

Club Membership Committee Manual

A part of the *Club Officers' Kit*

ROTARY INTERNATIONAL®



This is the 2009 edition of the *Club Membership Committee Manual*. It is intended for use by 2010-11, 2011-12, and 2012-13 club committees. The information in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, and the Rotary Code of Policies. Please refer to those resources for exact guidelines. Changes to these documents, by the Council on Legislation or the RI Board, override policy as stated in this publication.

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Introduction

The *Club Membership Committee Manual* was developed to help Rotary club membership committees worldwide establish goals and understand their responsibilities related to increasing club effectiveness. Because committee responsibilities vary according to area laws, cultural practices, and established club procedures, you should adapt the suggestions in this publication to fit your club's needs. Throughout the manual, cultural differences in Rotary clubs are highlighted in Around the World boxes, while general tips are offered in the Rotary Reminder boxes.

This publication includes three chapters. The first describes the major responsibilities of your committee. The second describes responsibilities specific to you as the chair of the committee. The third contains resources that may be useful for you and committee members. Following the third chapter are the appendixes, including the club membership section of the *Planning Guide for Effective Rotary Clubs*, article 13 of the Recommended Rotary Club Bylaws, and a list of discussion questions, as well as the worksheets that will be used at the district assembly.

You should use this manual to prepare for your role as membership committee chair. Bring it with you to the district assembly, and review its contents beforehand. Pay particular attention to the questions in appendix 3, which will help you get the most out of the facilitated discussions at the meeting. After you have completed your training, this publication will serve as a resource as you work with your fellow club officers and members.

Under the Club Leadership Plan, the recommended administrative structure of Rotary clubs has the following five standing committees:

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



Rotary Reminder

Committee chairs should make copies of chapter 1 and distribute to committee members so they are fully aware of the committee's responsibilities.

Each committee has a manual which provides an overview of the committee and its responsibilities, as well as resources available to support you and your committee members. Information pertinent to your committee members should be distributed or communicated to them. Additional copies of this manual can be downloaded for free at www.rotary.org. This manual is part of the *Club Officers' Kit* (225-EN). However, each manual can be purchased separately through the *RI Catalog*.

As you prepare to help lead your club, remember that your Rotary club is a member of Rotary International. Through this membership, it is linked to more than 33,000 Rotary clubs worldwide and granted access to the organization's services and resources, including publications in nine languages, information at www.rotary.org, grants from The Rotary Foundation, and staff support at world headquarters and the seven international offices.

Comments?

If you have questions or comments about this manual or any of RI's training resources, please direct them to:

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Committee Role and Responsibilities



Rotary Reminder

The club membership committee's work will address the Club and Vocational Avenues of Service.



The role of the membership committee is to develop and implement an action plan for membership development. To be effective, a Rotary club needs members. Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving Rotary beyond the club level is directly related to the size and strength of your club's membership base.

The responsibilities of the club membership committee summarized below are explained further in this chapter:

- Develop committee goals to achieve club membership goals for the coming year.
- Conduct club assessments to determine strengths and weaknesses.
- Work with the public relations committee to create a positive club image that is attractive to prospective and current members alike.
- Develop programs to educate and train new and current club members.
- Sponsor newly organized clubs in your district, if applicable.



Rotary Reminder

Subcommittees can be created to manage the committee's various responsibilities, especially if you have a large club.

As you read more about these responsibilities below, think about your committee goals, what your action plan will be, and what resources you will need for your year.

Membership Development

Developing your club's membership requires both recruitment and retention efforts. New members bring important benefits to the club, including diversity, fresh ideas, and new energy. Existing members are crucial to sustaining your club's membership and continuing the good works of your club.

To recruit new members, the membership committee sets goals, develops a plan for achieving them, and communicates with club members in order to implement the plan. Although the committee leads the club's recruiting efforts, recruiting new members is a responsibility of each club member. The membership committee should encourage all members to reach out to friends, family, business associates, and other community members by asking them to join.

Retention efforts should be a priority for the membership committee. Conduct club assessments regularly to determine your club's strengths and weaknesses. Ensuring that members are informed, involved, and recognized for their contributions to the club will increase member satisfaction. Monitoring trends in attendance, length of membership, service project participation, and contributions to The Rotary Foundation can point out concerns that may need to be addressed.

The process for developing Rotary club membership is a fluid course of action that often includes the following stages:

- Identify
- Introduce
- Invite
- Induct
- Inform and orient
- Involve
- Educate

Identify. Identify professional members of your community who are qualified to join your club. Careful selection of members will increase your club's retention rate and reinforce positive attitudes toward new member induction.

Use the classification survey and membership diversity assessment to determine how well your club represents the professional diversity of your community and to target recruiting efforts to help your club better represent your professional community.

Introduce. Prospective members should be introduced to Rotary's history, ideals, and service and leadership opportunities. All members should be encouraged to bring in new members to the club. A prospective member who has been introduced to Rotary by enthusiastic Rotarians and is informed about the club's projects before joining is more likely to become involved and remain active.



Rotary Reminder

Conduct the classification survey, membership diversity assessment, and 25-minute membership survey with your club members to identify potential members in the community. To find these tools, keyword search "Club Assessment Tools" at www.rotary.org.



Rotary Reminder

Before inviting someone to become a Rotarian, make sure that the prospective member is fully aware of the financial obligations of membership, attendance requirements, and expectations for involvement.

The committee should compile a club profile that can be presented to visitors. Consider also providing the *Prospective Member Information Kit* (423-EN), which includes publications to introduce RI and its Foundation.

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

Assist the board in investigating the eligibility of all people proposed for membership. If the candidate meets qualifications for membership, your committee should submit the proposal to the club's board of directors, reporting the reasons for proposing the candidate.

Induct. New members should be welcomed in a dignified and meaningful way. Invite family members to attend the induction ceremony. During the ceremony, ask new members to talk briefly about themselves, their businesses, and their families. Ensure that all club members are present and that each member personally welcomes the new member. Your Rotary club should provide a new member with the following items:

- Rotary lapel pin
- Membership identification card
- Club name badge and banner
- District directory
- District governor's monthly letter
- List of local clubs for make-up meetings

Communicate with the club administration committee to ensure that the new member and sponsor are recognized in your club's bulletin and at the weekly meeting.

Inform and orient. The membership committee should develop a formal orientation program for new members if your club does not already have one. New member orientation should build on the information provided to prospective members and should begin after induction, taking place over the course of several months. The orientation program should inform new club members about Rotary International's programs, The Rotary Foundation, your club's service efforts, and the benefits and responsibilities of membership.

Involve. Ensure that all club members are involved in club projects, committees, activities, fundraisers, board meetings, weekly club meetings, and social activities. An involved member will feel a part of the club and make Rotary a priority in his or her life. Consider these suggestions for involving new members in club activities:

- Assign new members to a committee or give them a weekly meeting assignment.



Rotary Reminder

See the *Membership Development Resource Guide, New Member Orientation: A How-to Guide for Clubs*, and the Recommended Rotary Club Bylaws (appendix 2) for ideas on electing new members.



Rotary Reminder

Make sure members are well-educated about RI and Foundation programs such as Rotary Youth Exchange, Ambassadorial Scholarships, and World Community Service. Becoming involved in one of these programs could spark a lifelong interest in Rotary.

- Introduce a program in which all club members who joined in the same Rotary year work together on a project.
- Encourage new members to volunteer for a service project.
- Ask new members to find two or three other new members from among their peer group. When new members promote Rotary to their friends, they become stronger and more enthused about Rotary.
- Encourage new members to experience the internationality of Rotary by attending the RI Convention or hosting a Group Study Exchange team member for a meal or other activity.
- Have a new member serve as a delegate to the district conference to learn about the world of Rotary and the projects being done outside of your club. Some clubs assist the new member by paying part or all of the costs of the conference. After the conference, ask the new member to give a report to the club.

Educate. During the first six months, new members can expand their understanding of Rotary by

- Attending new member orientation meetings
- Visiting the Rotary E-Learning Center at www.rotary.org
- Attending club assemblies, board meetings, or committee meetings
- Talking about their profession at a club meeting and discussing how it may be useful to the club
- Making up a meeting at another club
- Serving on a club committee

Although it is important for new members to participate in a formal orientation process during their first several months of Rotary membership, it is also important for all members continue to learn about the scope of their Rotary membership, whether they have been members for three months or 30 years.

Continuing Education

Continuing member education ensures that members remain challenged, motivated, and enthusiastic. The membership committee should have a continuing Rotary education plan in place to keep existing members current on Rotary International, The Rotary Foundation, and the club.

Members who feel informed and involved are more likely to actively participate. In this way, training is fundamental to your club's membership retention. If your club has a club trainer, work with him or her on implementing the training; work with your district membership committee on topics to cover. The district membership committee works with the regional RI membership coordinator, who has been trained on the latest membership strategies and initiatives.



Rotary Reminder

Develop members' leadership skills using *Leadership Development: Your Guide to Starting a Program* (250-EN).



Rotary Reminder

Keep your club members up-to-date and educated on Rotary's US\$200 Million Challenge. Encourage involvement in this momentous effort to eradicate polio.



Rotary Reminder

See article 8 of the Standard Rotary Club Constitution for a detailed explanation of the classification principle.



Rotary Reminder

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

Continuing education programs might include:

- Regular club assemblies to discuss which club activities club members want to continue and which they want to change
- A leadership development program to enhance members' professional lives and nurture future club leaders
- A club program focused on Rotary, its history, object, scope, and activities
- Participation of club members in district meetings that address continued education
- A special program presented by your regional RI membership coordinator, Public Image Resource Group member, regional Rotary Foundation coordinator, or regional Rotary Foundation alumni coordinator

Use your club and district Web sites, weekly meetings and e-mails, and club bulletins to share information from your district governor or Rotary International with club members.

RI publications are also excellent continuing education tools. By reading publications such as *The Rotarian* or Rotary regional magazines, club members can stay current on Rotary activities worldwide. Encourage members to visit www.rotary.org often to stay current on events and resources.

Diversity

The Rotary Code of Policies states: "A club that reflects its community with regard to professional and business classification, gender, age, religion, and ethnicity is a club with the key to its future."

Rotary clubs use the classification system to help ensure they represent the professional diversity of the local business and professional community. In order to make optimal use of the classification system, conduct an annual classification survey to determine your club's open classifications. This survey's purpose is to identify the professional makeup of the local community, review the classifications of current members, create or modify classifications to better reflect the community, and set or adjust recruiting efforts, as needed.

A phone directory or a business directory from a chamber of commerce can provide an overview of local businesses and professions in your area. If you are not sure how to list a member's classification, contact the CDS representative who serves your area.

Find a classification survey and membership diversity assessment at www.rotary.org, keyword search "Club Assessment Tools."

Club Image

A club's image is directly related to its ability to recruit new members. With high-quality, consistent public image efforts, individuals will seek out local clubs and be more inclined to accept invitations to join. The club membership committee should work with the club public relations committee to coordinate public image efforts.

Develop a club Web site that contains current photos and contact information, depicts your club's projects and goals, uses Humanity in Motion graphics and Web banners, and embeds the *Welcome to Rotary* membership video or a custom-made membership video of your own. Your club should consider using digital audio, streaming video, podcasts, online social networks, and blogs in your promotional efforts to recruit new members. For help developing these resources, consider targeting marketing, public relations, and Internet and Web technology professionals for membership recruitment.

Sponsoring New Clubs

While your club membership committee is primarily working toward the growth of your own club, it is important to consider that your club may not be the best fit for every prospective Rotarian in your community. Prospective members' work and travel schedules, family commitments, and different areas of interest often create the need for different options of meeting times and days.

Alert your district governor and district extension committee if the demand is sufficient to support a new Rotary club. Your club can mentor and work in partnership with new Rotary clubs in your area.

If your club sponsors a new Rotary club, your committee can:

- Assist the special representative in planning and organizing the administrative processes of the new club.
- Help organize the new club's programs and projects.
- Report to the district governor as requested during the club's first year.
- Serve as a mentor to the new club for at least two years after its admission to membership in RI.

Requirements for sponsoring new Rotary clubs include:

- Agreeing to mentor the new club for a minimum of one year
- Being in good financial standing with RI
- Having at least 20 active members
- Carrying out a well-rounded program of Rotary service

For more information on opportunities to sponsor a new Rotary club in your area, contact your district governor, district membership committee, or district extension committee.

Club Membership Committee Chair



To prepare for your term as committee chair, learn what will be expected of you and your committee by the club's board of directors and members, your district, and Rotary International. It is recommended that you assist the outgoing club membership chair before taking office to better understand your role. Ask questions such as:

- What is your role as committee chair?
- How can the club membership committee recruit and retain members?
- What controls are in place to ensure that new members are informed and included?
- How can you help your committee members do their job?
- What are your committee's long-range and annual goals?

As chair of your committee, you are responsible for ensuring that your committee does its job well. There are several things you should do before you take office to prepare for your role. In addition to attending your training sessions at the district assembly, you should

- Review this entire manual
- Review your club's bylaws to become familiar with your club's procedures and regulations
- Select your committee members with the president-elect
- Prepare your committee members for the coming year



Rotary Reminder

Answer discussion questions in appendix 3, and discuss them with your peers from other clubs at the district assembly.

- Create subcommittees if needed
- Develop committee goals to achieve club's membership goals
- Develop a communication plan for the year
- Review and establish club long-range and annual goals with the president-elect

Good preparation will lead to a productive year. Once you have taken office, you will have the following major responsibilities as committee chair:

- Manage your committee's budget.
- Work with other committees in your club and your district committee on multiclub activities or initiatives.
- Plan and conduct regular committee meetings and activities.
- Monitor status toward your committee goals, and report committee activities and progress to the club president, board of directors, and the full club.

Consult the outgoing club membership committee chair for duties that may be specific to your club. Developing your own list of regular duties will help keep you and your committee organized and on task. The major responsibilities listed above are described below.



Rotary Reminder

The club president serves as an ex officio member of all club committees.



Rotary Reminder

All incoming committee members should attend the district membership seminar to learn the district's membership goals, discuss membership strategies, and learn what resources are available.

Your Committee

Work with the president-elect to select committee members to fill vacancies and conduct planning meetings before the start of the year. When feasible, committee members should be appointed to the same committee for three years for continuity. Committee members should have connections to and represent a cross-section of the community. When selecting new members, consider the following important characteristics:

- Professional experience in recruiting, marketing, or sales
- Thorough knowledge of Rotary
- Outgoing and sociable personality

Once your committee is formed, it is your responsibility to prepare it for the coming Rotary year. You can prepare committee members by

- Informing new members of the committee's ongoing activities and plans related to the club's strategic plan
- Pairing new committee members with more experienced ones
- Encouraging communication with counterparts in other clubs using the district directory
- Sharing the resources available to your committee
- Giving members a list of district activities and meetings



Around the World

Clubs vary in size and goals and can structure their committees accordingly.



Rotary Reminder

Various planning tools are available to clubs, including the *Club Leadership Plan*, the *Strategic Planning Guide*, and the *Planning Guide for Effective Rotary Clubs*.

Subcommittees

Depending on the size and goals of your club, the membership committee can be divided into subcommittees such as those listed below or others as determined by your club:

- Recruitment
- Retention
- Classification
- Orientation and education

Determine how to best utilize the skills and interests of your members and assign tasks accordingly. Hold committee members accountable for the responsibilities they have assumed, and recognize them for their hard work.

Goal Setting

As the chair of your committee, you are responsible for ensuring your committee sets and achieves its goals. Committee goals should be based on the long-range and annual goals of your club. Think about your club's strategic plan, and what your committee can do to help it achieve its vision.

The *Planning Guide for Effective Rotary Clubs* is a goal-setting tool that helps the club president-elect work with club committees to assess the current state of the club and establish annual goals that support the club's long-range goals for the year. The planning guide has a section for each of the recommended club committees that you should bring to the district assembly, where you'll have an opportunity to work on it with your club president-elect and other incoming club leaders. The *Planning Guide for Effective Rotary Clubs* can be used throughout the year to help measure progress toward established goals. It should be reviewed periodically and updated as needed.

Effective goals. To ensure that the goals established are effective, be sure that they accurately reflect committee capabilities and club interests. Your goals should be

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it. Consult with club leaders, club members, and district leaders in setting a goal.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available. Compare goals to previous goals achieved by the committee and the club.
- **Time specific.** A goal should have a deadline or timeline.

Action plan. Work with club leaders and committee members to develop an action plan that outlines the steps needed to achieve each goal. The following steps can help you develop an action plan:

- Establish a time frame for each step.
- Determine who is responsible for implementing each step.
- Establish the criteria for measuring progress and success for each step.
- Consider the resources and tools available from your club, district, and RI to support the goal.
- Secure human, informational, and financial resources before taking action.
- Evaluate the success of previous goals and your current plan, making modifications as necessary.

Regularly evaluate your goals to ensure steady progress is being made toward achieving goals as envisioned, and adjust if necessary.

Motivation. It is important to remember that Rotarians are volunteers, and their involvement is highly dependent upon personal motivation. Part of your responsibility as committee chair is keeping your committee members motivated. Common motivators include:

- Assurance that the goal will benefit the community and their club, district, and Rotary
- Opportunities for fellowship
- Opportunities for networking
- Belief that the goal is achievable and the project or activity will be successful
- Assignments that challenge members or use their expertise
- Recognition of efforts and time spent working toward committee goals

Using these motivating factors can help maintain member commitment to Rotary and encourage continued participation in club activities.

Budget

Before 1 July, work with your committee and the club treasurer to determine what funds your committee will need to achieve its goals. Also include any planned fundraising activities. Ensure your committee's financial needs are included in the club budget.

Provide oversight of committee funds, transactions, and reports, and be aware of the financial condition of your committee's budget at all times. By meeting regularly with your club's treasurer, you can take early corrective measures if issues arise.

Communication

Before the start of the year, develop a communication plan with other club leaders that outlines with whom, when, and how you will communicate, including communications with:

- **Committee members.** Committees should meet regularly to review and identify available resources, discuss ongoing projects and new initiatives, and develop strategies to achieve committee and club goals.
- **Your club.** Report your committee's activities, including action plans and progress toward goals, to your club's president, board, and all club members.
- **Other committees.** Often, the work of one committee affects the work of another. Effective communication will help committees work together to coordinate projects and initiatives. The club membership committee should work with the following club committees to meet club membership goals:
 - Public relations committee (to elevate the image of your club in the community, making it more attractive to potential members and building pride in current members)
 - Service projects committee (to ensure that service projects are relevant to club members and to involve non-Rotarians in service projects to better understand the opportunities for service that Rotary membership provides)
 - Club administration committee (to plan weekly programs that educate members about Rotary and address their personal needs and interests)
- **Your district.** If your committee needs guidance or information, contact your district counterpart or your assistant governor.
- **Your region.** Your regional RI membership coordinator is available to help your club with its membership issues. Subscribe to your RRIMC's newsletter or blog to ensure you are receiving all of the latest membership news and initiatives within your region.

Resources



There are many resources available to help your committee fulfill its role. Take advantage of the informational resources produced by Rotary International, the information on the RI Web site, and from fellow Rotarians and RI staff who may be able to answer your questions.



Rotary Reminder

Download publications at www.rotary.org/downloadlibrary, or order them through shop.rotary.org, shop.rotary@rotary.org, or your international office.

Informational Resources



Membership Development Resource Guide (417-EN) — Booklet outlining steps to help clubs develop a membership development action plan for recruiting and retaining members. Works in coordination with online companion piece, *Club Assessment Tools*.

- District directory — Listing of district leaders and activities (if your district produces a directory).
- *How to Propose a New Member (254-EN)* — Brochure outlining the procedure for selecting and electing members. Includes a Membership Proposal Form.
- *Membership Video Set (427-MU)* — Two DVDs (one for new members and one for prospective members), each featuring a compilation of Rotary videos.

- *New Member Orientation: A How-to Guide for Clubs* (414-EN) — Resource for club’s prospective and new member information programs that includes sample program outlines, action steps, worksheets, and resource listings.
- *New Member Information Kit* (426-EN) — Resource that provides new members with essential information on Rotary International and The Rotary Foundation. The contents listed below can also be ordered as individual items.
 - *Welcome to Rotary Folder* (265-MU) — Pocket folder in which a club can place material for presentation to new members.
 - *The ABCs of Rotary* (363-EN) — Compilation of short, informative articles about Rotary history and programs.
 - *RI Theme Brochure* (900-EN) — Pamphlet that features the current year’s RI theme and logo, along with a message from current year’s RI president.
 - *Rotary’s US\$200 Million Challenge Brochure* (986-EN) — Pamphlet with information about Rotary’s commitment to eradicate polio.
 - *Rotary Foundation Facts* (159-EN) — Pocket-size leaflet with recent Foundation statistics.
 - *The Rotary Foundation Quick Reference Guide* (219-EN) — Booklet that provides a overview of Rotary Foundation programs and services.
 - *Rotary International and The Rotary Foundation Annual Report* (187-EN) — Annual report on service and financial highlights and major events of the previous Rotary year.
- *Official Directory* (007-EN) — Contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing of clubs within districts, including contact information.
- *Planning Guide for Effective Rotary Clubs* — Club assessment and goal-setting tool used to plan membership goals (see appendix 1).
- *Prospective Member Information Kit* (423-EN) — Basic information on Rotary, The Rotary Foundation, and the responsibilities of club membership. The contents listed below can also be ordered as individual items.
 - *Welcome to Rotary Folder* (265-MU)
 - *Rotary Basics* (595-EN) — Colorful eight-page guide to Rotary history, fundamental principles, programs, achievements, and membership benefits and responsibilities.
 - *This Is Rotary* (001-EN) — Colorful brochure with photos providing brief overview of Rotary for prospective Rotarians and the general public.
 - *What’s Rotary?* (419-EN) — Wallet-size handout to non-Rotarians that answers frequently asked questions about the organization and scope of Rotary.
 - *Rotary Foundation Facts* (159-EN)
 - *Rotary’s US\$200 Million Challenge Brochure* (986-EN)



Rotary Reminder

The RI Web site provides online resources and current information on all aspects of Rotary. Download free publications, shop the online catalog, or locate the meeting time and place of any Rotary club.

- Recommended Rotary Club Bylaws — Legal document that expands on club operations guidelines in the club constitution.
- Standard Rotary Club Constitution — Constitutional document that is a framework for Rotary club operations that includes policy on membership.
- *Start with Rotary* Postcards (614-EN) and Wallet Cards (613-EN) — Postcards and wallet cards that can be used as invitations for prospective members to attend a Rotary club meeting.

www.rotary.org

- *Club Assessment Tools* — Online supplement to the *Membership Development Resource Guide* with various club assessment activities including:
 - Membership section of the *Planning Guide for Effective Rotary Clubs*
 - Classification Survey
 - Membership Diversity Assessment
 - 25-Minute Membership Survey
 - Retention Model
 - Termination Profile
 - Membership Satisfaction Questionnaire
 - Resigning Member Questionnaire
- Running a Club (click the Members tab) — Aimed at helping club leaders gather information about effective club operations, including links to club administration, membership, public relations, service projects, and Rotary Foundation information and to club-level resource pages.
- Awards section — RI and Rotary Foundation awards and recognition programs, including the RI Membership Development and Extension Award, RI Recognition of Membership Development Initiatives, the RI Recognition of Smaller Club Membership Growth, and the RI Recognition of New Member Sponsors and Retention.
- Rotary E-Learning Center — Brief modules designed for independent study by new members and club officers.

Human Resources

Find contact information in the *Official Directory*, at www.rotary.org, or from your district governor.

- Assistant governor — Rotarian appointed to assist the governor with the administration of designated clubs. Your assistant governor will visit your club quarterly (or more often) and is available to answer questions or provide advice.
- District governor — RI officer responsible for advising your club on strategies to make your club more effective.

- District membership development committee — Rotarians appointed to support clubs in their membership development efforts.
- District public relations committee — Rotarians appointed to provide resources to clubs for developing a positive image within the community.
- Other club committee chairs in your district — Club leaders who can serve as a resource to help support your club's projects and initiatives.
- Past club committee chairs and leaders — Knowledgeable Rotarians who can advise you as you plan your year and can be assigned to lead committee activities.
- Regional RI membership coordinator (RRIMC) — Rotarians appointed by the RI president to serve as a primary membership development resource within a specific region.
- RI Membership Development staff — Staff members at RI World Headquarters dedicated to assisting clubs and districts in their membership development efforts.

Financial Resources

- Club fundraisers
- Funds from individual donors or local businesses
- Grants from other foundations
- Rotary Foundation grants for club and district humanitarian projects

Appendix 1: Club Membership Section of the *Planning Guide for Effective Rotary Clubs*

August 2009

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in each section are common ways clubs might choose to pursue goals. Clubs are encouraged to develop alternative strategies to achieve their goals when appropriate. Presidents-elect should complete this form in cooperation with their club and submit a copy of it to their assistant governor by 1 July.

Download a Microsoft Word version at www.rotary.org.

MEMBERSHIP

Current State

Current number of members: _____

Number of members as of 30 June last year: _____ 30 June five years ago: _____

Number of male members: _____ Number of female members: _____

Average age of members: _____ Number of Rotary alumni members _____

Number of Rotarians who have been members for 1-3 years: _____ 3-5 years: _____

5-10 years: _____

Number of members who have proposed a new member in the previous two years: _____

Check the aspects of your community's diversity that your club membership reflects:

Profession Age Gender Ethnicity

Our classification survey was updated on _____ and contains _____ classifications, of which _____ are unfilled.
(number) (date) (number)

Describe the club's current new member orientation program.

Describe the club's continuing education programs for both new and established members.

Our club has sponsored a new club within the last 24 months. Yes No

Number of Rotary Fellowships and Rotarian Action Groups that club members participate in:

What makes this club attractive to new members?

What aspects of this club could pose a barrier to attracting new members?

Future State

Membership goal for the upcoming Rotary year: _____ members by 30 June _____
(number) (year)

Our club has identified the following sources of potential members within the community:

How does the club plan to achieve its membership goals? (check all that apply)

- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Ensure the membership committee is aware of effective recruitment techniques
- Develop a recruitment plan to have the club reflect the diversity of the community
- Explain the expectations of membership to potential Rotarians
- Implement an orientation program for new members
- Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- Assign an experienced Rotarian mentor to every new club member
- Recognize those Rotarians who sponsor new members
- Encourage members to join a Rotary Fellowship or Rotarian Action Group
- Participate in the RI membership development award programs
- Sponsor a new club
- Other (please describe):

Action steps:

Appendix 2: Recommended Rotary Club Bylaws

Article 13 Method of Electing Members

Section 1 – The name of a prospective member, proposed by an active member of the club, shall be submitted to the board in writing, through the club secretary. A transferring or former member of another club may be proposed to active membership by the former club. The proposal shall be kept confidential except as otherwise provided in this procedure.

Section 2 – The board shall ensure that the proposal meets all the classification and membership requirements of the standard Rotary club constitution.

Section 3 – The board shall approve or disapprove the proposal within 30 days of its submission and shall notify the proposer, through the club secretary, of its decision.

Section 4 – If the decision of the board is favorable, the prospective member shall be informed of the purposes of Rotary and of the privileges and responsibilities of membership, following which the prospective member shall be requested to sign the membership proposal form and to permit his or her name and proposed classification to be published to the club.

Section 5 – If no written objection to the proposal, stating reasons, is received by the board from any member (other than honorary) of the club within seven (7) days following pub-

lication of information about the prospective member, that person, upon payment of the admission fee (if not honorary membership), as prescribed in these bylaws, shall be considered to be elected to membership.

If any such objection has been filed with the board, it shall vote on this matter at its next meeting. If approved despite the objection, the proposed member, upon payment of the admission fee (if not honorary membership), shall be considered to be elected to membership.

Section 6 – Following the election, the president shall arrange for the new member's induction, membership card, and new member Rotary literature. In addition, the president or secretary will report the new member information to RI and the president will assign a member to assist with the new member's assimilation to the club as well as assign the new member to a club project or function.

Section 7 – The club may elect, in accordance with the standard Rotary club constitution, honorary members proposed by the board.

Appendix 3: District Assembly Discussion Questions

Reviewing this manual before you attend the district assembly will help you prepare for your training, which will include facilitated discussion sessions that address the questions below. When considering the questions, refer to earlier sections in this manual, and talk to outgoing and incoming club leaders to compare thoughts.

What are the responsibilities of the club membership committee and what are your responsibilities as chair of this committee?

How can the club membership committee recruit and retain members?

What controls are in place to ensure that new members are informed and included?

How can you help your committee members do their job?

What are your committee's long-range and annual goals?

Worksheet 1: Summary

Notes

Role and Responsibilities

I learned ...

I will ...

Contacts

Worksheet 2: Goals

Use this worksheet to draft a long-range goal and annual goals for three years to reach the long-range goal. Ensure that your goals are:

Shared. Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.

Measurable. A goal should provide a tangible point to pursue.

Challenging. A goal should be ambitious enough to go beyond what your club has accomplished in the past.

Achievable. Rotarians should be able to accomplish the goal with the resources available.

Time specific. A goal should have a deadline or timeline.

You will continue working on these preliminary goals with your club teams, using the *Planning Guide for Effective Rotary Clubs* in session 4.

<ul style="list-style-type: none">• Long-range goal (goal for your club three years from now):
<ul style="list-style-type: none">• Year 1 annual goal:
<ul style="list-style-type: none">• Year 2 annual goal:
<ul style="list-style-type: none">• Year 3 annual goal:

Worksheet 3: Action Plan

In the space below, write one annual goal from your goals worksheet. Then, determine the action steps that need to be taken to meet this goal, noting for each step the person responsible, the time frame, the signs of progress, and the necessary resources.

Annual goal:

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

Resources needed:

Worksheet 4: Club Membership Committee

Case Study

Read the case study below to complete the retention model, which is designed to help clubs identify whether they're retaining new members or existing members. Based on this information, create a step-by-step membership plan for the Rotary Club of Sun Village using the questions and the case study action plan on the next pages.

The Rotary Club of Sun Village is located in a town of 40,000. Sun Village's core economy is a mix of industry and commerce surrounded by farms. Sun Village has two high schools and a small community college that serves the town and the surrounding area. Recently, a few large companies have set up offices, attracting young professionals to the area.

Three years ago, the club had 47 members. Since then, two members have died, and six others have left the club. In addition, five new members joined the club, but two of them left. The club now has 42 members. The average age of members is 62, and 85 percent of them are men. Most members have been in the club for more than 15 years.

Though proud of their club's accomplishments and its service activities, many members are concerned that membership will continue to decline and make the club less capable of serving the Sun Village community. The club consistently performs the same annual community service projects it has become known for, but some club members would like to be able to take on new projects.

What are the strengths and weaknesses of this club?

Which is more problematic for this club: new members leaving the club in less than three years or long-term members leaving?

To be completed at district assembly

How can the club identify sources of new members within the community?

Who could the club work with to review its membership retention strategies and to learn strategies that have been successful for other clubs?

How can the club attract younger members?

How can the club provide basic information to the community about its projects and activities?

Case Study Action Plan

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

What did you learn that you can apply to your club?

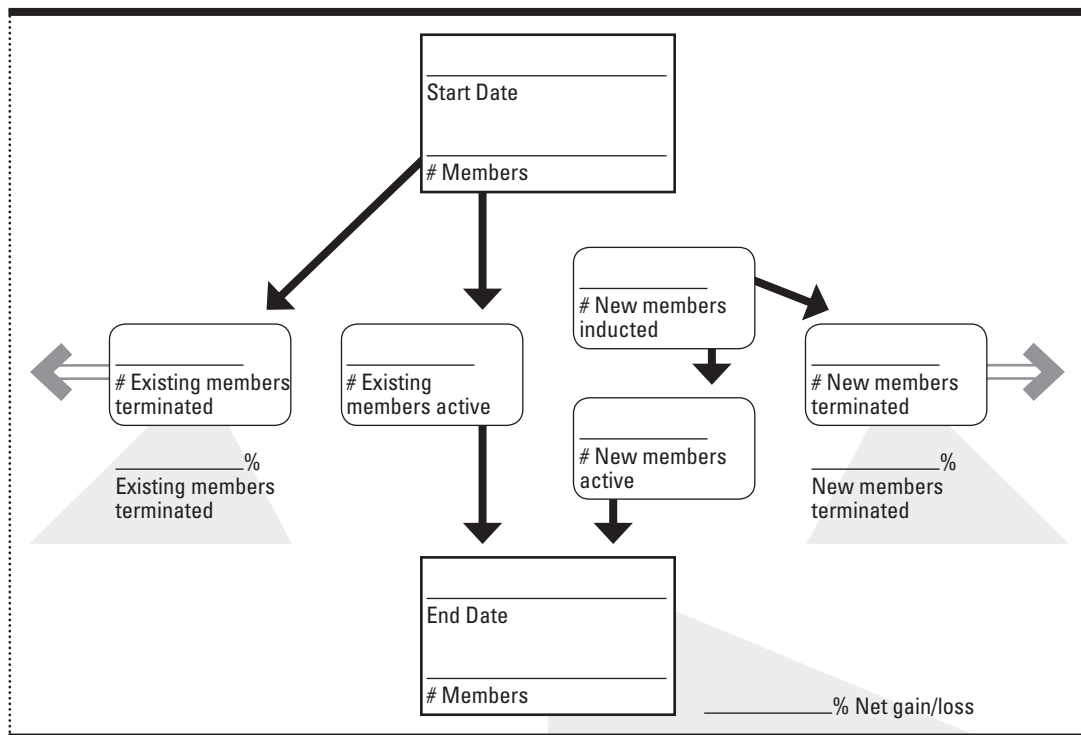
Worksheet 5: Retention Model

To remain viable, a Rotary club must retain its current members and induct and retain new, qualified members. The retention model is a tool to help clubs calculate their net membership gain or loss over a specified time period and determine its source: existing or new members.

Use your club membership records and the following diagram and instructions to create a retention model for your club. You'll need induction and termination dates for all members in the three- to five-year period. (If your club doesn't have complete records, your president or secretary can download them from Member Access at www.rotary.org.)

Once you've completed your model, use the instructions to interpret it.

Creating Your Retention Model



1. Establish the time frame you wish to study by entering a **Start Date** in the top box of the retention model and an **End Date** in the bottom box. (We recommend a time frame between three and five years.)
2. In the **Start Date** box, enter the number of active members who were in the club on that date.
3. In the **End Date** box, enter the number of active members who were in the club on the end date and calculate the **% Net gain/loss** by:

$$\frac{(\text{End Date number of members} - \text{Start Date number of members}) * 100}{\text{Start Date number of members}} = \text{ } \% \text{ Net gain/loss}$$

To be completed at district assembly

4. In the **Existing members terminated** box, enter the number of members who were active on the start date but terminated before the end date and calculate the % **Existing members terminated** by:

$$\frac{\text{Existing members terminated} * 100}{\text{Start Date number of members}} = \text{---}\% \text{ Existing members terminated}$$

5. Calculate the number of **Existing members active** by:

$$\text{Start Date number of members} - \text{Existing members terminated} = \text{Existing members active}$$

6. In the **New members inducted** box, enter the number of new members inducted between the start date and end date.

7. In the **New members terminated** box, enter the number of new members who were terminated before the end date and calculate the % **New members terminated** by:

$$\frac{\text{New members terminated} * 100}{\text{New members inducted}} = \text{---}\% \text{ New members terminated}$$

8. Calculate the **New members active** by:

$$\text{New members inducted} - \text{New members terminated} = \text{New members active}$$

* The number of members at the **End Date** should equal the number of **Existing members active** plus the number of **New members active**.

Interpreting Your Retention Model

Once you know who constitutes your club's net membership gain or loss, you can begin to identify the club's retention strengths and weaknesses.

Net Gain or Loss

A net gain or net loss of members is the first indication of a club's retention status. A net gain indicates that the club has more members. This could mean that the club retained its active members and brought in new members, or it could indicate that the club is inducting enough new members to compensate for the active members who are leaving.

A net loss indicates that the club has failed to retain more members than it inducts.

Evaluating Termination Rate

The primary evidence that the club might have a retention problem is if it has terminated a large number of members. Add the number of **Existing members terminated** (far left box) and the number of **New members terminated** (far right box) to determine the total number of members the club has terminated. Is the total number of terminations reasonable for the size of the club? Consider the reasons for these terminations and the steps the club can take to limit these losses.

New Members

To continue the termination analysis, consider the number of **New members terminated** (far right box). This indicates how many new members the club inducted and subsequently terminated within the time frame. Keep this number as low as possible. It is understood that occasionally a new member

To be completed at district assembly

may leave unexpectedly; however, if the club fully informs prospective members about the responsibilities of membership and maintains an effective new member orientation program, the number of new members terminated should be extremely low. The percentage listed under the **New members terminated** box (% **New members terminated**) identifies what percentage of new members have been terminated.

Existing Members

The number of **Existing members terminated** (far left box) identifies how many of the members that were active on the start date have been terminated. (The club's attrition percentage is % **Existing members terminated**). A low attrition percentage is an indication that the club is retaining its existing members.

Other Resources

Additional retention strategies and retention assessment tools can be found in the *Membership Development Resource Guide* and *Club Assessment Tools*, respectively. Contact your regional RI membership coordinator (RRIMC) for guidance on your retention efforts.

Detailed instructions on completing and analyzing the retention model are available by downloading *Club Assessment Tools* from www.rotary.org.



Plan your club's future using these guides

**Club Leadership Plan
Strategic Planning Guide
Planning Guide for Effective Rotary Clubs**

Guides are designed to work together. Download at www.rotary.org.



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