

Module C-9 **Engaging and Retaining Members** (60 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Topic and Presenter(s)	Direct attention to the PETS Learning Guide C-9: Engaging and Retaining Members. Introduce concepts in membership resource materials. Refer to the three learning objectives. Introduce presenter(s).	2 min
2.	Main Room/ Content Overview	1st Learning Objective: Explaining the value of membership assessment tools in the planning of strategies to engage and retain club members. Refer to all Membership materials in A-3 and C-8 in PN Learning Guide. Refer to handout in PN Learning Guide, Membership Satisfaction Survey. Facilitate classroom discussion: What makes this a valuable process? How could you, as club PE, utilize this survey as a planning tool for your club?	12 min
3.	Breakouts/ Discussions	2nd Learning Objective: Identify how key benefits of attending district events and seminars impact membership engagement and retention. Facilitate classroom discussion: How can having your club members attend these events assist in engaging and retaining your members? In what ways can a PE effectively promote district events? How can members who attend district events and seminars be engaged in club activities so their experience at the event helps the club as a whole?	12 min
4.	Breakouts/ Discussions	3rd Learning Objective: Outline the steps to design a comprehensive membership engagement and retention strategy for their respective Rotary club. Divide the participants into 5 groups. Refer to handout in PN Workbook, A Retention System and Analysis. Assign each group to one of these categories: (Members who stay under 1 year; 1-2 years; 3-5 years; 6-10 years; leave after 10+years). Group is to discuss the issues for their assigned category of club members and develop three action steps. Spokesperson from each group shares one action step with entire group. Encourage the use of the Exit Survey.	28 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 P.E.T.S. 2026

PRESIDENTS-NOMINEE LEARNING GUIDE

SATURDAY

MODULE C-9 ENGAGING AND RETAINING MEMBERS

GOAL

Club Presidents-elect will begin to design a strategy to engage and retain members through learning opportunities and events.

OBJECTIVES

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

1. Explain the value of membership assessment tools in the planning of strategies to engage and retain club members.
2. Identify how key benefits of attending district events and seminars impact membership engagement and retention.
3. Explain the value of a comprehensive membership engagement and retention strategy for their respective Rotary club.

REFERENCE MATERIALS:

Membership Assessment Tools
Member Satisfaction Survey
A Retention Assessment and Analysis
Exit Survey

Club Health Check
Designing Your Rotary Experience
Enhancing Belonging and Engagement at Rotary
Introducing New Members to Rotary
Rotary Basics
Strengthening Your Membership

Module C-9: Engaging and Retaining Members

Breakout Discussion Questions

1. Refer to all Membership materials in A-3 and C-8 in PN Learning Guide. Refer to handout in PN Learning Guide, Member Satisfaction Survey. What makes this a valuable process?
How could you, as club PE, utilize this survey as a planning tool for your club.
2. How can having your club members attend these events assist in engaging and retaining your members?
In what ways can a PE effectively promote district events?
How can members who attend district events and seminars be engaged in club activities so their experience at the event helps the club as a whole?
3. Refer to handout in PN Learning Guide, A Retention Assessment and Analysis.
Discuss issues for assigned category of club members and develop three action steps.
For each group, share one action step with entire group.
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 Engaging and Retaining Members session?
6. Any other question(s)?



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>

ENHANCING THE CLUB EXPERIENCE: MEMBER SATISFACTION SURVEY



The experience your club offers people affects how they feel about the club. By asking members for feedback regularly and then responding to it, you're showing your openness to change and empowering them to help create their ideal club experience. The Member Satisfaction Survey can help you gather feedback so you can use it to ensure that members are enjoying their experience.

WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

- Identify what your members like and dislike about their club experience
- Develop an action plan that builds on what people enjoy and that ends or changes what they don't

GETTING ORGANIZED

You'll need a dedicated group of people to conduct the Member Satisfaction Survey. It can be your club's membership committee or a few interested volunteers. You can devote time during a club meeting to discuss how satisfied people are and have them take the survey. You could also hand out the survey or email it to members so they can have more time to complete it. Or you could hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.



Emphasize to those administering the survey the importance of keeping the responses confidential when they discuss and analyze them. Be sure to tell members this will happen.

GETTING STARTED

Step 1: Customize the survey.

Use the sample questions below to develop your club's Member Satisfaction Survey.

Step 2: Distribute the survey.

Distribute the survey to people or use an online survey platform. Explain that their responses are confidential and will be used to enhance the club experience for both current and prospective members.

Step 3: Analyze the data.

Have the group you organized to administer the survey review the results. Remind people about the importance of confidentiality and respecting all viewpoints.

Step 4: Share the results and make an action plan.

Present the survey results to the club and discuss them. Allow time for members to ask questions and offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for making changes.

Step 5: Take action.

The final step is to implement the action plan. Talk to members and involve as many of them as you can in the process so that they're invested in making the club experience better for everyone.



Consider using an online survey platform. They're convenient, often free or inexpensive, and helpful in managing the response data.



Be sure to allow enough time when you're planning the schedule. Each step can take a week or longer.

Want to do other assessments?

[Member Interest Survey](#)

[Diversity Assessment](#)

[Prospective Member Exercise](#)

[Retention Assessment and Analysis](#)

[Exit survey](#)

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

MEMBER SATISFACTION SURVEY

SAMPLE QUESTIONS

This survey focuses on your typical experiences in our club. Your input is valuable and will be used to make the club even better for everyone. There are no right or wrong answers, so simply offer your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with being a member of our club?

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

2. Thinking about our club’s **culture, members, and meetings**, indicate how much you agree with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I enjoy our club meetings.	<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"/>
Members of my club care about each other.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club is as diverse as our community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Members are involved in ways that match their interests and skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The number of fundraising activities is appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our club has a welcoming environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I can freely express myself among our club members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm proud to belong to this club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

3. How do you rate the following aspects of club meetings?

	Excellent	Good	Fair	Poor	Very poor	Not applicable
Rotary International updates	<input type="checkbox"/>					
Length	<input type="checkbox"/>					
Frequency	<input type="checkbox"/>					
Format (online, in person, or hybrid)	<input type="checkbox"/>					
Time for socializing	<input type="checkbox"/>					
Professional connections and networking	<input type="checkbox"/>					
Content variety	<input type="checkbox"/>					
Location	<input type="checkbox"/>					
Meeting time and day	<input type="checkbox"/>					
Meals or other food options	<input type="checkbox"/>					
Opportunities to offer input and have discussions	<input type="checkbox"/>					

Comments and suggestions:

4. What do you think about these aspects of our club's **service projects**?

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

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

Comments and suggestions:

5. Thinking about **communication** and **responsiveness** in our club, indicate how much you agree with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club is good at communicating with members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club is good at listening to members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club seeks input and ideas from members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club regularly acts on input and ideas from members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club updates our processes and rules to meet the needs of our members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm comfortable with the pace of change in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

6. Indicate how much you agree with the following statements about being a member.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I am welcome in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I can be myself around members of my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club members know me and value me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I make valuable connections through my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club provides opportunities to use my talents and skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have access to leadership opportunities in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My Rotary experience is worth the cost.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the time I commit to Rotary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My family understands the value I place on my Rotary membership.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My friends understand the value I place on my Rotary membership.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in my community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in the world.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

7. Indicate how much you agree with the following statements about club engagement.

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

Comments and suggestions:

8. Think about the costs associated with being a club member and rate these factors.

	Too low	Just right	Too high	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for donations for service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

9. What didn't we ask about that you'd like to start, stop, or continue in your club?

ENGAGING AND KEEPING MEMBERS: A RETENTION ASSESSMENT AND ANALYSIS



When members stay, it's a sign that your club's doing well. But just keeping your overall member count steady doesn't mean you don't need to be concerned about retention. If clubs are consistently losing members and inducting new ones, that indicates that they may need to change how they manage their growth or retention.

This assessment provides ways to understand your club's trends and engage people more meaningfully at different stages of membership. This increases the likelihood that they'll remain in Rotary.

WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

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

GETTING ORGANIZED

Part of this process requires access to club membership reports in Rotary Club Central. The club president, secretary, treasurer, membership chair, and Foundation chair have this access and can delegate it to anyone at the same organizational level. It may be helpful to involve a member who has experience in data analysis.

GETTING STARTED

Step 1: Gather information.

Think about the members who have resigned from your club during the past year or two. Consider whether they were newer members or longtime members, and whether they had any reasons in common. If your club surveys exiting members, you can gain insight from that feedback. When

you terminate a member in My Rotary, it's important to list the reason they left. This information will be used in the Rotary reports that are a good source for analyzing trends.

To access these reports:

- Sign in to My Rotary
- From the MEMBER CENTER menu, choose Online tools and then Rotary Club Central
- From the options on the left, choose **Reports**
- Under **Club Reports**, choose the report you'd like to access

You can use the Member Viability and Growth report to find the retention rates for existing members. You can also search for trends in when members leave your club and their reasons by using the Membership Termination Profile report. To export reports, select the "Export" icon  and choose a program or format. You can now save or print the report.

Knowing why people left and when in their Rotary membership they did so can help you recognize your club's retention strengths and weaknesses to focus your efforts.



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

Step 2: Understand when and why members leave your club.

Once you've reviewed the Member Viability and Growth and the Membership Termination Profile reports, discuss the results with the membership committee. Think about:

- Who is leaving your club? Are they longtime members, new members, or both?
- Why are members leaving?
- Are any common themes emerging from the data?

Step 3: Develop an action plan to better engage members.

Present the membership committee's findings to the club. Ask your club to consider:

- What is our club good at?
- What could our club do better?
- What keeps our active members involved?
- How can we better engage those who aren't as involved?

Lead a discussion about how to build on what you're doing well and address any challenges. Encourage members to share their ideas about how to involve people at different stages of membership.

WHY MEMBERS LEAVE AND TIPS TO RETAIN THEM

Understanding why members leave is crucial to strengthening your club. The Exit Survey we discuss elsewhere in this guide helps you gather this information on a club level. Rotary has also conducted extensive research worldwide on why people leave at various points in their membership. Here’s what we’ve found along with tips to address various situations.

MEMBERS WHO STAY LESS THAN A YEAR

Although about three-fourths of new members who leave say they were told about the responsibilities of being a member before they joined, 40% cite the cost or time commitment as their reasons. Others lose interest, don’t feel included, or find that their experience didn’t meet their expectations. Some say they weren’t able to engage with the club or found the club unwilling to change its traditions.

What you can do

If your club is losing members within their first year, try these strategies:

With prospective members	With new members	With your club practices
Communicate better about the personal and professional benefits that your club offers as well as the expectations that the club has for members.	Plan meaningful induction ceremonies that celebrate the occasion and include their families.	Make sure current members make new members feel welcome (such as by engaging them in conversation or inviting them to sit with you at meetings).
Ask for their impressions of the club and be willing to act on their suggestions.	Offer orientation programs that help them learn more about Rotary and how to get involved in the areas they’re especially interested in.	Pair new members with mentors who can explain the club’s practices and traditions, answer questions, introduce them to other people, and talk regularly with them about how they’re enjoying their experience.
Tell them about the professional development opportunities available through Rotary, such as the leadership and communication courses in the Learning Center.	Involve them in ways that match their specific interests and expertise rather than in ways that fill the club’s needs.	Keep club meetings fun, energetic, and entertaining without forgetting that most people join Rotary for the opportunity to engage in meaningful service.

MEMBERS WHO LEAVE AFTER 1-2 YEARS

Many members who leave after a year or two say they didn't feel involved in club events and activities, didn't get along with people in the club, or had difficulty fitting Rotary into their lives because of other commitments.

What you can do

If your club is losing members after one to two years, try these strategies:

Get them involved	Connect with them	Emphasize learning
Talk to members who are reaching this point about opportunities to join a committee or get involved in a project.	Ask these members for feedback about what they like and what they want to change. They may have ideas that can revitalize the club's social activities or service projects.	Remind them about the professional development opportunities available through Rotary, such as the leadership and communication courses in the Learning Center. New courses are added regularly, so they may have more options than when they first joined.
Ask how they want to get involved (find ideas in Connect for Good and the guide to Avenues of Service activities).	Pair members who don't have mentors with one, or suggest that they change mentors if they want a different perspective or have become interested in different aspects of Rotary.	

MEMBERS WHO LEAVE AFTER 3-5 YEARS

Members who leave after three to five years may do so because their social expectations weren't being met, they were frustrated with the club's leaders, or they had difficulty meeting the expectations for members because of other commitments.

What you can do

If your club is losing members after three to five years, try these strategies:

Innovate	Listen	Provide opportunities
Implement new activities so that people remain excited about attending meetings and other club functions.	Ask these members for feedback about what they like and what they want to change. They may have ideas that can revitalize the club's social activities or service projects.	Offer these members leadership opportunities and ensure that those who want these kinds of roles are considered for them. By taking on leadership roles, they'll feel useful, valued, and more connected with the club.
Find videos from recent Rotary events to supplement your club meetings. After you watch, ask people to discuss the topic's relevance in their club or community.	Ask them to give a presentation to the club about something that's important to them. Encourage those who are in club leadership roles to mentor newer members or participate in district activities, which puts them and others in a position to take on more challenging roles.	
Organize social activities that are different from the ones your club has held before.	Ask them what's preventing them from participating more fully, then accommodate them as much as you can.	Ask them to advise on or lead a project or activity in their specific area of expertise, and recognize them for their efforts.

MEMBERS WHO LEAVE AFTER 6-10 YEARS

Some members who leave after six to 10 years say that their social expectations weren't being met and they were frustrated with the club's leaders. Others left when they retired or needed to relocate.

What you can do

If your club is losing members after six to 10 years, try these strategies:

Understand their needs	Recognize their value	Connect them with a new club
Talk with these members about what they're looking for and how their interests have changed since they joined.	Let them know what you value about their perspective and what you look forward to doing alongside them in the future.	Forward a relocating member's contact information to clubs in their new area, refer them through My Rotary, or encourage them to let Rotary know they want to change clubs.
Ask if they're interested in mentoring newer members or getting involved in district activities, such as planning the district conference or serving on a district committee.	Thank them for their contributions, big and small.	
Ask them what they need or if you can make something easier for them that will keep the club experience relevant and accessible for them and others.	Give them an opportunity to lead in some capacity.	If several members have different interests, suggest that they start a satellite club.

MEMBERS WHO LEAVE AFTER 10 YEARS

Many members who leave after more than 10 years say they weren't interested in the club's meetings and activities. Others left because of retirement, family obligations, financial constraints, or health problems.

What you can do

If your club is losing members after more than 10 years, try these strategies:

Show them they matter	Offer new ways to get involved	Accommodate them if you can
Talk with these members to learn what they're experiencing and feeling.	Ask for their opinions on how to energize or reinvent your club meetings.	Consider easing the financial or participation obligations on these members if it's a factor that pressures them to leave.
Recognize them for their efforts over the years by <u>nominating</u> them for an award.	Ask if they're still interested in the club's activities or what might interest them instead.	Be aware that these members may have health concerns that they may or may not want to disclose. Ask them what they need or if you can make something easier for them that will keep the club experience relevant and accessible for them and others.
Tell them what you value about them and how much your club benefits from their perspective and expertise.	Gauge their interest in taking on a district leadership position such as assistant governor, district governor, or district committee chair.	



Use the Member Satisfaction Survey to ask everyone for feedback about the club and the Member Interest Survey to learn more about people so you can better engage with them.

Want to do other assessments?

Member Interest Survey

Diversity Assessment

A Prospective Member Exercise

Member Satisfaction Survey

Exit Survey

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

UNDERSTANDING WHY MEMBERS LEAVE: EXIT SURVEY



The exit survey can help you understand why members leave and suggest changes your club can make to better accommodate people in the future so they stay. Your club membership committee can review and customize the survey to meet your needs. You can also choose to create an online form or conduct an in-person interview.

WHAT YOU'LL GAIN

Use exit surveys and act on their results to:

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

GETTING ORGANIZED

Taking this survey may be the final contact that a person has with Rotary, and it's very important to listen to their feedback. If you conduct the survey online or use a paper survey, delegate someone to manage the process whenever a member leaves the club. If you have an in-person conversation, ask someone who is a good listener to talk with the member who's leaving. The interviewer will need to share the results with the membership committee and club board.

GETTING STARTED

Step 1: Ask permission.

Ask the person who is leaving if they're willing to take a confidential exit survey. Explain that the purpose is to understand any problems that need to be addressed in order to improve the club for others and prevent even more members from leaving.



Consider using an online survey platform. They're convenient, often free or inexpensive, and helpful in managing the response data.

Step 2: Provide the survey.

Give the person the survey and ask them to complete it as soon as they can reasonably do so. You can edit the survey included in this document and attach it to an email or use an online survey platform. If the person cannot complete the survey online, use a paper form and provide a stamped, addressed envelope for them to return it.

Step 3: Discuss the results.

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

Step 4: Take action.

This step is crucial. You invest time and resources into attracting and engaging members, so it's important to protect that investment by addressing any reasons that make people leave. Although not every exit survey will require action, they do all merit consideration. Create a plan to address any issues and delegate the tasks that it involves. Once a year, update your club's Member Satisfaction Survey based on the responses from resigning members over the previous year.

Want to do other assessments?

[Member Interest Survey](#)

[Diversity Assessment](#)

[Prospective Member Exercise](#)

[Retention Assessment and Analysis](#)

[Member Satisfaction Survey](#)

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

EXIT SURVEY

SAMPLE QUESTIONS

We're sorry to lose you as a member of our club. To help us understand why you're leaving and what we can do to improve the club for others, please answer these questions about your Rotary experience. We appreciate your candid and honest responses.

1. What were your primary reasons for joining the club? (Choose all that apply.)

- Community service
- International service
- Personal development
- Leadership or professional development
- Family legacy or tradition
- Status and prestige
- Social opportunities
- Networking
- Opportunity to facilitate international exchange
- Tutoring and mentoring young people
- Reconnecting with Rotary as an alum
- Other: _____

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

- Less than a year
- 1-2 years
- 3-5 years
- 6-10 years
- More than 10 years

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

What did you like least?

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

- 1
- 2
- 3 or more
- None, because the club didn't offer them
- None, because I wasn't interested

5. How many club meetings did you attend before you joined?

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

6. How did you learn about club activities and your responsibilities before joining? (Choose all that apply.)

- I attended information sessions.
- I received information from a club officer.
- I received information from my sponsor.
- I found information on my own.

7. Did you learn more about Rotary in a structured way (such as through a new member orientation or continuing education) after you became a member? (Select one.)

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

8. Do you believe you were adequately informed about the financial and time commitments of being a club member? (Select one.)

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

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

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

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

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

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

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

12. If you didn't feel welcome or didn't feel comfortable expressing concerns, please explain why.

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

14. What can club leaders do to improve the experience for new members?

15. How do you rate these aspects of the club meetings?

	Excellent	Good	Fair	Poor	Very poor	Not applicable
Rotary International updates	<input type="checkbox"/>					
Length	<input type="checkbox"/>					
Frequency	<input type="checkbox"/>					
Format (online, in person, or hybrid)	<input type="checkbox"/>					
Time for socializing	<input type="checkbox"/>					
Professional connections and networking	<input type="checkbox"/>					
Content variety	<input type="checkbox"/>					
Location	<input type="checkbox"/>					
Meeting time and day	<input type="checkbox"/>					
Meals or other food options	<input type="checkbox"/>					
Opportunities to offer input and have discussions	<input type="checkbox"/>					

16. Please evaluate these aspects of club meetings.

Meeting components	Excessive	Reasonable	Inadequate
Learning about Rotary (Rotary Youth Exchange, Rotary Foundation programs, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Structure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Did you participate in service projects? Yes No

18. If no, why not?

- Type and quality of projects
- Number of projects
- Personality conflicts
- Cost
- Schedule conflicts
- Other: _____

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

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

20. If your participation in service projects wasn't satisfying, why not? (Choose all that apply.)

- Lack of variety in projects
- Lack of quality of projects
- Not enough projects
- Personality conflicts
- Lack of support from other members
- Insufficient family involvement
- High costs
- Did not feel welcome
- Schedule conflicts
- Other: _____

21. Please evaluate how your Rotary experience aligned with your family commitments.

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

22. How could club leaders provide more opportunities for families to be involved?

23. Please evaluate the costs associated with being a member.

Cost	Too high	Reasonable	Too low	Not applicable
Club dues (including RI and district dues)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meal costs (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service project contributions (time or money)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rotary Foundation contributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. How well does the club reflect the demographic profile of professionals in the community?
(Select one.)

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

25. Think about what you were told when you joined the club. Were your expectations met?

26. Why did you terminate your membership?

27. Would you consider joining another club?

Yes

No

Not sure

28. What advice do you have for the club's leaders?

29. Do you have any other comments?

Thank you for completing this survey. If you ever want to rejoin or change clubs, you can start at rotary.org/join.

