

ACTION PLAN FOR MEMBERSHIP RETENTION
ROTARY Club of _____

1. Appoint a Membership Retention/ Attendance committee

2. Schedule the First Committee meeting - _____ time and place

3. Besides the committee members and club President, decide whom to invite

___ Club President elect ___ Club Secretary ___ Sergeant at Arms

___ Assistant Governor ___ someone from the District Membership committee

___ other _____

4. Decide which methods the club will use to retain its members

___ Meeting improvements ___ better projects ___ fellowship events

___ Published and available attendance reports ___ Phone calls to absentees

___ Orientation program for new members ___ Mentorship of New members

___ Appointing all members to suitable club tasks ___ improved communications
to members ___ e-mails ___ club bulletins ___ phone chain

___ Surveying members to find out what they want from Rotary

___ Promoting District Events such as the District Conference

___ Promoting Vocational and Recreational Fellowships

___ Inviting Members to the Rotary Leadership Institute

5. Decide who is responsible for the methods selected

6. Present program to Board of Directors _____ date

7. Present Program to Assistant Governor _____ date

8. Followup – Monitor progress – conduct exit interviews – discussion at committee



ROTARY CLUB OF: _____
Engagement Action Plan
 Rotary Year: 201__-201__

Sample

Goal: To achieve a club retention rate at least 95% for the 201_ - 201_ Rotary year.

Interim Goal: 92% by 12/31

Measurement and Reporting: Monthly; reported to board and to club members.

| EVERY MEMBER NEEDS FELLOWSHIP | WHO IS IN CHARGE | WHEN WILL IT HAPPEN | WHO WILL FOLLOW UP |
|---|--|---|---------------------------|
| Focus on increasing fellowship at meetings and through other Rotary venues: greeters, ice-breakers at meetings; planning firesides and other fellowship opportunities; new ways to include family members | Virginia, Chair | Weekly meetings and events every other month | Max / Jamie |
| Form committee to manage balance and types of programs and speakers meaningful to member interests; arrange a variety of weekly programs | David, Chair Committee Members: Ron, Ellen, George, Charlie | Weekly program presentation | Eric /Jamie |
| Implement "Bring a Family Member to Lunch Day". Family members eat free and are recognized. | Max | Last Wednesday of every other month: 8/29, 10/31, 12/19, 2/27, 4/30 & 6/25. | Eric |

| EVERY MEMBER NEEDS TO MAKE A MEANINGFUL CONTRIBUTION | WHO IS IN CHARGE | WHEN WILL IT HAPPEN | WHO WILL FOLLOW UP |
|---|-------------------------|--|---------------------------|
| Define a new "hands on" project for this Rotary year that offers opportunity for participation by majority of club members and will involve family members; project implementation plan will follow | Eric/Board of Directors | Determine project by 08/31 | Eric/Sam |
| Participation of at least 14 members in Project Amigo in Mexico. | Max | 1/26 – 2/2 | Eric |
| Coordinate project for all members to collect/contribute clothing, books or other items in advance for the project | Bill | 12/10 – 1/23 | Sue |
| At least 20 members and family members participate in Goose Creek clean-up project | Tammi, Chair | 5/1 – 5/30 | Phil |
| Keep active service committee lists with up to date committee decisions; ask each new member to participate in committee on day of induction | Jamie | Monthly for review of involvement at board meeting | Max/Eric |

| EVERY MEMBER NEEDS CONTINUING EDUCATION | WHO IS IN CHARGE | WHEN WILL IT HAPPEN | WHO WILL FOLLOW UP |
|--|-------------------------|----------------------------|---------------------------|
| Hold new Rotary year club assembly (club goals and plans, budget, member involvement among other topics) | Eric | July 8 | Eric |
| Hold mid-year club assembly to provide goal updates, budget, and plans for the remainder of the year | Eric | January 15 | Eric |
| Hold two club assemblies on "Programs of RI" to familiarize members on basic and new programs of Rotary | Eric | November and February | Eric |
| Include articles in each newsletter about club activities, projects, club goal tracking and ways members and families can get involved; announce at meetings and personally invite new members | Kim/ Craig | Weekly | Eric / Jamie |
| Hold club assemblies on Membership | Max / Jamie | August and January | Eric |
| Hold club assembly to give Rotary 101 presentation to all members | Eric | May | Eric |

| EVERY MEMBER NEEDS TO BE RECOGNIZED | WHO IS IN CHARGE | WHEN WILL IT HAPPEN | WHO WILL FOLLOW UP |
|---|--|---|---------------------------|
| Contact members for club reasons and/or special occasions in their life to recognize the member's value to the club (Reasons include follows up to missed meetings, unusual attendance patterns, birthday, illness, death of a loved one, etc.). In person contacts will be made. | Max, Chair Committee members: Sara, Terry, Paul | Weekly | Jamie |
| Recognize members for 100% attendance and exceptional participation in projects (given to SAA's for recognition during meetings) | Susie/Jamie; Tim | Second meeting of month for previous month | Eric |
| Recognize new member sponsors with a standing O (ovation) | Craig | Meetings where there is induction of a new member | Max |
| Recognize members with a standing O for contributions to Rotary, the community or other reasons | Tim | Weekly meetings | Eric |

Annual Member Involvement Appraisal

From friendship to community service, people are drawn to and stay with their Rotary club for a variety of reasons. Use the Annual Member Involvement Appraisal to ensure members stay engaged and receive the support, benefits and recognition that they deserve. The checklist can be used in two ways:

- club officers should complete the check list if they are knowledgeable about the experience of their members
- in conjunction with the survey that should be distributed and filled out by each member to gauge involvement

Club officer: Please fill in the names of your club members below and check off each box that pertains to their engagement in your club.

Rotary Club Of: _____

| Member Names | Friendship | Involvement | Continuing Education | Recognition | Benefits |
|---------------------|-------------------|--------------------|-----------------------------|--------------------|-----------------|
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |
| 4. | | | | | |
| 5. | | | | | |
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| 17. | | | | | |
| 18. | | | | | |
| 19. | | | | | |
| 20. | | | | | |

To be completed by club members.

Friendship

1. Did you participate in any social gatherings, parties, or other fun activities with the club this year?

- Yes No
 Club did not offer

If yes, please list that activity or activities:

If yes, were these social gatherings, parties, or other fun activities?

- Social gatherings
 Parties
 Fun activities

2. What ideas do you have to increase social activities and friendship among members in the club?

Involvement

3. Were you involved in any club service projects or club administration (i.e., club leadership roles, committees, task forces) during the current Rotary year?

- Yes No

If yes, what were your favorite projects or activities?

4. Did you receive information on the following programs sponsored by Rotary International or The Rotary Foundation for? (Please check all that apply)

- New Generations (Interact, Rotaract)
 Rotarian special interests (Fellowships, Rotarian Action Groups)
 Vocational service (Rotary service, Rotary volunteers, group study exchange)
 Youth leadership (RYLA)
 Youth study abroad (Youth Exchange)
 Host of youth exchange student
 Rotary foundation grants

5. What types of projects or activities were you involved in with the club this year?

- | | |
|--|---|
| <input type="checkbox"/> Committee | <input type="checkbox"/> Assumed roles at club meetings |
| <input type="checkbox"/> Community service project | <input type="checkbox"/> Host of group study exchange |
| <input type="checkbox"/> Club leadership position | <input type="checkbox"/> Hosted a Rotarian from another country |
| <input type="checkbox"/> Rotary fellowship | <input type="checkbox"/> Attended a board meeting |
| <input type="checkbox"/> Proposed a new member | <input type="checkbox"/> Fundraising |
| <input type="checkbox"/> International service project | |

6. What area(s) *would* you like to be involved in?

- | | |
|--|---|
| <input type="checkbox"/> Committee | <input type="checkbox"/> Assume a role at club meetings |
| <input type="checkbox"/> Community service project | <input type="checkbox"/> Host of group study exchange |
| <input type="checkbox"/> Club leadership position | <input type="checkbox"/> International service project |
| <input type="checkbox"/> Rotary fellowship | <input type="checkbox"/> Host a Rotarian from another country |
| <input type="checkbox"/> Propose a new member | <input type="checkbox"/> Attend a board meeting |
| <input type="checkbox"/> Fundraising | |
| <input type="checkbox"/> I want to stay with the same activity | |

7. Did you participate in the club's community service project(s)?

- Yes
- No
- I was unaware of an opportunity for involvement
- The club did not participate in any community service project(s)

If yes, please share your favorite community service project:

8. How did you become engaged in the club's community service project(s)? (Choose one)

- I volunteered for service
- I was nominated or asked to participate
- Other (Please explain):

9. Did you participate in the club's international service project(s)?

- Yes
- No
- I was unaware of an opportunity for involvement
- The club did not get involved in any international service project(s)

If yes, please share the project you were involved in:

10. How did you become involved? Choose one:

- I volunteered for service I was nominated or asked to participate
 Other: _____

11. What suggestions do you have for increasing club member involvement in club service opportunities?

12. Please choose the appropriate response to complete the following statement:

“My participation in club community projects this year.....”

- Went above and beyond my original expectations
 Did not meet my expectations

Please explain:

13. If you chose “did not meet my expectations,” what were the reasons? (Check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Project(s) did not address community needs | <input type="checkbox"/> Insufficient knowledge of project |
| <input type="checkbox"/> Not enough resources were available to accomplish a project | <input type="checkbox"/> Project(s) too costly |
| <input type="checkbox"/> Club lacked the skills required to accomplish the project | <input type="checkbox"/> Project(s) lacked support |
| <input type="checkbox"/> Competing personal time conflicts | <input type="checkbox"/> Project(s) did not meet my interest |
| | <input type="checkbox"/> Did not know enough about project opportunities |

14. What suggestions do you have for improving the club’s community projects?

Continuing Education

15. Do you receive updated and consistent information on Rotary activities?

- Yes No

16. Do you receive updated and consistent information on the club's activities?

Yes

No

17. What is your primary source of information about Rotary? (Choose only one)

Rotary International's e-learning center

The Rotarian Magazine or regional magazine

Club programs

www.rotary.org

RI e-newsletters: Which one? _____

Rotary Video Magazine

Other: _____

18. Please choose one answer to complete the statement, "My Rotary education..."

Exceeded my expectations

Met my expectations

Did not meet my expectations

19. Please choose one answer to complete the statement, "My club education..."

Exceeded my expectations

Met my expectations

Did not meet my expectations

20. If you chose "did not meet my expectations," what might the club do differently?

21. Does the club provide sufficient continuing education programs?

Yes

No

22. Did you enjoy the topics that were presented in the club's weekly programs?

Yes

No

23. If your answer is no, why not?

The topics were not interesting

Too few programs or topics

I didn't learn anything

Too many programs

No variety in topics

Other: _____

24. What suggestions do you have for improving the club's weekly programs?

Recognition

25. Has the club recognized you for your efforts or service within the club?

Yes

No

Please explain:

26. What suggestions do you have for improving recognition of members' efforts in the club?

Benefits of Being a Member

27. What is the benefit of being a member of this Rotary club?

(Please select all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Community service opportunities | <input type="checkbox"/> Friendship |
| <input type="checkbox"/> Networking | <input type="checkbox"/> Family engagement |
| <input type="checkbox"/> Leadership skills | <input type="checkbox"/> Involvement with youth based programs |
| <input type="checkbox"/> International service | <input type="checkbox"/> Support of The Rotary Foundation |
| <input type="checkbox"/> Public speaking skills | <input type="checkbox"/> Professional development |
| <input type="checkbox"/> Community relationships | <input type="checkbox"/> Other: _____ |

28. What benefit would you most like the club to focus on next year?

- | | |
|--|--|
| <input type="checkbox"/> Community service opportunities | <input type="checkbox"/> Friendship |
| <input type="checkbox"/> Networking | <input type="checkbox"/> Family engagement |
| <input type="checkbox"/> Leadership skills | <input type="checkbox"/> Involvement with youth based programs |
| <input type="checkbox"/> International service | <input type="checkbox"/> Support of The Rotary Foundation |
| <input type="checkbox"/> Other: _____ | |

29. Please explain what the value of being a member of this Rotary club is to you.

30. Is the benefit of your membership in this club worth the time and money you have invested in the club? Yes No

Please explain.

Terminating Rotarian Survey

Thanks to Eileen Rau and D7890 for sharing this survey with us.

Purpose of survey: Determine why district 7890 members leave their Rotary Clubs and use this information to guide retention efforts.

Qualified Respondents: Terminating from a club from January to July/August 2012, for any reason other than deceased. (Do not contact if more than a year after terminating.)

Methodology: Online survey (www.surveymonkey.com) = free if 10 questions or less and if less than 100 respondents answer. For the most candid results (and not "sugar coated" responses which occur when members are asked reasons for leaving by the clubs who they left), survey is conducted by the district and individual responses are confidential (not identified by club or respondent). District governor provides names of terminated members and e-mail addresses if available (by club) to membership chairman, then notifies club presidents about the survey (general introduction explaining purpose, that it is a very short survey, and that results are confidential, as well as specific request to cooperate if contacted by the membership chairman for assistance with e-mail addresses). By club, membership chair sends the names of ex-members for whom e-mail addresses are needed, to the club presidents and secretaries asking for assistance. Survey is programmed into online program. After the entire list of e-mails is complete, membership chairman e-mails an invitation to participate (in this less than 5 min survey) and survey link to the terminating members. For best response rate, membership chairman sends out reminders also.

1. Please read the entire list below and select your top reasons for leaving your Rotary club.

Cost

Dues are too expensive/Can't afford the cost of membership anymore
Meals are too expensive
Foundation donations are expensive
Fundraising projects/donations are expensive
My company has stopped covering my membership dues
Club constantly asks for money from members
Other cost concerns

Time

Too time consuming
Attendance requirement is difficult for me
Have too many commitments with job or family
Have too many commitments with other organizations
Other time concerns

Job Issues/Retirement

Change of job/Lost job
Change in work time
Retired/retiring from work and want to do other things
Other job issues/retirement concerns

Location

Moved out of area/work out of area now
Other location concerns

Membership

Too many older people
Not enough women or minorities
Club seems like a "Good Ole Boys" club/"Cliques"
Club has little/no interest in recruiting and retaining new members
Conflict with someone in the club
Other membership concerns

Meetings/Environment

Inconvenient meeting time
Inconvenient meeting place
Meeting place has no privacy for meetings
Meeting place not handicap accessible
Meetings are boring
Not enough fun
Not enough speakers/poor programs
Club seems prejudicial/discriminatory against newer members/not absorbed into club
Members not making others feel welcome, most members sit at same place every week
Fellowship expectations not met
Communication issues/don't know what's going on
Club members are not involved in decision-making
Networking expectations not met
Meeting attendance poor among many members
Other meetings/environment concerns

Club Activities

Not enough fun
Difficult to get agreement on activities to do/how to do them
Not enough meaningful service projects/club could do better projects
Fundraising issues
Many members do nothing and leave it to the same few to handle every project
Little/no effort to include new members
Leadership concerns
Lack of publicity showing Rotary as a relevant service organization in area
Club is not interested in supporting District/International goals, too narrow-minded
Other club activity concerns

Club Needs Change/Updates

Resistance to change or new ideas ("We always did it this way"), Want change/new activities
Club traditions are old fashioned
Club web presence is not satisfactory (website, social media, etc.)
My concerns are ignored by the board of directors
Other club needs change/updates concerns

Miscellaneous

Would like to join board but was not asked
Joining another Rotary club/another community/service organization
Club disbanded
Health concerns
Other (Specify) _____

2. Which of the following have you done in the past year or are you seriously considering doing in the next year? (Please select all that apply.)

- Joining another Rotary club in the same area
- Joining another Rotary club in a new area (you have moved/are moving/job in different)
- Joining a different/new service organization (specify) _____
- Joining a business networking group or local Chamber of Commerce
- Joining a group associated with family/youth activities - educational (PTA), sports or other
- Joining an organization associated with adult activities - sports/fitness, dance, arts/theater/culture, literature, etc.
- None
- Other (Specify) _____

3. (Optional) If any, what suggestions do you have for Rotary regarding improving membership or member retention in the future?

4. These last few questions are just for classification purposes, and all information will be looked at in groups, not individually. What area was your Rotary club in?

- Area 1 - CT & MA: Salisbury, Great Barrington, North Adams, Pittsfield, Tri-Town & Williamstown clubs
- Area 2 - MA: Amherst, Easthampton, Franklin County, Holyoke, Chicopee & Northampton clubs
- Area 3 - MA: East Longmeadow, Ludlow, Monson, Palmer, Ware & Wilbraham/Hampden clubs
- Area 4 - MA: Agawam, Southwick, Springfield, Westfield & West Springfield clubs
- Area 5 - CT: Danielson, Plainfield, Putnam, Stafford & Willimantic clubs
- Area 6 - CT: Broad Brook, East Hartford, Glastonbury, Manchester, Rockville & South Windsor clubs
- Area 7 - CT: Bloomfield, Enfield, Somers, Simsbury/Granby, Suffield, East Windsor & Windsor/Windsor Locks clubs
- Area 8 - CT: Litchfield/Morris, New Milford, Torrington, Washington, Watertown & Winsted clubs
- Area 9 - CT: Avon/Canton, e Club, Farmington, Hartford, Newington, West Hartford & Wethersfield/Rocky Hill clubs
- Area 10 - Bristol, Kensington/Berlin Sunrise, New Britain-Berlin, Plainville, Southington, Terryville & Thomaston clubs
- Don't know/Refused

5. How long were you a member of your Rotary club?

- One year or less
- Over 1 to 2 years
- Over 2 to 5 years
- Over 5 years
- Refused

6. Which of the following best describes your position at work?

- Business owner with employees,
- President/top management but not owner,
- Middle management,
- Self employed with no employees,
- Retiree,
- Other

7. Which of the following includes your current age?

- Under 30
- 30 to under 40
- 40 to under 50
- 50 to under 60
- 60 to under 70

70 or older
Refused

8. What is your gender?

Female
Male
Refused

9. Are there any children under the age of 18 living in your household?

Yes
No
Refused

Thank you for your feedback. Have a nice day!

Prepared by District 7890 Membership Co-Chair



RESIGNING MEMBER INPUT

We regret that you have terminated membership with your Rotary club. In order to enable Rotary International to work with clubs to enhance the experience provided to future Rotarians, please take a few moments to respond to the following questions. Please return the completed questionnaire to the attention of Donna McDonald, Membership Development (MD400), One Rotary Center, 1560 Sherman Avenue, Evanston, IL 60201. An envelope is provided for this purpose, or you may respond via facsimile at 1-847-866-9446.

I. REASONS FOR RESIGNING

1. Why are you leaving your Rotary club? (Please check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Relocating to a new community | <input type="checkbox"/> My networking expectations were not met |
| <input type="checkbox"/> Unable to meet attendance responsibilities | <input type="checkbox"/> My community service expectations were not met |
| <input type="checkbox"/> Competing priorities | <input type="checkbox"/> My fellowship expectations were not met |
| <input type="checkbox"/> Financial constraints | <input type="checkbox"/> Did not feel included in the club |
| <input type="checkbox"/> Not interested in club service projects | <input type="checkbox"/> Business/professional pressures |
| <input type="checkbox"/> Not interested in Rotary's mission | <input type="checkbox"/> Not interested in weekly club programs |
| <input type="checkbox"/> Health Concerns | <input type="checkbox"/> Too much time away from family responsibilities |
| <input type="checkbox"/> Club meeting time was not convenient | |
| <input type="checkbox"/> Other (please explain) _____ | |

2. If you are moving, would you consider joining a Rotary club in your new place of residence or occupation? Yes No

Would you like Rotary International to contact the Rotary club in your new place of residence to notify them that you are interested in joining their club? Yes No

If yes, please provide the following information:

Name: _____

Address: _____

Phone Number: _____

E-mail Address _____

II. CLUB MEETINGS & ACTIVITIES

3. Did you enjoy your club's weekly meetings? Yes No

4. Please check the appropriate response to the following questions:

- | | | | |
|---|-------------------------------------|---|---------------------------------------|
| The amount of Rotary content in our meetings was: | <input type="checkbox"/> Adequate | <input type="checkbox"/> Excessive | <input type="checkbox"/> Insufficient |
| The length of our meetings were: | <input type="checkbox"/> Adequate | <input type="checkbox"/> Excessive | <input type="checkbox"/> Insufficient |
| Our meetings were: | <input type="checkbox"/> Organized | <input type="checkbox"/> Poorly organized | |
| Our meeting time was: | <input type="checkbox"/> Convenient | <input type="checkbox"/> Inconvenient | |
| The location of our meeting was: | <input type="checkbox"/> Convenient | <input type="checkbox"/> Inconvenient | |
| The cost of attending the meeting was: | <input type="checkbox"/> Adequate | <input type="checkbox"/> Excessive | <input type="checkbox"/> Insufficient |

5. Our club should have held (more the same amount fewer) fellowship activities.

6. Did you feel welcome in your Rotary club? Yes No

If no, why? (Please check all that apply)

- Club cliques
- Other members did not make an effort to interact with me.
- I did not make an effort to meet other members.
- I felt demographically isolated: (Please check all reasons that apply)

Other members were:

- older younger different gender different ethnicity
- different professions too professionally homogeneous
- other demographic reason (please explain) _____

7. The club should involve or provide more opportunities for family involvement. Yes No

8. The following changes would improve club meetings:

- | | |
|--|---|
| <input type="checkbox"/> Better speakers | <input type="checkbox"/> Increased emphasis on vocational information |
| <input type="checkbox"/> Increased variety of program topics | <input type="checkbox"/> More focus on professional networking |
| <input type="checkbox"/> More information on Rotary programs | <input type="checkbox"/> More focus on fellowship |
| <input type="checkbox"/> More information on service opportunities | <input type="checkbox"/> Better time management |
| <input type="checkbox"/> Other (please explain) _____ | |

9. Indicate your feelings regarding your club's activity in the following areas:

(Please check the appropriate response)

| Area | Level of Activity | | | |
|------------------------|------------------------------------|-----------------------------------|---------------------------------------|------------------------------------|
| Membership Recruitment | <input type="checkbox"/> Excessive | <input type="checkbox"/> Adequate | <input type="checkbox"/> Insufficient | <input type="checkbox"/> Not Aware |
| Membership Retention | <input type="checkbox"/> Excessive | <input type="checkbox"/> Adequate | <input type="checkbox"/> Insufficient | <input type="checkbox"/> Not Aware |
| Membership Development | <input type="checkbox"/> Excessive | <input type="checkbox"/> Adequate | <input type="checkbox"/> Insufficient | <input type="checkbox"/> Not Aware |
| New Member Orientation | <input type="checkbox"/> Excessive | <input type="checkbox"/> Adequate | <input type="checkbox"/> Insufficient | <input type="checkbox"/> Not Aware |
| Club Public Relations | <input type="checkbox"/> Excessive | <input type="checkbox"/> Adequate | <input type="checkbox"/> Insufficient | <input type="checkbox"/> Not Aware |
| Fundraising | <input type="checkbox"/> Excessive | <input type="checkbox"/> Adequate | <input type="checkbox"/> Insufficient | <input type="checkbox"/> Not Aware |
| The Rotary Foundation | <input type="checkbox"/> Excessive | <input type="checkbox"/> Adequate | <input type="checkbox"/> Insufficient | <input type="checkbox"/> Not Aware |

III. CLUB PROJECTS

10. Did you participate in your club's local service projects? Yes No

If yes, how did you become involved?

- I volunteered I was asked

Did your involvement meet your expectations/goals? Yes No

If no, why? (Please check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Projects did not address community needs | <input type="checkbox"/> Personality conflicts |
| <input type="checkbox"/> Insufficient knowledge of project | <input type="checkbox"/> Personal time conflicts |
| <input type="checkbox"/> Lack of resources to accomplish project | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Lack of support from other members | <input type="checkbox"/> Insufficient family involvement |
| <input type="checkbox"/> Lack of required skill to accomplish project | <input type="checkbox"/> Other (please explain) _____ |

11. Did you participate in your club's international service projects? Yes No

If yes, how did you become involved?

- I volunteered I was asked

Did your involvement meet your expectations/goals? Yes No

If no, why? (Please check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Projects did not address needs I considered important | <input type="checkbox"/> Personality conflicts |
| <input type="checkbox"/> Insufficient knowledge of project | <input type="checkbox"/> Personal time conflicts |
| <input type="checkbox"/> Lack of resources to accomplish project | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Lack of support from other members | <input type="checkbox"/> Insufficient family involvement |
| <input type="checkbox"/> Lack of required skill to accomplish project | <input type="checkbox"/> Other (please explain) _____ |

IV. CLUB BULLETIN & COMMUNICATION

12. Our club bulletin contained (sufficient excessive insufficient) club and Rotary information.

13. Our club bulletin was: (please check all that apply)

- interesting useful informative boring limited uninformative

14. Our club has a website does not have a website

If not, would your club have benefited from having a website Yes No

V. MEMBERSHIP EXPENSES

15. Indicate your feelings regarding the following expenses associated with membership in your club:

Type of Cost

Perception of Cost

- | | | | |
|--|------------------------------------|-------------------------------------|-------------------------------------|
| ▪ Club dues | <input type="checkbox"/> Excessive | <input type="checkbox"/> Reasonable | <input type="checkbox"/> Inadequate |
| ▪ Rotary International dues | <input type="checkbox"/> Excessive | <input type="checkbox"/> Reasonable | <input type="checkbox"/> Inadequate |
| ▪ Cost of weekly meetings | <input type="checkbox"/> Excessive | <input type="checkbox"/> Reasonable | <input type="checkbox"/> Inadequate |
| ▪ Amount of club fines/assessments | <input type="checkbox"/> Excessive | <input type="checkbox"/> Reasonable | <input type="checkbox"/> Inadequate |
| ▪ Voluntary contributions to service projects | <input type="checkbox"/> Excessive | <input type="checkbox"/> Reasonable | <input type="checkbox"/> Inadequate |
| ▪ Voluntary contributions to The Rotary Foundation | <input type="checkbox"/> Excessive | <input type="checkbox"/> Reasonable | <input type="checkbox"/> Inadequate |

VI. CLUB LEADERS

16. Did you feel comfortable sharing your concerns with club leaders? Yes No

If no, why? (Please check all that apply)

- Club leaders had so many responsibilities I did not want to burden them.
- I was not a member long enough to feel comfortable approaching club leaders.
- I did not want to be perceived as a complainer.
- Club leaders had their own agenda and were not interested in other ideas.
- Club leaders were not open to discussion or concerns.
- Other: _____

17. Did you ever share suggestions with club leaders? Yes No

Were club leaders receptive? Yes No

18. Did club leaders ever seek your opinions/reactions? Yes No

VII. ADDITIONAL INFORMATION

19. How long were you a member of your Rotary club? _____ years

20. How did your spouse/partner/family feel about your involvement in Rotary?

- | | |
|--|---|
| <input type="checkbox"/> Proud of my involvement | <input type="checkbox"/> Felt it took too much of my time |
| <input type="checkbox"/> Wanted to know more | <input type="checkbox"/> Sought interaction with other Rotary spouses/partners/families |
| <input type="checkbox"/> Felt it was too expensive | <input type="checkbox"/> Other (please explain) _____ |
| <input type="checkbox"/> Wanted to be involved | |

21. Is there anything not mentioned above that your club could have done differently to meet your needs?

- Yes No

If yes, please indicate what action could have been taken:

22. With which volunteer activities will you spend your time in the future? Please check the 2 most likely

- | | | |
|---|--|---|
| <input type="checkbox"/> Political | <input type="checkbox"/> School Board | <input type="checkbox"/> Hospital/Healthcare |
| <input type="checkbox"/> Town/city board | <input type="checkbox"/> PTA | <input type="checkbox"/> Medical fundraising |
| <input type="checkbox"/> Town/city council | <input type="checkbox"/> Classroom volunteer | <input type="checkbox"/> Religious |
| <input type="checkbox"/> Community organization board | <input type="checkbox"/> Youth sports | <input type="checkbox"/> Other (please specify) |
-

23. Please indicate your age range.

- 30-35 years 36-40 years 41-45 years 46-50 years 51-55 years 56-60 years
 61-65 years 66-70 years 71-75 years 76-80 years 81 years or older=

Optional:

_____ Name

_____ District

Thank you for taking the time to complete this questionnaire. Your comments will help us provide guidance to clubs in their membership retention efforts.



ROTARY CLUB OF: _____
Membership Satisfaction Questionnaire

Sample

This survey will be used by the club to more effectively meet the needs of our members. Please complete this questionnaire to help assess member satisfaction with club activities and projects. We welcome your ideas and suggestions.

Return completed survey to the club secretary. Your response is confidential.

1. Do you feel welcome in our Rotary club? Yes No

If no, why not? (Please mark all that apply)

I feel demographically isolated:

Other members were older younger different gender different ethnicity

Other demographic reason

I have not made an effort to get to know other members

Other members have not made an effort to get to know me

Other (please describe)

2. Do you feel comfortable sharing concerns with club leaders?

Yes No

If no, why not? (Please mark all that apply)

Club leaders have so many responsibilities I do not want to burden them.

Club leaders have their own agenda and are not interested in other ideas.

I have not been a member long enough to feel comfortable approaching club leaders.

I do not want to be perceived as a complainer.

Other (please describe)

3. How do you feel about the level of our club's involvement in the following types of activities?

ACTIVITY LEVEL OF CLUB INVOLVEMENT

Membership Development Excessive Adequate Insufficient Unaware

Orientation and Education Excessive Adequate Insufficient Unaware

Local Service Projects Excessive Adequate Insufficient Unaware

International Service Projects Excessive Adequate Insufficient Unaware

Club Public Relations Excessive Adequate Insufficient Unaware

Fundraising Excessive Adequate Insufficient Unaware

The Rotary Foundation Excessive Adequate Insufficient Unaware

Fellowship Excessive Adequate Insufficient Unaware

4. Have you participated in club projects and activities? Yes No

If yes, how did you become involved?

I volunteered

I was asked

5. Please indicate your involvement in the following types of activities:

| ACTIVITY | LEVEL OF INVOLVEMENT |
|-------------------------------|---|
| Membership Development | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |
| Orientation and Education | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |
| Local Service Projects | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |
| Internat'n'l Service Projects | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |
| Club Public Relations | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |
| Fundraising | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |
| The Rotary Foundation | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |
| Fellowship | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |
| Other | <input type="checkbox"/> I am currently involved <input type="checkbox"/> I would like to be involved |

6. I am

VERY SATISFIED

SATISFIED

DISSATISFIED

with my participation in club activities and projects.

If you are dissatisfied, please tell us why. (Please mark all that apply)

- Insufficient knowledge Lack of resources
 Personality conflicts Lack of support from other members
 Cost Insufficient family involvement
 Personal time conflicts Other

7. How do you feel about the following costs associated with membership in our club?

| TYPE OF COST | PERCEPTION OF COST |
|--|--|
| Club dues | <input type="checkbox"/> Excessive <input type="checkbox"/> Reasonable <input type="checkbox"/> Inadequate |
| Cost of weekly meetings | <input type="checkbox"/> Excessive <input type="checkbox"/> Reasonable <input type="checkbox"/> Inadequate |
| Club fines/assessments | <input type="checkbox"/> Excessive <input type="checkbox"/> Reasonable <input type="checkbox"/> Inadequate |
| Voluntary contributions to service projects | <input type="checkbox"/> Excessive <input type="checkbox"/> Reasonable <input type="checkbox"/> Inadequate |
| Voluntary contributions to The Rotary Foundation | <input type="checkbox"/> Excessive <input type="checkbox"/> Reasonable <input type="checkbox"/> Inadequate |

8. Do you enjoy our weekly meetings? Yes No

(Please circle the appropriate response)

- A. The amount of Rotary content in our meetings is **ADEQUATE / EXCESSIVE / INSUFFICIENT**
- B. The length of our meetings is **ADEQUATE / EXCESSIVE / INSUFFICIENT**
- C. Our club should have **MORE / SAME AMOUNT / FEWER** fellowship activities.
- D. Our club newsletter contains **SUFFICIENT / EXCESSIVE / INSUFFICIENT** Rotary information.
- E. Our club newsletter is **INTERESTING / USEFUL / INFORMATIVE / BORING / LIMITED / UNINFORMATIVE.**
- F. Our meetings are **WELL ORGANIZED / POORLY ORGANIZED.**
- G. Our meeting time is **CONVENIENT / INCONVENIENT.**
If inconvenient, please suggest an alternate time:
- H. The location of our meeting is **CONVENIENT / INCONVENIENT.**
If inconvenient, please suggest a different location:

I. Which of the following aspects of our meeting place do you find to be unsatisfactory?
(Mark all that apply)

- Service
- Meal quality
- Parking availability
- Other
- Decor/Atmosphere
- Meal variety
- Safety of the area in which it is located

Suggestion(s) for changes:

The following changes would improve our club meetings:

- Better speakers
- Increased variety of program topics
- Increased emphasis on vocational information
- More involvement of family
- More service opportunities
- More focus on fellowship
- Better time management
- More leadership opportunities

9. Is there anything else you would like to see changed?

10. How does your spouse/partner/family feel about your involvement in Rotary?

- Proud of my involvement
- Wants to know more/be involved
- Feels it is too expensive
- Seeks interaction with other Rotary spouses/partners/families
- Other
- Feels it takes too much of my time

11. Additional comments or ideas

Thank you for your time to complete this survey and for your commitment to improving our Rotary club. Please give the completed survey to the secretary.



ROTARY CLUB OF: _____

Mentor Plan

Sample

Role of the Mentor

Our club has two types of mentoring for new members:

- One-on-One Mentoring
- Group Mentoring

- Has a high level of knowledge, dedication and interest in the club and Rotary
 - Is willing and able to devote time and energy to help new member
 - Introduces the new member to the other club members
- Supplements the group mentoring by explaining all the roles of the club from social events to fund raisers
- Supplements the group mentoring by explaining the bigger picture of Rotary such as Foundation.
 - Ensures new member understands club rules and attendance requirements
 - Is there to answer questions and provide advice and guidance
- Gives the gift of time and guidance to a new Rotarian *The mentor is a resource for the new member, in addition to the new member's sponsor.*

Role of the Mentor

As the assigned mentor for a new club member, you are the “welcoming handshake” of the entire club. Your time and support will help the new member feel comfortable in the club and with Rotary, and begin the learning process.

Your willingness to help a new member in this way will have outstanding benefits for both Rotarians. The average duration of the commitment as a mentor is a minimum of six months; the entire first year of membership is recommended as it will firmly establish the new member in Rotary. If you find you do not have the time required, please let the Membership Chair know as soon as possible so a new mentor can be assigned.

Responsibilities:

- Personally meet with the new member within the first two weeks of membership and develop a plan to complete the items on the mentoring guide
- Sit with the new member to club meetings on occasion
- Introduce the new member to other club members
- Take the new member to make up meetings at two other clubs and demonstrate the process.
- Explain the various committees in the club. Ensure the new member is assigned to at least one service committee, as well as a task for the major club fundraiser.
- Inform the new member about special meetings, such as the club auction, and special events.
- Monitor the new member's attendance and help them to understand about the process of make ups at another club or at an approved club activity. You may wish to call the new member the first month of membership to "meet" them at the meeting.
- Monitor the new members' participation in the club. Invite them to attend committee meetings or club projects why you.
- Be available to answer questions and provide advice or guidance if asked. Schedule coffee with the new member after two months to see how he/she is feeling about Rotary and to discuss questions.
- Meet with the Membership Committee when the new member has completed the items on the mentoring guide
- Ensure the newsletter editor has a photo and biography on the new member for the next edition after induction
- Attend the new member induction and be ready to assume your mentor role that day.

These are the basic responsibilities of a mentor but there are many additional ways you can provide support to a new member. Take the new member to lunch to ensure they are enjoying the club. Pick up the new member and take them to the next club work project. Give the Sergeant at Arms with a funny story or other information to recognize or "fine" the new member, so they feel part of the weekly social aspect of the club. (no embarrassing stories please!)

A member of the Membership Committee will meet with you at least once during the first three months of this mentoring process. You can take the initiative and request this meeting if you feel your new member needs extra guidance or you would like to brag about the new member's progress under your mentorship.

ROTARY CLUB OF: _____

Mentoring Guide for New Members

Name _____
Date of Induction: _____
Mentor _____

Welcome to our Rotary club!

The members of the Rotary Club of _____ are pleased to welcome you into our club and help you explore the many exciting aspects of Rotary.

_____ will be your mentor, will guide you through the process becoming acquainted and involved with Rotary and our club, will answer your questions and help you become involved in providing service to others.

Completion of items listed below within the first six months of your membership will help you to create a vision for your own Rotary service.

- | | Date Completed |
|--|----------------|
| 1. Attend new member orientation meeting | _____ |
| 2. Read the New Member handbook and browse the Rotary websites _____ <ul style="list-style-type: none">• _____ <i>Rotary Handbook</i>• www.rotarydistrict__.org• www.rotary.org• www.ourROTARYclub.org | _____ |
| 3. Attend one or more of the following club functions <ul style="list-style-type: none">• Board of Directors Meeting• Committee Meeting• Fellowship Activity• Other _____ | _____ |
| 4. Complete one or more of the following tasks <ul style="list-style-type: none">• Serve as a greeter at a club meeting• Introduce a guest speaker• Thank a guest speaker• Give a classification talk at a club meeting• Participate in a club service project• _____ | _____ |
| 5. Make up a meeting at another club To replace a meeting missed or just to visit | _____ |
| 6. Extend Rotary to others (complete at least one) <ul style="list-style-type: none">• Invite a guest to Rotary• Propose a new member | _____ |

7. Experience the internationality of Rotary _____
 (complete at least one)
- Host the Youth Exchange student for a meal or other activity
 - Host an outgoing, returning or visiting Group Study Exchange team member for a meal
 - Invite a business or professional non-Rotarian to apply for Group Study Exchange
8. Attend one or more district meetings (listed in priority) _____
- District Assembly (Date _____)
 - District Conference (Date _____)
 - District Foundation Seminar (Date _____)
 - Other District meeting _____
9. Choose a committee on which you would like to serve _____
10. Accept an assignment to serve on a club committee _____
11. Attend a least one meeting of this committee _____

CLUB COMMITTEES

- DOOR
 - a) Greet club members and take their payments, count the money the Sergeant at Arms collects and the 50-50 donations
- CLUB SERVICE
 - a) Special Events – help organize the social events for the club
 - b) Annual In-House Club Auction – help organize this event
- COMMUNITY SERVICE
 - a) Work Parties – coordinate the hands-on work groups for the community projects
- INTERNATIONAL SERVICE
 - a) Group Study Exchange – promote this within the club and community
 - b) Exchange Student – help with the committee for interviewing outgoing students, hosting incoming students and events for the student
 - c) World Community Service – participate in some aspects of the club’s international project club
- VOCATIONAL SERVICE
 - a) Professions Shadow Day– help with the planning and organizing of this annual event
 - b) Interact – work with the students at _____ school
- WEBSITE
 - a) Collect committee reports or interesting facts that would interest other club members for the website. Work with the web coordinator
- BULLETIN
 - a) Club Newsletter – work with the editor to write or produce the weekly publication
- PROGRAMS
 - a) Contribute ideas for speakers for weekly meetings.
- MINI RYLA

Participate in organizing this four-day program for young people held in February.

- Major Fundraiser
Serve on one of the sub-committees to plan and implement this major fund raising event that allows the club to fund projects within the community. All members sell tickets and all members also take on another job to make the event a success.

GROUP MENTORING

Bringing several new members into the club at one time offers a unique mentoring opportunity. Group mentoring sessions cover the areas of education that would normally be carried out on a one-to-one basis. There are a variety of options on how to conduct them. The first step is to get as many members of the club as possible involved as mentors.

Hold a half to one-day workshop to help club members better understand and feel ready to help with the mentoring process. This workshop can cover the following:

1. Basic Mentoring
 - a. The difference between a sponsor and a mentor
 - b. The type of contact necessary for one-to-one mentoring
 - c. The commitment expected of a new Rotarian (time/engagement)
 - d. The commitment of the club to the new Rotarian
 - e. The commitment of the club to the Mentor
2. Education Topics
 - a. Roles of the club president and board, club committees and the history of the club
 - b. The Rotary Foundation –how it operates, programs and activities contributions support and Every Rotarian Every Year. Provide information on Ambassadorial scholars, Group Study Exchange, grants and Polio Plus, in addition to specific projects of the club related to these areas.
 - c. The Rotary District and opportunities for Rotarians to contribute their time and leadership skills beyond the club level.

You may want to ask for the help and participation of the help of District leadership when holding a mentoring workshop. Your Governor, District Membership Chair, Assistant Governors and other district chairs are there to help your club succeed.

After you have held the workshop, you have a group of club members ready to participate in the mentoring sessions. Schedule a series of sessions over a six-month period with specific topics for each session.

You may choose a wine and cheese evening, called a Fireside at many clubs, to create a casual and friendly setting for your new club members and one to which they can bring their partners. You may decide on a morning breakfast session to catch the early birds before they head to the office. The time you pick should allow the largest number of new members to attend. You may find you offer more than one option.

Allow time at each of these sessions for new members to ask questions both about the subject covered and any other concern or specific interest they have about Rotary.

These group sessions are an excellent opportunity to:

- a) Conduct an informal satisfaction survey for the new members on their experience so far
- b) Ask the new Rotarians to invite others to join. Most new members are very enthusiastic about sharing their new experience with others. Remember to fully explain the process as they need to know what goes on ‘behind the scenes’.