the poster at club meetings or special events to remind current members of their responsibility to invite others to join.



### 25-Minute Membership Survey



### How to Propose a New Member (254-EN)

- Assign a veteran Rotarian to mentor new, younger Rotarians and make them feel welcome. Mentors can also educate new Rotarians and actively involve them in club fellowship and service projects. For more information on mentoring, see *New Member Orientation: A How-to Guide for Clubs (414-EN)*.
- Develop an action plan for building strong relationships with RI and Rotary Foundation program alumni, including former Ambassadorial Scholars, Group Study Exchange team members, Rotary Youth Exchange students, Rotaractors, and Interactors. Keep them involved in Rotary activities, and invite them to become Rotarians.

## Increasing Diversity

Rotary clubs should not only reflect the workforce, age, and gender demographics of their communities, but also the religious and ethnic demographics. Use the membership diversity assessment in *Club Assessment Tools* to research the diversity of your community, and compare it with the composition of your club.

## Encouraging Member Responsibility in Recruitment Efforts

All club members have a responsibility to contribute to membership development through continued outreach, which includes:

- Proposing new members to the club
- Referring qualified candidates to other clubs
- Referring interested individuals to the prospective member form at [www.rotary.org](http://www.rotary.org)
- Referring relocating Rotarians to clubs in their new location

## The 25-Minute Membership Survey

Once a year, ask club members to write down the names of friends, neighbors, colleagues, and business acquaintances in the community who might be qualified prospective members. This activity reminds Rotarians of their responsibility to propose new members and generates lists that can serve as a valuable pool of potential candidates. Develop a system for inviting these individuals to club meetings, and compare their information with your club’s classification survey and membership diversity assessment.

## Proposing Members to Your Club

*How to Propose a New Member* is a user-friendly brochure that concisely explains the process of proposing new members. Distribute it annually to all club members during meetings focusing on membership recruitment and responsibility.

In the standard procedure for proposing a new member:

1. The proposer completes part A of the Membership Proposal Form and returns the form to the club secretary for submission to the club's board of directors. Prospective members shouldn't be informed of the proposal until after the board approves it.
2. The board checks that the person is fully qualified and approves or rejects the proposal within 30 days. The club secretary notifies the proposer of the decision.
3. If the proposal is approved, the candidate is fully informed of the privileges, expectations, and responsibilities of club membership. The prospective member is then asked to complete and sign part B of the form, which gives the club permission to publish his or her name and proposed classification to the club membership.
4. The proposed member's name and classification are published to the club. The Recommended Rotary Club Bylaws allow seven days for club members to consider and file any objections. If no objections are made, the proposed member pays the admission fee and is inducted as a Rotarian.
5. The club secretary submits the new member's name using Member Access on the RI Web site (preferred method) or sends a completed Membership Data Form to RI.

## Sharing and Following Up on Qualified Leads

To help provide clubs with qualified leads and to help individual club members fulfill their responsibility to propose new members, RI offers three forms on its Web site: the Membership Referral Form, Prospective Member Form, and Rotarian Relocation Form. Please note that the referral, prospective member, and relocation programs do not operate in all regions.



Rotarians may submit online referrals for membership at [www.rotary.org](http://www.rotary.org).

**Referring qualified candidates to other clubs.** Use the Membership Referral Form to refer a qualified friend, family member, or colleague as a potential candidate for membership in a Rotary club *other* than your own.

**Reaching out to non-Rotarians who have expressed an interest in Rotary.** The Prospective Member Form is for non-Rotarians who are interested in joining a Rotary club. Club leaders should familiarize themselves with the process by which they will receive these inquiries from their district governor or district membership chair.

**Helping Rotarians relocate.** Leaving the community shouldn't be a reason for leaving Rotary. Advise any club members who are relocating to complete the Rotarian Relocation Form.

**Following up on qualified leads.** RI staff initially screens all forms for basic membership qualifications and forwards qualifying inquiries to the appropriate district governor for evaluation; district membership chairs who've provided their e-mail address to RI also will receive a copy. After deciding which candidates may be qualified for club membership, they in turn forward the leads to relevant clubs. Clubs can then invite these prospective members to attend a meeting and later, if appropriate, propose them for membership.



### ***New Member Orientation: A How-to Guide for Clubs (414-EN)***

Find action steps for developing your club's prospective and new member orientations.

See appendix 1 for a list of publications and videos relevant to prospective and new members.



### ***Prospective Member Information Kit (423-EN)***

See appendix 1 for the contents of this kit.



### ***Membership Video Set (427-MU)***

Have copies of your club profile available at your meeting site to give to each departing visitor or prospective member.

## **Introducing Prospective Members to Rotary**

To make an informed decision about joining Rotary, prospective members need information about your club and Rotary International programs, along with realistic expectations about the benefits and obligations of membership. Members who join without some knowledge of Rotary are more likely to leave the club within a year or two.

Every club should develop a formal informational program for prospective members. For more information on prospective member information programs, see *New Member Orientation: A How-to Guide for Clubs*.

## **Creating a Club Library**

All clubs are urged to establish and maintain a library of current RI print and audiovisual materials, which should include all the publications mentioned throughout this guide. Encourage members to check out publications or videos that interest them, and use these resources for prospective member education, new member orientation, and continuing member education. For example, you could ask a member to give a report at a weekly meeting on the latest edition of *RVM: The Rotarian Video Magazine*. You could also organize group discussions around a particular video or publication that members watch or read in advance.

## **Providing Prospective Member Information Materials**

RI's *Prospective Member Information Kit* includes materials to educate potential members about Rotary. Distribute the kits at prospective member information sessions and give to prospective members when they attend a club meeting as a guest. The *Membership Video Set* contains informative and inspirational videos that can be shown during prospective member information sessions or as part of a continuing education program for current members.

Rotary International produces a variety of other publications that you'll find useful for recruitment purposes. See appendix 1 for a comprehensive list.

## **Providing Customized Information about Your Club**

Before joining Rotary, prospective members will want to know more about your club's history and recent accomplishments. Create a club profile — a brochure, flier, or a one-page sheet of past and present club service projects and other relevant information. Give prospective members a handout or develop a PowerPoint presentation that explains your club's attendance requirements, expectations for participation, and financial obligations. More information about customized information for prospective members, including a sample attendance requirements and financial obligations handout, is found in *New Member Orientation: A How-to Guide for Clubs* (414-EN).

## Using the Membership Development Best Practices Exchange

Rotary clubs worldwide share their successful recruitment strategies by posting them on the Membership Development Best Practices Exchange on the RI Web site. This searchable database offers a wealth of ideas to help you create a membership development action plan and a way to share your success stories with RI and other clubs. Here's just a sampling:

- Create a database of program alumni (former participants in Rotaract, Interact, Rotary Youth Exchange, Group Study Exchange, and other RI and Foundation programs) so you can actively recruit these individuals to become Rotarians.
- Invite program alumni to club meetings as guests, and propose alumni for membership, when appropriate.
- Ask members to consider recruiting their spouses, and offer an incentive (such as a full year of free monthly club dues) for joining.
- Hold a lunch for community leaders. Ask each member to invite a specific number of leaders and to donate a set amount to cover the cost of the meal and invitations. Show the brief *Welcome to Rotary* video or a segment from *RVM: The Rotarian Video Magazine*, and bring in a dynamic Rotary leader as a speaker.
- Scan local business journals and newspapers for the names of influential businesspeople and community leaders, and invite them to a meeting.
- Print wallet-size cards with your name and the Rotary emblem, along with the words "Be My Guest" and the day, time, and location of your club's meetings. Distribute them to prospective members as an invitation to attend a club meeting at the club's expense.
- Invite prospective members to participate in a club activity or project to demonstrate the meaningful work your club does.
- Ask members to wear pins or T-shirts that read "Ask Me about Rotary" to generate conversation about Rotary membership.
- Experiment with new media — blogs, streaming video, podcasts — on your club Web site. Post a recruitment video in which club members introduce themselves and explain the benefits of becoming a member of your club.
- Obtain space in a prominent shop window to display information about the club's activities in the community.
- Give gift subscriptions of *The Rotarian* (or other regional magazine) to potential members.
- Send a welcome letter to the owners of new businesses in your community.
- At each meeting, collect business cards from guests and speakers, and follow up with a note or postcard thanking them and inviting them back.
- Place a promotional ad or insert in your local chamber of commerce directory.
- Wear the Rotary logo on your clothes during service projects.



Send your personal notes on *Rotary Notecards* (980-MU) or *RI Theme Postcards* (910-MU).



Invite prospective members to meetings with *Start with Rotary Postcards* (614-EN) or *Wallet Cards* (613-EN).



## Attracting Members through Public Relations

Your club's public image has a direct effect on membership growth, so make sure your membership and public relations committees work together to coordinate their goals. By publicizing your club's events and service projects, you can let more people know about your good work and increase your appeal to prospective members. Media coverage — in newspapers or on television, radio, the Internet, or billboards — generates interest in Rotary membership. For example, RI has seen a noticeable increase in prospective member forms from parts of the world where there has been a major public relations campaign.

Rotary International provides a wealth of materials to assist your club in developing and implementing a public relations strategy. As part of Rotary's ongoing Humanity in Motion campaign, ready-made public relations tools on DVD and CD-ROM are sent annually to every club. Rotarians can use these materials to obtain free or low-cost placements from their local media. Each kit contains television and radio public service announcements and print, Internet, and billboard ads. The RI publication *Effective Public Relations: A Guide for Rotary Clubs* should be required reading for your membership committee members. This how-to guide offers basic tools and tips for promoting your club's activities to the general public. Go to [www.rotary.org](http://www.rotary.org) for other materials, including sample news releases, letters to the editor, and fact sheets on a variety of Rotary-related topics.

RI offers Public Relations Grants at the district level to help clubs publicize their activities in the local media. See the RI Web site for further program information.



*Effective Public Relations:  
A Guide for Rotary Clubs*  
(257-EN)

## Inviting Prospective Members to Join

Once you've proposed a well-qualified candidate for membership and the club's board has accepted the proposal, it's time to invite the prospective member to join your club. A member of the membership committee and the proposer should visit the prospective member and extend the invitation. This personal touch is another step toward establishing a strong relationship and retaining the member for years to come.

Throughout the recruitment process and when you make the invitation, demonstrate your enthusiasm for your club's projects and your pride in being a member. Think about the people and activities that sparked your interest in Rotary. How did you go about becoming involved in your first service project? Friendly, inviting, and inclusive members send the most important message to the prospective member — that he or she is welcome and will have the opportunity to participate in something important.

## CLUB MEMBERSHIP COMMITTEE ACTION STEPS FOR CHAPTER 2

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Our club has identified and discussed other volunteer options available in the community and devised a strategy to establish our club as the preferred option.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has discussed the classification principle with our members, and we understand the importance of diversifying across classifications in our club.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has completed its annual classification survey for the Rotary year 20____ - ____.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has distributed a final list of filled and unfilled classifications, and the members have discussed the contents of this list.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has completed the membership diversity assessment, and we understand the strengths and weaknesses of the club's current demographics.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has implemented an action plan focusing on increasing our club's diversity across classification, gender, age, religion, and ethnicity, and our members clearly understand their role in its success.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has completed the 25-Minute Membership Survey.
<input type="checkbox"/>	<input type="checkbox"/>	Our club members understand that we should concentrate our efforts on inviting members of underrepresented groups to attend club meetings.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has distributed copies of <i>How to Propose a New Member</i> (254-EN) to all members and discussed the purpose of the online prospective member, referral, and relocation forms with members.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has created a publication library that is updated annually and encourages members to use it.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has purchased a supply of the <i>Prospective Member Information Kit</i> (423-EN) or created its own kit for prospective members and has also ordered a <i>Membership Video Set</i> (427-MU) for our club library.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has prepared customized materials to distribute to prospective members, including a club profile of service projects and a financial obligation and attendance requirement handout.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has an active public relations committee that works to obtain media coverage for our club's events.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee collaborates with the club public relations committee when appropriate.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has submitted one of our recruitment best practices to the Membership Development Best Practices Exchange on the RI Web site.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has shared at least one recruitment strategy that we discovered in the Membership Development Best Practices Exchange with our club leadership and/or club members.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee routinely reminds our club members to invite qualified prospective members as guests to our weekly meetings.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee understands the process involved with receiving leads on qualified potential members from the prospective member, referral, and relocation forms submitted through the RI Web site, and we have implemented a timely process for following up on these leads.

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Our club members have been encouraged to refer a qualified member for membership in a Rotary club other than our own at least once a year by completing the online Membership Referral Form as well as propose someone for membership in our Rotary club.
<input type="checkbox"/>	<input type="checkbox"/>	Our club members understand that, as Rotarians, they each have a responsibility to refer qualified individuals for membership.



## Chapter 3

# Maximizing Member Retention

Retaining good members is as critical to long-term growth and success as the induction of new members. The high turnover rate in existing clubs is one of the most pressing membership issues that Rotary faces today. In addition, experienced and active members can play a crucial role in recruiting and retaining new members.

Although clubs can't prevent a certain amount of natural attrition, they can minimize its effect by working toward a balanced club membership across all demographics. Membership retention is an ongoing process that requires constant attention, action, and commitment.

### Assessing Retention in Your Club

It's important to look at how many members are leaving your club each year, and not just your net gain or loss. Clubs may have significant retention problems even if the number of members stays constant from year to year. When clubs continually gain and lose members, a revolving-door effect is created, making it difficult to operate effectively and attract potential members.

### Using the Retention Model

The retention model illustrates a club's retention rate by exploring its membership activity within a specific time frame. Instead of merely looking at net gain or loss from year to year, the model provides a framework for viewing how both the induction and termination of members contribute to overall net gain or loss and identifying any significant turnover that may be occurring. Find instructions for completing your club's retention model in *Club Assessment Tools*.

To obtain a long-term, relevant overview, clubs should use this model to study three to five years at a time. Studying fewer than three years does not use a large enough sample of data to establish a consistent trend; studying more than five years can introduce too many environmental factors and make it difficult to develop conclusive statements about your club's retention. Using a three- to five-year time frame for the model will also help clubs identify their retention of new members.

### Using the Termination Profile

Knowing how long members remain in your club can help you identify your club's strengths and weaknesses in retaining members and tailor your club's retention strategies. The termination profile divides terminated members into "tenure groups" according to how long they remained in the club. These tenure groups are then plotted on a chart that shows the point at which the majority of the club's terminations are occurring. Identifying how many terminated members fall into each



#### Retention model

If your retention model results show that your club has an excellent rate of retention, submit your successful strategies to the Membership Development Best Practices Exchange.



#### Termination profile

tenure group helps a club focus its retention strategies on members in the tenure group that has experienced the most terminated members.

For example, if you discover that the majority of your terminated members leave within the first two years, your club will want to focus more of its efforts on newer members. These strategies could include more comprehensive preinduction education, new member orientation, and early involvement of members in club programs and projects.

The key, of course, is to retain members in all tenure groups. The termination profile simply provides a way to identify any especially vulnerable tenure groups.

After a club leader with access to all membership records has completed the initial assessment, the club membership committee should evaluate the results. Distribute the completed graph to club members during a meeting, and discuss its findings. This discussion can serve as an excellent forum for continuing member education and involves all members more closely in membership development.

## Interviewing Club Members

Interviewing club members — even those who are leaving — can help clubs identify why members either stay in or leave a club.

The Resigning Member Questionnaire should be completed whenever a member chooses to leave a club. It consists of a short exit interview that helps the club prevent such losses in the future.

The Membership Satisfaction Questionnaire is designed to identify what club members most appreciate about a club, as well as what they believe needs improvement. It provides invaluable information for the club membership committee in developing an action plan for retention. Find both questionnaires in *Club Assessment Tools*.



Resigning Member  
Questionnaire



Membership Satisfaction  
Questionnaire

## Creating Customized Assessment Tools

Each club has specific needs in terms of membership retention. If the tools RI offers don't meet those needs or aren't culturally appropriate, use them as a basis for creating your own customized assessment tools.

## Taking Steps to Retain Members

The assessment results should help you identify successful practices and may also reveal a need to implement some new practices. Here are some steps that can help you maximize retention.

## Developing Meaningful Induction Ceremonies

The day a person becomes a Rotarian can be the beginning of many years of involvement and achievement. Such an event warrants a memorable induction ceremony to welcome the new member to the club. Consider the following when you plan your ceremony:

- Invite spouses, partners, and family members to the ceremony.
- Decorate the location of your induction ceremony appropriately with your club banner and other Rotary items.



*New Member Orientation:  
A How-to Guide for Clubs*  
(414-EN)

Find sample induction  
ceremony programs.

- Conduct the ceremony in a special facility other than the club's regular meeting place to add to the formality of the occasion.
- Encourage current members to speak to the group about their commitment and pride in Rotary.

### **Involving New Members in Meaningful Service Projects**

A key reason people are drawn to membership in Rotary is the promise of working on meaningful service projects. Clubs with multiple projects going on can offer more opportunities for involvement at all levels, making members feel they are contributing to an important effort and happy with their decision to join Rotary.

Giving new members an active role in your club makes them realize an immediate connection. Identify the new members' interests, appoint them to appropriate committees, and immediately involve them in projects. Talk to them about the potential for future club leadership positions.

Rotarians want to work on relevant projects. Without such opportunity, they will quickly lose interest in your club. The *Communities in Action/Menu of Service Opportunities Kit* provides the necessary tools for clubs to plan, implement, and evaluate effective service projects. Purchase at least one kit for your club library.



***Communities in Action/  
Menu of Service  
Opportunities Kit***  
(605-EN)



***Developing Your Club's  
New Member Information  
Program*** (425-EN)

This essential resource for club membership committees includes *New Member Orientation: A How-to Guide for Clubs* and the latest edition of the *RI Catalog*.



***New Member Information  
Kit*** (426-EN)

This compilation of Rotary print publications, presented in a Rotary pocket folder, is suitable for distribution to new members.

### **Informing and Orienting Your New Members**

New members must be well-informed about Rotary International and what's going on with your club. Make sure you educate new members about the benefits and responsibilities of membership as well as the opportunities for service in your club and at the district and international levels. Develop a formal orientation program to ensure that new members are not lost due to lack of knowledge. Find action steps for developing your club's new member orientation program in *New Member Orientation: A How-to Guide for Clubs*.

### **Using New Member Information Kits**

The *New Member Information Kit* contains publications to help educate new members during their orientation. Order a supply of these kits to distribute to new members, or create your own new member kit. The *Membership Video Set* (427-MU) is another excellent addition to your club's library. Many of the items can also be used for continuing member education. See appendix 1 for a complete list of the publications and DVDs included in each kit.

## Communicating Electronically

Use your club's Web site, newsletter, and e-mail to regularly inform new, current, and prospective members of what is happening in your club. Maintain a contact list of phone numbers and e-mail addresses for all club members.

Be creative and resourceful when it comes to electronic communication. Streaming video, digital audio, podcasts, and blogs on your Web site can serve a variety of communication purposes. If no one in your club is familiar with how to use new media, consult your local business directory to find a new media marketing professional in your community and invite him or her to speak at a club meeting.

## Educating and Nurturing Existing Members

Continuing member education is a primary means of retaining club members. Research has shown that continuing education helps increase a club's overall retention rate. The more members know about Rotary, the more likely they are to become active members. Four or more weekly club programs per year should focus on the following topics:

- Opportunities for
  - participation in multidistrict meetings
  - attending club assemblies or district-level seminars
  - involvement in club and district projects and activities
  - taking on leadership roles
- Ideas and information pertaining to Rotary programs, projects, and activities
- Special Rotary events, including the RI Convention and the district conference
- Proposing new members
- Goals and initiatives of the club and district membership committees
- Progress reports on membership goals
- Status in efforts to achieve the Presidential Citation, RI Membership Development and Extension Award, RI Recognition of Membership Development Initiatives, or Recognition of Smaller Club Membership Growth (see chapter 5)
- Serving as a sponsor club for a new Rotary club

This list is not all-inclusive. Be sure to add any topic relevant to your club members and their continued involvement in your club. Designate at least one club meeting per quarter to discussing membership issues and your current membership development strategy. Also consider using some of the assessment activities in *Club Assessment Tools* as part of your continuing education series.

In addition to continuing education, clubs should focus on ongoing member satisfaction. Use the information provided on the Membership Satisfaction Questionnaire to determine how to keep current members active and involved. The results of your termination profile can help you identify and address the key times when dissatisfaction may set in



Membership Satisfaction  
Questionnaire



(frequently between the first and third year of membership). These tools can help you create a program that makes existing members feel they are valuable members of an effective team.

#### **Resources for Continuing Education Programs**

- *Club Assessment Tools*
- *RVM: The Rotarian Video Magazine*
- *How to Propose a New Member (254-EN)*
- [www.rotary.org](http://www.rotary.org)
- Assistant governor
- District membership chair



Encourage club members to stay informed by signing up at [www.rotary.org](http://www.rotary.org) to receive *Membership Minute*, *Rotary PR Tips*, *Training Talk*, and other e-mail newsletters published by Rotary International.

### **The Membership Minute**

The *Membership Minute* is a monthly e-mail newsletter from Rotary International that features:

- The latest research on membership in Rotary
- Suggestions for finding and recruiting qualified, committed members
- Ideas for creating or enhancing new member orientation programs
- Tips for retaining current members

Subscribe and download back issues at [www.rotary.org](http://www.rotary.org).

### **Sharing Club Retention Successes**

Use the Membership Development Best Practices Exchange at [www.rotary.org](http://www.rotary.org) to share your successes and get ideas that have helped Rotary clubs in many parts of the world improve their retention rates. Here's a small sampling of best practices that have worked for other clubs:

- Encourage new members to choose a committee to work on.
- Introduce new members to Rotarians with similar service interests.
- Prepare a new member checklist that details the many opportunities for learning about Rotary and becoming involved in club activities.
- Pair a new member with an experienced Rotarian mentor.
- Ask new members for feedback on your orientation program.
- Arrange for new members to attend the district conference or other district-level meeting. Consider contributing to or covering the cost to attend.
- Recognize members who propose new members with the new member sponsor pin, which you can purchase through licensed suppliers of Rotary merchandise. Find a list of licensed suppliers at [www.rotary.org](http://www.rotary.org).
- Organize a club membership workshop to discuss membership issues and action plans.

- Reorganize the structure of your weekly meetings. Try alternating the order in which you have your meal and conduct your business to determine how your club is most productive.
- Create and maintain a club Web site.
- Create PowerPoint presentations for new members that include information about active projects, events, fees, committees, and membership goals.
- Working with your district leaders, develop a program to share the names of potential members with other Rotary clubs in your area.

## **Developing and Implementing Your Club's Membership Development Action Plan**

In a retention pilot program that RI conducted during 2003-06, seven steps were identified as effective activities to support and sustain membership retention:

1. Identifying well-qualified potential members
2. Introducing prospective members to Rotary by informing them about RI programs and the club's service efforts
3. Inviting prospective members to become club members
4. Inducting new members in a dignified and meaningful manner
5. Educating new members with a formal orientation program
6. Quickly involving new members in club committees, activities, fundraisers, board meetings, weekly club meetings, and social activities — essentially all aspects of club membership
7. Educating members on a continual basis through a formal continuing education program

The worksheet in appendix 2 can help you determine if your club currently addresses each of these steps. Consider the assessments you have completed from *Club Assessment Tools* as you complete this worksheet.

Your club membership committee is the driving force behind developing the club's membership development action plan, yet club members play a vital participatory role in the execution of the plan. A great amount of teamwork and club member involvement is highly encouraged.

After completing the worksheet, the club membership committee should develop a report that outlines the club's membership development action plan and distribute it to all club members. Discuss the plan and encourage all members to participate in executing it.

## CLUB MEMBERSHIP COMMITTEE **ACTION STEPS** FOR CHAPTER 3

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has completed the retention model and discussed the results with our club members.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has completed the termination profile and discussed the results with our club members.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has facilitated a discussion with members about our retention strengths and weaknesses, and our club has brainstormed ideas to address our weaknesses.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has implemented a plan to increase retention in our lowest scoring tenure group from the termination profile.
<input type="checkbox"/>	<input type="checkbox"/>	Our club uses the Resigning Member Questionnaire or a customized exit interview whenever a member leaves the club.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee oversees the completion of an annual Membership Satisfaction Questionnaire.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee uses the information gained in these questionnaires and other assessment tools to improve our current membership development practices.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee recognizes that our service projects are a major factor in our retention success because club members must find our projects effective and worthwhile.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has read <i>Communities in Action: A Guide to Effective Projects</i> (605-EN) and collaborated with our club service projects committee in initiating new, relevant projects.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee members have read <i>New Member Orientation: A How-to Guide for Clubs</i> (414-EN).
<input type="checkbox"/>	<input type="checkbox"/>	Our membership committee has established, or is in the process of creating, a new member orientation program that focuses on early involvement of new members and new member education.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has either purchased a supply of the <i>New Member Information Kit</i> (426-EN) from RI or developed our own new member kit.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has purchased the <i>Membership Video Set</i> (427-MU) for our club library.
<input type="checkbox"/>	<input type="checkbox"/>	Our club has a Web site that is updated regularly.
<input type="checkbox"/>	<input type="checkbox"/>	Our club leaders keep our members informed through e-mail or newsletters.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee oversees a continuing education program, and our club spends four or more weekly meetings per year focusing on continuing education.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee members have signed up to receive the <i>Membership Minute</i> at <a href="http://www.rotary.org">www.rotary.org</a> .
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has submitted one of our club's retention best practices to the Membership Development Best Practices Exchange.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee has adopted one retention best practice from the Membership Development Best Practices Exchange.

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee welcomes members to participate in the creation of a membership development action plan.
<input type="checkbox"/>	<input type="checkbox"/>	All club members have received a written report from the club membership committee detailing the membership development action plan for identifying, introducing, inviting, inducting, informing, involving, and educating prospective, new, and continuing members.

# Chapter 4 Sponsoring New Rotary Clubs

The organization of new clubs is vital to Rotary's growth as an organization, and sponsoring a new Rotary club is an honor not to be taken lightly. The success of a new club depends largely on the guidance it gets from seasoned Rotarians in its sponsoring club.

Although the creation of new clubs is solely the responsibility of the district governor, your club can play an important role in the process by agreeing to sponsor a new club.

Serving as a sponsor club requires a strong commitment from all of your members. Before undertaking this responsibility, educate your membership thoroughly about the expectations of a sponsoring club, and make sure they are willing to contribute.

## Growth through New Clubs

Your club may not be the best fit for every prospective Rotarian in your community. Varying work and travel schedules, family commitments, and areas of interest create the need for *options* for individuals interested in becoming Rotarians.

In addition to proposing members to their own club, Rotarians should also be aware of other Rotary clubs in the community that might better fit the needs of a particular potential qualified member. If no other clubs currently exist in your community — and the demand is sufficient — alert your club and district leaders to the need. Also look at surrounding communities. If no clubs exist, recommend that the district governor form a new club and offer your support as a sponsor club.

## Sponsor Club Qualifications and Responsibilities

Although a sponsor club isn't required for each new club, it's strongly recommended by the RI Board of Directors. In selecting a sponsor club, the district governor and the district extension team should look for a club that meets the following criteria:

- Agrees to mentor the new club for at least one year after its admission to membership in RI
- Is in good financial standing with RI
- Has at least 20 active members
- Carries out a well-rounded program of Rotary service

A new club's success depends on how well it is organized and how well it operates in the first few months. After the new club receives its charter, the sponsor club acts as a mentor, remaining involved and offering guidance during the club's first year, or possibly longer.



### Organizing New Clubs (808-EN)

This guide for district governors and special representatives is also useful for anyone interested in learning about the process of organizing new clubs.

### Sponsor Club Responsibilities

- Assisting the district governor's special representative in planning and organizing the administrative processes of the new club
- Helping to organize the initial programs and projects of the new club
- Guiding the new club in its development as a member of RI
- Reporting to the district governor as requested during the club's first year

Other duties may include:

- Asking the secretary to serve as an adviser to the secretary of the new club during its initial meetings
- Asking the club president to join the special representative at the first regular board meeting of the new club
- Encouraging experienced members to help members of the new club become familiar with RI information, policies, and procedures
- Assisting the new club in planning its programs during its first year
- Planning joint fundraising activities

## CLUB MEMBERSHIP COMMITTEE **ACTION STEPS** FOR CHAPTER 4

**Yes**   **No**

Our club has discussed the responsibilities of serving as a sponsor club.

Our club has collectively agreed to serve as a sponsor club, should we be called upon by our district governor. Our club leaders are unanimous in their commitment to sponsoring a new Rotary club.

Our club membership committee chair has informed our district governor of our willingness to serve as a sponsor club if an opportunity becomes available in our district.

## Chapter 5

# RI Membership Awards and Recognition Programs

Realizing that the continued growth and revitalization of Rotary's membership is essential to the future of the organization, the RI Board of Directors has established three annual recognition programs for membership development. Every club should work toward receiving one or more of these awards.



*RI Membership Development and Extension Award*  
(901-EN)

### RI Membership Development and Extension Award

This award recognizes clubs for the three fundamental aspects of membership: membership growth in existing clubs, retention of current club members, and the organization of new clubs. The district governor selects the top-ranking clubs in each category to receive recognition.



*RI Recognition of Membership Development Initiatives*  
(422-EN)

Includes program guidelines and club submission form.

### RI Recognition of Membership Development Initiatives

This award acknowledges clubs that have developed and implemented creative strategies to increase membership. Up to three clubs from each district (one per category) will be recognized, based on their fulfillment of one of the three primary foundations of membership growth and development: retention, recruitment, and organization of new clubs.

Clubs must submit an application to their district governor each year by 15 April. After reviewing the applications, district governors must submit the top clubs in each category to RI by 15 May. Each recognized club receives a certificate as well as recognition at the RI Convention.



*Recognition of Smaller Club Membership Growth*  
(416-EN)

### Recognition of Smaller Club Membership Growth

To encourage clubs that have fallen below the new club charter requirement of 20 members, the RI Board approved the Recognition of Smaller Club Membership Growth program. The program awards a certificate of recognition to clubs with fewer than 20 members that demonstrate an increase in membership.

Recognition is awarded to clubs that reach the following goals: 10 members for clubs with fewer than 10 members, 15 members for clubs with 10-14 members, and 20 members for clubs with 15-19 members.

#### Club Size

In July 2006, the average Rotary club had 38 members. While not all localities can be expected to support the same number of members, clubs need to have an appropriate number to function effectively in their communities. To ensure that clubs have sufficient members, the RI Board has established these provisions:



Check your *Regional Membership Supplement* to find the average club size in your region.

- A new club must have a minimum of 20 charter members, unless there are sufficient reasons for the Board to waive this requirement. At least 50 percent of the charter members must be from the local community in which the new club is established.
- A club that wishes to sponsor a new club must have at least 20 members. If two or more clubs sponsor a new club, however, only one of the cosponsors must meet this requirement.
- Each club is required to pay RI dues for a minimum of 10 members.

### Determining Club Size

Whether a Rotary club is an appropriate size depends on such factors as the size of the community, the number of Rotary clubs in the area, and socioeconomic conditions. In some cases, local circumstances dictate a smaller club.

To decide whether your club is too small, consider the following questions:

- Does your club reflect the composition of the community?
- Is it capable of executing successful service projects for the community?
- Are there enough Rotarians to lead and carry out all club functions?
- Are all professions in your community represented?

Smaller clubs should set realistic goals for recruiting more members. To improve your club's efforts, follow the steps presented in chapters 3 and 4, and use the resources outlined in chapter 6.

## CLUB MEMBERSHIP COMMITTEE **ACTION STEPS** FOR CHAPTER 5

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Our club has committed to achieving one or more of the membership development recognition awards as part of our membership development action plan.
<input type="checkbox"/>	<input type="checkbox"/>	<i>For clubs with fewer than 20 members:</i> Our club president has contacted our district governor, district membership chair, or regional RI membership coordinator to seek assistance in establishing membership goals and a membership development action plan.



# Chapter 6 Resources

## RRIMCs

The Regional RI Membership Coordinator (RRIMC) program was created to provide a strategic approach to promoting membership development. This network of well-trained Rotarians supports districts and clubs in achieving membership growth.

The 64 RRIMCs are responsible for identifying and developing membership development strategies and tools that are relevant to the needs of their specific geographic area and for training district membership chairs and committees through regional training and other appropriate workshops and membership seminars.

These dedicated volunteers are knowledgeable about membership development strategies and techniques as well as specific RI programs related to membership. Clubs can use RRIMCs as a resource to:

- Conduct regional training related to membership development
- Appear as guest speakers at membership-related special events
- Assist club leadership in identifying and developing membership growth and development plans, goals, and strategies
- Identify appropriate regional tools to be used in membership development efforts

To find your RRIMC, go to [www.rotary.org](http://www.rotary.org), see the *Official Directory* (007-EN), or ask your district membership chair.

## District Membership Development Committee

The district membership development committee identifies, markets, and implements appropriate membership development strategies for your district. The committee chair acts as a liaison between the governor, RRIMC, RI, and the clubs in the district on membership development issues. Your assistant governor or district governor has contact information for this committee. If your district doesn't have a membership development committee, suggest that your district leadership establish one.

Your club membership committee should communicate its membership goals to the district committee and share successful initiatives. It is just as important for the district to learn about new and effective club-level strategies and tools as it is for you to learn what the district committee has to offer.

## **District Public Relations Committee**

The district public relations committee promotes Rotary to external audiences and fosters understanding and support for the programs of RI. The committee should also promote awareness among Rotarians about the many benefits that effective publicity, favorable public relations, and a positive image can bring to clubs.

Ask this committee if they have any campaigns or initiatives planned and for the latest campaign tools provided by RI. The committee's plans could be beneficial to your club membership development and public relations efforts. The committee may also have information or tools that your club public relations committee can use to create an effective campaign in your area.

## **RI Web Site**

The RI Web site ([www.rotary.org](http://www.rotary.org)) is a fundamental source of information for all Rotarians. Every Rotarian should visit [www.rotary.org](http://www.rotary.org) on a regular basis to stay up-to-date on all of the latest news from Rotary International.

As a tool for promoting membership development, search the site for the following information and much more:

- Membership survey results
- Prospective member, member relocation, and Rotarian referral forms
- Print publications (many are available as free downloads or can be ordered online at [shop.rotary.org](http://shop.rotary.org))
- Information on all RI and Rotary Foundation programs
- Member Access, used by club presidents or secretaries to report membership changes to RI (preferred method)
- The downloadable Membership Data Form, used to (manually) report membership changes to RI
- E-Learning Center (an online, self-paced training resource for club officers and new members)
- Latest news releases from RI
- Locations of Rotary clubs in areas you'll be visiting
- The name and contact information for your RI Club and District Support representative
- Licensed suppliers of RI merchandise (pins, clothing, software, and more)

## Club and District Support Representatives

Every club has a Club and District Support representative on the RI staff who is available to answer questions about

- The RI Constitution and Bylaws, the Rotary Code of Policies, the *Manual of Procedure*, and RI Board policy
- Rotary International and the Secretariat
- Issues arising from elections or the interpretation of official RI policy
- How to conduct Rotary business online through Member Access

A searchable database by district — located at [www.rotary.org](http://www.rotary.org) — provides the name, phone number, and e-mail address of the RI staff member to contact with these types of questions.

## Other RI Secretariat Staff

The RI Secretariat includes RI World Headquarters, located in Evanston, Illinois, USA, and seven international offices. Staff members at the Secretariat can assist you with any questions or requests pertaining to membership. A contact list for Secretariat staff is available at [www.rotary.org](http://www.rotary.org) and in the *Official Directory*.

Send inquiries to [membershipdevelopment@rotary.org](mailto:membershipdevelopment@rotary.org).

## CLUB MEMBERSHIP COMMITTEE **ACTION STEPS** FOR CHAPTER 6

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee communicates regularly with the district membership development committee.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee uses the district membership development and public relations committees as resources.
<input type="checkbox"/>	<input type="checkbox"/>	Our club leaders regularly communicate with our district governor or assistant governor and contact them when we need assistance.
<input type="checkbox"/>	<input type="checkbox"/>	Our district membership committee disseminates regional membership initiatives from our RRIMC to our club.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee understands the purpose of the RRIMC program and feels comfortable contacting our RRIMC for advice on membership questions or issues that haven't been resolved by district leaders.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee members have visited <a href="http://www.rotary.org">www.rotary.org</a> within the last month and routinely download relevant RI materials for our club.
<input type="checkbox"/>	<input type="checkbox"/>	Our club membership committee will consider implementing the appropriate action steps listed throughout this publication to help strengthen our membership development activities.





# Appendix 1: RI Publications and Resources

The print and video publications listed below are available through the *RI Catalog*. Shop the catalog online at [shop.rotary.org](http://shop.rotary.org) or order by phone (847-866-4600), fax (847-866-3276), e-mail ([shop.rotary@rotary.org](mailto:shop.rotary@rotary.org)), or mail (RI Publications Order Services, 7100 N. Lawndale Ave., Lincolnwood, IL 60712, USA). Publications can also be ordered from the RI international office serving your area.

Title	Description	Catalog Number	Available as a free download?
<b>Membership Kits*</b>			
Developing Your Club's New Member Information Program (for clubs)	Contents: <i>New Member Orientation: A How-to Guide for Clubs, Membership Development Resource Guide, RI Catalog</i>	425-EN	No
Membership Video Set	2-DVD set includes: Prospective Member DVD New Member DVD	427-MU	No
New Member Information Kit (for new members)	Contents: <i>Welcome to Rotary</i> folder, <i>The ABCs of Rotary</i> , <i>RI Theme Brochure</i> , <i>Rotary Foundation Facts</i> , <i>The Rotary Foundation Quick Reference Guide</i> , <i>RI Annual Report</i> , <i>Rotary's US\$100 Million Challenge Brochure</i>	426-EN	No
Prospective Member Information Kit	Contents: <i>Welcome to Rotary</i> folder, <i>Rotary Basics</i> , <i>This Is Rotary</i> , <i>What's Rotary?</i> , <i>Rotary Foundation Facts</i> , <i>PolioPlus Brochure</i>	423-EN	No
<b>Print Publications</b>			
The ABCs of Rotary	A compact guide through Rotary's history, customs, and traditions originating from a compilation of short articles first written by Past RI President Cliff Dochterman.	363-EN	No
A Century of Service: The Story of Rotary International	Inspirational book, commissioned for the Rotary Centennial in 2005, that vividly documents Rotary's history, the development of its programs, and the difference that Rotarians have made around the world; includes fascinating facts, untold stories, and never-before-published photographs.	913-EN	No
Communities in Action/Menu of Service Opportunities Kit	Kit contains: <i>Communities in Action: A Guide to Effective Projects</i> , which provides step-by-step instructions on developing, carrying out, and evaluating a service project, and <i>A Menu of Service Opportunities</i> , which provides information on recommended types of service projects.	605-EN	Yes

\* Membership Kit contents subject to change. Kits contain the most current publications and/or editions available.

Title	Description	Catalog Number	Available as a free download?
<b>Print Publications</b>			
Effective Public Relations: A Guide for Rotary Clubs	A how-to guide that provides basic tips and tools to help Rotarians promote club activities.	257-EN	No
How to Propose a New Member	Brochure includes the basic procedure for election of a new member.	254-EN	Yes
New Member Orientation: A How-to Guide for Clubs	Resource for Rotarians responsible for creating or updating their club's prospective and new member education programs; contains guidelines, worksheets, and action steps.	414-EN	Yes
Organizing New Clubs: A Guide for District Governors and Special Representatives	Guidebook outlines the procedures for creating a new club; includes suggestions for ensuring a new club's effectiveness and longevity.	808-EN	Yes
RI Catalog	A list of RI publications, audiovisual tools, books and periodicals, forms, and supplies.	019-EN	Yes
Rotary Basics	An eight-page overview of the structure, mission, and programs of Rotary International and The Rotary Foundation; serves as an excellent orientation tool.	595-EN	Yes
The Rotary Foundation Annual Report	Illustrated report on Foundation programs and audited finances.	187B-EN	Yes
Rotary Foundation Facts	Brief statistical overview of Foundation programs and contribution information. Revised annually. Suitable for general distribution; in lots of 50.	159-EN	Yes
Rotary International Annual Report	Illustrated highlights of the Rotary year, plus audited finances.	187A-EN	Yes
<i>Start with Rotary</i> Postcards	Postcards that feature an invitation for prospective members to attend a Rotary club meeting; in lots of 20.	614-EN	No
<i>Start with Rotary</i> Wallet Cards	Small cards that feature an invitation to attend a Rotary club meeting. Perfect for handing out to professional colleagues and other prospective members; in lots of 20.	613-EN	No
This Is Rotary	Colorful brochure providing an overview of Rotary for prospective Rotarians and the general public.	001-EN	Yes
What's Rotary?	Handy, wallet-size card answering frequently asked questions about the organization and scope of Rotary. Popular as a handout to non-Rotarians.	419-EN	Yes

Title	Description	Catalog Number	Available as a free download?
<b>Recognition Program Guides</b>			
Presidential Citation Brochure	Leaflet outlining the current Presidential Citation Program for Rotary and Rotaract clubs.	900A-EN	Yes
RI Membership Development and Extension Award	Guide to district-level certificate award program that recognizes clubs for membership growth in existing clubs, retention of current members, and the organization of new clubs. Districts that meet their membership goals are also recognized.	901-EN	Yes
RI Recognition of Membership Development Initiatives	Guide to district-level certificate award program that recognizes clubs for the development and implementation of a creative plan or strategy to support one of the three primary foundations of membership growth and development: retention, recruitment of new members, and the organization of new clubs.	422-EN (club form); 421-EN (district form)	Yes
RI Recognition of Smaller Club Membership Growth	Guide to certificate award program that recognizes clubs under 20 members for achieving set membership goals.	416-EN	Yes
<b>DVDs/Videos/CD-ROMs</b>			
Every Rotarian, Every Year DVD	Inspirational overview of Rotary Foundation programs and grants supported by Annual Programs Fund contributions. Running time: 9 min.	978-MU	No
PolioPlus: A Gift to the Children of the World	DVD highlighting Rotary's latest work in the march toward polio eradication. Running time: 11 min.	317-MU	No
Rotary and the International Community: Connecting the Local to the Global	Highlights Rotary, the United Nations, and the international community, with best-practice examples of connecting the local to the global. On video and DVD. Running time: 8 min.	266-DVD	No
The Rotary Heritage Collection DVD	Historical videos on one DVD: <i>Paul Harris Live, 1942</i> ; <i>History of Rotary</i> ; <i>Paul Harris, a Man of Action and Vision</i> ; and <i>The Great Adventure</i> (EN only), a 30-minute bonus feature with Edward Arnold and Jim Backus produced in Hollywood in 1955 for Rotary's 50th anniversary. Total running time: 57 min.	020-MU	No

Title	Description	Catalog Number	Available as a free download?
<b>DVDs/Videos/CD-ROMs</b>			
Rotary: Humanity in Motion	Set of ready-made PR campaign tools on DVD and CD-ROM that Rotarians can use to obtain free or low-cost placements with their local print or broadcast media. Contains television, print, Internet, and outdoor ad designs. Revised annually.	See <i>RI Catalog</i>	No
Rotary: The Possibility	Video illustrating projects from around the Rotary world. Designed for prospective members. Running time: 3 min.	688-MU	No
RVM: The Rotarian Video Magazine	Documentary-style stories, interviews, and news features on DVD chronicling the achievements and projects of Rotarians worldwide. Great for membership promotion and retention.	See <i>RI Catalog</i>	No
Service Above Self: A Century of Extraordinary Purpose	Documentary look at Rotary's first 100 years of volunteer service. Explores Rotary's success as one of the world's largest club-based humanitarian organizations and focuses on several key Rotary programs, including PolioPlus. Produced by Horizons Communications Group, an independent documentary production agency. EN only. Running time: 60 min.	929-EN	No
This Is Rotary	Video overview of Rotary and The Rotary Foundation. Ideal for Rotary information programs and new member orientation. Running time: 6 min.	449-MU	No
Welcome to Rotary	Provides a brief introduction to Rotary for new members. Running time: 3 min.	n/a	Yes
You — The Rotary Foundation	Inspirational video showing the many people around the globe who are helped by The Rotary Foundation. Music, no narration; running time: 4 min.	170-MU	No



Title	Description	Catalog Number	Available as a free download?
<b>Periodicals</b>			
Every Rotarian, Every Year	An e-newsletter with Annual Programs Fund updates, articles on how Rotarians are meeting their clubs' goals, and stories about how Annual Programs Fund contributions enhance people's lives. Subscribe at <a href="http://www.rotary.org">www.rotary.org</a> .	n/a	n/a
International Service Update	An e-newsletter that provides current information about World Community Service, Rotary Volunteers, and Rotary Community Corps, as well as disaster relief and recovery. Subscribe at <a href="http://www.rotary.org">www.rotary.org</a> .	n/a	n/a
The Membership Minute	Monthly e-newsletter filled with tips, tools, and the latest research on membership development. Subscribe at <a href="http://www.rotary.org">www.rotary.org</a> .	n/a	Yes
RI Community Service	An e-newsletter published every two months that includes the latest service news and resources for Rotarians. Subscribe at <a href="http://www.rotary.org">www.rotary.org</a> .	n/a	n/a
RI Vocational Service	An e-newsletter that provides Rotarians with vocational service news and resources every two months. Subscribe at <a href="http://www.rotary.org">www.rotary.org</a> .	n/a	n/a
The Rotarian	RI's monthly magazine. (Find Rotary regional magazine information at <a href="http://www.rotary.org">www.rotary.org</a> or in the <i>Official Directory</i> .)	n/a	Selections from <i>The Rotarian</i> ; Links to Rotary regional magazines
Rotary PR Tips	Biweekly e-newsletter offering innovative ideas for clubs and districts to promote Rotary in their communities. Subscribe at <a href="http://www.rotary.org">www.rotary.org</a> .	n/a	Yes
Rotary World	Eight-page, tabloid-size newspaper published four times a year for Rotary leaders.	n/a	Yes
Training Talk	A monthly e-newsletter directed at district trainers and those interested in Rotary training. Subscribe at <a href="http://www.rotary.org">www.rotary.org</a> .	n/a	Yes

Title	Description	Catalog Number	Available as a free download?
<b>Web-based Resources</b>			
Leadership Development: Your Guide to Starting a Program	Contains program guidelines and session ideas for developing leadership skills.	250-EN	Yes
Membership Development Best Practices Exchange	Searchable database that features best practices submitted by Rotary clubs and districts around the world.	n/a	n/a
Membership Referral Form	Allows current Rotarians to submit the names and contact information of non-Rotarians for potential Rotary membership in a club <i>other</i> than their own. (This program does not operate in all regions.)	n/a	n/a
Prospective Member Form	Allows non-Rotarians to request information about Rotary membership through the RI Web site. (This program does not operate in all regions.)	n/a	n/a
Rotarian Relocation Form	Allows Rotarians who are moving to have their new contact information forwarded to Rotary clubs in their new location. (This program does not operate in all regions.)	n/a	n/a
Rotary E-Learning Center	Online, self-paced training resource for club officers and new members.	n/a	Yes



# Appendix 2: Membership Development Action Plan Worksheet

To recruit and retain high quality Rotary club members, your membership development plan should have the following action steps:

1. Identify
2. Introduce
3. Invite
4. Induct
5. Inform and orient
6. Involve
7. Educate

**As you fill out this worksheet, refer to the checklists at the end of each chapter in the *Membership Development Resource Guide*. You may want to consider any items checked “no” as potential strategies for implementation.**

## 1. Identify

Identify well-qualified members of your community to be members of your Rotary club. These individuals should be professional or community leaders of strong character who have a commitment to service.

Our club currently identifies well-qualified members by:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

After reading chapters 1-2 of the *Membership Development Resource Guide* and completing the corresponding club assessments, our club has decided to implement these three additional strategies to identify prospective members:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 2. Introduce

Introduce prospective members to Rotary by informing them about Rotary International’s programs and your club’s service projects. Develop a formal prospective member information program that provides prospective members with an overview of:

- Rotary International and The Rotary Foundation
- The benefits and responsibilities of membership in your club
- A description of your club’s primary projects and activities

A prospective member who has been introduced to Rotary by enthusiastic Rotarians, and who is well-educated in these areas before joining, is more likely to become an involved and active member.

Our club currently introduces prospective members to Rotary by:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

After reading chapters 1-2 of the *Membership Development Resource Guide* and chapter 1 of *New Member Orientation: A How-to Guide for Clubs*, our club has decided to implement these three additional strategies to introduce Rotary to prospective members:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### 3. Invite

Invite prospective members to become Rotarians with a personal visit from both the proposer and a member of the club's membership committee. This personal visit provides the prospective member with a second contact in the club, one who brings additional Rotary knowledge and experience. Rotarians extending the invitation should know the interests and expertise of the prospective member in order to point out relevant club activities and projects.

Our club currently invites prospective members to become members through the following action plan:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

After reading chapters 1-2 of the *Membership Development Resource Guide*, our club has decided to implement these three additional strategies in our process of inviting qualified prospective members:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### 4. Induct

Induct new members in a dignified and meaningful manner. Invite spouses, partners, and family members to attend. During the ceremony, offer new members the opportunity to introduce themselves in a brief, five-minute speech. Also make sure that all club members personally introduce themselves to each new member.

Our club currently inducts new members by:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

After reading chapter 3 of the *Membership Development Resource Guide* and *New Member Orientation: A How-to Guide for Clubs*, our club has decided to implement the following induction procedures for new members:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 5. Inform and Orient

Inform new members about your club and RI by focusing on the following areas:

- Rotary policies and procedures
- Opportunities for service
- Rotary history and achievements

Consider scheduling a formal new member orientation program that extends over several sessions. See *New Member Orientation: A How-to Guide for Clubs* (414-EN) for ideas.

Our club currently conducts new member orientation consisting of the following action steps:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

After reading chapter 3 of the *Membership Development Resource Guide*, completing the corresponding club assessments, and reading *New Member Orientation: A How-to Guide for Clubs*, our club plans to add the following new action steps to our new member orientation program:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 6. Involve

Involve new members in club committees, activities, fundraisers, board meetings, weekly club meetings, and social activities.

Many clubs find it wise to involve the new member's sponsor during the introductory period of membership and/or to appoint each new member a Rotarian mentor. These individuals keep close contact with the new Rotarian for the first six months or until the new member is fully involved in the club.

Our club currently makes involving all club members in club activities a priority by:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

After reading chapters 3 and 5 of the *Membership Development Resource Guide* and completing the corresponding club assessments, our club has decided to implement the following action steps in an effort to increase club-member involvement:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 7. Educate

Educate all club members so they have enough knowledge to take initiative and become active members. Clubs should develop a curriculum for continuing education in an effort to keep members up-to-date on club programs, projects, and initiatives. Clubs also should communicate news from Rotary International and The Rotary Foundation to their members.

Our club currently has a continuing member education program that consists of the following three primary activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

After reading chapters 1-6 of the *Membership Development Resource Guide* and completing all of the corresponding assessments, our club has decided to update our continuing member education program by implementing the following steps:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Some further action steps

Our club has chosen to implement all of the new strategies listed in steps 1-7 above for the following reasons (e.g., in response to outcomes of specific club assessments, as a result of club discussions, etc.):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Our club understands that membership development is an ongoing process, and we will continue to strive to achieve our membership development goals set forth in the *Planning Guide for Effective Rotary Clubs* by building on our following three strengths:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

We will also continue to work toward addressing the following three weaknesses:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

We will do this by prioritizing these three action steps (from steps 1-7 above):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

The club membership committee should compile the information collected on this worksheet and make a report to members on the club's membership development action plan. Hold a discussion during a club meeting to inform members about the steps you are taking to strengthen your club's membership and encourage their continued involvement in the process.







# Publication Evaluation Form

RI wants to provide effective resources to Rotarians and Rotary clubs and districts. Your feedback about this guide will help us to improve future editions. Thank you.

1. How did you learn about the *Membership Development Resource Guide*?

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2. How did your club use this guide?

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3. What did you find most useful about:  
*Membership Development Resource Guide*

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*Club Assessment Tools*

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*Regional Membership Supplement*

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4. What did you find least useful about:  
*Membership Development Resource Guide*

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*Club Assessment Tools*

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*Regional Membership Supplement*

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5. What information would you add to this guide?

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6. Any additional comments or suggestions?

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**Contact Information (optional)**

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Rotary Club: \_\_\_\_\_ District: \_\_\_\_\_

Address: \_\_\_\_\_

City, State/Province, Postal Code: \_\_\_\_\_

Country: \_\_\_\_\_

E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_

Please send to:

Membership Development Division (MD100)  
Rotary International  
One Rotary Center  
1560 Sherman Ave.  
Evanston, IL 60201-3698  
Fax: 847-866-9446  
E-mail: [membershipdevelopment@rotary.org](mailto:membershipdevelopment@rotary.org)

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