

2024 Outline for 10 Steps to Rotary Membership Roadmap:

- *Action Step*
- *Video Moment to share*
- *Learning Opportunity*
- *Club Membership Team Focus*
- *Resources*

Step 1: What is your Club Value Proposition?

- Video to Share (What is your Club Value Proposition? 30 Minutes)
- Action Plan Worksheet
- Proven Strategies Worksheet

Step 2: Club Membership Plan

- Identify Club Membership Lead by October 15th— Add in [Club Runner](#)
- Review club's membership goals
 - Use RI surveys to gain insight
 - club status
 - club composition
 - club needs
 - club wants
 - club wishes

Club Membership Video Moment: Share at Meeting

- [Rotary Membership Video Series-What You Get Out of Rotary-You Tube](#)
- Be a Vibrant Club - learn.rotary.org/members/share/asset/view/3302

Membership Learning Opportunity:

- [Get Ready: Club Membership Committee](#)

Club Membership Meeting:

- Sample Outline (Check List)

Survey Materials:

- Rotary Club Health Check
- Membership Assessment Tools

Step 3: Survey Your Membership/Evaluation

Action Step:

Club Membership Video Moment – Share at Meeting

Membership Learning Opportunity:

Club Membership Meeting:

Resources:

Club Health Check

Prospective Member Exercise

Member Satisfaction Survey

Member Exit Survey

Membership Assessment Tool

Member Diversity Assessment

Step 4: Membership Retention

Step 4: Membership Retention

Action Step:

- Use information from attached Retention Assessment Analysis
- What is your plan? Is your end goal **PLUS ONE**.
- Review attached District Membership Chart.
- Make a list of former members and inactive members; strategize on best way to re-engage.
- Record your progress in the [District Olympics](#).

Club Membership Video Moment – Share at Meeting

- [Rotary Membership Video Series - Is Your Club Really Welcoming? Part 1 - YouTube](#)
- [Rotary Membership Video Series-Is your club really welcoming? Part 2-YouTube](#)

Membership Learning Opportunity:

- [learn.rotary.org/members/learn/course/94/best practices-for engaging members](https://learn.rotary.org/members/learn/course/94/best-practices-for-engaging-members)

Club Membership Meeting:

- Make a list of former members and determine whether or not to re-engage them or interview them.
- Assign club member to contact inactive members.
- Utilize attached Membership Assessment Tools

Survey Materials - These resources are also available on the District website - [Membership Roadmap](#).

- Membership Assessment Tools
- Retention Assessment Analysis
- Member Satisfaction Survey

Action Step:

- Use information from attached Retention Assessment Analysis
- What is your club good at? What could your club do better?
- Make a list of former members and inactive members; strategize on best way to re-engage.

Club Membership Video Moment – Share at Meeting

- [Rotary Membership Video Series - Is Your Club Really Welcoming? Part 1 - YouTube](#)
- [Rotary Membership Video Series-Is your club really welcoming? Part 2-You Tube](#)

Membership Learning Opportunity:

- [learn.rotary.org/members/learn/course/94/best practices-for engaging members](https://learn.rotary.org/members/learn/course/94/best-practices-for-engaging-members)

Club Membership Meeting:

- Make a list of former members and determine whether or not to re-engage them or interview them to find out why they do not want to be a member of the club
- Utilize attached Membership Assessment Tools

Survey Materials

- Membership Assessment Tools
- Retention Assessment Analysis

Step 5 Membership Development/Recruitment

Action Step:

- Review Club's Action Plan. What is your value? Why should new members join? What is your plan? (See attached Action Plan Worksheet)
- Review club's bylaws on membership flexibility: Young Professionals, Seasonal Members, Ambassadorial Members, Service Memberships, Corporate Memberships, Family Memberships
- Review attached surveys

Club Membership Video Moment – Share at Meeting

- [Proven Strategies to Recruit and Retain Members](#) (District 5610 webinar)

Membership Learning Opportunity

- [Attracting New Members](#) (RI Learning Center)
- [Action Plan | My Rotary](#)

Club Membership Team Meeting:

- Complete Action Plan Worksheet (Proven Strategies Webinar)
- Complete "Identifying Prospective Members Worksheet"
- Complete "Membership Diversity Worksheet"
- Organize and introduce a game/contest for each current member to sponsor a new member; men vs women with losing group hosting a social.

Survey Materials

- Action Plan Worksheet
- Prospective Member Survey
- Membership Diversity Worksheet

- Strategic Planning Guide

Step 6: Diversify Your Club

Action Step

- Design a specific plan with actionable steps to promote and attract younger members.
 - meetings
 - service projects
 - leadership roles
 - social
- Review Club Membership Demographics-[Grow Rotary](#)
- Membership Types – Flexibility in dues and attendance
 - Service Member
 - Corporate Member
 - Family Member
 - Seasonal Member
 - Ambassadorial Member

Club Membership Video Moment: Share at Meeting

- [Rotary Membership Video Series - Different Types of Membership, Part 1 - YouTube](#)

Membership Learning Opportunity:

- [Grow Rotary](#) What is your Club membership demographics?
- [Engaging Younger Professionals Toolkit | Rotary International](#)
- [Tips for increasing club membership | Rotary International](#)
- [Diversify Your Club Learning Course](#)

Club Membership Meeting:

- How can you make club leadership roles more accessible and to more members?
 - What is your Plan?
 - Look to young Rotarians for fresh perspectives
 - Appeal to local volunteers
 - Emphasize service
 - Include new members on your committees

Resources:

Prospective Member Exercise
Corporate Membership Guide
Club Membership Checklist

Step 7: New Member Orientation

- *Action Step*
- *Video Moment to share*
- *Learning Opportunity*
- *Club Membership Team Focus*
- *Resources*

Action Step:

- Review New Member Orientation process within your club including recognition, mentorship. Review District 5610 examples and checklist.
- Present 4-Way Test Plaque to New Member
- Celebrate new members

Video Moment to Share:

- [Rotary Membership Video Series-New Member Induction-You Tube](#)
- [Welcome to Rotary - Welcome to Rotary on Vimeo](#)

Learning Opportunity - Club Membership Course for Committee:

- [New Member Basics Course](#)

Club Membership Meeting:

- Develop a new member orientation and process for use in the club
- Outline for Orientation
 - Rotary 101 (See attached New Member Orientation Samples/Checklist)
 - International
 - District 5610
 - Club Activities, Events, Grants
 - Acronyms used in Rotary

Resources:

- Mitchell Club New Member Orientation PowerPoint
- Downtown Sioux Falls Club New Member Orientation PowerPoint
- New Member Orientation Check List
- Rotary Acronyms

Step 8 - Community Engagement – Expand Your Reach

- *Action Step*
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Action Step

Use the questions below to talk about how this can help your club work with new partners, connect with new audiences, and inspire more people to take action. Think about groups in your community that you want to get involved in your club (alumni, youth program participants, business groups, other organizations, professional associations, etc.):

- What do they know about your club?
- What do you want them to know about your club?
- How would you engage them in your club or project?
- What type of event or activity would appeal to people in this group?
- How would you promote the activity to members of this group? Think of a project that your club has completed and its community impact: How would you celebrate or share the outcomes of the project with your community?

Club Membership Moment:

- [Working With New Partners, Reaching New Audiences](#)

Club Membership Course for Committee:

- [Rotary Learning Center – Public Image](#)
 - Quick Start Guide-Social Media
 - Promoting Your Club as People of Action
- [Public Image Resources Zones 25B & 29](#)

Club Membership Meeting:

On a scale of 1-10, with 10 being extremely well-known, how recognizable is your Club in your community?

What specific steps has your Club taken to increase public awareness and image of your projects, for the purpose of generating new and diverse membership leads and retaining existing members?

What new models might bring people together to experience the power of Rotary? What might inspire more people to take action?

Define how club can maximize social media

Resources

Expand Your Reach

Leveraging Local Events to Grow Rotary

Step 9 - Club Experience

- *Action Step*
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Action Step

Expand Your Reach through Socials and Service.

- Review your club's activities and determine which ones can be streamlined or eliminated.
- Survey members on club experience
- Create opportunities for members to set up regular social events, quarterly, semi-annually. Example: Divide members into 4 groups by using deck of cards, clubs, diamonds, hearts, spades, each group organize a social event.

Video Moment to Share

[Rotary International: Transform Your Club Culture & The Club Experience](#)
[Member Attraction - Understanding Your Club Culture](#)

Learning Opportunity:

- [Club Service Projects](#)
- [What Makes Up Club Experience](#)
- [Club Experience Concierge \(qualtrics.com\)](#)

Club Membership Team Focus:

- Review Enhancing Club Experience Survey
- Review Flexibility Worksheet

Resources

What Makes Up Club Experience

Designing Club Experience

Member Satisfaction Survey

Flexibility Worksheet

Step 10: New Club Development

- *Action Step*
- *Video Moment to share*
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- *Club Membership Team Focus*
- *Resources*

Action Step

Use support materials to encourage new and support current Rotaract, Interact, RYLA, and alternative clubs. Identify opportunities in your community to grow Rotary.

Club Membership Video Moment – Share at Meeting

- [New Types of Rotary Clubs](#)
- [What is Rotaract?](#)

Membership Learning Opportunity:

- [Starting a New Club](#)
- [Nurturing New Clubs](#)

Club Membership Team Meeting:

- Review Flexible Options for clubs
- Review club types
- Look for unmet needs by researching characteristics of existing area clubs (for example, meeting time and location, club model, meeting format and frequency, club member and profession diversity, and service activities).

Resources:

- [Welcome to Phoenix 223 | Zones 25B & 29 \(zones25b-29.org\)](#)
- Club Types
- New Club Planning
- Member Diversity Worksheet

