



# MEMBERSHIP ASSESSMENT TOOLS

Rotary



TAKE ACTION: [www.rotary.org](http://www.rotary.org)

# ABOUT THIS GUIDE

Whether your club is strong or struggling, taking the time to evaluate what you're doing is a worthwhile endeavor. In the business world, companies continually improve their products to keep their customers satisfied. Using the assessment tools below will reveal opportunities to add value to your club experience so that more people will join and fewer members will leave.

- Representing Your Community's Professions: A Classification Assessment
- Diversifying Your Club: A Member Diversity Assessment
- Finding New Club Members: A Prospective Member Exercise
- Improving Your Member Retention: Retention Assessment and Analysis
- Enhancing the Club Experience: Member Satisfaction Survey
- Understanding Why Members Leave: Exit Survey

Your club may choose to use one or more of these assessments, depending on its needs. If you do more than one, they work best when done in order. For example, the classification and member diversity assessments identify groups that are underrepresented in your club so you can look for prospective members from those groups. Then the prospective member exercise helps you single out individuals who would be a good fit for your Rotary club.

The member retention and satisfaction tools help you determine what your club's current members want, find ways to involve them in the club, and think of new things you might try to keep your club relevant. The exit survey informs you about the members who leave your club, reveals any expectations they had that were not met, and suggests what you might do differently to avoid losing members for similar reasons.

We recommend having a group of members who are devoted to membership — ideally, the club membership committee — conduct the assessments, analyze the results, and then take action based on the findings. While you may not see immediate changes, taking time for in-depth assessments will strengthen your club and Rotary.

# REPRESENTING YOUR COMMUNITY'S PROFESSIONS



In Rotary, members' classifications refer to their occupations, professional expertise, and training. Rotary clubs aim to include members from a number of classifications because bringing together professionals from different fields and industries increases a club's capacity to serve its community as well as giving its members an opportunity to learn more about others in the community. To maximize your impact, strive for professional diversity that represents the professions held in your community. Because business activities and terminology vary from community to community, Rotary doesn't maintain a comprehensive list of classifications. Be open to nontraditional professions that bring new skills and perspectives to your club.

## OUTCOME

Conduct this classification assessment and act on its results to:

- **Grow and diversify your club's membership.**

You will clearly see which professions are represented in your club and what skills and expertise it's missing. Each gap you identify presents an opportunity to target your recruitment efforts.

- **Make the best use of members' expertise and skills.**

Your club's collective knowledge and talent can help it make a more significant impact in your community. Once you recognize the expertise and skills your members have acquired through their professions, you'll be better able to use them to the club's advantage. Recognizing members for their unique talents will yield a number of benefits, too. When members' professional skills are put to good use:

- Retention rates are higher, because members feel useful and valued
- Clubs are better equipped to conduct successful service projects
- Members are motivated to excel
- Members have more opportunities to grow professionally and network
- Clubs are more attractive to prospective members

## GETTING ORGANIZED

To conduct a successful classification assessment, you'll need a dedicated group of members. It could be your membership committee, or you can organize a classification assessment team.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time. Steps 3 and 4 could take 1-2 weeks.

## GETTING STARTED

Ready to start? Here's how.

### Step 1: Gather member data

Have all club members complete the Occupation and Professional Expertise Survey on page 1.4. You can ask them to take it during a club meeting or turn it into an online survey that they can complete in their own time. Explain the purpose of the classification assessment and make sure that members understand the benefits of having a good mix of professions represented in your club.

### Step 2: Evaluate the data

Analyze the completed Occupation and Professional Expertise Surveys and fill in the Classification Audit on page 1.6 with the professions of your club's members.

### Step 3: Collect data on your community

Gather data about the professional makeup of your community. You can research local employment statistics online or ask your chamber of commerce or another local business association for information.

Next, fill in the Classification Audit table with the top five professions in your community, along with the percentage of community members in those professions.

### Step 4: Analyze the data

Use the results of the Classification Audit to determine which professions should be added to your club to achieve a balanced membership. Finally, answer questions on the Classification Worksheet on page 1.7.

## Step 5: Present the results

Present your results and recommended actions at a club meeting, including:

- How seeking members from underrepresented classifications can guide your efforts to identify potential members
- How the skills you've discovered among your current members can be used to strengthen your club and enhance service projects

Get member input on your recommended actions, gather consensus, and adjust your action plan accordingly.

## Step 6: Take action

The final step is to take action based on your results. Identify qualified prospective members according to the gaps you found in your club's classifications. Ask current members to fill club roles or apply their skills to service projects to maximize the club's impact.

### Interested in doing other assessments?

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

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4. Do you have experience or expertise in the following areas? If so, please briefly explain.
- A. Leadership roles
  
  - B. Training/ teaching
  
  - C. Mentoring
  
  - D. Website design or management
  
  - E. Social media (blogging, Twitter, Facebook, LinkedIn, etc.)
  
  - F. Research or survey design
  
  - G. Fundraising
  
  - H. Public relations or marketing
  
  - I. Project management
  
  - J. Strategic planning
  
  - K. Other experience, expertise, or skills

# CLASSIFICATION AUDIT

Professions represented in the club	Number of members in that profession	Percentage of membership
1.		%
2.		%
3.		%
4.		%
5.		%
6.		%
7.		%
8.		%
9.		%
10.		%
11.		%
12.		%

Top professions in the community	Percentage of community (if available)
1.	%
2.	%
3.	%
4.	%
5.	%





# ACTION PLAN

Use your findings to create an action plan that addresses your club's professional diversity.

Action	Person responsible	Time frame	Resources needed

# DIVERSIFYING YOUR CLUB



Diversifying your club is not just about including a mix of people. It's also about working well together.

Diversity refers to inclusion of people from many groups. It is a source of innovation, as well as one of Rotary's core values. Having members with different backgrounds and viewpoints gives your club a broader understanding of the community, its problems, and possible solutions. Strive to have a group of members who offer the club diverse skills, talents, and experiences. If your club includes different ethnicities, ages, and cultures, as well as a good gender balance, it will have greater capacity to serve your community and communities around the world. Equally important is creating a culture of inclusion, where these differences are respected, supported, and valued.

## OUTCOME

Conduct this diversity assessment and act on its results to:

- Raise your members' awareness of the diversity in your community
- Build member support for increasing diversity
- Diversify your club to better represent the working professionals in your community

## GETTING ORGANIZED

Dedicate time in a series of club meetings to conducting each step of your member diversity assessment. Choose a facilitator (the membership committee chair, a committee member, or the club president) who is comfortable talking about diversity and passionate about the need for greater diversity in your club. Or, consider inviting a diversity and inclusion leader to talk to your club. This activity should involve all club members so that they all have a stake in the process. Greater inclusion will increase awareness and support for future action.



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

## GETTING STARTED

Ready to start? Here's how.

### Step 1: Discuss the benefits of having a diverse membership

Discuss the benefits of diversity with your club. Recognize and celebrate past successes, if appropriate. For example, highlight a service project or other club accomplishment that has been achieved through having members with diverse professional skills. Discuss your club's representation of professional field or classification, gender, age, ethnicity, and culture, and set goals.

### Step 2: Collect information

Recap the diversity discussion from step 1 and reiterate the positive effects of having a more diverse membership.

Distribute the Member Diversity Worksheet. Split club members into four groups and instruct each group that they are to gather information from one of the following sources on their own time between this meeting and the next, completing what they can of the worksheet:

- **Group 1:** Get data on the demographics of the community from a local business association, such as the chamber of commerce
- **Group 2:** Gather information about the community's cultural and demographic composition from the local tourism bureau
- **Group 3:** Get socioeconomic statistics from local economic development experts or city government departments
- **Group 4:** Get the most recent census results, which may include information on the age, gender, and ethnic makeup of the area's residents and review them

### Step 3: Discuss the findings within the groups

The following week, ask groups to meet to discuss their assignments, share what they completed on their worksheets, and compile their findings. Then have each group choose a spokesperson who will present its findings to the club at a future meeting.

#### **Step 4: Report the results and discuss their implications**

Have each group spend about five minutes presenting its findings at a club meeting. Facilitate a discussion about the reports and their relevance.

Does your Rotary club's membership reflect:

- The ages of the professional population in the community?
- The gender composition of the working professionals in the community?
- The ethnic and cultural diversity of the community?

#### **Step 5: Develop a member diversity action plan**

Find strategies to reach out to specific groups that were found to be underrepresented in your club. Document your plan and assign tasks to those on the membership committee, or ask other club members to help. Monitor progress toward your diversity goals and continually update club members.

#### **Interested in doing other assessments?**

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

[Finding New Club Members: A Prospective Member Exercise](#)

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

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

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



# MEMBER DIVERSITY WORKSHEET

1. What sources did you consult in your search for data on your community's demographic composition?

2. What data did you find on:

Age:

Gender:

Ethnic background:

3. Does this data correspond to the current composition of working professionals in your community? Explain your evidence.

4. What fact or statistic did you find most interesting?

5. What surprised you most?

6. What surprised you least?

7. Are any demographic groups underrepresented in the club?

8. What can the club do to better represent working professionals in the community?

9. How can your findings be integrated into an action plan for membership development?



# 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?

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# 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: \_\_\_\_\_

# IMPROVING YOUR MEMBER RETENTION



Keeping current members is a sign of a club's stability and overall well-being. Many clubs don't recognize their retention problems if the number of members remains somewhat steady. However, clubs that consistently lose members and compensate by inducting new members are not managing their growth or retention well. This assessment provides a view of how both the induction and the termination of members contribute to the net gain or loss of members.

## OUTCOME

Conduct this assessment and act on its results to:

- Determine when and why members leave your club
- Generate strategies to keep them engaged and involved so they stay

## GETTING ORGANIZED

To complete the steps below, you will need access to club membership reports on My Rotary. The club president, secretary, treasurer, membership chair, and Foundation chair have this access and can delegate it to any fellow club member. It may be helpful to work with a member who has experience in data analysis.



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


## GETTING STARTED

Ready to start? Here's how.

### Step 1: Review your club's historical and existing member retention percentages

Go to Rotary Club Central's [Reports page](#) and, under **Club Reports**, choose the **Member Viability and Growth** report to see current retention rates for existing members.



To export reports, click or tap Export (the  icon), and choose a program or format. You can now save or print the report.

To run the Member Viability and Growth report without following a link to the Reports page:

- Sign in to My Rotary
- From the **Take Action** menu, choose **Rotary Club Central**
- Choose **Reports** from the options on the left
- Under **Club Reports**, choose **Member Viability and Growth**

### Step 2: Determine when members leave your club

Run the Membership Termination Profile report to see when people are most likely to terminate their club membership and the reasons they give for doing so. Knowing at what point in their Rotary tenure members are most likely to leave can help you recognize the club's retention strengths and weaknesses and focus your efforts accordingly.

Go to Rotary Club Central's [Reports page](#) and, under **Club Reports**, choose **Membership Termination Profile**.

To run the Membership Termination Profile without following a link to the Reports page:

- Sign in to My Rotary
- From the **Take Action** menu, choose **Rotary Club Central**
- Choose **Reports** from the options on the left
- Under **Club Reports**, choose **Membership Termination Profile**

### Step 3: Generate strategies for keeping members

Once you've reviewed the Member Viability and Growth and Membership Termination Profile reports, discuss the results within the membership committee. Consider these questions:

- Who is leaving your club? Veteran members? New members? Both?
- Why are members leaving?

### Step 4: Develop an action plan

Report the membership committee's findings to the club. Facilitate a discussion about how you might address areas of weakness and build on what you're doing well.

## ROTARY RESEARCH

Understanding why members leave is crucial to strengthening your club. The Exit Survey in Understanding Why Members Leave is designed to gather this information. Rotary International has conducted extensive research on the reasons members leave their clubs worldwide. Here's what we've found.

### Members who stay less than 1 year

Many members leave within the first year because they were not fully informed about the responsibilities of membership before joining or not fully educated about Rotary after joining. Some have trouble meeting attendance requirements or struggle with financial obligation, while others say that their networking expectations were not being met.

#### *What you can do*

If your club loses members within the first year, focus on:

- Communicating better to prospective members, both about the personal and professional benefits that your club has to offer, as well as about the responsibilities of being a Rotary member
- Planning meaningful induction ceremonies that celebrate this special step and making sure current members make new members feel welcome
- Making club meetings fun, energetic, and humorous, without losing sight of Rotary's mission
- Assigning new members mentors who can explain club workings and traditions, answer questions, help them get to know other members, and, if they miss any meetings, make sure all is well
- Offering useful new member orientation programs
- Assigning newer members to committees or otherwise involving them in the club
- Connecting often with new members to answer questions and teach them about Rotary



Use the Member Satisfaction Survey in **Enhancing the Club Experience** to ask all members for feedback about your club and ideas for improving their experience.

## Members who stay for 1-2 years

Many members who leave after spending one to two years in a club do so because they do not feel engaged in club events and activities, their fellowship expectations aren't being met, or they have difficulty meeting the attendance requirements because of competing priorities.

### *What you can do*

Take action to keep members who have been in your club for one to two years:

- Identify members who have been in your club for one to two years and make sure they are involved in a project or committee that interests them.
- Ask these members for their feedback. They may have ideas for revitalizing the club's fellowship activities or service projects.
- Suggest hosting a Youth Exchange student, or see if they would like to serve as a liaison to your Rotaract or Interact club.
- Assign mentors to members who don't have them, or suggest that they change mentors if they would like to.

## Members who stay for 3-5 years

Members who leave after spending three to five years in a club may do so because their fellowship expectations are not being met, they are frustrated with the club's leadership, or they have difficulty meeting the attendance requirements because of competing priorities.

### *What you can do*

For members who have been in your club for three to five years:

- Provide leadership opportunities. Members can get more involved by serving as club officers. Encourage those who have already held club leadership positions to mentor newer members or participate in district activities. In taking on leadership roles, they will feel useful, valued, and connected with the club's decisions and events.
- Organize new activities, such as continuing member education, or revitalize established club activities so that members remain engaged and excited about attending club meetings and fellowship opportunities.
- Get members' feedback on their club experience and ask for their ideas on what could be improved.
- Put their expertise and skills to use and recognize them for their efforts.



## Members who stay 6-10 years

Some members who leave after spending six to 10 years in a club report that their fellowship expectations weren't being met and that they were frustrated with the club's leadership. Others leave when they retire or need to relocate.

### *What you can do*

For members who have been in your club for six to 10 years:

- Recommend they mentor newer members and get involved in more district activities, such as planning the district conference or serving on a district committee. Or they might wish to join a [Rotary Fellowship](#). Both can help them meet more people and experience Rotary beyond the club.
- If members are planning to leave upon retiring, remind them that retired members are an important part of Rotary. They provide valuable perspective and can serve as mentors to younger professionals in the club.
- If members are relocating, forward their contact information to the clubs in their new area, [refer them](#) through My Rotary, or encourage them to let Rotary know they want to [change clubs](#).
- Put their expertise and skills to use and recognize them for their efforts.

## Members who leave after 10 years

Many members who leave after spending more than 10 years in a club say they are not interested in the club's meetings and activities. Other members choose to leave because of retirement, family obligations, financial constraints, or health problems.

### *What you can do*

For members who have been in your club more than 10 years:

- Spend some time with them to learn whether any of the reasons above could prompt them to leave your club. Some reasons for leaving are beyond your control, but learning why members might leave can help you find ways to prevent it.
- Ask for their opinions on how to energize or reinvent your club meetings, or gauge their interest in taking on a district leadership position — assistant governor, district governor, or district committee chair.

- Consider easing the financial obligations of members of this group, who may be under financial strain because of retirement or other factors.
- Put their expertise and skills to use and recognize them for their efforts.
- See if they would be interested in mentoring a new member.

### **Interested in doing other assessments?**

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# ENHANCING THE CLUB EXPERIENCE



The power of your club lies in your members. By asking them for feedback regularly, you are demonstrating your openness to change and empowering them to help craft an ideal club experience. Use this survey to obtain member feedback about your club. Then use the information to make a plan to ensure that members are enjoying their Rotary club experience.



Keep responses confidential when discussing and analyzing them.

## OUTCOME

Conduct this assessment and act on its results to:

- Identify what your members like and don't like about their club experience
- Develop an action plan that builds on what your members like and discontinues or changes what your members aren't satisfied with

## GETTING ORGANIZED

You'll need a dedicated group of members to conduct the member satisfaction survey. It can be your club's membership committee or a few interested, unbiased members. You can either devote time during a club meeting to talking about member satisfaction and taking the survey or hand it out or email it to members and allow them more time to complete it. Alternatively, hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.



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



Consider using an online survey tool. They're convenient, are often free or inexpensive to use, and are helpful in managing response data.

## GETTING STARTED

Ready to start? Here's how.

### Step 1: Introduce the survey

Discuss why it's important to get feedback from all club members.

### Step 2: Distribute the survey

Pass out or email the Member Satisfaction Survey to members or use an online survey tool. Explain that their responses are confidential and will be used to enhance the club experience for both current and prospective members.

### Step 3: Analyze the data

Have your dedicated group review the survey results. Stress the importance of confidentiality and respecting all viewpoints.

### Step 4: Present the results

Present and discuss the survey results to the club. Allow time for members to ask questions.

### Step 5: Make an action plan

Hold a forum where club members can offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for implementing changes.

### Step 6: Take action

The final step is to implement the action plan. Talk to members and involve as many of them as you can in the process so that they are invested in enhancing the club experience.

### Interested in doing other assessments?

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# MEMBER SATISFACTION SURVEY

This survey focuses on your day-to-day experiences in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers; we simply ask for your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with your membership in our Rotary club?

- Satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Dissatisfied

2. Considering our club's **culture, members, and meetings**, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Club meetings are a good use of my time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job involving new members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club's members care about one another	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club reflects the demographic profile of our area's business, professional, and community leaders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club actively seeks to involve all members in projects and activities according to their interests, skills, and availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The amount of fundraising activities is appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

3. How would you rate the following aspects of our **weekly meetings**?

	Excellent	Good	Fair	Poor	Very poor	N/A
Rotary International updates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for socializing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional connections and networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of program topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting time and day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals or refreshments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speakers and programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

4. What are your opinions about our club's **service projects**?

	Just right	Too many	Too few
Total number of service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of community service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of international service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Disagree	No opinion
Service projects are well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service projects make a difference in the community or the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service projects are meaningful to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**



5. Thinking about **communication** and **responsiveness** in our Rotary club, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club does a good job communicating to members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job listening to members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club seeks input and ideas from members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club regularly acts upon members' input and ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am comfortable with the pace of change in my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club works to update club processes and rules to meet the needs of its members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

6. Indicate your agreement with the following statements about the **value** of your membership.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I feel welcome in my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I make valuable connections through my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club provides opportunities to use my talents and skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the money I spend on Rotary participation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the time I give to Rotary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My family sees value in my Rotary membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My friends see value in my Rotary membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in my community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

7. Indicate your agreement with the following statements about **club engagement**.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I invite my friends, family, and colleagues to club events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I invite qualified prospective members to join my Rotary club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I frequently participate in my club's activities, projects, and programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm proud of my Rotary club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

8. Thinking about the **costs** associated with club membership, how would you rate the following?

	Too low	Just right	Too high	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals at weekly meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club assessments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for donations for service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

# UNDERSTANDING WHY MEMBERS LEAVE



Why are you leaving? This is a question you should ask all members who decide to leave your club. No matter what the answer is, you can use this information to try to prevent the same issue from causing others to leave. Use the Exit Survey on page 6.3 to determine why your members leave and start a conversation about what your club can do to keep members in the future. Your club membership committee can review and tailor the survey to your club's needs. Or you may choose to create an online form or conduct an in-person interview.

## OUTCOME

Use exit surveys and act on their results to:

- Determine why members resign from your club
- Address any issues the survey reveals



Consider using an online survey tool. They're convenient, are often free or inexpensive to use, and are helpful in managing response data.

## GETTING ORGANIZED

Taking this survey may be the final contact that a member has with Rotary, and it's very important. If you conduct the survey online, put someone in charge of managing the process whenever a member leaves the club. If you use a paper survey or an in-person conversation, ask someone who is a good listener to talk with the resigning member. The interviewer will need to relay the results to the membership committee and club board. Regardless of the method, it's important to make it a positive interaction so that the member leaves with a positive regard for Rotary.

# GETTING STARTED

Ready to start? Here's how.

## Step 1: Ask permission

Ask the resigning member if he or she is willing to take a confidential exit survey. Explain that the purpose of the survey is to determine whether there are problems that should be addressed to help prevent further losses of valued members and to improve the club for others.

## Step 2: Provide the survey

Give the member the survey and ask them to complete it at their earliest convenience. You can edit the survey included in this document and attach it to an email or use an online survey tool. If the member is unable to complete the survey online, use a paper form and provide a stamped, addressed envelope.

## Step 3: Discuss the results

Once you receive the completed survey, discuss the results with your club's membership committee. If the member is leaving for a reason other than relocation, discuss what your club can change to prevent current or future members from leaving for similar reasons. Compare this member's responses to those of other recent exit surveys to identify trends. Stress the importance of confidentiality and respect for all viewpoints.

## Step 4: Take action

This step is crucial for your club's membership development. You invest time and resources into attracting and engaging members; protect that investment by addressing member losses. While not every exit survey will require action, they do merit consideration. Create a plan and delegate its tasks. Update your club's Member Satisfaction Survey based on the responses of resigning members over the previous year.

### Interested in doing other assessments?

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

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

[Finding New Club Members: A Prospective Member Exercise](#)

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

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



# EXIT SURVEY

We're sorry to lose you as a member of our club. To help us understand why you're leaving and what we can do to improve the club experience, please answer the following questions about your Rotary experience and return the completed survey to your club secretary or president. We appreciate your candid and honest answers.

1. What were your primary reasons for joining the club?

- Community service
- International service
- Personal development
- Leadership or professional development
- Family legacy or tradition
- Status and prestige
- Social opportunities
- Networking
- Opportunity to facilitate international exchange
- Tutoring and mentoring of youth
- Reconnecting with Rotary as an alumnus or alumna
- Other: \_\_\_\_\_

2. How long have you been a member of the club?

- Less than 2 years
- 2-5 years
- 6-10 years
- 11-20 years
- More than 20 years

3. What did you like best about being a member of this club?

What did you like least?

4. How many prospective member information sessions did you attend before you became a member?

- 1
- 2
- 3 or more
- None, because the club did not offer such sessions
- None, because I was not interested

5. How many club meetings did you attend before you became a member?

- 0
- 1-2
- 3-4
- 5 or more

6. How were you informed about club activities and your responsibilities before joining?  
(Mark all that apply.)

- Attended information sessions
- Received club information from a club officer
- Received club information from my sponsor
- I found information on my own



7. Did you learn more about Rotary in a structured way (e.g., new member orientation, continuing education) once you became a member? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all					Definitely

8. Do you believe you were adequately informed of the financial and time obligations of club membership? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all					Definitely

9. Were club meetings a worthwhile use of your time? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all					Definitely

10. Did you feel welcome in the club? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all					Definitely

11. Did you feel comfortable expressing concerns to club leaders? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all					Definitely

12. If you did not feel welcome or did not feel comfortable expressing concerns, explain why.

13. How would you describe the club's culture?

14. What could be done to improve the club experience for new members?

15. Please evaluate meeting logistics.

Meeting logistics	Yes	No
Convenient meeting location	<input type="checkbox"/>	<input type="checkbox"/>
Enjoyable meeting location (atmosphere, service)	<input type="checkbox"/>	<input type="checkbox"/>
Convenient meeting time	<input type="checkbox"/>	<input type="checkbox"/>
Appropriate meeting length	<input type="checkbox"/>	<input type="checkbox"/>
Well-run and organized meetings	<input type="checkbox"/>	<input type="checkbox"/>

16. Please evaluate meeting activities.

Meeting activities	Excessive	Reasonable	Inadequate
Rotary education (on Rotaract, Youth Exchange, Rotary Foundation programs, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Please rate the following aspects of club meetings.

Meeting features	Excellent	Fair	Poor
Program content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program structure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meal quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meal cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to socialize	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. Did you participate in service projects?  Yes  No

19. If no, why not?

- |   |   |
|---|---|
| <input type="checkbox"/> Type and quality of projects | <input type="checkbox"/> Number of projects |
| <input type="checkbox"/> Personality conflicts        | <input type="checkbox"/> Cost               |
| <input type="checkbox"/> Schedule conflicts           | <input type="checkbox"/> Other: _____       |

20. How satisfying was your participation in service projects? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all					Very

21. If your participation in service projects wasn't satisfying, why wasn't it? (Mark all that apply.)

- |   |  |
|---|--|
| <input type="checkbox"/> Lack of variety in projects        | <input type="checkbox"/> Lack of quality of projects     |
| <input type="checkbox"/> Low quantity of projects           | <input type="checkbox"/> Personality conflicts           |
| <input type="checkbox"/> Lack of support from other members | <input type="checkbox"/> Insufficient family involvement |
| <input type="checkbox"/> High costs                         | <input type="checkbox"/> Did not feel welcomed           |
| <input type="checkbox"/> Schedule conflicts                 | <input type="checkbox"/> Other: _____                    |

22. Please evaluate your experience of Rotary with respect to your family.

Family of Rotary	Agree	Disagree	Not applicable
Rotary interfered with my family responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My family was proud of my involvement in Rotary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My family wanted to be more involved in Rotary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There were opportunities to include my family in club activities and projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. How could your family have been more involved in your Rotary experience?

24. Please evaluate the costs associated with membership.

Cost	Too high	Reasonable	Too low	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meal costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club assessments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service project contributions (time or monetary)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rotary Foundation contributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. How well does the club reflect the demographic profile of professionals in the community?

(Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all					Very well

26. Think about what was communicated to you when you joined the club.

Were your expectations met?

27. Why did you decide to terminate your membership?

28. Would you consider joining another Rotary club?

Yes

No

Not sure

29. What is your best advice to the club's leaders as you leave?

30. Do you have any other comments?

Thank you for completing this survey.



**ROTARY  
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