



## Membership Matters Seminar Resources

November, 2018

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2. Rotary Club Health Check
3. Ten Actions to Improve Your Clubs Culture
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# Membership Matters Seminar

**Seminar Producers:**

**Karen Mazzarella-Russo, District Membership Chair**  
**Dave Haradon, Past District Governor**

## DATES & LOCATIONS

**Wednesday, November 7, 2018**  
The Inn at Swarthmore  
10 S, Chester Road  
Swarthmore, PA 19081

**Tuesday, November 13, 2018**  
West Chester Graduate Center  
1160 McDermott Dr.  
West Chester, PA 19380

**Wednesday, November 14, 2018**  
Holy Family University  
9801 Frankford Ave.  
Philadelphia, PA 19114

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## AGENDA

### **1. WHY MEMBERSHIP MATTERS**

### **2. OUR EXISTING CLUBS**

- Rotary Club Health Check
- Improving a Club's Culture
- Keeping Members thru INVOLVEMENT

### **3. OUR FUTURE CLUBS**

- NEW Innovative Rotary Clubs
- Why Start a NEW Rotary Club
- How to Start a NEW Rotary Club
- Rotary International Resources

### **4. TOP REASONS FOR A CLUB'S MEMBERSHIP GROWTH**

- Actions
- Priority
- Events
- Campaigns

### **5. GET IN ACTION – “Just Ask”, “Just Join”, “Just Make a Difference”**

### **6. MEMBERSHIP MATTERS – 2020 in 2020: Let's Grow TOGETHER!**



# ROTARY CLUB HEALTH CHECK

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.



## YOUR CLUB EXPERIENCE



Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary experience for others, because their enthusiasm is contagious. If your club's members genuinely enjoy being a part of the club, you're on the right path. Your experience includes not just your club meetings and other activities, but also the connections you've made and your pride in Rotary's work.

- ☐ I look forward to attending club meetings.
- ☐ Our club meeting programs are relevant, interesting, and varied.
- ☐ We have a greeter who welcomes members to meetings.
- ☐ Our meetings are organized and run professionally.
- ☐ Members sit at different tables each week to meet and talk to different people.
- ☐ Some of the members of my club are my close friends.
- ☐ Members other than club leaders participate in Rotary events at the district or international level.
- ☐ Most members are aware of Rotary's progress toward polio eradication and feel proud to be a part of it.
- ☐ Our members contribute to The Rotary Foundation.
- ☐ We raise funds in a way that allows members to contribute what they wish.
- ☐ We recognize members of the club or community at least monthly.
- ☐ I have made international connections through Rotary.
- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.

**SEE THE FOLLOWING PAGE  
FOR YOUR PROGNOSIS**





While some members leave for logistical reasons, many leave because of a lack of engagement, an inflexible club culture or other unmet expectations, all of which affect a member's experience. If members are not having a good experience, your club is at risk of losing them. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> <li>+ Change the meeting format or style. For ideas, see <b>Lead Your Club: President</b>, chapter 2, and <b>Be a Vibrant Club's</b> "Ideas to try."</li> <li>+ Find out what your members want using the <b>Member Satisfaction Survey</b> and then give them that experience.</li> <li>+ Develop leadership skills among club leaders and members by holding a <b>leadership skills training</b>.</li> </ul>
Rotary experience beyond the club	<ul style="list-style-type: none"> <li>+ Sponsor an <b>Interact</b> or <b>Rotaract</b> club, <b>organize a RYLA event</b>, <b>create a scholarship</b>, or <b>start an exchange</b>.</li> <li>+ Join a <b>Rotary Fellowship</b> or <b>Rotarian Action Group</b>.</li> <li>+ Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience.</li> <li>+ Promote the work that Rotary does globally, including polio eradication, by showing a short <b>Rotary video</b> or projects on <b>Rotary Showcase</b> during a club meeting.</li> </ul>

## SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons Rotarians join and stay in Rotary. The healthiest clubs vary their activities and offer multiple ways to get involved. Try a new kind of social event or a different service experience and watch the impact it has on your club.

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- ☐ Our club holds regular get-togethers (aside from club meetings) for socializing and networking.
- ☐ Our club encourages members to bring partners, spouses, and family members to club meetings and events.
- ☐ Our club offers members leadership opportunities and professional development.
- ☐ Our club invites Rotaractors, Interactors, and Youth Exchange students to participate in meetings and is active in Interact and Rotaract clubs and mentors their members.
- ☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Youth Exchange student, or sponsors a RYLA participant.
- ☐ We consult community leaders and community members to determine needs before choosing a project.
- ☐ We visit Rotary Ideas, an online project idea starter, before choosing a new project.
- ☐ Our club has a service project in progress.
- ☐ All members can give input on service and social activities.
- ☐ Our club service projects are aligned with Rotary's areas of focus and Avenues of Service.
- ☐ Our club has applied for or used Rotary grant funds for a service project.



Clubs that have inadequate social or service opportunities are at risk of losing members who don't feel connected or empowered. The good news is that these deficiencies can be remedied in fun and rewarding ways. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> <li>+ Sponsor an <b>Interact</b> or <b>Rotaract</b> club, <b>organize a RYLA event</b>, <b>create a scholarship</b>, <b>start an exchange</b>, join a <b>Rotarian Action Group</b>, or <b>support the Rotary Peace Centers</b>.</li> </ul>
Quality of projects	<ul style="list-style-type: none"> <li>+ Use <b>Community Assessment Tools</b>, <b>Guide to Global Grants</b>, and <b>Rotary Ideas</b> to improve the quality of your projects.</li> </ul>
Social activities	<ul style="list-style-type: none"> <li>+ Put one or two members in charge of organizing socials throughout the year.</li> <li>+ Join a <b>Rotary Fellowship</b>.</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>+ Hold a <b>leadership training</b>.</li> </ul>

## MEMBERS



A healthy club is one that is growing and changing. Having members with diverse perspectives and backgrounds will fuel innovation and give your club a broader understanding of your community's needs. Pay attention to how your members are feeling about the club. Research shows that one of the most common reasons members leave is that club leaders are not open to new ideas. Involving members and giving them a voice in their club's future will strengthen both the club and members' commitment to Rotary.

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- ☐ Our club has had a net increase in members in the past year.
- ☐ Our club has had a net increase in female members in the past year.
- ☐ Our club has had a net increase in members under age 40.
- ☐ Our club seeks to recruit members from professions in the community that are underrepresented in the club.
- ☐ Our club keeps in touch with Rotary alumni (former Rotaractors, Youth Exchange students, peace fellows, and participants of other Rotary programs).
- ☐ Our club actively recruits Rotary alumni.
- ☐ Our club actively recruits recently retired professionals.
- ☐ Our club retains at least 90 percent of its members each year.
- ☐ At least 75 percent of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
- ☐ Our club has a process for soliciting feedback from members.
- ☐ A designated person checks and follows up on membership leads assigned to the club.
- ☐ Guests are asked to introduce themselves and are invited back.
- ☐ Member benefits are explained and promoted to new and continuing members.
- ☐ New members are provided with an orientation and opportunities to get involved.
- ☐ Newer and seasoned members are paired for mentoring relationships.
- ☐ We ask members to speak at meetings about their vocations or other topics of interest.





Clubs that have deficiencies in membership are at risk of becoming outdated, dull, and less valuable to their members and community. Fortunately, there are many tools available that are proven to give results. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> <li>+ Take action to diversify your club using <b>Diversifying Your Club: A Member Diversity Assessment</b>.</li> </ul>
Professional diversity	<ul style="list-style-type: none"> <li>+ Make your club a microcosm of your community with <b>Representing Your Community's Professions: A Classification Assessment</b>.</li> </ul>
Stagnant or declining membership	<ul style="list-style-type: none"> <li>+ Create a membership development plan with <b>Strengthening Your Membership</b>.</li> <li>+ <b>Connect to Membership Leads</b> assigned to your club using <b>How to Manage Membership Leads (For Clubs)</b> and <b>resources for prospective members</b>.</li> <li>+ Target prospective members using this <b>exercise</b>.</li> <li>+ Show members how to <b>propose new members</b> to their own club and explain that they can <b>refer</b> qualified prospects to other clubs.</li> </ul>
Members leaving	<ul style="list-style-type: none"> <li>+ Start with the <b>Member Satisfaction Survey</b> to enhance current members' experience.</li> <li>+ Learn and act on trends using the <b>Retention Assessment and Analysis</b>.</li> <li>+ Use the <b>Exit Survey</b> to understand why members resign.</li> <li>+ Let resigning members know they can <b>rejoin or change clubs</b> when they are ready.</li> </ul>
Orientation and Rotary knowledge	<ul style="list-style-type: none"> <li>+ Offer <b>new member orientation, leadership development</b>, and ongoing learning opportunities with Rotary's <b>Learning Center</b>.</li> </ul>

## IMAGE



Clubs that have fun and make an impact are attractive to those who see that. A positive public image improves your club's relationship with your community and prospective members. Make sure your club is getting the credit for the service you provide. Demonstrating that your club meets real needs confirms your value to your community.

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- ☐ We have an online presence, including a public-facing, visually appealing club website, Facebook page, or other social media page that explains what the club does, who its members are, and the benefits of membership.
- ☐ Our club has members dedicated to public image and outreach.
- ☐ Our club appeared in the local media multiple times last year.
- ☐ We promote our club and Rotary through various media in the community.
- ☐ Our club invites members of the media to cover our service work.
- ☐ Our club materials follow Rotary's updated branding guidelines.
- ☐ We use branded materials and templates from Rotary's Brand Center.
- ☐ We use marketing materials provided by Rotary International, such as public service announcements, videos, images, and logos.
- ☐ We display Rotary signs and banners at our meeting place.
- ☐ Our club's presence is known in our community.
- ☐ We have a customized brochure that we give to community members and prospects.
- ☐ We use Rotary Showcase to promote our finished projects.



Clubs that don't have a visible presence in their community are at risk of minimizing their impact or being perceived as irrelevant. Rotary has resources that can help. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> <li>+ Use the resources in Rotary's <b>Media Center</b> and use them in your community's media.</li> <li>+ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's <b>Brand Center</b>.</li> </ul>
Outdated materials	<ul style="list-style-type: none"> <li>+ Find customizable club brochures and membership materials on Rotary's <b>Brand Center</b>.</li> <li>+ Follow the <b>Voice and Visual Identity Guidelines</b> in any materials your club creates.</li> <li>+ Use <b>Rotary Images</b> and <b>Rotary videos</b>, as well as images of your members, in your materials.</li> </ul>
Online presence	<ul style="list-style-type: none"> <li>+ Find a tech-savvy member to create and manage your club website and social media pages.</li> <li>+ Take the social media course in the <b>Learning Center</b>.</li> <li>+ Use <b>Rotary Images</b> and <b>Rotary videos</b>, as well as images and videos of your own members.</li> <li>+ Share your projects on <b>Rotary Showcase</b>.</li> </ul>
Marketing expertise	<ul style="list-style-type: none"> <li>+ Find tips in <b>Lead Your Club: Public Relations Committee</b> and put members with public relations expertise on the committee.</li> <li>+ Recruit professionals with marketing expertise using ideas from <b>Finding New Club Members: A Prospective Member Exercise</b>.</li> <li>+ Build your own social media expertise using the Social Media Toolkit in Rotary's <b>Brand Center</b>.</li> </ul>

## BUSINESS AND OPERATIONS



When your club runs smoothly, you likely have good leaders who are looking toward the club's future. The leaders shape the club as a whole, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development is also a way to fortify your club.

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- ☐ We have a strategic plan for our club that we update regularly.
- ☐ We have annual goals and enter them in Rotary Club Central.
- ☐ Our club has committees that support the activities and regularly report to the club board on progress toward goals.
- ☐ Our club board changes what isn't working well and updates club bylaws accordingly.
- ☐ We have a process for ensuring continuity that includes preparing members for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
- ☐ Our club president attends PETS, and club leaders attend the district training assembly.
- ☐ Members attend district events and seminars on Rotary topics that interest them.
- ☐ New members are officially inducted and are presented with appropriate materials.
- ☐ At least half of our club's members have a My Rotary account.
- ☐ Club officers conduct Rotary business using My Rotary or integrated club software.
- ☐ Our club sets and approves a budget for the upcoming Rotary year, designates a treasurer, and keeps separate bank accounts for administration and fundraising or project funds.
- ☐ Our club sets and achieves fundraising goals using a variety of fundraising activities.
- ☐ We ask our members to complete a member satisfaction survey each year.
- ☐ We offer ongoing learning opportunities for our members.



Clubs that don't have skilled members in leadership roles or that neglect member needs are at risk of becoming ineffective and obsolete, and losing their members as a result. There are plenty of remedies for clubs that want to thrive. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	<ul style="list-style-type: none"> <li>+ Create a vision for your club and set long-range and annual goals using the <b>Strategic Planning Guide</b>.</li> <li>+ Track your annual goals in <b>Rotary Club Central</b>.</li> <li>+ Use <b>Strengthening Your Membership</b> to make a membership development plan.</li> </ul>
Innovation	<ul style="list-style-type: none"> <li>+ Ask members for input using the <b>Member Satisfaction Survey</b>, and try their ideas. If they're successful, edit your club bylaws accordingly.</li> <li>+ Use templates in the <b>Brand Center</b> to create your own materials.</li> </ul>
Processes	<ul style="list-style-type: none"> <li>+ Develop standard processes for <b>new members, prospective member follow-up, proposing a new member</b>, leadership continuity, etc.</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>+ Find tips and resources in Lead Your Club: <b>President, Secretary, and Treasurer</b>.</li> <li>+ Offer leadership development opportunities and promote self-paced learning with Rotary's <b>Learning Center</b>.</li> </ul>
Managing funds	<ul style="list-style-type: none"> <li>+ Use <b>The Rotary Foundation Reference Guide</b> to learn about giving options.</li> <li>+ Find best practices in <b>Lead Your Club: Treasurer</b>.</li> </ul>
Managing your club on MyRotary	<ul style="list-style-type: none"> <li>+ Use the <b>Club Administration</b> section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads.</li> </ul>

## WHAT'S NEXT?



Using the Rotary Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most check marks and which had the fewest. Look at the suggested remedies and take action. When you visit your doctor, you may get advice about maintaining your good health or possibly a prescription or two to combat an ailment. If you don't follow the advice or take the prescriptions, you aren't making the most of your visit. Similarly, to make the most of your club health check, use the suggested resources to treat your problem areas. Paul Harris said, "May our happiness increase with our usefulness." As our communities and their needs change over time, Rotary clubs must adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

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### FEATURED RESOURCES

#### Membership Assessment Tools

#### Membership resources

#### Brand Center

#### Learning Center

#### Rotary videos



# TEN ACTIONS to Improve Your Club's Culture

Evolution is inevitable. It might be time to revisit how your Club operates. But don't discredit what your Club is doing well. Show off what you're proudest of so you can attract others who will help you do more of it. If you aren't satisfied with the way it is now, or if you worry what it will be like if it continues its current course, you can change its direction.

## 1. Remake traditions:

Some traditions, like singing songs, ringing a bell, or reciting the Four-Way Test to start a meeting may be confusing and unwelcoming to guests. Try playing music in the background as members and guests arrive and socialize.

## 2. Update Your Lingo:

Consider changing how you talk about Rotary. You're more than just a Rotary "Club". Show prospective members you are more than meetings – share with them about your social events, service projects, networking and leadership development opportunities... and the FUN you have in Rotary.

## 3. Embrace Social Media:

It's where younger generations live and where they check in every day, even every hour. Create and maintain a social media presence for your Club that demonstrates to prospective members what you're doing and how they can get involved.

## 4. Reduce the Cost of Membership:

The expense of Rotary membership can be challenging. Be transparent about the breakdown of dues to the Club, the District, and Rotary International.... PLUS other costs such as meals. Lower your expenses by rethinking your venue, meal or other activities. Instead of an expensive meal, offer a la carte options or meet at a local pub.

## 5. Provide Flexible Attendance:

People are busy. Instead of requiring members to attend make-ups, encourage them to attend an online meeting or count their participation in a service activity. Take advantage of flexible meeting policies so members can participate even when their calendars are full.

## 6. Make It Personal:

Acknowledge and celebrate family and personal events like weddings, children, and professional milestones or personal achievements. Make your Club is family-friendly; consider offering child care or welcoming families to your Club events.

## 7. Assign Mentors:

Connect younger professionals with Club members that match their interests, skills, or professional background. Mentors also benefit by staying engaged, honing their leadership skills, and building meaningful connections with other members.

## 8. Meet and Don't Repeat:

Clubs have the flexibility to meet how and when they want so it's not the same ole get-together week after week. Make it a unique experience, something exciting that can't be missed. Change up your meeting location, pique members' interest about a new, exciting topic, and people will pay attention.

**9. Go Mobile:** Younger professionals communicate by text message instead of via a phone call or email. After you've connected, stay in touch by text. Everyone texts these days. You need to also.

## 10. More Than Brochures.

Brochures and print materials are only part of your promotional plan. Digital communications are inexpensive, fast, and reach a wide audience





# INCREASE YOUR MEMBERSHIP THROUGH AN OPEN HOUSE

Zoë van der Meulen, governor of District 7170 (New York, USA) is building on a tradition established by district leaders before her: She's encouraging clubs to invite community members to receptions, or "open houses," to learn more about Rotary's work.

A member of the Rotary Club of Unadilla, New York, USA, van der Meulen says her small club has brought in 10 new members, thanks in part to open houses.

"At each open house there's someone who says, 'I've always been interested in Rotary' or 'I was a Rotary Youth Exchange student, but I never knew how to get involved,'" says van der Meulen. "So many people think very highly of Rotary but need this extra nudge to join."

Although the concept of an open house, also sometimes called a mixer, is not new to Rotary, a growing number of districts are urging clubs

to organize these events as an effective grassroots effort to promote Rotary. Van der Meulen has created an invitation template and tips (see graphic) that she shares during training sessions and club visits.

Programming for open houses varies from planning formal events to inviting guests to a regular club meeting to after-work gatherings. Wherever the events are held, van der Meulen says it is important that members talk to visitors about what Rotary means to them personally.

"At every [event], Rotarians have spoken from the heart about why they joined and what it means to them to be a Rotarian," she says. "The stories and sentiment help compel others to serve through Rotary."

**Download Creating a Positive Experience for Prospective Members** for more ideas.

## 10 TIPS FOR A SUCCESSFUL OPEN HOUSE

1

**Plan** with other clubs in your area so that prospective members have a variety of options for meeting times, formats, etc.

3

**Send invitations** a month before the event, and make follow-up calls two weeks beforehand.

4

**Update club brochures and communications** with content from the **Brand Center** at least three weeks before the event, and hand out the printed materials at the event.

5

A week beforehand, **assign specific event tasks** to club members. Put someone in charge of organizing the flow of guests as they arrive so that the event lasts no longer than 90 minutes.

6

**Create a relaxed atmosphere** so people can mingle informally, and remind members to share their personal Rotary stories.

9

**Share information** about your club's format and the club's expectation for membership.

8

**Discuss Rotary's global causes** using the **Discover Rotary presentation**, to which you can add your club's own projects, both local and international.

10

**Follow up** by inviting to a future club meeting anyone who has expressed interest. Be persistent but patient.



# FINDING NEW CLUB MEMBERS



Clubs around the world approach member recruitment in very different ways. Customize this exercise to make it appropriate in your region.

Asking your fellow members about people they know in the community who would be assets to the club is an important step in membership growth. Prospective members are likely to rely on the experiences and opinions of their friends, family, or colleagues when considering joining an organization like Rotary.

Encourage others to invite prospective members to club meetings, service projects, and events so they can see how your club helps the community and provides opportunities to form connections and friendships. It may take a few conversations or several visits for prospective members to get a full understanding of Rotary and how they could benefit from membership. It's important to allow that time to make sure that it's a good fit for everyone involved.



Two out of every three prospective members who are referred by a Rotarian join Rotary. If a prospect can't join your club but is interested in Rotary, help Rotary grow by **referring him or her** to another club.

## OUTCOME

Identifying prospective members and actively recruiting them will help your club:

- Develop a pool of potential candidates for membership
- Determine how to introduce prospective members to your club
- Get new members who are well vetted and more likely to stay

## GETTING ORGANIZED

Set aside time for members to complete the worksheet on page 3.3 at one of your club meetings. Typically, this exercise works best at the beginning of a Rotary year, when annual membership goals have just been set, or in March, when the incoming president is planning for the next Rotary year.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.



Prospective members can also find their way to your club by inquiring about membership on [Rotary.org](https://www.rotary.org). To see a list of potential members in your area who have been reviewed by your district and assigned to your club for consideration, sign in to My Rotary and head over to the **Club Administration** page.

## GETTING STARTED

Ready to start? Here's how.

### Step 1: Ask members to complete the Identifying Prospective Members Worksheet

Explain the purpose of this exercise and how it relates to the assessments your club has already completed. Distribute the worksheet to club members and ask them to complete it. Compile the information from the worksheets and maintain a master list of prospects.

### Step 2: Make an action plan

Compile the names that were circled on the worksheets and make a plan to invite those people to a club meeting, service project, or social event. If you conducted classification and diversity assessments, refer to the list of groups you found to be underrepresented in your club. Your plan should specify who you'll invite, to what, who will invite them, and how they'll do so.

### Step 3: Invite prospective members to a club event

Invite the people you identified as qualified prospective members to attend an upcoming service project or meeting. Or host a special event where they can meet club members and learn about the club in a casual atmosphere. Make them feel welcome by having the club president or another leader greet them personally.

### Step 4: Follow through

- Ask members who invited prospective members to contact their guests and report back on their interest in joining.
- Keep the worksheets and your compiled list for future recruiting efforts.
- Regularly go to My Rotary's Club Administration area to track membership leads gathered through Rotary's website.
- If you find people who are interested in Rotary and qualified for membership but not a good fit for your club, [refer them](#) to another club.

### Interested in doing other assessments?

[Representing Your Community's Professions: A Classification Assessment](#)

[Diversifying Your Club: A Member Diversity Assessment](#)

[Improving Your Member Retention: Retention Assessment and Analysis](#)

[Enhancing the Club Experience: Member Satisfaction Survey](#)

[Understanding Why Members Leave: Exit Survey](#)



# IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

Think of your contacts, acquaintances, friends, and family members who might qualify for membership in your club. It's not necessary to know whether they are ready to join Rotary.

Once you've listed your contacts, circle the names of any you feel would be a good fit for your club.

Member name: \_\_\_\_\_ Date: \_\_\_\_\_

## Professional Contacts

Consider your supervisor, current and former colleagues, acquaintances from professional associations, and people you have done business with recently.

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

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

## Service Contacts

Consider neighbors, community leaders, and acquaintances who have volunteered with you on Rotary or non-Rotary events or service projects.

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

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

## Community Contacts

- Physicians
- Dentists
- Real estate agents
- Financial managers or planners
- Religious leaders
- Lawyers
- Business consultants
- Accountants
- Veterinarians
- Internet technology consultants
- Public relations professionals
- Entrepreneurs
- Nonprofit professionals
- School administrators
- University professors
- Civic leaders
- Social workers
- Psychologists
- Sales executives

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

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

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

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

## Rotary Contacts

Consider past members or Rotary alumni that you know or that your club maintains contact with. Rotary alumni are those who have experienced Rotary through various programs, including:

- Interact
- Rotaract
- Rotary Youth Exchange
- New Generations Service Exchange
- Rotary Youth Leadership Awards (RYLA)
- Rotary Peace Fellowships
- Rotary Scholarships
- Vocational training teams
- Ambassadorial Scholarships
- Grants for University Teachers
- Group Study Exchange
- Rotary Volunteers

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

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



# CLUB MEMBERSHIP COMMITTEE CHECKLIST

The role of the club membership committee is to write and follow an action plan to attract and engage members. An effective committee should be composed of five to 15 motivated members to guide the implementation of your membership plan. The committee's composition should allow for continuity from one year to the next and should represent the full diversity of your club's membership and your community.

## 1. Identify:

- ☐ Complete the [member diversity](#) and [classification assessments](#), found in [Membership Assessment Tools](#), yearly. Identify individuals in the community who fill gaps in the club's membership or exhibit interest in Rotary's ideals.
- ☐ Ask all members to complete the [Identifying Prospective Members Worksheet](#) at least yearly.
- ☐ Regularly go to the [Club Administration](#) area of My Rotary to manage the member leads assigned to your club.
- ☐ Meet at least monthly to review prospective members and their status in the membership process.
- ☐ Ask current members who are assigned to each prospective member to move them to the next step of the membership process.

## 2. Introduce:

- ☐ Select the most appropriate club members to engage prospective members. Keeping each prospective member's particular interests in mind, explain how your club can help them pursue their passions.
- ☐ Periodically hold events for prospective members to introduce them to Rotary, your club, and our core values.
- ☐ Invite the people you identified as prospective members to attend a service project or meeting.
- ☐ Tell qualified prospective members about your club, what to expect at meetings, and the networking, social, and service opportunities your club offers.

## 3. Invite:

- ☐ Designate the appropriate club member to invite each prospective member to join.
- ☐ Hold a meaningful ceremony to induct new members. Include their families and involve the entire club.
- ☐ Give new members a [welcome kit](#) that includes club and Rotary resources that they will find useful.
- ☐ Celebrate the addition of new members to your club. Announce it on your club's website, social media pages, and newsletter.

## 4. Engage:

- ☐ Welcome new members both through an [orientation program](#) and by involving them in the club.
- ☐ Assign a mentor to each new member to share professional expertise, community knowledge, and Rotary information.
- ☐ Engage each club member in a service project or club committee.
- ☐ Check in with all current members using the [Member Satisfaction Survey](#) at least yearly.

# Rotary Membership Development Action Plan

# 30-Day Plan

Goals	Actions	Resources	Responsible
,			

# 60-Day Plan

[illegible]

# 90-Day Plan

[illegible]



# INTRODUCING NEW MEMBERS TO ROTARY

AN ORIENTATION GUIDE





“Our club has veered away from the traditional, formal Rotary orientation where we give the full history of Rotary including the history of our 78-year-old club. We make the ... members comfortable in an ambience of club fellowship and camaraderie. Information about our club is passed on as part of an informal conversation. ... We also engage his/her family members into the conversation. We make them feel that Rotary is all about family. So far, it works.”

— Evangeline Maranan,  
Rotary Club of Baguio,  
Benguet, Philippines

When new people join your club, you have an opportunity to connect with them and inspire them to be active members.

Research shows that clubs that have a new member orientation program also have higher member retention rates. A new member orientation program is a plan for engaging new members and acclimating them to your club. This guide can help you develop your own orientation plan or improve the one you have.



## DEVELOP A NEW MEMBER ORIENTATION PROGRAM

There is no formula for an effective Rotary orientation — clubs all over the world are finding creative ways to introduce new members to Rotary. The orientation programs that are successful are those that offer a meaningful learning experience, personal connections, inspiration, and fun.

In comparison to how we teach prospective members about Rotary, new member orientation is more in-depth but also slower-paced, so as not to overwhelm new members with too much information. Some clubs hold informational sessions and others have fun “start classes” in a less formal setting. The size of your club may inform the format you choose. Regardless of the setup, pacing the orientation allows new members to form relationships and get involved in ways that best fit their interests and needs.

**Check with your district membership attraction and engagement chair to see if your district offers a districtwide new member orientation, and encourage new members to attend.**



## WHAT TO COVER

Before joining, your newest members learned a little about Rotary and your club as prospective members. Build on their understanding, and answer any questions they may have. The table below offers ideas to get you started.

### ROTARY

- + For context and depth, start by explaining:
  - That your club is part of an international organization of people who share a passion for service
  - Rotary's mission and values
  - Rotary's legacy in the effort to eradicate polio worldwide
  - How Rotary started and grew
- + Find historical information and more on the **About Rotary page** or take courses such as Rotary's Strategic Plan, Areas of Focus, and Rotary Foundation Basics on the **Learning Center**.

### BENEFITS OF MEMBERSHIP

- + Explain the benefits of membership, including opportunities to:
  - Make a difference in the lives of others
  - Develop skills that can easily be applied to a career, like public speaking, project management, and event planning
  - Network with other professionals
  - Build lifelong friendships
  - Make international connections
- + Let new members know they can also receive discounts on a variety of services all over the world through the **Rotary Global Rewards** program and post offers from their own companies.
- + Find more information on **video.rotary.org** or the **Member Center**.

### YOUR CLUB

- + Give new members a clearer idea of what to expect as a member of your club, including:
  - Your club's culture and different kinds of meetings
  - What your club does best and what it's known for
  - Your club's history
  - Projects and activities your club is involved in
  - Social events
- + Point new members to other information about your club, including its website, social media pages, and any other materials your club has.

**Note:** Communicate financial requirements and participation expectations to prospective members before they join.

How you decide to offer orientation to new members will reflect your club culture. Some clubs have fun activities new members have to complete in order to earn a badge, "passport," or other type of recognition, and the program ends with a celebration. See the page 6 for a list of ways new members can get involved and learn more about Rotary. Whatever you do, make sure new members feel welcome and have an opportunity to engage with your club right away.

Your club may already have a new member orientation program. If so, just use this guide to get ideas to enhance it. Regularly evaluate your program by asking new members for feedback, and then use it to improve your program for future new members.



“Mentoring is, in my opinion, the most important part of the orientation process. However, mentors cannot just be appointed and left on their own. They must be trained! Their duties and expectations must be clear and a list of expected activities or actions with the new member must be clear. ... Effective mentors will virtually guarantee long-term retention and active involvement of the new member. Poor mentorship will almost certainly assure short-term retention. Mentoring is too valuable to leave it to happenstance.”

— Joseph Hentges,  
Rotary Club of Marana  
Dove Mountain,  
Arizona, USA



## ASSIGN A MENTOR

Clubs around the world have found it's useful to assign new members a mentor. The mentor should be someone who has something in common with the new member, has a welcoming personality, is committed to the club's growth, and is knowledgeable about Rotary. Be sure that the mentor you assign has the time to devote to helping the new member become integrated into your club. While some mentoring relationships continue for some time, the first six months are the most important.

### ASK MENTORS TO:

- Let the new members know how to contact them
- Check with them regularly to make sure they're comfortable
- Introduce them to other club members
- Encourage them to invite someone they know to a meeting
- Show them Rotary's tools on My Rotary, including **Club Finder** and the **Learning Center**, and any app your club uses
- Talk to them about open roles they could fill
- Invite them and their family members to attend the district conference
- Accompany them to events

You can offer mentor training to members to improve their mentoring skills with this **leadership skills training** guide.



“[Once] new members are inducted, we give them the following:

- A mentor to help guide the new Rotarian and answer questions.
- A temporary name tag. When they have completed a “passport” checklist, we present them with a permanent badge and a Rotary club jacket at a club meeting.
- A printed club history as well as a glossary of Rotary terms and acronyms to help explain the “language” of Rotary.
- An invitation to a “fireside chat.” Twice a year, we hold these for new members and their spouses. They are held at a Rotarian's home and are attended by several Rotarians of various ages. This provides a relaxed social setting. The objective is to give new members a chance to interact and ask questions that club meetings don't provide.”

— Brian Wilson, Rotary Club of Peterborough, Ontario, Canada



"We've grown our club from 78 to 112 by focusing on our orientations. We have a social at the chair's home [where we cover] the history and Rotary basics with everyone present reporting. ... Prior to the meeting we orient again for 1 hour with even more members speaking about their roles. In all, our new members meet 15-20 members. We ask new members when initiated that day to give us a membership moment about themselves and they will have practiced it two times during the orientations! People really get Rotary with this process."

— Cindi Hewitt, Rotary Club of Summit (Greensboro), North Carolina, USA



## INVOLVE AND CONNECT MEMBERS

Prospective members join Rotary to make a difference, and they stay because of the friendships they've made. No matter how much impact your club has in the community, if new members don't make a connection with others in the club, they are unlikely to stay. Here are some ways to create a welcoming environment:

- Keep presentations brief and avoid Rotary acronyms in and outside of meetings
- Let new members know how they can involve their families

Find ways to get to know new members better and help them get to know other members. For example, some clubs give their new members access to a member directory (printed or online) with pictures and a short bio for each member. Others ask new and seasoned members to take turns each month, giving brief talks about themselves, their professions, and backgrounds.

### Share your ideas on our **Membership Best Practices discussion group**.

Involving experienced members as mentors, trainers, celebration planners, or event speakers allows them to share insight and enthusiasm that can inspire new members. This is also a way to engage experienced members who are otherwise disengaged. Offering their experiences and advice can be enjoyable and rewarding. Many clubs find fun ways for members to get acquainted through games or interactive activities.



**"New members should be treated like new employees at a company. The [early] months [are] critical for both [the club and the new member,] as that is when a new member will feel the most engaged and excited about their decision to join the club. So engaging them to keep that feeling high will enhance the experience for that new member, as well as the club. Like a new employee in a company, there should be an effort to make them feel welcome, training, socials to make new friends, etc. Too many times I have seen new members become disengaged early because they are left to themselves to figure it out."**

— Gina McBryan, Rotary Club of Grand Cayman, Cayman Islands



“All new members are given a checklist to complete before we give them their membership badge. This includes items such as ... attending a board meeting and getting involved in one of our projects. This helps to engage new members immediately in the club before they become complacent and view Rotary as a weekly lunch obligation.”

— Chase Moses, Rotary Club of Lake City, Florida, USA

## HOW CAN WE ENGAGE NEW MEMBERS?

Encourage new members to get involved in some of the following ways:

- Read the Rotary Foundation Reference Guide and Connect for Good
- Introduce yourself to two new people each week
- Meet with a mentor
- Attend new member information sessions
- Attend a club board meeting
- Attend a district meeting (for example, the district conference)
- Create a My Rotary account
- Participate in a service project
- Join a committee
- Present at a club meeting
- Take an online course on the Learning Center ([learn.rotary.org](https://learn.rotary.org))
- Find information about the club (website, etc.)
- Invite a friend to a meeting
- Explore club website and [Rotary.org](https://www.rotary.org)
- Have some fun!



**“Our club offers a weekly “Rotarian in the Spotlight” with a twist. We play “Three Truths and a Lie” with a member each week in an effort to get to know members better. We have found in a club our size people like to “be known,” and we rotate interviewing board members, 20+ year members, and brand new members. This seems to work better than simply having someone stand up and share a few words about who they are and what they do — and it always leads to laughs!”**

— Mandi Stanley, Rotary club of Madison-Ridgeland, Mississippi, USA



“In addition to Rotary new member information, our club has what we call a fireside chat. That is when a senior member of the club sits one-on-one with a new member and discusses some of the history of Rotary. There are also videos available on Rotary’s website that the whole club can view. It is always good to share these with all members. Additionally, it is always good to get new members involved. Get them on a committee, a fundraiser, or whatever seems a good fit.”

— Grant Bayer, Rotary Club  
of Gloucester Township-  
Pine Hill, New Jersey, USA



## USE ROTARY RESOURCES

Rotary has resources to supplement your training. You can find all kinds of information about Rotary on the **About Rotary page**. Show new members videos about Rotary, and why members joined, on **video.rotary.org**. Have new members register for My Rotary and take a course or two at Rotary’s **Learning Center**, such as Rotary Foundation Basics, Strengthen Rotary, and Rotary’s Areas of Focus.

Order the **New Member Welcome Kit** for new members from **shop.rotary.org**.

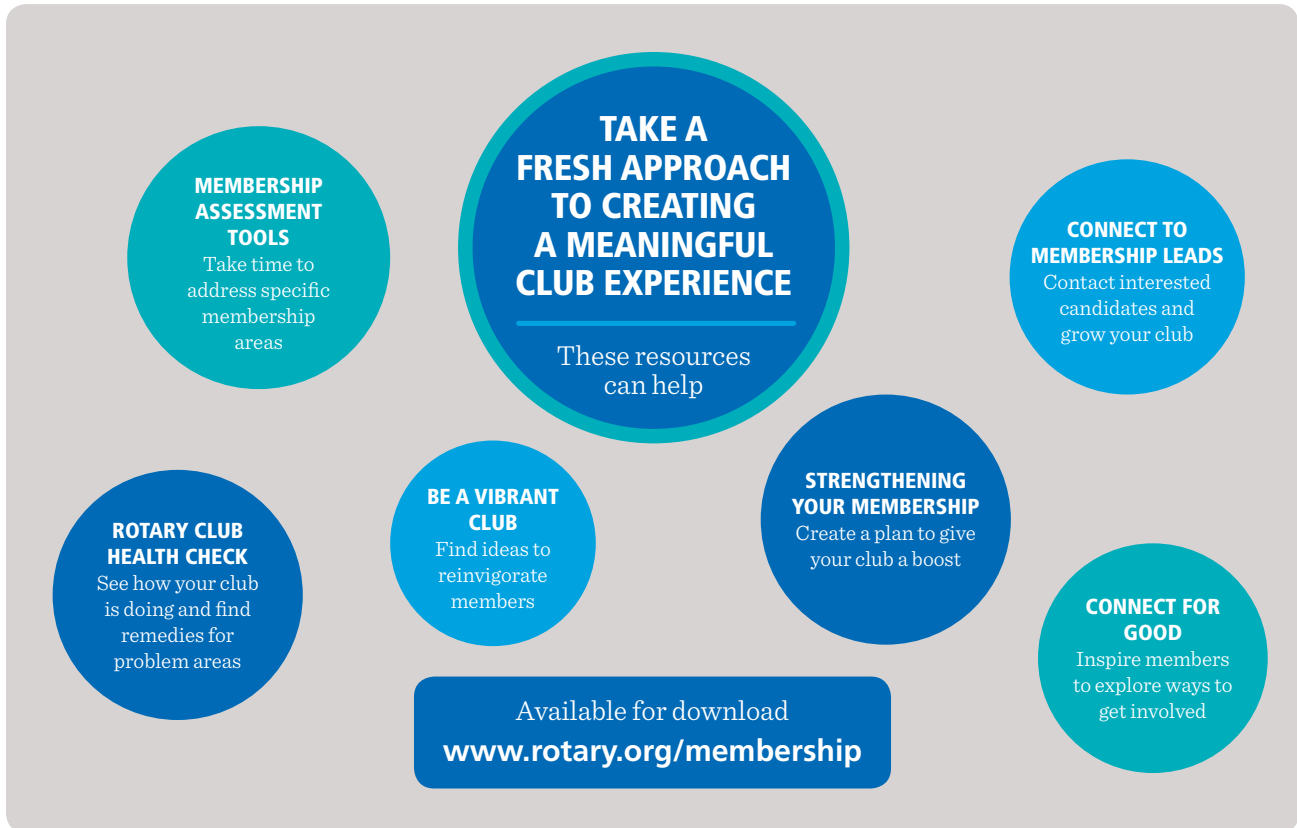
Your members’ needs will change over time, and engaging with them at all stages of their membership, not just when they’re new, is key to keeping them happy and active in the club. To understand how to engage current members, see **Improving Your Member Retention** and **Connect for Good**.

To learn how to follow up with and engage prospective members, see **Creating a Positive Experience for Prospective Members**.



“Rotary completely changed me as a person ... now I have a more mature ... responsible role to play as a global citizen. ... That’s the hidden power of Rotary ... exemplifying how Rotary can make a 360-degree impact on a new Rotarian ... needs to be incorporated [into new member training].”

— R. Murali Krishna, Rotary Club of Berhampur, Orissa, India



One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
[www.rotary.org](http://www.rotary.org)



# STARTING A ROTARY CLUB



**JOIN LEADERS:** [Rotary.org](https://Rotary.org)

808-EN—(317)

# NINE STEPS TO STARTING A ROTARY CLUB

## ① Identify a Locality for the New Club

- Look for opportunities to start new Rotary clubs
- Research the characteristics of area clubs (general meeting times, professions and other groups that aren't participating, etc.)
- Contact the district governor and other leaders to get approval to start a club in intended area

## ② Get Organized

- Find supporters, including a sponsor club
- Contact **Club and District Support (CDS) staff**

## ③ Make a Communication Plan

- Tailor your message to your audience
- Identify communication channels
- Contact prospective Rotarians you know about
- Consult local leaders to identify other prospective members

## ④ Hold Informational Meetings

- Plan your agenda and prepare your materials
- Invite prospective members
- Market informational meetings through traditional and social media
- Collect contact information from attendees who are interested in being part of the new club

## ⑤ Recruit Charter Members

- Sign up regular attendees to your informational meetings as charter members
- Continue to invite prospective members
- Consider your online membership leads

## ⑥ Hold Organizational Meetings

- Consider ways to collaborate with another club
- Reach a total of at least 20 regular attendees
- Choose club officers
- Select a club name and meeting location
- Decide how and where you'll meet

## ⑦ Submit the New Club Application

- Ask your district governor to sign the **new club application form** and send it to **Club and District Support staff**

## ⑧ Celebrate the Charter and Publicize the Club

- Celebrate with your community and with current and prospective Rotarians in a way that fits the culture of the new club

## ⑨ Continue Developing the New Club

- Continue to bring in new members
- Support members and officers as they learn about Rotary
- Provide advice and support on governance, projects, and administrative matters



# WHY START A ROTARY CLUB?

If you haven't been a member of a Rotary club, or haven't seen one in action in your community, you have a unique opportunity before you. By founding a new Rotary club, you can:

- Engage with your community differently
- Make an impact in the lives of others
- Connect with leaders in your area and around the world
- Set out with others to build something together for yourselves and the community, shaping the club from the start — forming its culture, establishing its unique traditions, setting its service priorities, and making it your own

If you're already a member of a Rotary club, you know that new clubs are needed to increase our membership. They also bring other benefits to you, the community, and Rotary. Starting a club is an ideal way to:

- Increase the diversity of the clubs in your area
- Explore different forms of club organization and club life in your district
- Pursue new project possibilities in your district
- Meet more leaders in the area and hear their fresh ideas

This guide describes the process of establishing a new club, from the initial idea to the charter celebration and beyond. You can use it to start a Rotary club whether you're a nonmember interested in bringing Rotary to your community, a Rotarian who wants to start a new club, or a district leader who wishes to increase district membership.

Rotary will need to grow and evolve in order to continue to meet community needs. When you charter a new club, you increase Rotary's capacity to improve lives in communities around the world. Thank you for helping to make this happen.

"[By] starting a new club, ... people can bring Rotary into their lives the way it works for them."

— Past RI President Ron D. Burton

"Try chartering some new clubs with energetic fresh thinkers and set an example of what is possible."

— Past RI President Kalyan Banerjee

# WHAT YOU'LL NEED TO START

Starting a new club brings community leaders and experts together to exchange ideas and take action to meet community needs. District governors often appoint a new club adviser and collaborate with Rotary International's [Club and District Support staff](#) during the process. If you don't know who is the district governor for your area, contact Club and District Support.

## A NEW ROTARY CLUB WILL NEED:

### A new club adviser

Typically, the district governor appoints a new club adviser or works with the district's new club development committee.

*What makes the difference?* Commitment and experience. The new club adviser champions the effort from start to finish, and the adviser's involvement after the club gets its charter is critical to its success in its first years.

### A sponsor club

Having a sponsor is strongly recommended but isn't required.

*What makes the difference?* The support of a designated sponsor club can increase the success rate of new clubs by as much as 10 percent.

### Charter members

The minimum number of charter members is 20. However, it's best to start a club with at least 25 members.

*What makes the difference?* More charter members. Our records indicate that the more members a club starts with, the more likely it is to succeed. Increasing the number of charter members by just five significantly reduces the risk that a club will be terminated.



If you don't have enough members to start a Rotary club, you can start a satellite club instead, with the goal of chartering a Rotary club once you have at least 20 members. Find the [Satellite Club Application](#) on [Rotary.org](#).

# STARTING A ROTARY CLUB

Rotary clubs are formed in numerous ways. The following steps make up the basic process used to charter a sustainable, successful new club. Adapt them as needed so that they're relevant and appropriate for your community and your culture.

## 1 IDENTIFY A LOCALITY FOR THE NEW CLUB

Make a list of communities in your district that could benefit from having a new club. Include communities that have no Rotary clubs and those that have needs that additional vibrant clubs could address.

Start by looking at a map of your district. Mark the locations of all the clubs in the district, and see what patterns emerge. If the map already has many clubs, check their meeting times and look for opportunities to add clubs that meet at different times. Use Rotary's [Club Finder](#) or the [Rotary Club Locator mobile app](#).

In general, look for:

- Communities with recognized needs
- A population of at least 1,000-3,000 (This number may vary by region.)
- Groups of people and professions that currently aren't being recruited
- Rotary alumni (former Rotaract and RYLA participants, vocational training team members, Rotary Scholars, etc.)
- Young adults, women, members of ethnic minorities, and other underrepresented groups



*Locality* refers to the geographical area a club is in, and the club *location* is where it meets.



## 2 GET ORGANIZED

Once you choose an area for the new Rotary club, you'll need to identify the key people, including a new club adviser, who will be involved and bring them together to learn about their roles and responsibilities. Let the district governor know you would like to start a club in this area, and get their support.

### Identify supporters

Starting a club is a large endeavor and should be undertaken by several dedicated people. The main players are:

- The district governor — Appoints the new club adviser and approves the new club application
- The district new club development committee chair — Identifies opportunities to start new clubs in the district, plans and implements the district's new club strategy, guides clubs during their first two years, trains new club officers, and motivates new clubs and supports their growth and development
- The new club adviser — Guides and oversees the creation of one specific new club; frequently is a member of the sponsor club; is instrumental in creating the communication plan; initiates informational meetings
- The sponsor Rotary club — Works closely with the new club's officers and mentors the club during its first year



If you find that starting a Rotary club isn't going to be feasible, consider an alternative, such as a [satellite club](#), a [Rotaract](#) or [Interact](#) club, or a [Rotary Community Corps](#). All of these are considered to be part of the family of Rotary. Depending on the ages and other characteristics of the people who are interested, another type of club may be a more appropriate option.

A great resource for anyone establishing a Rotary club is the office that supports your district. Rotary's [Club and District Support staff](#) are trusted advisers who can help, from initial planning to implementation of your plan. They'll check the proposed name of the new club, advise you on each step of the process, review the new club application, and recommend approval to Rotary's Board of Directors.

You may also want to take the New Club Formation course at [learn.rotary.org](https://learn.rotary.org).

## 3 MAKE A COMMUNICATION PLAN

How will you let prospective members know about the club? This is the first step in finding members.

First, create a clear, simple message that communicates what you're offering and how prospective members would benefit.



Find flier templates and other [promotional resources](#) in Rotary's Brand Center.

Create a Rotary-branded flier that includes the following information:

- What's happening? A Rotary club is forming in our community
- Who can join? Professionals in the community
- What will they do? Put their unique expertise and perspectives to use to solve community problems
- Why should I join? To make a difference in your community and meet other professionals in the area
- And if I'm interested? Come to our informational meeting [add details]

Next, find ways to get the message out. Here are six ideas:

- Post an announcement on social media
- Have your flier printed in local newspapers, trade association publications, and professional directories
- Ask local radio stations to make an announcement
- Email local business leaders and promote the club as a leadership development opportunity for employees
- Talk to professional and community leaders and ask them to spread the word among your target audiences (i.e., community groups, trade associations, and other professional groups)
- Leave fliers in waiting rooms and office lobbies and post them around your community

Identifying the needs of the community may help you target local organizations and experts that may be able to address them. If you aren't sure what the community's needs are, talk with knowledgeable leaders there.

Once you get the word out, you'll need to plan your informational meeting, where you'll elaborate on the vision you have for the club, meeting details, and how attendees can benefit from joining.

## 4 HOLD INFORMATIONAL MEETINGS

Informational meetings are where prospective members meet for the first time to find out more about Rotary and the new club. Many people who have said they're interested in joining won't attend the meeting. Don't be discouraged.

Here are some tips on preparing for your meeting:

- Have a sign-up sheet to collect prospective member names and contact information
- Decide who will be responsible for setting up the meeting, leading it, and distributing materials
- Start by inviting people (ask club members to invite prospective members in person or using tools like social media, phone calls, emails, and ads)
- Order materials to distribute at the meeting, such as:
  - **Impact Begins With You** (prospective member brochure)
  - **Connect for Good** — Inspires members to get involved
- Consider showing the **Discover Rotary PowerPoint presentation** to highlight the organization's values and the benefits it offers members, and supplementing your presentation with **Rotary videos** or other materials as appropriate
- Make an agenda

For more details about how to conduct an informational meeting, see **Informational Meetings**.



## 5 RECRUIT CHARTER MEMBERS

You need 20 members to start a club. You may have enough after your informational meeting, but if you need more members, you'll have to continue to recruit them.

The criteria for being a Rotarian are simple: Be an adult who demonstrates good character, integrity, and leadership; have a good reputation within your business or profession and community; and be willing to serve in the community or around the world. How will you find prospective members who fit this description? Business, professional, and community leaders can be good prospects.

Diversity of membership is critical. It will help make the club sustainable for the long term, because including members with diverse perspectives and backgrounds keeps the club relevant to the community.

If you need help finding prospective members:

- Hold additional informational meetings.
- Check your [online membership leads](#). (Club and district leaders have access to these, which have information from people who have expressed interest in joining a club through Rotary.org.)
- Ask established clubs for suggestions.
- Try the exercise in [Finding New Club Members](#).
- Revisit your outreach efforts from step 3.
- Contact your district's Rotary alumni.
- Visit local businesses and offices to talk to business owners or managers about their interest in joining. Ask if you may speak with their employees about joining.
- Find out who has helped with community projects or played a role in organizing social or cultural events.
- Consider professionals from different fields and industries to increase the club's capacity to serve its community.

Strive to ensure that the new club's members offer diverse skills, talents, and experiences and include people of different ethnicities, ages, and cultures, as well as a good gender balance.



There is only one Rotarian that was never asked to join Rotary, our founder Paul Harris. The No. 1 reason people do not join Rotary clubs is that they are never asked.

## 6 HOLD ORGANIZATIONAL MEETINGS

Hold an organizational meeting when you have 8-10 people interested in joining the new club. The preparation for this meeting is the same as the informational meeting, including finding someone to run the meeting and making an agenda, handouts, and a sign-up sheet. The purpose of this meeting is to elect club officers, reach agreement on a regular meeting time, and plan for the club's first project. The organizational meeting can also be a good time to decide where the club will meet.

For information on how to select the best possible meeting location for the new club, consult [Club Meetings](#). For more on how to conduct an organizational meeting, see [Organizational Meetings](#) and Rotary's [promotional resources](#).

Continue recruiting charter members and holding meetings until you have 20 committed members and all of the information you need for the New Rotary Club Application.

## 7 SUBMIT THE NEW CLUB APPLICATION

Complete the New Rotary Club Application and give it to the governor of the district. The district governor then verifies that the application is correct and complete by signing it and forwarding it to the district's [Club and District Support staff](#).

The [new club application form](#) is online at Rotary.org and at the end of this guide.

Be sure to keep a copy of the application in the club's files for historical purposes.



Once you submit the application, a Club and District Support staff member will review it and contact you with any questions. Processing time varies. If you have questions, contact your Club and District Support representative.

## 8 CELEBRATE THE CHARTER AND PUBLICIZE THE CLUB

It's essential to celebrate the charter of a new club. Celebrations bring everyone together to commemorate a momentous event. They solidify a group's identity and strengthen the members' sense of belonging.

A charter celebration is also an opportunity to hold a memorable fellowship event and generate publicity. You can use it to introduce the club to the community, recognize its leadership, and set the stage for the club's active participation in its community.

How you celebrate is up to the club but generally reflects the club's culture. For ideas on how to plan a successful new club charter celebration, consult [Club Charter Celebrations](#).

## 9 CONTINUE DEVELOPING THE NEW CLUB

It will take some time for a new club to develop its own culture, character, and traditions, and for new members to learn how to run a club successfully. New members can learn more about Rotary by familiarizing themselves with [Rotary Basics](#), the [Learning Center](#), and [Membership Assessment Tools](#).

Members of the sponsor club can support the new club by sharing their Rotary knowledge, helping to train club leaders, offering new member orientation (see [Introducing New Members to Rotary](#)), advising on club governance, volunteering to work on the club's service projects, recommending speakers for meetings, and attending the new club's events. You can find more information about sponsor club responsibilities and the mentoring relationship in [Sponsor Clubs](#) and chapter 5 of [Strengthening Your Membership: Creating Your Membership Development Plan](#).

# “Just Ask”

## Someone To Be a Rotary Member

*A Conversation about the Possibility of Rotary Membership*

Rotary District 7450 - Philadelphia, PA



### CAMPAIGNS

Much time, energy and planning goes into developing elaborate “campaigns” to grow Rotary Membership. Campaigns typically have a theme, incentives, and various levels of recognition. Most campaigns are short-lived, non-sustained and while often producing short term results, they are usually minimally effective over the long term. Based upon many conferences, meetings and speeches, the overwhelming view is that the most successful, sustainable and impactful way to attract new members into the world of Rotary is through interpersonal conversations which includes a simple “ask” by one person/friend to another person/friend.

### ENROLLMENT CONVERSATIONS

The effective way to have someone take action (i.e. visiting or joining a Rotary Club) occurs via an “enrollment conversation”. The best enrollment conversations are composed of three steps:

**1. Getting In Their World:** Exploring what is going on in another person’s world is crucial to understanding that person. What are they up to, what pressures do they have, what has been their past experiences, what do they enjoy doing, what is important to them, etc. are all crucial parameters to better understand people. Once we understand these important facts, we can then better position Rotary as a “possibility” in their busy life. This DOES take more than the stereotypical elevator pitch. The length of time to drink a cup of coffee is often enough.

**2. Authentically Sharing Yourself:** BRIEFLY sharing what’s going on in our world, including our “Service Above Self” commitment to Rotary, provides an authentic and heartfelt testimony about how Rotary has meant to us and how it has changed our life. Our personal sharing provides a better understanding of Rotary that another person probably wishes they could have the opportunity to experience.

**3. Enrollment and Action:** The most crucial of an enrollment conversation is about our friends “considering the possibility”. As a part of our own sharing, we have inherently presented a “possibility” to our friends. We have shared something wonderful that we have and that they do NOT have, i.e. Rotary Membership. Now is the time to “Just Ask” about the possibility of visiting our Club to find out more about this great community service organization named Rotary. As part of that possibility, it’s also an opportunity to meet new friends, gain new experiences and make a difference in the lives of others that will last a lifetime! “Hey, how about coming to visit my Rotary Club to find out what this is all about?” This simple question has the power to change a person’s life... FOREVER !

### WHAT IS ROTARY MEMBERSHIP ALL ABOUT

The proposing of Rotary membership to another person is not just about adding to a Club’s membership list. It’s not just about getting more dues money. It’s not about gaining more Foundation money.

Rotary membership IS about making a profound difference in the life of another person, their family, and their associates. Every time we have an enrollment conversation with another person, we can look them in the eyes and just think of what possibility exists for this person as a result of joining a Rotary Club. Just like current Rotarians, the new Rotarian will have new experiences, learn new ideas, travel to new places that they could never imagine without the influence of Rotary in their lives. Best of all, they will have the opportunity to make a difference in another person’s life that they may never meet and never know.

**All we have to do is ....  
“JUST ASK”**



## Rotary Club Membership Growth Plan - Worksheet

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TASK	PERSONS RESPONSIBLE	GOAL	DUE DATE
<b>DEVELOP CLUB MEMBERSHIP GROWTH PLAN</b>			
Club President appoint Club Membership Chair.			
Club Membership enrolls 3-5 other Club members to join the Club Membership Committee.			
Committee meets with District Membership Chair for initial training.			
Club Membership Committee conducts a Club Assembly meeting to discuss the need for membership growth, possible campaign plans and solicit ideas from members.			
Define Club membership growth goal/commitment:  New Members: _____ Expected Members Loss: _____ Net Member Change: _____  Date Start: ____/____/____ Date Complete: ____/____/____			
<b>PREPARE INFO MATERIALS</b>			
Prepare Club promotional literature.			
Order membership training and informational materials from Rotary International.			
Conduct training seminars for all Membership Committee members. Contact District Membership Chair for content ideas.			

## Rotary Club Membership Growth Plan - Worksheet

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TASK	PERSONS RESPONSIBLE	GOAL	DUE DATE
Prepare new member information and literature folders to be given to prospective members.			
Make thermometer or other way to record new members.			
<b>NEW MEMBERS PROSPECT RESOURCES</b>			
Obtain Club membership list for the past 5 years.			
Get volunteers to contact former members from 5-year list.			
Provide attraction literature to all Club members.			
List existing Club classifications and create additional classifications.			
List and contact local businesses.			
List and contact local government and non-profits.			
List 55+ and Multi-family Communities.			
Contact past Club speakers and all future Club speakers.			
Contact Rotary alumni.			
Assign specific lists for follow-up to Club Membership Committee members and other Club members.			

## Rotary Club Membership Growth Plan - Worksheet

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TASK	PERSONS RESPONSIBLE	GOAL	DUE DATE
Assign a person(s) to <u>attend</u> Chamber of Commerce and other networking meetings.			
Assign a person to prepare and distribute Club literature at Rotary and public events.			
Assign a person to post Club projects and activities on Club Website, Facebook, etc.			
Appoint a Club Public Relations person and to post articles and releases to local media (newspapers, blogs, etc).			

### NOTES:

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## New Member **ATTRACTION** Plan – Worksheet

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Prospective Member Name:					
Committee Member Name:					
Date:	Date	Date	Date	Date	Date
Meet with possible member to inquire about their activities, history, interests, values, etc. Invite to a meeting.	Follow-up within one week to determine interest and re-invite.	Have prospective member complete application form. Submit to Committee and approve.	If accepted, conduct a Rotary 101 meeting.	Establish an inductions date and order a New Member Kit.	Induct Member

## New Member **INVOLVEMENT** Plan - Worksheet

Dates:	Dates:	Dates:	Date:	Date:	Date:
Appoint Mentor for 6 months	Appoint as Greeter for one month	Assure new member sits with different members each meeting.	Give classification talk during first three months.	Meet with Club President or Membership Chair	Meet with Rotary Foundation Chair
Date:	Date:	Date:	Date:	Date:	Other Activities
Meet with Club Service Chair	Meet with District Foundation Chair	Meet with Youth Committee Chair	Involve in Service Project #1	Involve in Service Project #1	

## MEMBERSHIP RESOURCE GUIDE

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

PUBLICATIONS			
Name	Description	Audience	Available
<b>Revised!</b> <a href="#">Strengthening Your Membership</a>	This guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members.	Club presidents and membership committees, and district membership chairs	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 417)
<a href="#">Starting a Rotary Club</a>	This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond.	District governors	N/A
<a href="#">Introducing New Members to Rotary</a>	Utilize this guide to develop a process for engaging new members from the start by helping them get involved, connecting them with a mentor, and by pacing the learning over time.	Club leadership	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 414)
<b>Revised!</b> <a href="#">Be A Vibrant Club</a>	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture.	Club leadership	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 245A)
<a href="#">Connect for Good</a>	Eight-page guide shows how to get involved and connect with Rotary.	Current members	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 595)
<a href="#">Rotary Basics</a>	This comprehensive guide to all things Rotary covers everything from how Rotary began to how you can optimize your membership experience.	New members	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 699)
Impact Begins With You	This prospective member brochure explains who we are and what sets us apart from other organizations.	Prospective members	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 001)

ONLINE COURSES			
Name	Description	Audience	Available
Your Membership Plan	Create a step-by-step plan to strengthen your membership and keep your club vibrant and relevant.	Rotary members	<a href="http://learn.rotary.org">http://learn.rotary.org</a> (log in My Rotary account required)
Best Practices for Engaging Members	Is your club losing more members than it's gaining? It's time to get serious about engaging members.	Rotary members	<a href="http://learn.rotary.org">http://learn.rotary.org</a> (log in My Rotary account required)

Kick-start Your New Member Orientation	Are new members leaving within a year or two? Learn how to better connect with them and help them get involved from the start.	Rotary members	<a href="http://learn.rotary.org">http://learn.rotary.org</a> (log in My Rotary account required)
Practicing Flexibility and Innovation	If you find that your club's rules are preventing members from getting the experience they want from Rotary, try changing them.	Rotary members	<a href="http://learn.rotary.org">http://learn.rotary.org</a> (log in My Rotary account required)
Building a Diverse Club	A diverse club reflects the make-up of its community, has a greater impact, and is more attractive to prospective members.	Rotary members	<a href="http://learn.rotary.org">http://learn.rotary.org</a> (log in My Rotary account required)
Online Membership Leads	What's all this talk about membership leads? This course will clear up the mystery behind these online leads.	Rotary members	<a href="http://learn.rotary.org">http://learn.rotary.org</a> (log in My Rotary account required)
Is Your Club Healthy?	Take this course to help your club stay valuable to your members and your community.	Rotary members	<a href="http://learn.rotary.org">http://learn.rotary.org</a> (log in My Rotary account required)
Strategies for Attracting New Members	Are guests of your club not interested in joining? Learn how to improve the club experience to make it attractive to visitors.	Rotary members	<a href="http://learn.rotary.org">http://learn.rotary.org</a> (log in My Rotary account required)
Alumni Report Guide	Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members.	District and zone leadership	<a href="https://my.rotary.org/en/document/how-use-program-participants-and-alumni-report">https://my.rotary.org/en/document/how-use-program-participants-and-alumni-report</a>

TOOLS			
Name	Description	Audience	Available
<a href="#">Membership Best Practices Discussion Group</a>	This discussion group provides a forum for leaders at all levels to share best practices for recruiting, attracting, engaging, and retaining current and prospective members.	Rotary members	<a href="https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices">https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices</a>
<a href="#">Rotary Club Health Check</a>	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 2540)
<a href="#">Membership Assessment Tools</a>	Learn how to evaluate and improve your membership development plan with these tools, complete with sample surveys and information on organizing new clubs, recruiting and retaining members.	Current members	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 801)
<a href="#">Customizable Rotary Club Brochure</a>	In this template, clubs can upload their own photos, edit text, list dates of upcoming events, and share member testimonials.	Prospective members	N/A

RESOURCES			
Name	Description	Audience	Available
<b>New!</b> <a href="#">Engaging Young Professionals Toolkit</a>	This online toolkit can help clubs connect with Young Professionals by first understanding them. Topics included are characteristics of your audience, your club's culture, ideas for outreach and engagement, and the long-term benefits of becoming a Rotarian.	Rotary Members	N/A
<b>New!</b> <a href="#">State of Rotary's Membership power point</a>	Understand the current State of Rotary's Membership: how we got here, who is joining, who is leaving — and the	Rotary Members	N/A

	opportunities that exist to strengthen membership.		
<a href="#">Club Flexibility web page</a>	This web page offers ways clubs can implement the new flexible options Council decisions granted them. Includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats.	Rotary members	N/A
<a href="#">“Discover Rotary” Power Point</a>	Show this presentation at prospective member or other events to introduce Rotary to the public. It covers Rotary’s values, history, and the benefits of membership.	Prospective members	N/A
<a href="#">Understanding Membership Reports: Getting Started</a>	This guide lists each membership report available, explains the information it provides, and steps on how to find them.	Rotary members	N/A
<a href="#">Creating a Positive Experience for Prospective Members</a>	Find tips and ideas for connecting with prospective members, and what you can do to ensure they have a positive experience.	Rotary members	N/A
<a href="#">Proposing New Members</a>	Best practices for proposing new members to your club.	Rotary members	N/A
<a href="#">How to Manage Membership Leads (Clubs)</a>	Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level.	Club leaders	<a href="https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs">https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs</a>
<a href="#">How to Manage Membership Leads (Districts)</a>	Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level.	District leaders	<a href="https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts">https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts</a>
New Member Welcome Kit	Welcome new members to your club with pre-packaged Rotary essentials: Connect for Good brochure, What's Rotary? card, RI/TRF Annual Report, and Proud Member window cling.	New members	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 426)
Membership Minute e-newsletter	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders	<a href="http://www.rotary.org/en/news-features/newsletters">www.rotary.org/en/news-features/newsletters</a>
<a href="#">Strategic Planning Guide</a>	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club and district leaders	<a href="https://www.rotary.org/myrotary/en/document/strategic-planning-guide">https://www.rotary.org/myrotary/en/document/strategic-planning-guide</a>

WEBINARS			
Name	Description	Audience	Available
Hot, Warm, and Cold Leads: Engaging Your Prospective Members (Club Level)	Rotary volunteers and staff share best practices in communicating with prospective members, ensuring their Rotary experience is positive, and managing and admitting them through the Membership Leads platform.	Club leaders	<a href="https://vimeo.com/240685013">https://vimeo.com/240685013</a>
First Impressions Matter webinar: The Membership Experience	Find out what happens when Rotarians use every interaction to engage, educate, and inspire fellow Rotarians and the community. Moderated by Jennifer Jones, Past Rotary Vice President.	Rotary members	<a href="https://vimeo.com/232717098">https://vimeo.com/232717098</a>

How to Manage Membership Leads for District Leaders	This webinar shows district leaders how to effectively utilize the Membership Leads platform, provides best practices for encouraging clubs to take action with leads, and includes a Q&A section with attendees.	District leaders	<a href="https://vimeo.com/214073740">https://vimeo.com/214073740</a>
<a href="#">Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience</a>	Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members.	Rotary members	<a href="https://vimeo.com/180066536">https://vimeo.com/180066536</a>
<a href="#">Membership: It's Now or Never</a> (Part 1 of 5)	An international membership expert discusses new ways of thinking about membership and innovative tactics in part 1 of this "Membership Matters" webinar series.	Rotary members	<a href="https://vimeo.com/103365589">https://vimeo.com/103365589</a>
<a href="#">Perception vs. Reality: Club Evaluation and Visioning</a> (Part 2 of 5)	Focuses on the steps clubs should take to ensure a clear club vision and plan for the future.	Rotary members	<a href="https://vimeo.com/108381769">https://vimeo.com/108381769</a>
<a href="#">Simple Steps to Innovate Your Club</a> (Part 3 of 5)	Focuses on the steps clubs can take today to stay relevant and appeal to new and potential members.	Rotary members	<a href="https://vimeo.com/118740192">https://vimeo.com/118740192</a>
<a href="#">Membership Engagement: The Key to Retention</a> (Part 4 of 5)	Focuses on member engagement as a path to member retention.	Rotary members	<a href="https://vimeo.com/123234534">https://vimeo.com/123234534</a>
<a href="#">How to Recruit New Members and Strengthen Your Club</a> (Part 5 of 5)	Focuses on growing and strengthening clubs by inviting new and diverse groups of professionals to club meetings, asking friends and colleagues to participate in service projects, and reaching out to Rotary program alumni.	Rotary members	<a href="https://vimeo.com/127084618">https://vimeo.com/127084618</a>
<a href="#">Understanding Young Professionals</a>	Led by Rotary staff and a market research professional, this webinar is intended to help members better understand the perceptions and needs of young professionals. Password: <b>YPC</b>	Rotary members	<a href="https://vimeo.com/89536946">https://vimeo.com/89536946</a>

TRAINING MANUALS			
Name	Description	Audience	Available
<a href="#">District Membership Seminar Leader's Guide</a>	This guide provides you with speaking points, PowerPoint templates, and exercises to ensure your attendees participate and are engaged in each breakout session for club leaders or members.	District leaders	N/A
<a href="#">Lead Your Club: Membership Committee</a>	Describes the responsibilities of the chair and committee, and identifies resources that may be helpful relating to increasing the club's membership.	Club leaders	<a href="http://shop.rotary.org/">http://shop.rotary.org/</a> (SKU: 226)

**Questions? Please contact Regional Membership Officer for zones 24 and 32**  
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