

2019 Rotary Zones 25B and 29 Institute
September 24-29, 2019
Sheraton Overland Park at the Convention Center
6100 College Boulevard
Overland Park, KS

District Membership Chairs Training

September 26-27, 2019

Resource Index

Agenda and Zones 25B/29 Map	3-6
Facilitator Information	7-8
Rotary Club Health Check	9-21
Member Attraction/Engagement/Retention	22-28
Leads and RI Resources	29-53
Flexibility and Innovation	54
Rotaract Initiatives	55-74
Creating a Membership Team	75-76
New Club Development/Building Diversity	77-82
Membership Plans	83-90
Membership Charts	91
RCC Reports/Data	92-101

DISTRICT MEMBERSHIP CHAIRS

Facilitators: **RC Dian Edwards, Zone 29, District 5630**
 RC Debbie High, Zone 25B, District 5930
 RC Shannon Scheffel, Zone 29, District 6420

Wednesday, September 25, 2019		
8:00 AM – 8:00 PM	Registration	Lobby Pillar
5:30 PM – 6:30 PM	All Rotarian Reception (cash bar)	Cottonwood Pre-function Area
6:30 PM – 8:30 PM	District Foundation/Membership/Public Image Chairs Friendship Dinner Host: RC Dian Edwards	Leatherwood 2

Thursday, September 26, 2019		
8:00 AM – 8:00 PM	Registration	Lobby Pillar
8:00 AM – 8:30 AM	Opening Session: The Future is Ours Speaker: RI Director Larry Dimmitt	Cottonwood 2 & 3
8:30 AM – 9:00 AM	Transition to Training Room	
9:00 AM – 9:20 AM	Introductions and Ice Breaker RCs Dian Edwards, Debbie High, Shannon Scheffel	Hawthorne 2
9:20 AM – 10:15 AM	Rotary Club Health Check ARC Demetress Harrell RC Debbie High	Hawthorne 2
10:15 AM – 10:30 AM	Break	Leatherwood Pre-function Area

Thursday, September 26, 2019		
10:30 AM – 11:30 AM	Strategies for Attracting New Members Strategies to Engage/Retain Members RC Dian Edwards ARC Rod Kreie	Hawthorne 2
11:30 AM – 11:45 AM	RI Director-Elect Suzi Howe	Hawthorne 2
11:45 AM – 12:15 PM	Transition to Lunch	
12:15 PM – 1:15 PM	Luncheon Speaker: PRIVP Greg Podd	Cottonwood 2 & 3
1:30 PM – 2:45 PM	Membership Leads RI Resources RMO Emily Tucker RI Product Manager Nicole Daines	Hawthorne 2
2:45 PM – 3:15 PM	Practicing Flexibility and Innovation “Highways to Membership” RC Debbie High ARC Demetress Harrell	Hawthorne 2
3:15 PM – 3:30 PM	Break	Leatherwood Pre-function Area
3:30 PM – 4:00 PM	Rotaract Initiatives ARC David Postic ARC Jenna Buscemi Rotary Supervisor Molly Friend	Hawthorne 2
4:00 PM – 5:00 PM	How to Create Your Membership Team RC Shannon Scheffel	Hawthorne 2
5:30 PM – 6:30 PM	Major Donor Reception	Leatherwood 3
5:30 PM – 6:30 PM	Paul Harris Society Reception (cash bar)	Leatherwood 2
5:30 PM – 6:30 PM	All Rotarian Reception (cash bar)	Cottonwood Pre-function Area
6:30 PM – 9:30 PM	Governor Class Reunion Dinner All Institute Participant Dinner	Cottonwood Ballroom

Friday, September 27, 2019		
8:00 AM – 9:00 AM	New Club Development Satellite Clubs Building Diversity “Grow Rotary” RC Shannon Scheffel ARC Linda Marrin	Hawthorne 2
9:00 AM – 9:15 AM	Meet the RI President-Elect Holger Knaack	Hawthorne 2
9:15 AM – 9:45 AM	Your Membership Plan Using Membership Charts/RCC Data RC Dian Edwards	Hawthorne 2
9:45 AM – 10:00 AM	Wrap Up Evaluations RC Team	Hawthorne 2
10:00 AM – 10:30 AM	Break	
10:30 AM – 11:30 AM	*District Specific Caucus	See below
11:30 AM – 12:30 PM	Transition to All Club Luncheon	

* District Caucus Rooms:

Hawthorne 2	Leatherwood 1	Leatherwood 2	Redbud
5790	5580	6220	5610
5810	5650	6250	5630
5840	5950	6270	5680
5870	5960	6420	5710
5890	5970	6440	
5910	6000	6450	
5930			

ROTARY PAIRED ZONES 25 AND 29

Rotary 
Zone 29

- 5580, 5610, 5630, 5650, 5670, 5690, 5710, 5950, 5960, 5970, 6000, 6220, 6250, 6270, 6420, 6440, 6450

Rotary 
Zone 25

- B** 5790, 5810, 5840, 5870, 5890, 5910, 5930

- A** 4060, 4100, 4110, 4130, 4140, 4170, 4185, 4195, 4240, 4250, 4271, 4281, 4370, 4380





RC Dian Edwards
District 5630

Dian Edwards is a graduate of St. Mary's Academy in Austin, Texas and received her Bachelor of Liberal Studies Degree in Public Administration from St. Edward's University in Austin, Texas.

Dian is a member of the District 5630 Beyond Borders eClub Satellite. Her Rotary service includes: Rotary Club President; District Assistant Governor; District Trainer; District Governor (2012-2013); and Assistant Rotary Coordinator (2017-2019). She chaired the 2014 Multi-district High Country President Elect Training Seminar, served as General Chair of the 2016 Rotary Zones 21b-27 Institute, and represented District 5630 as a delegate to the 2016 Council on Legislation. She currently serves as Region 34 Rotary Coordinator, Training Coordinator for the 2019 Zones 25B & 29 Institute, and District 5630 Coordinator for the Rotary Leadership Institute.

Deborah High is an educator, entrepreneur, and Immediate Past President, Palisades Retreat Club, Colorado, a 99-year-old "recreational" fishing club. She's the former Project Manager, University Research Alliance, West Texas A&M University. Debbie is a graduate of The American University Kogod School of Business, Business Executive Program.

Debbie is a Past District Governor District 5930, Assistant Rotary Coordinator, Assistant Governor and Lieutenant Governor of Membership. Debbie is a Rotary Coordinator for Region 26. She also serves as the Secretary and on the Board of Directors for Rotary Leadership Institute Lone Star Division.

Under the leadership of Governor High, 2016-2017, District 5930 was recognized for the highest net membership growth percentage in Zone 21b and for the Above and Beyond Award. Debbie is a Cliff Dochterman Award recipient by the Fellowship of Scouting Rotarians.

Debbie is a member of the Rotary Club of Southside Corpus Christi, Texas. She is a Bequest Society Member and Major Donor of The Rotary Foundation. She is also a Rotary Leadership Institute graduate and facilitator. She previously served on the Lone Star Present-Elects Training Seminar Strategic Planning Committee.

Debbie believes together we should Fly High with Rotary to awaken the possibilities, so we do not let Rotary become extinct.



RC Debbie High
District 5930



RC Shannon Scheffel
District 6420

Shannon joined Rotary in 2002. She served as the 2014-15 District Governor for District 6420. She has been very active as a Rotarian in her club and her District. She has served in a variety of club officer positions, on its Charitable Foundation Board, and helped the club start a satellite club. Her other Rotary activities include ChiZone Leadership Development Summit Vice-Chair 2017, Youth Protection Officer, Youth Exchange District Committee, Zone Club Extension Chair, and Secretary of Midwest PETS.

Shannon has traveled to Nigeria to work on project development and was Team Leader for a 2016 Vocational Training Team to Uganda.

Shannon attended the University of Iowa where she earned her BA degrees (Sociology and Political Science) and her Masters of Social Work degree. She moved to northern Illinois in 2001 after her ex-husband retired from the United States Air Force. She is the Executive Director of the Harlem Community Center – a multi-purpose center that provides recreational, social, and educational programs and a 226 child state-licensed child care facility.

Shannon is active in the community serving as a past Junior League of Rockford member, past board member of the Rockford Woman magazine, and past Board member of the Rockford Network of Professional Women.

Shannon has three teenagers - Alyssa, Madeline, and Jeremy. All three of her children are Paul Harris Fellows. Alyssa just returned from her year in Chile as a youth exchange student. When she was District Governor, Shannon tried to bring one of her children to as many official club visits as possible. The children also attended the International Convention in Sydney, Australia and Hamburg, Germany. They have become quite versed in the Rotary world!



ROTARY CLUB HEALTH CHECK

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

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

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



YOUR CLUB EXPERIENCE



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

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

**SEE THE FOLLOWING PAGE
FOR YOUR PROGNOSIS**





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

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> <li data-bbox="597 569 1406 638">+ Change the meeting format or style. For ideas, see Lead Your Club: President, chapter 2, and Be a Vibrant Club's "Ideas to try." <li data-bbox="597 680 1401 749">+ Find out what your members want using the Member Satisfaction Survey and then give them that experience. <li data-bbox="597 791 1445 861">+ Develop leadership skills among club leaders and members by holding a leadership skills training.
Rotary experience beyond the club	<ul style="list-style-type: none"> <li data-bbox="597 940 1364 1010">+ Sponsor an Interact or Rotaract club, organize a RYLA event, create a scholarship, or start an exchange. <li data-bbox="597 1052 1252 1083">+ Join a Rotary Fellowship or Rotarian Action Group. <li data-bbox="597 1125 1466 1194">+ Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience. <li data-bbox="597 1236 1463 1346">+ Promote the work that Rotary does globally, including polio eradication, by showing a short Rotary video or projects on Rotary Showcase during a club meeting.

SERVICE AND SOCIALS



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

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



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

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

MEMBERS



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

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



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

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

IMAGE



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

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



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

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> <li data-bbox="597 533 1380 600">+ Use the resources in Rotary's Media Center and use them in your community's media. <li data-bbox="597 642 1468 709">+ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's Brand Center.
Outdated materials	<ul style="list-style-type: none"> <li data-bbox="597 791 1448 858">+ Find customizable club brochures and membership materials on Rotary's Brand Center. <li data-bbox="597 900 1448 968">+ Follow the Voice and Visual Identity Guidelines in any materials your club creates. <li data-bbox="597 1010 1386 1077">+ Use Rotary Images and Rotary videos, as well as images of your members, in your materials.
Online presence	<ul style="list-style-type: none"> <li data-bbox="597 1163 1438 1230">+ Find a tech-savvy member to create and manage your club website and social media pages. <li data-bbox="597 1272 1237 1306">+ Take the social media course in the Learning Center. <li data-bbox="597 1348 1458 1415">+ Use Rotary Images and Rotary videos, as well as images and videos of your own members. <li data-bbox="597 1457 1110 1491">+ Share your projects on Rotary Showcase.
Marketing expertise	<ul style="list-style-type: none"> <li data-bbox="597 1570 1403 1638">+ Find tips in Lead Your Club: Public Relations Committee and put members with public relations expertise on the committee. <li data-bbox="597 1680 1445 1747">+ Recruit professionals with marketing expertise using ideas from Finding New Club Members: A Prospective Member Exercise. <li data-bbox="597 1789 1429 1856">+ Build your own social media expertise using the Social Media Toolkit in Rotary's Brand Center.

BUSINESS AND OPERATIONS



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

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



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

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	<ul style="list-style-type: none"> <li data-bbox="597 531 1442 600">+ Create a vision for your club and set long-range and annual goals using the Strategic Planning Guide. <li data-bbox="597 642 1182 674">+ Track your annual goals in Rotary Club Central. <li data-bbox="597 716 1357 785">+ Use Strengthening Your Membership to make a membership development plan.
Innovation	<ul style="list-style-type: none"> <li data-bbox="597 867 1419 936">+ Ask members for input using the Member Satisfaction Survey, and try their ideas. If they're successful, edit your club bylaws accordingly. <li data-bbox="597 978 1370 1010">+ Use templates in the Brand Center to create your own materials.
Processes	<ul style="list-style-type: none"> <li data-bbox="597 1087 1438 1157">+ Develop standard processes for new members, prospective member follow-up, proposing a new member, leadership continuity, etc.
Leadership	<ul style="list-style-type: none"> <li data-bbox="597 1234 1365 1304">+ Find tips and resources in Lead Your Club: President, Secretary, and Treasurer. <li data-bbox="597 1346 1401 1415">+ Offer leadership development opportunities and promote self-paced learning with Rotary's Learning Center.
Managing funds	<ul style="list-style-type: none"> <li data-bbox="597 1493 1349 1562">+ Use The Rotary Foundation Reference Guide to learn about giving options. <li data-bbox="597 1604 1198 1635">+ Find best practices in Lead Your Club: Treasurer.
Managing your club on MyRotary	<ul style="list-style-type: none"> <li data-bbox="597 1717 1414 1822">+ Use the Club Administration section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads.

WHAT'S NEXT?



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

FEATURED RESOURCES

Membership Assessment Tools

Membership resources

Brand Center

Learning Center

Rotary videos

IS YOUR CLUB HEALTHY?



RELEVANCE: For clubs to be vibrant, they need to be healthy in all areas.

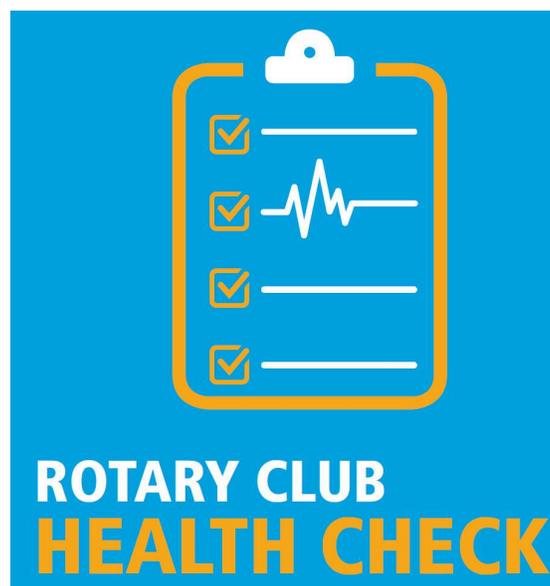
Learning objectives

At the end of this session, participants should be able to:

- Help clubs identify which areas need attention in order to be more vibrant
- Offer specific suggestions to improve in the areas where the club is struggling

Resources

- [Rotary Club Health Check](#)
- [Is Your Club Healthy – online course](#)
- [Be a Vibrant Club](#)
- [Membership Assessment Tools](#)
- [Strengthening Your Membership: Creating Your Membership Development Plan](#)
- [Understanding Membership Reports: Getting Started](#)
- [Strategic Planning Guide](#)



STRATEGIES FOR ATTRACTING NEW MEMBERS



RELEVANCE: Clubs need new members in order to be vibrant and active.

Learning objectives

At the end of this session, participants should be able to help clubs:

- Customize an approach for attracting members based on the needs of their target groups
- Develop a plan for engaging prospective members

Speaking points

- Participating in service and having fun with fellow members are the primary reasons that people join and stay in Rotary.
- To attract new members, it's important that clubs assess which areas they are doing well in, which areas need attention, and whether their club reflects the values of Rotary.
- Clubs should identify which professions and demographics are missing from your club so you can focus on these groups while seeking new members (the classification and member diversity assessments will help you).
- Rotaractors can now be members of a Rotary and Rotaract club at the same time.
- Younger professionals could make great Rotary members, but to bring them into our clubs, we first have to understand what they are looking for and what your club has to offer them.
- Develop a pool of potential candidates, such as women, younger professionals, alumni, recent retirees, an ethnic group, or Rotaractors to target in your promotional efforts (the prospective member exercise will help you do this).
- Once you've identified your target group, tell the group about the relevance, value, and benefits that a Rotary membership offers — this is often called a value proposition. Your approach to attracting these demographics will differ based on each group's needs.
- District governors, executive secretaries, and district membership chairs receive emailed alerts when an online membership lead is assigned to the district. Reach out to these people who have expressed an interest in joining Rotary, learn more about them, and assign them to a club in your district.

STRATEGIES FOR ATTRACTING NEW MEMBERS



- Meet with prospective members and decide whether they're suited for a club in your district by asking them what they're seeking. Encourage club members to do the same. If they are suited for a club other than your own, refer them.

Discussion questions

- What has growth been like in your district over the past five years?
- What strategies has your district used to attract members?
- How well has your district succeeded in inviting Rotaractors to become Rotarians? How can your club develop them to become members?
- How do clubs promote Rotary in the community?
- How can you use social media to promote Rotary to your contacts and appeal to different demographics?
- How do you approach prospective members? How can you alter your approach based on the group you're targeting?
- What is your practice for engaging prospective members?
- What factors do you consider when evaluating whether a prospect would be suited for your club? What factors do clubs in your district consider? Do these factors vary much from club to club?

Suggested Activity: Engaging with prospective members

Divide participants into groups and give each group a flip chart.

Ask groups to think of a plan for following up with prospective members that considers the questions below (list questions on a slide, flip chart, or whiteboard):

- Who will be responsible for following up with prospective members?
- Who will check and manage the status of online membership leads?
- How would you decide whether the candidate is a good fit for your club?
- If the candidate is well-suited, what are your next steps?
- What would you do if the candidate is not a good fit?

Ask each group to write its plans on the flip chart and allow groups to share their responses.

STRATEGIES FOR ATTRACTING NEW MEMBERS



Resources

- [Strategies for Attracting New Members \(online course\)](#)
- [Engaging Younger Professionals](#)
- [Finding New Members: A Prospective Member Exercise](#)
- [Customizable club brochure](#)
- [Discover Rotary presentation](#)
- [Connect to Membership Leads](#)
- [How to Manage Membership Leads \(for clubs\)](#)
- [How to Manage Membership Leads \(for districts\)](#)
- [Creating a Positive Experience for Prospective Members](#)

BEST PRACTICES FOR ENGAGING YOUR MEMBERS



RELEVANCE: Engaging members at all stages of their membership will help them maximize their Rotary experience and continue to find value in it.

Learning objectives

At the end of this session, participants should be able to help clubs:

- Use Rotary tools and resources to understand why members leave
- Develop strategies for engaging members at different stages of their membership

Speaking points

- Most members who leave do so within two years of joining.
- Encourage clubs to
 - Learn why members leave, by interviewing them and asking them to complete the exit survey in Understanding Why Members Leave.
 - Learn what their members like and dislike about the club, using the membership satisfaction survey in Enhancing the Club Experience, then develop an action plan.
- Implementing results from a member satisfaction survey demonstrates to members that their input is valued.
- Clubs should strive to find ways to engage your members at all stages of their membership to help them maximize their Rotary experience.

Discussion questions

- What are ways clubs can involve members who avoid projects, activities, and leadership roles?
- What if a club's activities don't reflect the skills and interests of your members? How can a club maximize its members' collective talent?
- How can clubs engage members who are at different stages of their membership?
- How can clubs recognize members for their efforts?
- What did you learn from the last member who left your club and what changes has your club made as a result?
- How can you promote or change your club's meetings to get members excited about coming?

BEST PRACTICES FOR ENGAGING YOUR MEMBERS



Suggested Activity: Engaging members at different stages of membership

Divide participants into five groups based on these membership stages:

- Less than one year
- 1-2 years
- 3-5 years
- 6-10 years
- 10 or more years

Give each group flip chart paper and copies of *Improving Your Member Retention: Retention Assessment and Analysis*.

Ask them to record strategies for engaging these types of members on their flip chart paper using the information they have and post them on the wall.

Ask each group to share its recommendations. Discuss the activity with the overall group as time allows.

Resources

- [Best Practices for Engaging Members \(online course\)](#)
- [Strengthening Your Membership: Creating Your Membership Development Plan](#)
- [Membership Assessment Tools:](#)
 - [Improving Your Member Retention: Retention Assessment and Analysis](#)
 - [Enhancing the Club Experience: Member Satisfaction Survey](#)
 - [Understanding Why Members Leave: Exit Survey](#)
- [Be a Vibrant Club](#)
- [Get More Out of Membership: Connect for Good](#)
- [Rotary Club Health Check](#)
- [Understanding Membership Reports: Getting Started](#)
- [Rotary Club Central Reports:](#)
 - Member Viability and Growth report
 - Membership Termination Profile

KICK-START YOUR NEW MEMBER ORIENTATION



RELEVANCE: Research shows that clubs with a new member orientation have higher member retention rates.

Learning objectives

At the end of this session, participants should be able to help clubs:

- Identify aspects of new member orientations to add to their program
- Develop an effective orientation for new members

Speaking points

- A successful Rotary orientation begins before the prospect joins and continues through the various stages of membership.
- Encourage clubs to give prospective members an idea of what to expect, such as the culture, history, projects and activities, and what the club is known best for.
- Finding ways to involve members at all stages of their membership helps them maximize their Rotary experience and continue to find value in it.
- Assigning a mentor to new members can help newcomers become part of the club more easily; it also can benefit experienced members by keeping them active and involved.
- Urge clubs to evaluate their new member orientation program regularly by asking their members for opinions and adjusting practices according to the feedback.

Discussion questions

- What information should be covered with prospective members, compared with new members?
- How can you help your clubs ensure that their new member orientation programs engage their new members?
- How should a mentoring relationship work with new members?
- In what ways can you encourage clubs in your district to get new members involved?
- How can you encourage club leaders in your district to make Rotary fun for new members?

KICK-START YOUR NEW MEMBER ORIENTATION



- What new member orientation success stories have you heard that you can suggest to clubs in your district?

Suggested Activity: Designing Your New Member Orientation

Divide participants into groups and ask them to design a new member orientation program based on the best practices and ideas discussed. Allow time for each group to share with the others. Encourage them to share their ideas with their clubs.

Resources

- [Kick-start Your New Member Orientation \(online course\)](#)
- [Introducing New Members to Rotary: An Orientation Guide](#)
- [Customizable club brochure](#)
- [New Member Welcome Kit](#)
- [Rotary Basics](#)
- [Connect For Good](#)

RELEVANCE: As a district leader, managing and understanding online membership leads is a key responsibility, as is supporting clubs in managing their leads and creating a positive experience for these prospective members.

Learning objectives

At the end of this session, district leaders should be able to help clubs:

- Understand how membership leads work
- Manage their membership leads online
- Create a positive experience for prospective members

Speaking points

FACILITATOR NOTE: Consider using the Managing Membership Leads PPT presentation during this session.

- Online membership leads are the result of
 - a prospective member expressing interest in Rotary by visiting Rotary.org
 - a relocating or former member expressing interest in changing clubs or rejoining a club
 - a Rotarian referring a prospective member to a club other than their own
- When any of these actions are taken, the leads are screened by Rotary International staff and assigned to the appropriate districts.
- When assigned to a district, district governors, membership committee chairs, executive secretaries, and assistant governors will receive an emailed alert, notifying them of a new lead. This email includes a link to their Manage Membership Leads page where they can review additional information about the lead.
- After contacting the candidate and updating the status and feedback online, a district leader may assign it to a specific club, if appropriate, on the Manage Membership Leads page.
- When assigned to a club, club presidents, secretaries and membership committee chairs receive an emailed alert, notifying them of the new lead and linking to their Manage Membership Leads page, where they can learn more about the lead, including notes left by their district leaders.

- Club leaders are expected to follow up with the candidates and take further actions, as appropriate, and update the status of the lead online to reflect the action taken.
- More than half of the membership leads received are not being acted upon by club and district leaders. This creates a negative Rotary experience for the candidate who began with a positive perception of Rotary.
- All current club and district officers can access and manage their membership leads. All incoming and immediate past club and district officers can view their membership leads.

Discussion questions

- How many of you are familiar with membership leads? How many of you have received email alerts? How many of these leads have been admitted to clubs?
- District governors, district membership committee chairs, district executive secretaries, and assistant governors receive the email alerts. It is crucial to establish a process for managing the leads. What is your process for managing the leads when they come to you? Who in your district is responsible for reaching out to candidates to learn more about them? Who is responsible for updating the status online?
- What could happen if a process is not established? (lead could be left unattended or multiple people could reach out to the candidate)
- What do you tell your clubs about membership leads? How do you involve your assistant governors?
- How do you ensure membership leads assigned to your district are followed up on by the clubs they are assigned to?
- Besides the potential to grow Rotary, why is it important to follow up on membership leads?

Suggested Activity: The membership lead experience

Instruct participants to navigate on their mobile devices to the Learning Center, then have them search take the [Online Membership Leads course](#) and open the interactive module. Give them 10 minutes go through it. Then have them get into groups of three or four, with each person sharing two new things they learned from going through the module. Have each group consolidate learnings and report the top 3 to the larger group.

ONLINE MEMBERSHIP LEADS



-OR-

Divide participants into groups of three or four and have each group discuss how to handle one of the scenarios below:

- A membership lead candidate – Daniel – is really impressed with Rotary and personally benefitted from a Rotary project when he was young. He expresses interest online by visiting Rotary.org and clicking on the JOIN button. He anxiously awaits a response. You assign him to a club who doesn't follow up with him. What do you do? What do you do to ensure that more membership leads like Daniel aren't left waiting?
- A membership lead candidate – Vivian – has moved from another country where she was a club leader in her Rotary club. She wants to join a new club in her new country and serve in a leadership position there. You receive the lead and want to ensure that she is matched with the right club and has a positive Rotary experience. How do you ensure that happens?
- A membership lead candidate – Sophia – was referred by a Rotarian from another state who met her on a plane. The lead was assigned to your district. When you call her, you get the feeling she has the wrong impression about Rotary. She is really excited, and seems to fit the profile, but you aren't sure. What do you do?

Ask each group to present their scenario and ideas to the larger group. If you have extra time, you can have each group take another scenario.

Resources

- [Online Membership Leads \(online course\)](#)
- [Managing Membership Leads \(PPT\)](#)
- [Connect to Membership Leads](#)
- [How to Manage Membership Leads \(for districts\)](#)
- [How to Manage Membership Leads \(for clubs\)](#)
- [Membership Leads \(video\)](#)

HOW TO MANAGE MEMBERSHIP LEADS (FOR DISTRICTS)



ROTARY.ORG > MY ROTARY | Sign in/Register Club Finder Location/Language

Rotary  My Rotary Exchange Ideas Take Action Learning & Reference **Manage** The Rotary Foundation Member News

CLUB & DISTRICT ADMINISTRATION
Club Administration
District Administration
Contributions
Reports
Club Invoice

TOOLS
Community Marketplace
RSS Feeds
Mobile Apps
Member Data Integration

Go to Rotary.org and sign in to My Rotary. Then go to **Manage**, then **District Administration**.

1

Images & Video
Strengthening Rotary Resources

Rotary  My Rotary Exchange Ideas Take Action Learning & Reference **Manage** The Rotary Foundation

Home | Manage | Club & District Administration | District Administration

DISTRICT ADMINISTRATION

CLUB FINANCES

- ★ **Club Invoice**
View the most recent invoices for each of your clubs.
[View invoices](#) | [View club balance report](#) | [About the club invoice](#)

CLUB & MEMBER DATA

- ★ **Manage Membership Leads**
Review your online membership leads for prospective, referred, and relocating or returning members. Then assign and track your candidates through the membership process – from inquiry to induction.
View or manage leads | [About the membership leads program](#)

Select **View or manage leads**.

If you don't have any leads, you'll get a message that explains why.



MANAGE MEMBERSHIP LEADS

You can filter or sort leads. Scroll down to see more pages.



SHOW LEADS BY:

PROSPECT TYPE

Any

STATUS

Any

FILTER

SUBMISSION DATE	PROSPECT TYPE	CANDIDATE	CURRENT STATUS
29-Oct-2015	Prospective member	John Smith	District assigned candidate to club Manage status
2-Nov-2015	Referral	Jane Referral	District contacted candidate
2-Nov-2015			

View your leads here. District governors and membership committee chairs can select a candidate's name to see more information.

SUBMISSION DATE

29-Oct-2015	Prospective member	John Smith	District assigned candidate to club Manage status
-------------	--------------------	------------	--

PROSPECTIVE MEMBER

FIRST NAME
John

LAST NAME
Smith

EMAIL
Personal
johnsmith@hotmail.com

PHONE
Home
555-555-5555
Antarctica

PROFESSION
Sales Manager

EMPLOYER NAME
XYZ Company

AGE RANGE
40-49

GENDER
Male

CLUB MEETING LOCATION
ABC city, Antarctica

CLUB MEETING DAY
Wednesday

CLUB MEETING TIME
Morning

MEMBER ID
1234

Prospective member leads show:

- How they heard about Rotary
- Alumni and program participation

Referral leads show:

- Details about the candidate
- Who made the referral

Rejoin or change club leads show:

- Current or previous clubs and positions held
- Previous club and district

MANAGE MEMBERSHIP LEADS

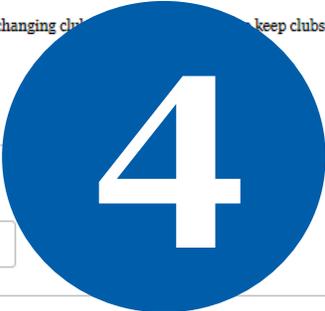
View and manage your membership leads, including prospective, referred, and former or current members who are rejoining or changing clubs. Keep clubs and districts informed about the progress of your candidates.

You are viewing membership leads for District 1234

Active and historical membership leads report

SHOW LEADS BY:

PROSPECT TYPE: STATUS:



SUBMISSION DATE	PROSPECT TYPE	CANDIDATE	CURRENT STATUS
29-Oct-2015	Prospective member	John Smith	District assigned candidate to club ^ Manage status

CURRENT STATUS

District assigned candidate to club

FEEDBACK

If a club is grayed out, it has opted not to receive leads.

CHANGE STATUS *

CLUB *

To take action on a lead, select **Manage status**. Then choose an action from the Change Status drop-down menu and select a club, if appropriate. Be sure to leave feedback for your clubs to endorse the candidate or add other notes for your club or district leaders. (Feedback is a requirement for some statuses.) Then hit **Submit**.

FEEDBACK

Some statuses are considered the final step of the process and the leads are no longer visible on this page. You can access these inactive leads in reports (see step 5).

250 characters

If a club doesn't take action on a lead, it will be routed back to you for reassignment.

Status history shows the progress of active leads and any feedback left by assigned clubs, other district leaders, or staff.

STATUS HISTORY

DATE	STATUS	DISTRICT/CLUB	FEEDBACK
4-Nov-2015	District assigned candidate to club	Club name	Feedback from district
29-Oct-2015	Staff assigned candidate to district	1234	



MANAGE MEMBERSHIP LEADS

View and manage your membership leads, including prospects in your districts informed about the progress of your candidates.

You are viewing membership leads for **District**.

[Active and historical membership leads report](#)

You can view reports by selecting this link for inactive leads or selecting **View reports** as shown below.

REPORTS

INDIVIDUAL REPORTS

Contributions & Recognition

☆ **Donor History Report**

View your contributions to The Rotary Foundation

[View report](#) | [Give online](#) | [Mail your contribution](#)

The **View reports** link leads to two reports:

- **Membership Leads Report** — List of active and historical leads and all associated data, by individual lead
- **Membership Leads Executive Summary** — Analysis of how your leads have heard about Rotary, their progress and demographics, and the average time to contact, assign, and admit them

CLUB REPORTS

☆ **Membership Leads**

Find a list of active and historical leads in the Membership Leads Report. Review demographics of your leads, and see the average time to admit them in the Membership Leads Executive Summary.

[View reports](#) | [About the membership leads program](#)

For more information about membership leads, see [Connect to Membership Leads](#). Questions? Email membershipdevelopment@rotary.org.

MEMBERSHIP SUPPORT & RESOURCES

Emily Tucker
Regional Membership Officer
Zones 29 and 25B



EMILY TUCKER

Regional Membership
Officer

Zones 29 and 25B

847-866-3258

Emily.Tucker@rotary.org



HOW CAN I HELP YOU?

Support and guide districts and zones:

- Membership resources
- Reports and data
- Attraction and engagement strategies
- Club assessments & member satisfaction surveys
- Enhance the member experience
- New club development
- Club & membership flexibility
- Membership Leads program

HOW WE COMMUNICATE

- Monthly RMO emails
- Phone and conference calls
 - Rotary Coordinators
 - District Membership Chairs
- Webinars
- Trainings

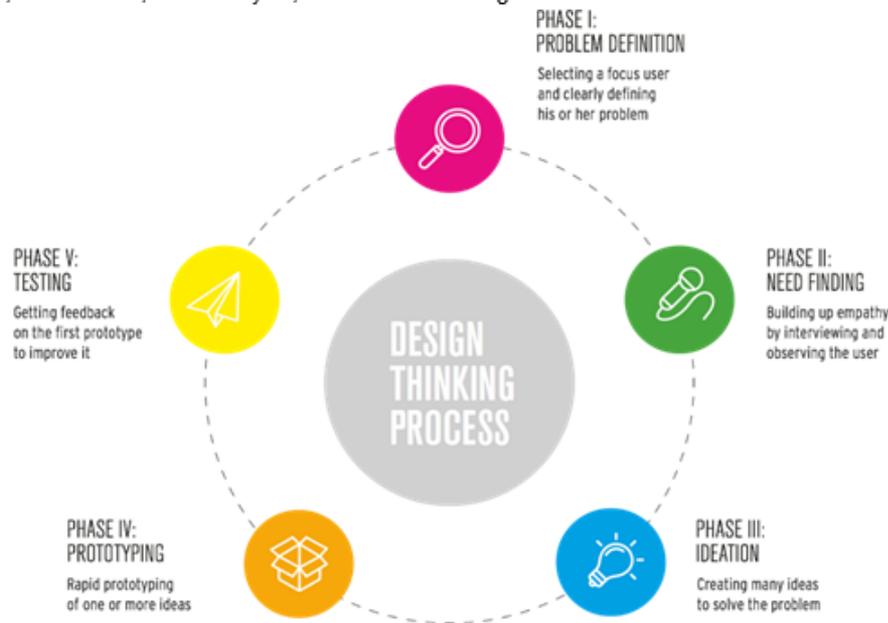


MONTHLY RMO EMAILS

Regional Story – Improving Membership through Strategy

What if we could examine the Rotary experience from the perspective of a member by using information to improve a club's culture in relation to membership engagement and community engagement, service projects, and grants? Could that enable a club to increase member satisfaction and retention? That's exactly what district 5180 is seeking to do by using [Design Thinking](#).

Design Thinking (also known as Human Centered Service Design) is a creative problem-solving process used to discover new solutions by focusing on the user's perspective through problem definition, observation, data analysis, and solution testing.



Using his own business experience, knowledge, and expertise, AG Brian Gladden is working with district leadership this year to introduce and implement this training in their district by:

- Training District leaders on Design Thinking and how it could be applied to Rotary membership
- Training presidents & presidents- elect on Design Thinking and how it can be applied to the member and club experience
- Following up with clubs on how the training is being utilized to evolve and enhance at least one club process that needs further development or improvement

If you would like to know more about this training and how it might be used in your district, please reply and I can put you in touch with Brian. To find out more about Design Thinking in general, click [here](#) to learn more.

RESOURCES – ROTARY.ORG/MEMBERSHIP



ROTARY CLUB HEALTH CHECK

CLUB FLEXIBILITY PAGE

[Rotary.org/Flexibility](https://www.rotary.org/Flexibility)



MEMBERSHIP ASSESSMENT TOOLS



TAKE ACTION: www.rotary.org



STRENGTHENING YOUR MEMBERSHIP

Creating Your Membership Plan



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"/>

Learn by Role

- New Member
- Club Roles
- Trainers
- District Roles
- District com

Learn by Topic

- Membership
- Fundraising
- Projects
- Grants

About Rotary

- Our Priorities
- Our Structure
- Leadership
- Our Partners

Document Center

- Learning Center**
- Webinars

www.rotary.org/learn

Policies & Procedures

- Governance Documents
- Council on Legislation

NEW



E-LEARNING 15m

Getting Started With the Learning Center

English ★★★★★

ENROLL

Rotary Courses - English >

NEW



E-LEARNING 15m

All About the Rotary Peace Fellowship

English ★★★★★

ENROLL

NEW



E-LEARNING 45m

Best Practices for Engaging Members

English ★★★★★

ENROLLED

NEW



E-LEARNING 45m

Building a Diverse Club

English ★★★★★

ENROLLED

NEW



LEARNING PLAN 30m

Club Administration Committee Basics

ENROLL

NEW



LEARNING PLAN 1h 15m

Club Membership Committee Basics

ENROLL

NEW



LEARNING PLAN 2h 30m

Club President Basics

ENROLL

NEW



LEARNING PLAN

Club Comr

ENRC

ONLINE MEMBERSHIP COURSES

- Is Your Club Healthy?
- Diversify Your Club
- Online Membership Leads
- Strategies for Attracting New Members
- Best Practices for Engaging Current Members
- Kick-start Your New Member Orientation
- Practicing Flexibility and Innovation
- Your Membership Plan

[Exchange Ideas](#)

[Take Action](#)

[Learning & Reference](#)

[Manage](#)

[The Rotary Foundation](#)

[News & Media](#)

[Member Center](#)

Club & District Administration

[Club Administration](#)

[District Administration](#)

[Contributions](#)

[Reports](#)

[Rotary Club Central](#)

Community Marketplace

[Official Rotary Apps](#)

[Club Management Systems & Website Providers](#)

[Marketplace Resources](#)

Brand Center

[Our Story](#)

[Guidelines](#)

[Logos](#)

[Materials](#)

[Ads](#)

[Images & Video](#)

[Strengthening Rotary Resources](#)

Products & Services

[Shop.rotary.org](#)

[Licensed Vendors](#)

[Special Offers](#)

[Rotary Global Rewards](#)

Travel & Expenses

Profile Picture



[Individual Contribution Form](#)

[Rotary Workgroups](#)

[Recommendations](#)

[My Invitations](#)

[Credit card opt-out \(U.S. & Canada\)](#)

[Donor History Report](#)

Connections

Set your privacy settings for who can see your connections.

Club Finances

☆ Club Invoice

View the most recent invoices for each of your clubs.

[View invoices](#) | [View club balance report](#) | [About the club invoice](#)

Club & Member Data

☆ Manage Membership Leads

Review your online membership leads for prospective, referred, and relocating or returning members. Then assign and track your candidates through the membership process – from inquiry to induction.

[View or manage leads](#) | [About the membership leads program](#)

District Conference

☆ District Conference

Submit district conference details by 1 February. Submit or view feedback after the conference.

[President's representative feedback](#)

District Giving

☆ Online

Make a contribution as an individual, on behalf of a group, or to a grant-funded project.

[Give](#) | [Multiple donor form](#) | [Individual contribution form](#)

☆ Printable Forms

Send printed forms to The Rotary Foundation with your credit card number or check, or as soon as a wire transfer is initiated.

[Multiple donor form](#) | [Individual contribution form](#)

Was möchten Sie tun?

Ich möchte gerne:



My Quick Links

You have no Quick Links. To add links, click on the ☆ icon and choose "Add to My Quick Links." To remove links, click on the ★ icon and choose "Remove from My Quick Links." [Learn more.](#)

FAQ & Help

Learn how to create a MyRotary account, pay your invoice, update club officers, and more.

Frequently Asked Questions

[Club & District Administration](#)

[Club Invoice](#)

[Paul Harris Society \(PDF\)](#)

[RI Payment Guidelines \(PDF\)](#)

[Rotary.org](#)

[Rotary Grants Travel Insurance \(PDF\)](#)

[Satellite Club \(PDF\)](#)

Help

[How to create a My Rotary account](#)

[How to pay your club invoice](#)

[How to add a member](#)

[How to remove a member](#)

[How to edit member information](#)

[How to add a club officer](#)

Manage Membership Leads

View and manage your membership leads, including prospective, referred, and former or current members who are rejoining or changing clubs. It's an effective way to keep clubs and districts informed about the progress of your candidates.

You are viewing membership leads for the **Rotary Club of**

Active and historical membership leads report

Show leads by:

Prospect type

Any

Status

Any

FILTER

Submission date	Prospect type	Candidate	Current status
20-Feb-2018	Prospective member	▼ Fozzie Bear	Staff assigned candidate to club ▼ Manage status
9-Nov-2017	Prospective member	▼ Miss Piggy	Staff assigned candidate to club ▼ Manage status
12-Oct-2017	Referral	▼ Deborah McPhearson	Auto assigned to district ▼ Manage status
23-Jun-2017	Prospective member	▼ Camilla the Chicken	District assigned candidate to club ▼ Manage status
21-Jun-2017	Prospective member	▼ Animal	District assigned candidate to club ▼ Manage status



Show leads by:

Prospect type

Status

Assigned club

FILTER

Submission date	Prospect type	Candidate	Current status	Assigned Club
7-Feb-2019	Prospective member	▼ Todd Plocher	Auto assigned to district ^ Manage status	

Current status

Auto assigned to district

Feedback

Change status *

- District reviewed inquiry
- District contacted candidate
- District assigned candidate to district officer
- District assigned candidate to club
- District assigned candidate to youth

Active and historical membership leads report

Show leads by:

Prospect type

Status

FILTER

Submission date	Prospect type	Candidate	Current status
12-Aug-2016	Prospective member	Elizabeth Carson	District assigned candidate to club Manage status

Current status

District assigned candidate to club

Feedback

Change status *

- Select -

- Club contacted candidate
- Club assigned candidate to club officer
- Club assigned candidate to youth program
- Candidate attended club meeting

[Exchange Ideas](#)[Take Action](#)[Learning & Reference](#)[Manage](#)[The Rotary Foundation](#)[News & Media](#)[Member Center](#)

Club & District Administration

[Club Administration](#)[District Administration](#)[Contributions](#)[Reports](#)[Rotary Club Central](#)

Community Marketplace

[Official Rotary Apps](#)[Club Management Systems & Website Providers](#)[Marketplace Resources](#)

Brand Center

[Our Story](#)[Guidelines](#)[Logos](#)[Materials](#)[Ads](#)[Images & Video](#)[Strengthening Rotary Resources](#)

Products & Services

[Shop.rotary.org](#)[Licensed Vendors](#)[Special Offers](#)[Rotary Global Rewards](#)

Travel & Expenses

Profile Picture

[Individual Contribution Form](#)[Rotary Workgroups](#)[Recommendations](#)[My Invitations](#)[Credit card opt-out \(U.S. & Canada\)](#)[Donor History Report](#)

Connections

Set your privacy settings for who can see your connections.

Club Reports

My Rotary Account Status

☆ Status of Club Members in the District

Lists all club members in the district, indicates which have active My Rotary accounts, and gives their email addresses.

[View report](#)

☆ Status of Club Members

Lists club members, indicates which have active My Rotary accounts, and gives their email addresses.

[View report](#)

Membership

☆ Rotary Club Members

Active and terminated members of your Rotary club

[View list](#)

☆ Club Data

Club Growth, Member Viability and Growth, Membership Termination Profile, Members in a Club, Listing of Sponsored and Satellite Rotary Clubs, Goal History by Club, Goals and Achievements by Club, Sponsor Relationship Information

[View reports](#)

☆ Membership Leads

Find a list of active and historical leads in the Membership Leads Report. Review demographics of your leads, and see the average time to admit them in the Membership Leads Executive Summary.

[View reports](#) | [About the membership leads program](#)

★ Donor History Report

[View report](#) | [Give online](#) |

[Mail your contribution](#)

★ Rotary Citation

★ Update Member Data

[Add, edit, or remove members](#) |

[Add, edit, remove club officers](#) |

[Record a new member sponsor](#)

FAQ & Help

Learn how to create a MyRotary account, pay your invoice, update club officers, and more.

Frequently Asked Questions

[Club & District Administration](#)

[Club Invoice](#)

[Paul Harris Society \(PDF\)](#)

[RI Payment Guidelines \(PDF\)](#)

[Rotary.org](#)

[Rotary Grants Travel Insurance \(PDF\)](#)

[Satellite Club \(PDF\)](#)

Help

[How to create a My Rotary account](#)

[How to pay your club invoice](#)

[How to add a member](#)

[How to remove a member](#)

[How to edit member information](#)

THANK YOU!

EMILY TUCKER

**Regional Membership
Officer**

Zones 29 & 25b

847-866-3258

Emily.Tucker@rotary.org





Membership Learning Course Guide September 2019

To begin please login to My Rotary: [MyRotary Login](#) use this link and enter your username and password.

If you are new to the Learning Center and need a little orientation, start with this [Getting Started with The Learning Center](#). For further assistance, please contact either Steve Lingenbrink, Dian Edwards, Debbie High or Lucinda General. Email us at: membership@zone2627.org

There are five learning center classes to complete.

- Is Your Club Healthy? (Topic 1)
- Best Practices for Engaging Members (Topic 2)
- Strategies for Attracting New Members (Topic 3)
- Kick Start Your New Member Orientation (Topic 4)
- Practicing Flexibility and Innovation (Topic 5)

Once you have completed the courses please print and save your Certificates of Completion. Please email the Certificates to membership@zone2627.org

Is Your Club Healthy? (Topic 1)

As you review the class online, please download the support materials. [Link to: Is Your Club Healthy?](#) These will add to your library of assets to use as you lead your district or help your own club. Remember to complete the Rotary Club Health Check and bring the hard copy to Denver.

When we reviewed this content, we find the sample Rotarian characters and situations are spot on. These vignettes provide valid representations of what we experience now in 2019. Please click every link, open and read every bubble of information to better round out your knowledge of what might be happening in your own club or district.

- What new idea or tool are you most enthusiastic to implement?
- Bring your completed Rotary Club Health Check to the Denver session, if applicable

Once you have completed the courses please print and save your Certificates of Completion. Please email the Certificates to membership@zone2627.org

Best Practices for Engaging Members (Topic 2)

This learning module should have started you thinking about some strategies to engage or reach out to members with less than one year in Rotary, as well as 6-10 years, and seasoned club members with over 10 years of Rotary experiences. [Link to: Best Practices for Engaging Members](#)

- What tools would you use to discover the best way to approach each of these groups?
- Think about reasons why members might leave your club and Rotary.
- What did you learn from the last member who left your club and what changes has your club made as a result?
- What are some ways that clubs can involve members who avoid projects, activities, and leadership roles?

Once you have completed the courses please print and save your Certificates of Completion. Please email the Certificates to membership@zone2627.org



Strategies for Attracting New Members (Topic 3)

In this course you will encounter deep dives into creating a positive experience for prospective members, engaging young professionals, utilizing and managing leads and more. What a wealth of clear suggestions, analysis tools and ideas for specific action! Please download all materials for your own learning library. Which of these items can you post and use on your club or district website? [Link to: Strategies for Attracting New Members](#)

After you have completed this course, please choose one of the four downloads shown in the course that is the one you believe will be the best place to start for your club. This is a great step to engage and activate more club members to focus on making your club truly vibrant and relevant. Select either: Creating a Positive Experience for Prospective Members, the Prospective Member Exercise, Club Website Guide or the Membership Leads video.

You will need to spend 30-60 minutes really working that area. It will be more effective if you work through your selection with another club member (or two). Including others in your planning process helps immensely. It causes other ideas to bubble up and can validate your opinion or broaden your perspective.

Once you have completed the courses please print and save your Certificates of Completion. Please email the Certificates to membership@zone2627.org

Kick Start Your New Member Orientation (Topic 4)

A New Member Orientation Program is integral to successfully retaining members in a club. Understanding the mission of Rotary, its humanitarian service component, and how local club service enhances the level of community experience will improve member engagement and retention. [Link to: Kick Start Your New Member Orientation](#)

- What types of orientation program(s) does your club or district use?
- Who is the best mentor for a new club member?
- What are the best ways to get new members engaged?

Be sure to check out the new member materials that is available on the Shop Rotary website.

Once you have completed the courses please print and save your Certificates of Completion. Please email the Certificates to membership@zone2627.org

Practicing Flexibility and Innovation (Topic 5)

As you are no doubt aware, the 2016 Council on Legislation relaxes many of the rules relating to the organization of clubs and types of membership. This relaxation created a great opportunity both strengthening existing clubs and forming new exciting clubs. Best of all, there are now assets and resources available from Rotary International to guide clubs in utilizing flexibility and innovation in forming new clubs! [Link to: Practicing Flexibility & Innovation](#)

Please take time before traveling to Denver to review:

- The New [Club Matrix](#) (EN 719)
- Tour the [Flexibility Page](#) on rotary.org www.rotary.org/flexibility
- Review the "[Enhancing the Club Experience Survey](#)" (both pdf and customizable word format)

We will further discuss these items in the afternoon on Thursday, September 5, 2019 in Denver.

Once you have completed the courses please print and save your Certificates of Completion. Please email the Certificates to membership@zone2627.org

PRACTICING FLEXIBILITY AND INNOVATION



RELEVANCE: Flexible and innovative clubs are more appealing to prospective members and help keep current members more engaged.

Learning objectives

At the end of this session, participants should be able to help clubs:

- Identify ways to make their club more flexible
- Understand the value of accommodating members' needs

Resources

- [Practicing Flexibility and Innovation \(online course\)](#)
- www.rotary.org/flexibility
- [Frequently asked questions](#)
- [Start Guide for Alternate Membership Types \(includes sample bylaws\)](#)
- [Enhancing the Club Experience: Member Satisfaction Survey](#)
- [Rotary Governance Documents](#)



Rotaract Survey 2018-19

Rotaract Research Review
As of 30 November 2018



STUDY POPULATION

- 5,797 responses
- 85% community-based club; 15% university-based club
- Geographic breakdown:
 - South America (25%);
 - South Asia (20%);
 - Africa (18%);
 - Europe/Middle East (15%);
 - North America (14%);
 - East Asia/South Pacific (7%)



SIGNIFICANCE OF RESEARCH

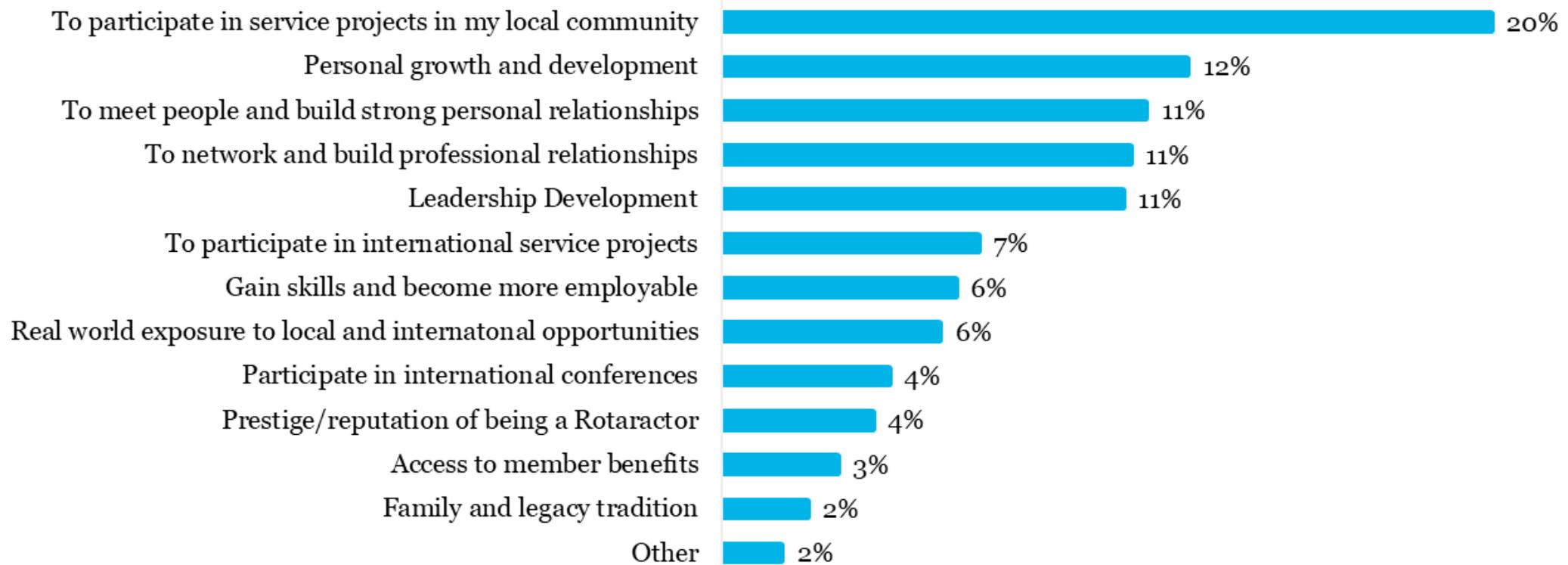
- Provides an opportunity to build a profile of the Rotaract population
- Builds a foundation of accurate, current data/insights on Rotaract membership and engagement
- Critically examines existing assumptions about Rotaractors

ROTARACT MEMBERSHIP NEEDS

Rotaractors join and belong to clubs for a variety of reasons. These needs may change over time.

ROTARACT MEMBERSHIP NEEDS

Membership Needs: Reasons Why Rotaractors Join

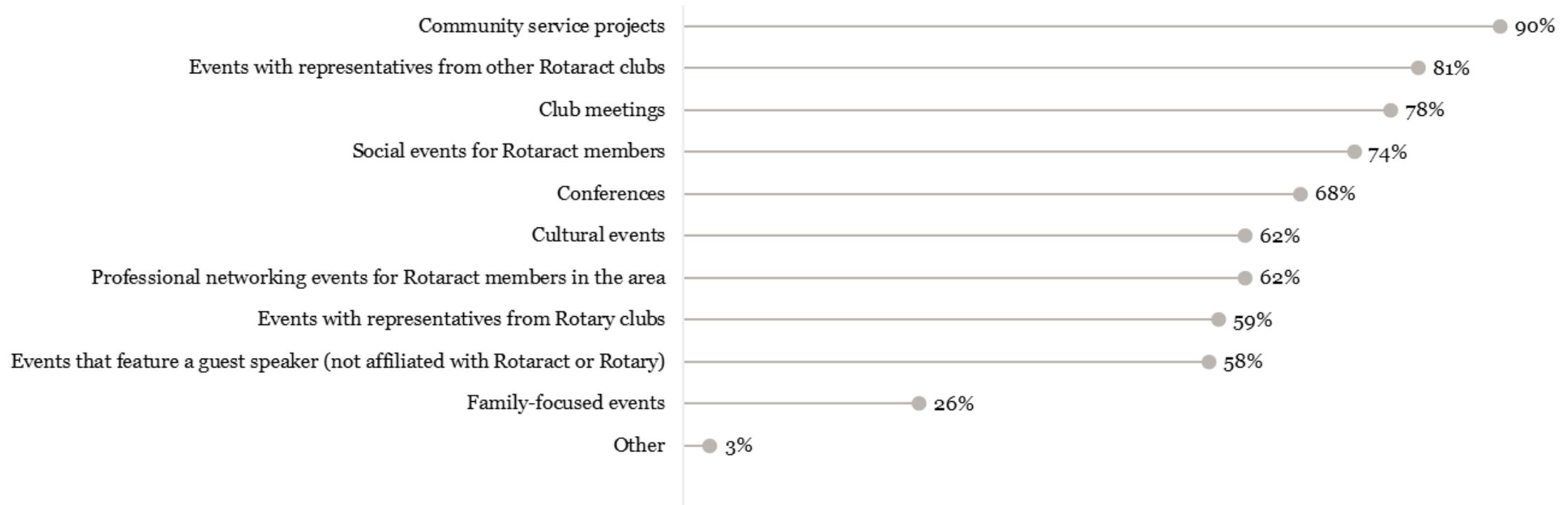


ROTARACT MEMBERSHIP ENGAGEMENT

Rotaractors are overwhelmingly committed to participating in community service projects as the primary way to stay engaged in Rotaract activities.

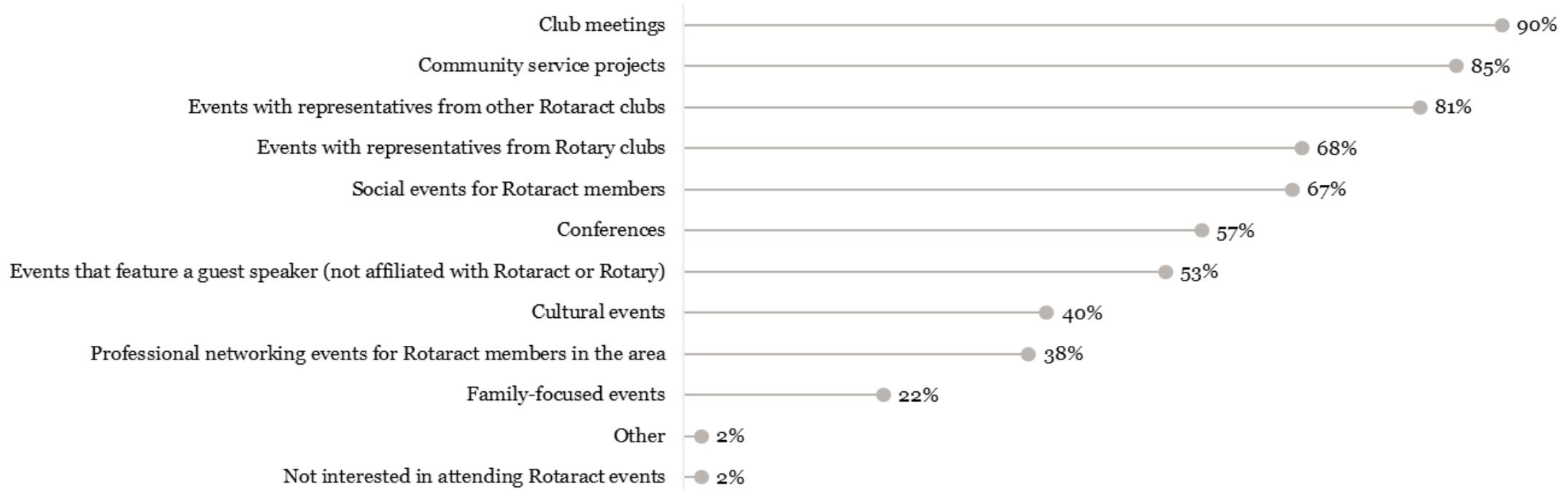
ROTARACT MEMBERSHIP ENGAGEMENT

Membership Engagement: Rotaract activities members are most likely to attend



ROTARACT MEMBERSHIP ENGAGEMENT

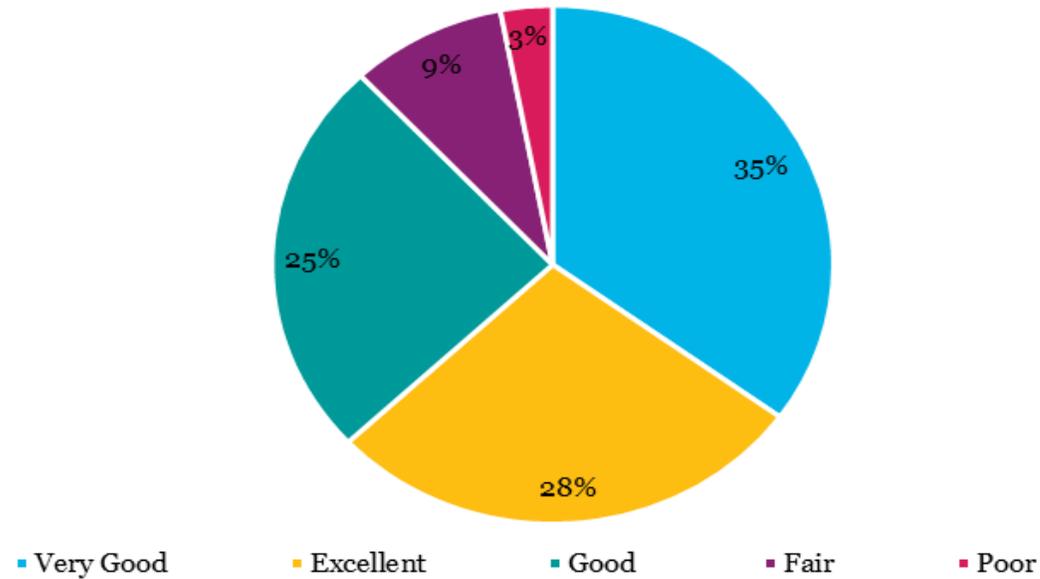
Membership Engagement: Rotaract Activities members attended in past six months



Rotaractors have a positive opinion about the overall quality of Rotaract benefits and services.

ROTARACT MEMBERSHIP PERFORMANCE AND AWARENESS

Membership Performance & Awareness: Perception of Overall Quality of Rotaract Benefits and Services

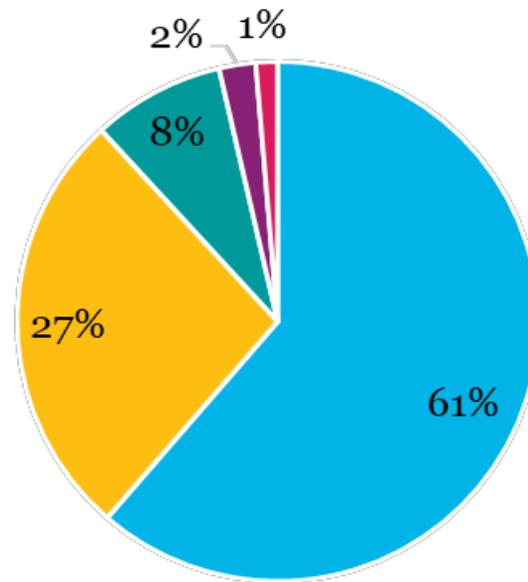


ROTARACT LOYALTY

Rotaractors are overwhelmingly loyal to Rotaract. This loyalty is built around the impressions of how Rotaractors feel whenever they interact or engage in the Rotaract experience.

ROTARACT LOYALTY

Membership Loyalty: Rotaractors likely to continue Rotaract membership



■ Extremely likely

■ Very likely

■ Somewhat likely

■ Not very likely

■ Not at all likely

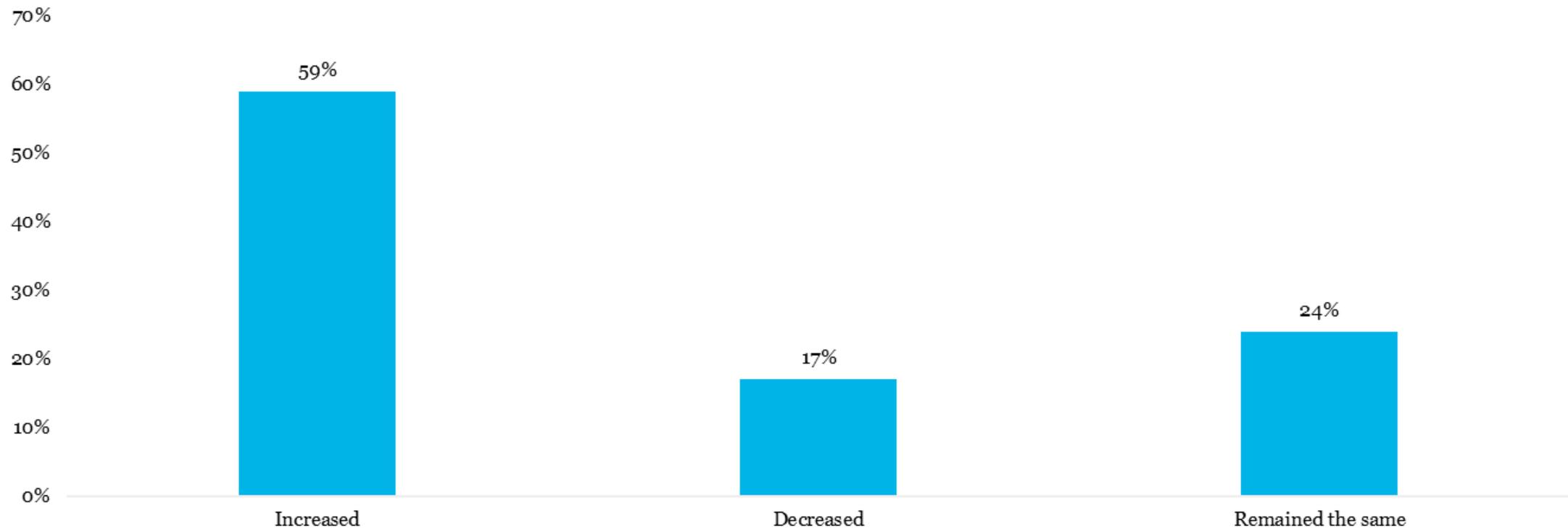


ROTARACT RETENTION

Retention rates are critical indicators of Rotaract's future viability. Rotaractors are reporting an increase in retention in Rotaract clubs.

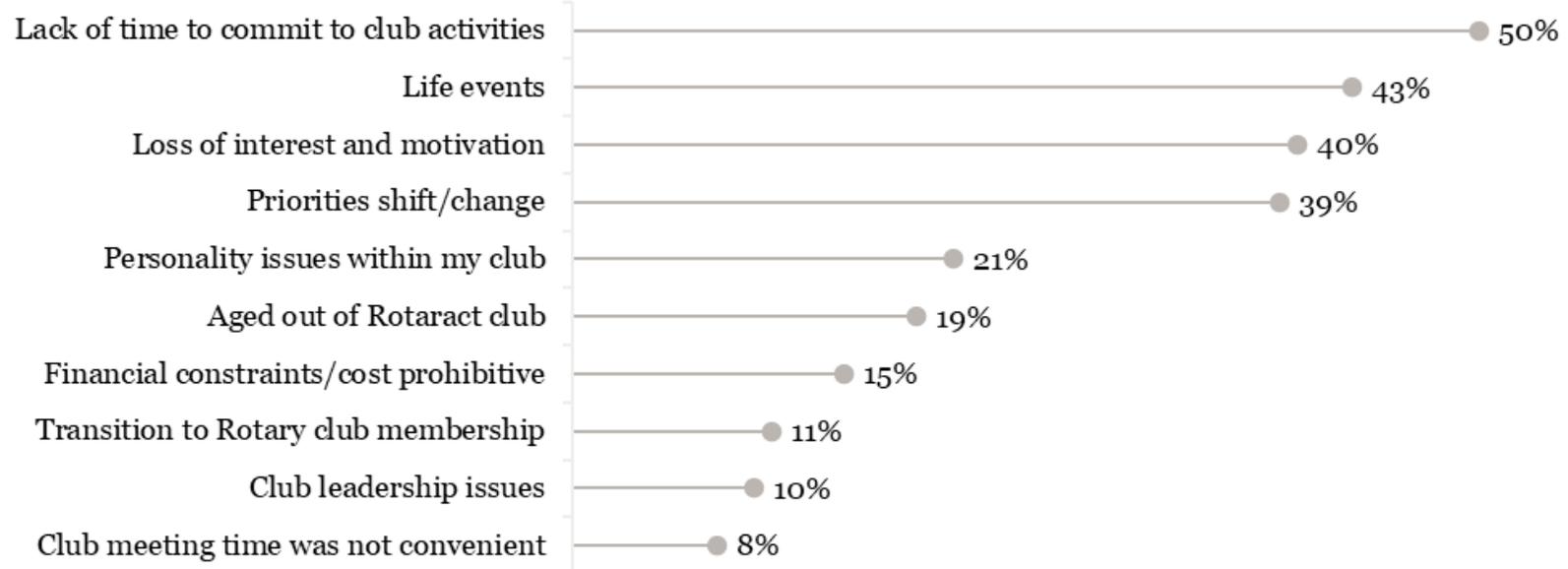
ROTARACT RETENTION, 30 NOVEMBER 2018

Membership Retention: Rotaract Membership Retention over the past 12 months



ROTARACT RETENTION

Membership Retention: Top 10 Reasons why people leave Rotaract

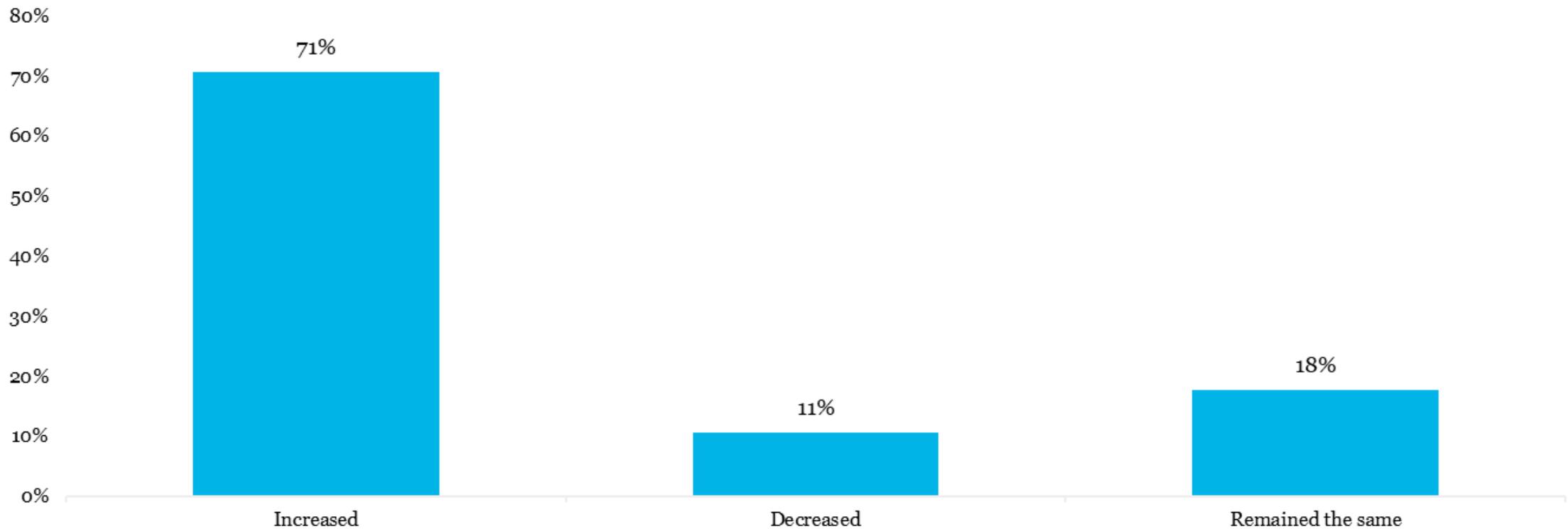


ROTARACT RECRUITMENT

Rotaractors report an increase in membership over the past 12 months. This positive trend may suggest recruitment strategies are highly effective among local Rotaract clubs.

ROTARACT RECRUITMENT, 30 NOVEMBER 2018

Membership Recruitment: New Rotaract membership trends in past 12 months

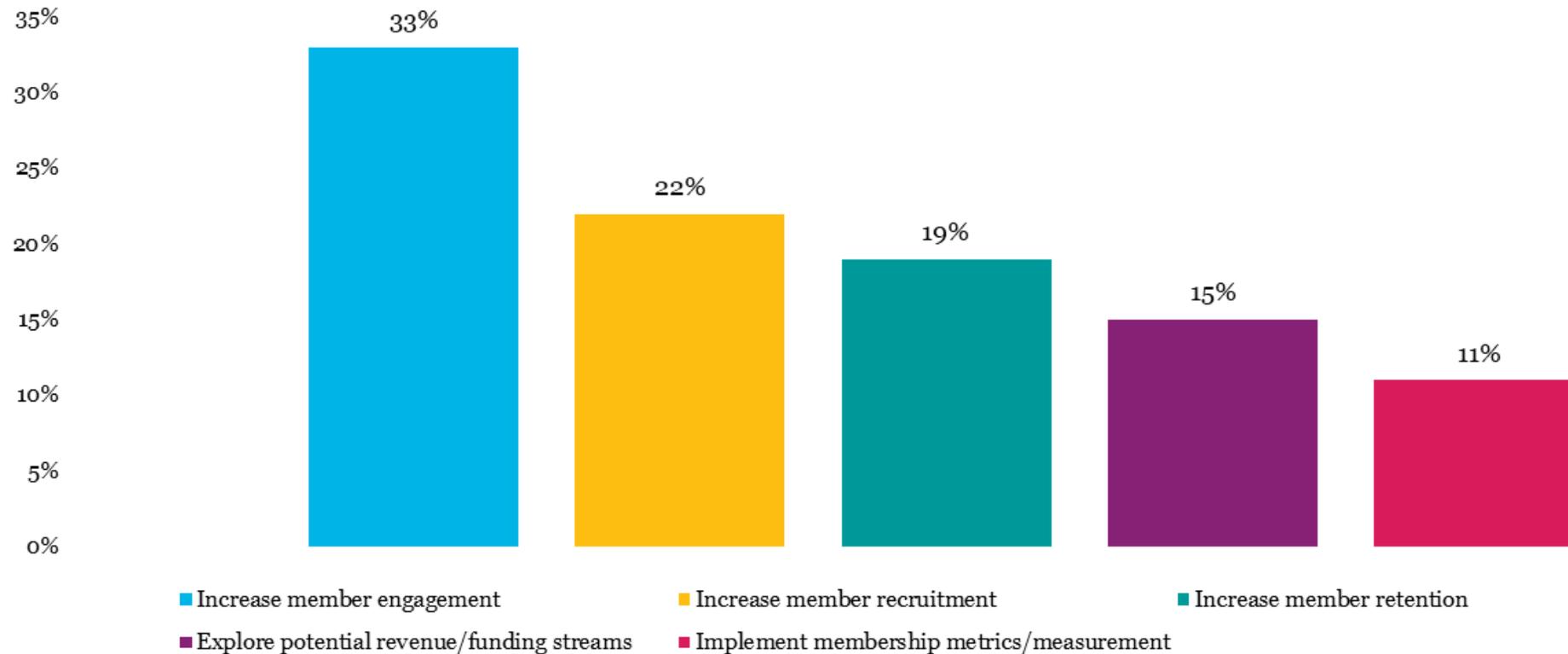


ROTARACT CLUB GOALS

The top priority of Rotaract clubs is to keep existing members active and engaged.

ROTARACT CLUB GOALS

Membership Goals: Rotaract club goals over the next 12 months



Rotary



Thank you!

District Membership Team Development



SHANNON SCHEFFEL, RC
ZONES 25B AND 29

DISTRICT MEMBERSHIP CHAIRS TRAINING



Rotary

LEARNING OBJECTIVES

At the end of this session, participants should be able to:

- Understand your responsibilities as a DMC
- Identify key members for inclusion on your team
- Articulate concrete ways to support club membership chairs

New Club Development & Club Diversity



SHANNON SCHEFFEL, RC
LINDA MARRIN, ARC
ZONES 25B AND 29

DISTRICT MEMBERSHIP CHAIRS TRAINING



Rotary

LEARNING OBJECTIVES

At the end of this session, participants should be able to:

- Identify opportunities to start new clubs
- Understand differences in club models and optimize for targeted audiences
- Articulate concrete ways to support new clubs
- Understand how to use Rotary's classification and member diversity assessment tools to broaden their club's membership
- Identify concrete ways to implement Rotary International's Diversity, Equity, and Inclusion Policy Statement



NEW CLUB DEVELOPMENT

Assessment

Resources on Rotary.org:

Starting a Rotary Club

Guide to Satellite Clubs

Rotary Club Models

Guide to Passport Clubs

Starting a Rotary Club

Club Membership Committee Basics (online)

Types of Rotary Clubs

Legacy

E-Club

Passport

Cause Based

Satellite

Other?

Nine Steps to Starting a Rotary Club



CLUB DIVERSITY

RI's Diversity, Equity and Inclusion Policy Statement:

As a global network that strives to build a world where people unite and take action to create lasting change, Rotary values diversity and celebrates the contributions of people of all backgrounds, regardless of their age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, and gender identity.

Rotary will cultivate a diverse, equitable, and inclusive culture in which people from underrepresented groups have greater opportunities to participate as members and leaders.



DIVERSE CLUBS

What Questions Should We Ask?

- Do Clubs in your district represent their community's professionals, gender, age, ethnicity, and culture?
- Would people from identified demographics that are missing from clubs feel welcome?
- How can we ensure that prospective members feel welcomed and comfortable?
- What kinds of practices make someone feel welcome or comfortable vs unwelcome or uncomfortable?

Assessment

Resources on Rotary.org:

Building a Diverse Club (online course)

Diversifying Your Club: A Member Diversity Assessment

Representing Your Community's Professions: A Classification Assessment



CLUB MODELS

Rotary is a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves. The criteria for membership are simple. For Rotary clubs, a member needs to be an adult — or for Rotaract clubs, a person age 18-30 — who demonstrates good character, integrity, and leadership; has a good reputation within their business or profession and community; and willing to serve in the community or have an impact elsewhere in the world. All clubs share similar values and a passion for service, but no two clubs are the same because each community has its own unique needs.

Club Model	Description	Appeals to	Minimum number of charter members
<u>Traditional Rotary Club</u>	Professionals and aspiring leaders who meet regularly for service, connections, and personal growth	People looking for connections, service opportunities, and traditions Learn more at <u>Start a Club</u> .	20
<u>Satellite Club</u>	A Rotary club sponsored by a traditional club but with its own meetings, projects, bylaws, and board	Those who want a club experience or meeting format or time other than what's offered by the traditional clubs in the area Learn more in the <u>Guide to Satellite Clubs</u> .	8
<u>E-Club</u>	A Rotary club that meets primarily online	People who travel frequently, whose schedules make it difficult to meet in person, or who prefer an online experience Learn more about <u>online club meetings</u> .	20
<u>Passport Club</u>	A Rotary club that allows members to attend other Rotary club meetings as long as they attend a specified number of meetings in their own club each year	People who travel frequently, or those who enjoy trying a variety of club experiences and meeting lots of new people Learn more in the <u>Guide to Passport Clubs</u> .	20
<u>Corporate Club</u>	A club whose members (or most of them) work for the same employer	Employees of an organization who want to come together to do good in their community	20
<u>Cause-Based Club</u>	A club whose members are passionate about a particular cause and focus their service efforts in that area	People who want to connect with others while addressing a particular set of problems.	20
<u>Alumni-based Club</u>	A club whose members (or most of them) are former Rotary or Rotary Foundation program participants	People who have participated in Rotary outside of a club	20
<u>Rotaract Club</u>	A club of members ages 18-30 that is sponsored by a Rotary club and often works with that club on projects	Younger people who want to serve their communities, develop leadership and professional skills, and have fun through service. Learn more in the <u>Rotaract Handbook</u> .	n/a

All club models meet at least twice each month. With exception of Rotaract clubs, all active members pay US\$68.00 in annual dues, are counted in Rotary International's database, and have voting privileges.

RELEVANCE: Clubs that have a membership plan that addresses areas that need attention will become more relevant to their members and attractive to prospective members.

Learning objectives

At the end of this session, participants should be able to help clubs:

- Create or refine a vision for their club
- Develop a membership plan for their club

Speaking points

- A membership plan, which is part of a club's strategic plan, outlines its goals and strategies for attracting new members and engaging current ones.
- Having clubs visualizing where they want to be in 3-5 years can help them think of goals for their membership plan.
- Involving all members in the process to gives them a sense of responsibility in the club and motivation to achieve the goals.
- Yearly goals should be entered and tracked in Rotary Club Central.
- Encourage clubs to use the worksheet Membership Development Plan below (and in Strengthening Your Membership) to build their club's plan.

Suggested Activity: Create a membership development plan

Divide participants into pairs, and give the worksheet Your Membership Plan, at the end of this guide, to participants.

Ask participants to work in pairs to fill out the work sheet for their own clubs and discuss how having a membership plan like this could be useful.

Ask various participants to share their thoughts on their experience of completing it and ideas for encouraging clubs to use it. Encourage participants to continue working on their membership plan when they return to their clubs to get opinions on each of their membership goals; also, have them determine the resources and people needed to carry out their plans.

Resources

- [Your Membership Plan \(online course\)](#)
- [Strengthening Your Membership: Creating Your Membership Development Plan](#)
- [Strategic Planning Guide](#)
- [Be a Vibrant Club](#)
- [Rotary Club Central Membership Reports](#)
- [Understanding Membership Reports: Getting Started](#)

YOUR MEMBERSHIP PLAN WORKSHEET

Use this worksheet to make a membership plan for your club. After evaluating your club, focus on the particular steps that address your club's toughest challenges. The steps will direct you to resources that can help. When you've completed the steps, you will have identified challenges and opportunities, developed a vision, and generated strategies for prospective, new, and established members.

During club meetings, talk to members about the steps you're taking to strengthen membership, and encourage those members to get involved in the process.

Step 1: Evaluating Your Club

- We identified areas for improvement after using the [Rotary Club Health Check](#), and we took the course [Is Your Club Healthy?](#) in the Learning Center to review the modules that address the areas of our club that need attention. Based on what we learned, we will try the following:

Area for improvement:

Remedy we plan to try:

- We found ideas or best practices in [Be a Vibrant Club](#) that we will use to make our club innovative and flexible:

- We completed the membership [diversity assessment](#), have taken the course [Building a Diverse Club](#) in the Learning Center, and plan to do the following to increase and celebrate new ideas and perspectives:

YOUR MEMBERSHIP PLAN



- Our club completed the [classification assessment](#) and plans to do the following to better represent our community's professional diversity:

Step 2: Creating a Vision for Your Club

- Our club completed the club visioning process and developed the following vision:
In 3-5 years, our club will:

- Our club has a membership committee with a leader and at least five members to guide the implementation of our vision and membership plan.
- Long-term goals that will help us achieve our vision include:

- We reviewed our club's strategic plan to ensure that our membership plan aligns with it.

Step 3: Attracting New Members

- Our club completed the course [Strategies for Attracting New Members](#) in the Learning Center and plans to make itself more attractive to prospective members in the following ways:

YOUR MEMBERSHIP PLAN



- Our club completed the [Finding New Club Members exercise](#) and will take these actions to find prospective members:

- Our club selected the following membership benefits to highlight when speaking to prospective members:

- Our club took the course [Practicing Flexibility and Innovation](#) in the Learning Center to understand the [flexible options now available to clubs](#), and we plan to try the following to better accommodate members:

- Our club took the [Online Membership Leads](#) course in the Learning Center, and we understand how membership leads can benefit our club.

- Our club leaders have determined who will manage membership leads assigned to our club.
- Our club has a process for following up with prospective members assigned to us through the membership leads program.

- Our club has read [Creating a Positive Experience for Prospective Members](#), understands how that experience can influence prospective members' perceptions of Rotary, and has a plan to ensure we create a good experience for prospects whether or not they join.

Step 4: Attracting New Members

- Our club has asked members to complete the [member satisfaction survey](#) and decided to implement the following changes based on the results:

- Our membership committee members have taken the course [Kickstart Your New Member Orientation](#) in the Learning Center, have read [Introducing New Members to Rotary](#), and are developing an orientation process that educates new members and involves them in the club.

Our orientation process will include the following:

- Our club completed the [retention assessment and analysis](#), discussed the results, and will take these steps to improve our engagement and retention:

- Our club has taken the course [Best Practices for Engaging Members](#) in the Learning Center and will take these actions to engage our members:

- Our club has taken the course has looked at the many ways members can get involved through Rotary, as outlined in [Connect for Good](#), and will encourage members to get involved in these new ways:

YOUR MEMBERSHIP PLAN



- Our club has asked members who've left recently to complete the exit survey to better understand why members leave the club. We've discussed the results and will take these steps to engage the member groups we've identified as the most vulnerable to termination:

Member groups

Strategy

Step 5: Improving Your Public Image

- We have selected a club member to manage our social media content.
- We have selected a member to manage and update our club website using materials from Rotary's [Brand Center](#).
- We have selected a member to update our customizable club brochure using the template on Rotary's [Brand Center](#).
- We visited the [Brand Center](#) on My Rotary and will use these additional tools to promote awareness in our community:

- Our club hosted a focus group in our community. The group yielded these findings:

YOUR MEMBERSHIP PLAN



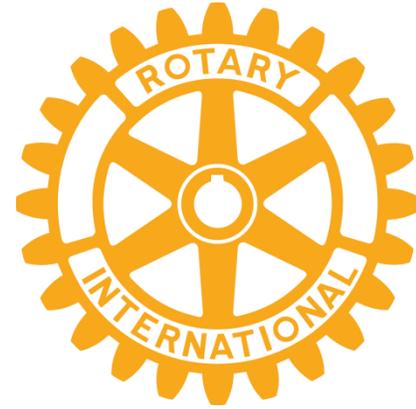
Step 6: Supporting New Clubs

- Our club membership committee chair has told our district governor that we're willing to serve as a sponsor club.
- Our club members have discussed the responsibilities of serving as a sponsor club and agree to commit to this relationship.
- Our club leaders are open to supporting a satellite club and consider it as an option for accommodating differing needs among members.

Step 7: Supporting Your Club: Rotary Resources and Tool

- Our club membership committee communicates regularly with our district membership committee.
- Our club leaders regularly communicate with our district governor or assistant governor and ask for help when we need it.
- Our club membership committee members have visited rotary.org/membership within the past month and know where to find Rotary materials to help our club.

District		7/1/2011	7/1/2012	7/1/2013	7/1/2014	7/1/2015	7/1/2016	7/1/2017	7/1/2018	7/1/2019	As of 9/12/2019	Plus/M inus	%
D5580		3066	3076	3045	3041	3061	3025	2884	2837	2719	2719	0	0.00%
D5610		2080	2065	1982	1936	1962	1937	1835	1774	1753	1733	-20	-1.14%
D5630		1212	1303	1242	1222	1196	1231	1175	1168	1122	1129	7	0.62%
D5650		2091	2058	2041	2040	1997	1991	1964	1908	1875	1896	21	1.12%
D5670	5680	1120	1151	1104	1085	1096	1065	1012	2515	2485	2476	-9	-0.36%
D5690	5680	1636	1610	1591	1601	1576	1546	1541					
D5710		2574	2571	2487	2493	2517	2417	2344	2334	2254	2263	9	0.40%
D5950		2727	2726	2746	2791	2667	2725	2624	2702	2709	2720	11	0.41%
D5960		3053	2948	2907	2895	2895	2848	2762	2765	2708	2697	-11	-0.41%
D5970		2860	2866	2760	2752	2757	2687	2629	2474	2346	2329	-17	-0.72%
D6000		4016	4011	3917	3900	3846	3844	3793	3693	3580	3590	10	0.28%
D6220		1891	1815	1794	1766	1711	1635	1541	1511	1383	1396	13	0.94%
D6250		3084	3041	2955	2956	2962	2919	2840	2858	2739	2759	20	0.73%
D6270		3008	2955	2886	2878	2887	2836	2771	2724	2698	2704	6	0.22%
D6420		1995	1947	1900	1853	1790	1754	1698	1706	1683	1693	10	0.59%
D6440		2347	2315	2269	2201	2165	2146	2124	2097	2053	2070	17	0.83%
D6450		1947	1923	1874	1805	1857	1803	1770	1769	1719	1734	15	0.87%
Subtotal 29		40707	40381	39500	39215	38942	38409	37307	36835	35826	35908	82	0.23%
D5790		2883	2881	2789	2882	2961	3047	3069	2788	2899	2938	39	1.35%
D5810		2865	2820	2754	2715	2667	2665	2708	2689	2549	2574	25	0.98%
D5840		2545	2611	2539	2494	2574	2575	2470	2523	2471	2489	18	0.73%
D5870		2767	2703	2665	2648	2649	2594	2511	2456	2368	2388	20	0.84%
D5890		2825	2672	2574	2560	2635	2564	2544	2386	2532	2563	31	1.22%
D5910		2324	2323	2301	2276	2279	2287	2233	2231	2204	2225	21	0.95%
D5930		1912	1851	1840	1848	1872	1858	1886	1870	1813	1829	16	0.88%
Subtotal 25b		18121	17861	17462	17423	17637	17590	17421	16943	16836	17006	170	1.01%
Total		58828	58242	56962	56638	56579	55999	54728	53778	52662	52914	252	
			-586	-1280	-324	-59	-580	-1271	-950	-1116	252		



UNDERSTANDING MEMBERSHIP REPORTS: GETTING STARTED

Rotarians use information in membership reports not only to understand club trends, but also to decide where to focus their membership efforts. The tables below show membership reports, the information they contain, and where to get them.

Detailed steps for finding reports are in the second part of this guide. To get to them, all you need is a My Rotary account. (If you don't have an account, learn [how to create one](#).) For others, you'll need access to Rotary Club Central, which you get automatically when your club tells Rotary that you hold certain club or district leadership positions.

REPORTS FOR MEMBERS WITH MY ROTARY ACCOUNTS

Report	Questions it answers	Where to find it	
		Rotary Club Central	My Rotary/ Reports
Gender Count by Country and Geographic Area	<ul style="list-style-type: none"> In each Rotary country, how many members are men and how many are women? 	X	
Gender Count by Zone and District	<ul style="list-style-type: none"> In each district or zone, how many members are women? How many are men? 	X	
Club Member Count by Country and Geographic Area	<ul style="list-style-type: none"> How many members and clubs are in each Rotary country? 	X	
Club Member Count by Zone and District	<ul style="list-style-type: none"> How many members and how many clubs does each district or zone have? 	X	

REPORTS FOR CLUB, DISTRICT, AND ZONE LEADERS

(Includes club presidents, secretaries, treasurers, and committee chairs; district governors, assistant governors, and committee chairs; regional leaders, directors, and Rotary Senior Leaders))

Report	Questions it answers	Where to find it	
		Rotary Club Central	My Rotary/Reports
Club Growth	<ul style="list-style-type: none"> How much has my club grown this Rotary year? 	X	X
Member Viability and Growth	<ul style="list-style-type: none"> What is my club's member retention rate? How many members have joined or left my district or zone? 	X	X
New Member Sponsors	<ul style="list-style-type: none"> Who sponsored whom in my club? Who sponsored the most new members? 	X	X
Active and Historical Membership Leads Report <i>For current, incoming, and immediate past leaders of zones, districts, and clubs</i>	<ul style="list-style-type: none"> What contact and other details are listed for each of my club's membership leads? What is the status of each lead? What details are listed for leads that are no longer visible on the club or district Manage Membership Leads page? Which leads have been discontinued because the candidates were admitted, reassigned, or dismissed? 		X
Membership Leads Executive Summary <i>For current, incoming, and immediate past leaders of zones or regions, districts, and clubs</i>	<ul style="list-style-type: none"> How many leads are assigned to my district or club? How many candidates have we contacted or invited to a meeting? What is our average response time? How many candidates were admitted or rejected? What is the membership status of candidates in my club or district? What are the trends (age, gender, Rotary program participation, etc.) among people assigned to my club or district? How did prospective members hear about Rotary? 		X

Report	Questions it answers	Where to find it	
		Rotary Club Central	My Rotary/ Reports
	<ul style="list-style-type: none"> • Which media campaigns, events, or programs generate member interest in my district or club? 		
Membership Termination Profile	<ul style="list-style-type: none"> • How many members were terminated in my club, district, or zone? • Why were they terminated? • When were they terminated? 	X	X

REPORTS FOR DISTRICT AND ZONE LEADERS

(Includes district governors, assistant governors, and committee chairs; regional coordinators, directors, and Rotary Senior Leaders)

Report	Questions it answers	Where to find it	
		Rotary Club Central	My Rotary/ Reports
Club Viability and Growth	<ul style="list-style-type: none"> • How many clubs has my district retained and lost? • How many clubs in my district are new? 	X	X
Membership Comparison to 1 July	<ul style="list-style-type: none"> • How many members are in my district or zone? • How many were in my district or zone at the start of the year? 	X	X
District Growth	<ul style="list-style-type: none"> • How much has my district's membership grown each month this year? 	X	X
Membership Progress to Goals	<ul style="list-style-type: none"> • Which clubs in my district have set a membership goal in Rotary Club Central for this year? • How many members did clubs in my district or zone have at the start of the year? • How does that compare with last year? • How many members do the clubs in my district have? 	X	X
Clubs in a District	<ul style="list-style-type: none"> • What clubs are in my district? • What clubs in my district have been terminated? • How many members do the clubs in my district have? 	X	X
Five-Year History of Membership Start Figures	<ul style="list-style-type: none"> • How many members did my club, district, or zone have at the start of each of the past five Rotary years? 	X	
New Clubs Chartered by Rotary Year	<ul style="list-style-type: none"> • How many new clubs are in my district? • What new clubs are in my district? • When do they meet? • When were they chartered? 	X	X

Report	Questions it answers	Where to find it	
		Rotary Club Central	My Rotary/ Reports
Terminated Clubs in District	<ul style="list-style-type: none"> • How many clubs were terminated in my district? 	X	X
Club Meeting Time	<ul style="list-style-type: none"> • What time do clubs in my district meet? 	X	X
Club Meeting Day	<ul style="list-style-type: none"> • What days do district clubs meet? 	X	X
Gender Count by Country and Geographic Area	<ul style="list-style-type: none"> • In each Rotary country, how many members are men and how many are women? 	X	X
Gender Count by Zone and District	<ul style="list-style-type: none"> • In each district or zone, how many members are women? How many are men? 	X	X
Club Member Count by Country and Geographic Area	<ul style="list-style-type: none"> • How many members and clubs are in each Rotary country? 	X	X
Club Member Count by Zone and District	<ul style="list-style-type: none"> • How many members and how many clubs does each district or zone have? 	X	
District Membership Progress to Goal <i>For Rotary senior leaders</i>	<ul style="list-style-type: none"> • How many clubs in my district have set membership goals? • What progress are they making toward those goals? 	X	X
Active Rotary Clubs by District	<ul style="list-style-type: none"> • How many active clubs do Rotary districts have? 		X

Where can I find membership reports?

You can get them in different ways.

To find membership reports in Rotary Club Central, follow these steps:

1

Sign in to My Rotary. Go to **Manage**, then **Rotary Club Central**.

Rotary My Rotary Exchange Ideas Take Action Learning & Reference Manage The R Found

CLUB & DISTRICT ADMINISTRATION
Club Administration
District Administration
Contributions
Reports
Rotary Club Central

COMMUNITY
Official Rotary
Marketplace Ap
Club Managemen
Online Resources

Licensed
Special O
Rotary G
TRAVEL

materials
Ads
Images & Video
Strengthening Rotary Resources

2

Make sure you are in the **Your Club** tab.

Rotary Club Central

Welcome

Club View

Your Club Service Foundation Giving

Club View
District View
Club Group View
Global View
Resources
Reports

Your Club
Successful clubs achieve their goals by staying vibrant, flexible, and innovative. This tab provides track membership, Rotarian engagement, club communication, and public relations goals.
Current, incoming, and immediate past club leaders — the president, secretary, treasurer, exec and membership chair — can edit goals and achievements. All club members can view goals and

Select **Reports** on the left side of the page to view a list of documents.

Worldwide Reports

- ▢ Club Member Count by Country and Geographic Area
- ▢ Club Member Count by Zone and District
- ▢ Gender Count by Country and Geographic Area
- ▢ Gender Count by Zone and District

3

Club Reports

- ▢ Club Growth
- ▢ Member Viability and Growth
- ▢ Membership Termination Profile
- ▢ Members in a Club

Select the report you want to open.

District Reports

- ▢ District Growth
- ▢ Club Viability and Growth
- ▢ Clubs in My District
- ▢ Rotary Club Central Goals Set
- ▢ Club Meeting Day
- ▢ Club Meeting Time
- ▢ Goal History by District
- ▢ Goals and Achievements by District

To learn more about Rotary Club Central, go to learn.rotary.org and search for Rotary Club Central.

Membership Trends

- ▢ New Clubs Chartered by Rotary Year
- ▢ Terminated Clubs by Rotary Year
- ▢ 5 Year History of Membership Start Figures
- ▢ Membership Comparison to 1 July
- ▢ Membership Progress to Goal

Sponsor Relationship Information

- ▢ Sponsorship Report

To find membership reports in My Rotary, follow these steps:

The screenshot shows the My Rotary navigation menu. The 'Reports' link under 'CLUB & DISTRICT ADMINISTRATION' is circled in red. A blue callout box contains the text: 'Sign in to My Rotary. Go to **Manage**, then **Reports**.' A large blue circle with the number '1' is positioned to the right of the callout box.

The screenshot shows the 'REPORTS' page in My Rotary. The breadcrumb trail is 'Home | Manage | Club & District Administration | Reports'. The page title is 'REPORTS' with a 'PAGE GUIDE' icon. Under 'INDIVIDUAL REPORTS', there is a section for 'Contributions & Recognition' with a 'Donor History Report' card. Under 'CLUB REPORTS', there is a 'Membership' section with a 'Rotary Club Members' card and a 'Club Data' card. A large blue circle with the number '2' is positioned to the right of the 'Rotary Club Members' card. A blue callout box points to the 'View reports' link on the 'Club Data' card.

Select **View reports** to see the reports that are listed. Note: Which reports you see here will depend on your role.

VERIFY & CONTINUE

YOU HAVE MULTIDISTRICT ACCESS



Please select the appropriate district to continue.

Select a district
and a role.

SELECT DISTRICT *

- REGION GROUP 25**
Director/Trustee MAP access
Start 1-Jul-2014 - End 30-Jun-2017

If you have access to information on multiple districts, you will be prompted to choose one.

DISTRICT

- Select District -

- REGION GROUP 26**
Director/Trustee MAP access
Start 1-Jul-2014 - End 30-Jun-2017

If you have more than one role, you may be prompted to select a role. Reports may be presented differently for different roles.

DISTRICT

- Select District -

CONTINUE



Choose a report to open.

Review Club Data

Click on the report name that you want to view. You will see a report opening in a new window or tab.

- Club Growth
- District Growth
- Member Viability and Growth
- Club Viability and Growth

- Clubs in My District
- New Clubs Chartered by Rotary Year
- Terminated Clubs by Rotary Year
- 5 Year History of Membership Start Figures

If you have any trouble finding or using these reports,
write to membership.reports@rotary.org.
If you don't have a My Rotary account, [create one](#).