

Module C-8 **Attracting Members** (45 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Topic and Presenter(s)	Welcome back after lunch. Then have everyone stand up with their materials and choose new seats sitting next to different people. Direct attention to the PETS Learning Guide C-8-: Attracting Members. Introduce concepts in membership resource materials. Refer to the three learning objectives. Introduce presenter(s).	4 min.
2.	Main Room/ Content Overview	1st Learning Objective: Outline a process for working with club members to develop new strategies for attracting new members. Facilitate classroom discussion: Why is it important to attract new members to Rotary? Why is it important to attain a diverse club which reflects your community's demographic composition? How can a club attract new members and achieve a diverse composition? Refer to Member Interest Survey and A Perspective Member Exercise in PN Learning Guide. How could you as PE work with your club to develop this plan for identifying new members who represent your community?	13 min
3.	Breakouts/ Discussions	2nd Learning Objective: Recall ideas offered by other members of the group during this session for including non-Rotarians in club projects and meetings. Divide the participants into new trios. If needed, a facilitator may join one to make a trio. Refer to Perspective Member Exercise Worksheet in PN Learning Guide. Instruct the trios to discuss ideas for including non-Rotarians in club meetings and projects. Have each trio select one outstanding idea and share with the entire group.	12 min
4.	Breakouts/ Discussions	3rd Learning Objective: Identify prospective groups and individuals in each respective community with interest in connecting with Rotary clubs. Facilitate classroom discussion: What groups does your club work with on service or fundraising products? How can your relationships with these groups lead to attracting new members? What other groups locally would have interest in connecting with your club?	10 min
5.	Sharing Back/ Q &A	Ask for good ideas to share, takeaways, and best practices. Ask for any questions and respond briefly.	3 min
6.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	3 min

Lone Star PETS 2026

PRESIDENTS-NOMINEE LEARNING GUIDE

SATURDAY

MODULE C-8 ATTRACTING MEMBERS

GOAL

Club Presidents-elect will begin to develop innovative strategies for attracting new members

OBJECTIVES

At the end of the session, Presidents-nominee will be able to:

1. Outline a process for working with club members to develop new strategies for attracting new members.
2. Recall ideas offered by other members of the group during this session for including non-Rotarians in club projects or meetings.
3. Identify prospective groups and individuals in each respective community with interest in connecting with Rotary clubs.

REFERENCE MATERIALS:

Membership Assessment Tools
Member Interest Survey
Perspective Member Exercise

Club Health Check
Designing Your Rotary Experience
Introducing New Members to Rotary
Rotary Basics
Strengthening Your Membership

Module C-8: Attracting Members

Breakout Discussion Questions

1. Why is it important to attract new members to Rotary?
Why is it important to attain a diverse club which reflects your community's demographic composition?
How can a club attract new members and achieve a diverse composition?
Refer to Member Interest Survey and Perspective Member Exercise in PN Learning Guide. How could you as PE work with your club to develop this plan for identifying new members who represent your community?
2. Refer to Perspective Member Exercise worksheet in PN Learning Guide.
Discuss ideas for including non-Rotarians in club meetings and projects.
Select one outstanding idea and share with the entire group?
3. What groups does your club work with on service or fundraising projects? How can your relationships with these groups lead to attracting new members? What other groups locally would have interest in connecting with your club?
4. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
5. What is your **primary takeaway** from the Attracting Members session?
6. Any other questions?



MEMBERSHIP ASSESSMENT TOOLS



Rotary

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

ABOUT THIS GUIDE

Whether your club is large or small, strong or struggling, taking the time to evaluate what you're doing is worth the effort. The tools in this guide can help you connect better with your members, involve new and longtime members in ways they enjoy, find approaches to make your club experience more inclusive and flexible, and gather helpful feedback from members who leave your club. These tools are intended to help you find ways to make more people comfortable in your club and inspired to join. You'll find these membership assessment tools in the guide:

- **Member Interest Survey.** This helps you get to know new and prospective members so your club can meet their expectations and maximize the ways in which they can get involved.
- **Diversity Assessment.** This helps you identify groups in your community that may be underrepresented in your club.
- **Prospective Member Exercise.** This helps you think about specific people you want to invite to your club.
- **Retention Assessment and Analysis.** This helps you engage people at different stages of their membership.
- **Member Satisfaction Survey.** This helps you learn what your club's members want, find ways to get them involved, and think of new initiatives to keep your club relevant.
- **Exit Survey.** This reveals the expectations former members had that your club didn't meet and what you might do differently to avoid losing other members for similar reasons.

For the assessment tools that involve surveys, we recommend creating an online survey using a free platform that's popular in your region, using the questions in this guide as a starting point.



Recommended survey platforms include: [Google Forms](#), [Qualtrics](#), [SurveyMonkey](#), [Microsoft Forms](#), and [Mailchimp](#).

Your club can use any or all of these assessments. We recommend asking a group of members who are committed to membership — ideally, the club membership committee — to conduct the assessments, analyze the results, and then recommend and help implement action based on the findings. While you may not have immediate changes in your membership, taking the time for in-depth assessments will strengthen your club and Rotary over time.

Use the **Club Action Plan template in appendix 1** to create a schedule and assign tasks for each membership assessment tool that you want to use.

APPENDIX 1

CLUB ACTION PLAN

Complete the plan for your club, noting which assessment tools you'll use and who'll be involved. Use the sample response for your reference.

Assessment tool	Specific action	Implementation	Analysis	Distribution of the findings	Action steps to take in response
List the tool	List the action	List the date and who'll do it	List the date and who'll do it	List the date and who'll do it	List the date, who'll do it, and tasks
Member Interest Survey	<i>Distribute survey to members</i>	<i>August (Sue)</i>	<i>September (Jorge)</i>	<i>October (Lisa)</i>	<i>November (Sue, Jorge, and Lisa)</i> <ul style="list-style-type: none"> <i>Relax attendance requirements</i> <i>Add participation opportunities that don't involve standing for long periods</i>

GETTING TO KNOW PROSPECTIVE AND NEW MEMBERS: MEMBER INTEREST SURVEY



Did you know that when members leave Rotary, one of the primary reasons they cite is that their expectations weren't met? Getting to know new and prospective members early on is helpful for everyone. If you understand someone's background, interests, and what they want to contribute, you can determine whether your club can offer what they want and how to involve them in ways they'll enjoy. You might even find opportunities for them to help your club grow. Surveying new and prospective members gives you feedback on any factors that might prevent them from joining or fully participating. You may also discover ways your club can be more flexible and accommodate more people.

WHAT YOU'LL GAIN

If you consistently conduct this survey and act on its results, you can:

- Help prospective members and new members feel comfortable in your club
- Increase member engagement and satisfaction
- Improve your club's retention rate
- Help your club make the most of members' unique skills and expertise

GETTING ORGANIZED

Identify a group of people who are committed to welcoming and involving new members and helping them understand the culture of your club. This may be your membership committee or a newly organized member interest team. Next, decide how you'll use the survey. You can send it to guests who inquire about joining, include it in the membership application, make it part of new member orientation, or use it as the basis for an informal conversation. You'll also need to decide whether you'll print copies of the survey, email it to people, or use one of the survey platforms mentioned above.



Some clubs that use this survey in their membership application take an additional step. If it's clear that the club doesn't meet the person's interests, the club asks the assistant governor to find one that does.

GETTING STARTED

Step 1: Decide what questions to ask and who will ask them.

Review the sample questions below and use them to create your club's survey or guide your informal conversations. Not every question will apply, so you can edit them, add your own, or omit some. Save them with your club files so they're ready to use. Determine who'll be responsible for sending out the survey or having the conversations.

Step 2: Determine when to use the questions and then do so.

Distribute the survey or schedule a time to talk based on the timing your committee decided upon. That might be after a guest's first visit or after a new member has joined. Let the person know the purpose of the survey or conversation and that their responses will help you offer them a better experience. Use the questions that your club had selected earlier.

Step 3: Use the feedback to engage each member in ways that suit their interests.

This is the most important step. If people take the time to answer the questions thoughtfully but there's no response, they might feel frustrated, which would undermine your goal. Because you know your club and Rotary well, learning what members are interested in will enable you to connect them with activities they'll find fulfilling. Review the sample below to learn how to address a member's response.

NEW OR PROSPECTIVE MEMBER'S RESPONSE	WAYS TO ACT ON THEIR RESPONSE
Example: The person is interested in hands-on service, but also concerned about the attendance requirement.	Introduce the person to the service projects chair and ask if they want to join the committee.
	If your club doesn't have a strong service component, ask your assistant governor whether another club is a better fit or if there's a districtwide project the person could join.
	Ask if the person is interested in sharing their ideas for service projects your club could conduct.
	Explain that attendance is flexible (if it is in your club). If it's not, consider updating your bylaws to better accommodate people with this concern.

MEMBER INTEREST SURVEY

SAMPLE QUESTIONS

Your background

1. What is your name and what do you like to be called?

What are your pronouns? (We ask because we always want to treat people with respect and ensure that people feel welcome.)

My pronouns are: ___ he/him/his ___ she/her/hers ___ they/them/theirs

2. What title do you prefer? Please circle one: Mr. / Mrs. / Ms. / Miss / Other: _____

3. Tell us about your areas of expertise.

4. What is your current or former profession?

5. What is your general field or industry? (For example, sales, publishing, etc.)

6. When is your birthday? (We ask so that we can honor you if you wish.)

7. Are there other significant dates we can help you or those close to you celebrate?

8. Tell us about where you grew up or the places you've lived.

9. What hobbies or interests would you like us to know about?

Membership in Rotary

1. What motivated you to get involved with the club? How did you learn about us?

2. Have you engaged with Rotary in the past? If so, how?

3. What do you want most from your experience as a member?

4. What opportunities would keep you interested and improve your Rotary experience?

5. What strengths and skills do you have that could help your club?

6. Please rank these in order of what you want from your Rotary experience, using 1 for most important and 5 for least important:
 - ___ Friendship and fun
 - ___ Service activities
 - ___ Networking opportunities
 - ___ Leadership and personal development
 - ___ The club meeting experience

Friendship and fun

1. What social activities are you excited to do with the club? This could include having coffee or tea and getting to know others better or attending sporting or cultural events.
2. What do you like about the club's social activities so far?

Service activities

1. What needs in our community do you think are most vital for our club to address through service projects?
2. Are there any organizations that you'd like the club to work with to address needs locally or internationally?
3. What experience have you had in community activities? What are your main community interests?
4. Are you aware of any current club projects that you'd like to be involved in?

Networking opportunities

1. What kinds of networking opportunities do you hope being a Rotary member will offer?
2. What do you like about the club's networking opportunities so far?

Leadership and personal development

1. Our club has many roles that can help you develop your leadership skills. Mark any roles below that you want to learn more about or have questions about:

Club president

Club secretary

Club treasurer

Club administration committee member

Club membership committee member

Club public image committee member

Club service project committee member

Club Rotary Foundation committee member

Other (Please specify.) _____

2. Do you have experience in volunteer leadership?

3. Are you interested in serving in a club leadership role at some point?

The club meeting experience

1. What are your expectations for club meetings or the topics you want addressed there?

2. Can you attend meetings on [day] and [time] (enter your meeting schedule)?

Circle one: Yes / No / Unsure

3. How do you feel about the meeting format? (Note whether your meetings are in person, virtual, or hybrid.)

4. How do you feel about how often the club meets? (Note your club meeting frequency.)
5. How do you feel about the club's expectations for attendance and participation? (Note what your club's expectations are.)
6. Are you aware of the membership dues and fees? (List the dues and fees.)
Circle one: Yes / No / Unsure
7. How do you feel about the club's fees, dues, and other costs? (Note any other costs.)

Want to do other assessments?

Diversity Assessment

Prospective Member Exercise

Retention Assessment and Analysis

Member Satisfaction Survey

Exit Survey

Use the Club Action Plan in appendix 1 to track your membership efforts.

FINDING PEOPLE TO INVITE: A PROSPECTIVE MEMBER EXERCISE



You can find new members by asking people you know, following up on your club's online membership leads, identifying who's missing from your club, cultivating new relationships, and leveraging social media.

Encourage members to invite prospective members to service activities, club meetings, and events so that they can learn how your club works with the community and provides opportunities for friendship and connection. Each club should review its list of membership leads regularly and contact those people. And keep making progress on making your club better reflect your community.

To reach an even broader group of people, work with your public image committee to promote your club's service and social activities on social media. Tagging contacts who may be interested in an event, adding a "join" link on public documents or webpages, and using hashtags strategically are all ways to broaden your reach.

WHAT YOU'LL GAIN

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

- Develop a group of potential candidates for membership
- Determine how to introduce prospective members to your club
- Get to know people and what they're looking for so you can meet those needs



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

GETTING ORGANIZED

Set aside time for members to complete the Identifying Prospective Members Worksheet at a club meeting. This exercise generally works best at the beginning of a Rotary year, when annual membership goals have just been set, or in March, when the incoming president is planning for the next year.

GETTING STARTED

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

Explain the purpose of this exercise and ask club members to fill out the worksheet. Compile the information they provide, along with your club's membership lead candidates, and maintain a list of prospective members.

Step 2: Make an action plan.

Invite the prospective members to a club meeting, service activity, or social event. If you conducted the diversity assessment, refer to the list of groups you found to be underrepresented in your club and include people from those groups as well. Now you can develop a plan that specifies:

- Who you want to invite, and if you want to do so in small groups
- Who is responsible for inviting each person
- What event they'll be invited to
- How the person responsible will make the invitation
- How they'll follow up with the prospective member after the event

Step 3: Invite prospective members to a club event.

Invite the people from your list to attend an upcoming service activity or meeting. Or host a special event where they can meet club members and learn about the club in a casual atmosphere. Make them feel welcome by having the club president or another leader greet them personally.



You can use the Manage Membership Leads page of My Rotary to [store information](#) about all your prospective members.



Two of every three prospective members who are referred by a current member join Rotary. If a prospect is interested but can't join your club, you can still help Rotary grow by referring them to another club.

Step 4: Follow up with prospective members.

- Ask members who invited guests to contact them and then share their interest or feedback with the club.
- Keep the worksheets and your compiled list for future membership efforts.
- Regularly use the Club Administration area of My Rotary to track membership leads gathered through Rotary's website.
- If you find people who are interested in Rotary and would be good members, but they aren't a good fit for your club, refer them to another club.

Want to do other assessments?

[Member Interest Survey](#)

[Diversity Assessment](#)

[Retention Assessment and Analysis](#)

[Member Satisfaction Survey](#)

[Exit Survey](#)

Use the Club Action Plan in appendix 1 to track your membership efforts.



You can also review the [Rotary Research page](#) for a broader understanding of membership trends.

IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

Think of your contacts, acquaintances, friends, and family members, as well as community residents who might be interested in your club. You don't have to know if they're ready to join Rotary.

After you've listed the names of people who might be interested, circle anyone you think would be a good fit for your club in particular.

Your name: _____ Date: _____

Professional contacts

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

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Service contacts

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

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Community contacts

Consider other people you know in your community, such as:

- Accountants
- Business consultants
- Civic leaders
- Construction workers
- Dentists
- Entrepreneurs
- Financial managers or planners
- First responders
- Food or beverage industry workers
- Health care workers
- Information technology professionals
- Lawyers
- Local innovators
- Nonprofit professionals
- Nurses or doctors
- Psychologists
- Public relations professionals
- Real estate agents
- Religious leaders
- Sales executives
- School administrators
- Social workers
- Stay-at-home parents
- Teachers or professors
- Veterinarians

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

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Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Rotary contacts

Consider past members or Rotary alumni that you know or that your club maintains contact with. Rotary alumni are people who have participated in:

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

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

