

Module A-3 Growing And Engaging Your Club Membership (60 minutes)

| | Step? | We want to accomplish? | How long? |
|----|----------------------------------|---|-----------|
| 1. | Introduce Topic and Presenter(s) | Direct attention to the PETS Workbook, A-3: Growing And Engaging Your Club Members. Refer to the four learning objectives. Introduce presenter(s). | 3 min |
| 2. | Main Room/ Content Overview | Presentation of key content (slide deck can serve as outline and handout for notes). Emphasize the importance of formulating a Club membership action plan with goals and strategies. Share resources within the district for membership development (attracting new members, engaging all members, retaining members through engagement). | 10 min |
| 3. | Breakouts/ Discussions | 1 st Learning Objective: Discuss the role and elements of a membership action plan for a vibrant and impactful club. 2 nd Learning Objective: Recognize key elements for club membership health. 3 rd Learning Objective: Identify strategies and best practices to attract and engage members for a vibrant and impactful club. 4 th Learning Objective: Describe how a Club President can create a club culture and experience that is welcoming for all groups. See Breakout Discussion Questions | 30 min |
| 4. | Sharing Back | Ask for good ideas to share and takeaways. | 10 min |
| 5. | Q & A | Ask for any questions and respond briefly. | 5 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. | 2 min |

Lone Star P.E.T.S. 2025

PRESIDENTS-ELECT / PRESIDENTS-NOMINEE WORKBOOK

FRIDAY, FEBRUARY 28, 2025

MODULE A-3 GROWING AND ENGAGING YOUR CLUB MEMBERSHIP

GOAL

Club Presidents and Presidents-Elect will possess tools needed to champion effective membership action plans for their respective clubs.

OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Discuss the role and elements of a membership action plan for a vibrant and impactful club.
2. Recognize key elements for club membership health.
3. Identify strategies and best practices to attract and engage members for a vibrant and impactful club.
4. Describe how a Club President can create a club culture and experience that is welcoming for all groups.

REFERENCE MATERIALS

Rotary Citation/Club Excellence Award
Strengthening Your Membership
Club Health Check
Be A Vibrant Club: Your Club Leadership Plan
Impact Begins With You
Membership Assessment Tools
Rotary International Harassment Policy



Module A-3: Growing and Engaging Your Club Membership

Breakout Discussion Questions

1. Refer to Rotary Citation/Club Excellence Award membership goals handout in your PETS Workbook.
In your role as President/President-Elect, describe what you will do to ensure that your club meets its membership goals this year.
2. Refer to Strengthening Your Membership manual in your PETS Workbook.
Discuss the importance of creating a club membership action plan.
For each of the following areas in your plan, list one primary action step:
 - a. Self-assessment/culture;
 - b. Attraction/recruitment;
 - c. Engagement/retention;
 - d. Diversity; and
 - e. Youth.
3. Refer to Club Health Check handout in your PETS Workbook.
Discuss the importance of assessment in club membership health.
Identify three key characteristics/attributes of a healthy club.
4. As a reminder, refer to Be A Vibrant Club and Impact Begins With You handouts in your PETS Workbook, Module A-1.
Identify three top strategies/best practices your club can undertake to attract/engage members who are vibrant and can make an impact?
5. Refer to Membership Assessment Tools handout and Rotary International Harassment Policy information in your PETS Workbook.
In your role as President/President-Elect, describe what can you do to create a club culture and experience that is welcoming to all groups?
6. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
7. What is your **primary takeaway** from the Membership session?
8. Any other question(s)?

ROTARY CITATION / CLUB EXCELLENCE AWARD

GOALS AND INSTRUCTIONS

The Rotary Citation, which will be renamed the Club Excellence Award starting 1 July 2024, recognizes the hard work clubs do throughout the year. Taking action toward achieving the required number of goals helps clubs engage their members, stay relevant in their communities, and run more efficiently. A welcoming and engaging club also reflects the values of Rotary. When clubs work to achieve these goals, they also contribute to the overall health and culture of Rotary for generations to come.

To be eligible for the Club Excellence Award, clubs need to be active clubs in good standing – or having paid each invoice balance in full upon receipt. To verify that your club is in good standing, go to My Rotary>Click on Club Name>Finance>Club Invoice. You should have an outstanding balance of \$0.00. Invoices are due when they are posted, in mid-January and mid-July.

Rotary club leaders can go into Rotary Club Central and select the goals they wish to apply toward the club excellence achievement. This flexibility allows clubs to choose the goals that are most relevant and achievable. In addition, many goals will be self-reported by marking “achieved” in Rotary Club Central. Clubs must achieve at least half of the goals by 30 June to be eligible.

To achieve the Club Excellence Award:

1. Go to [Rotary Club Central](#)
2. Review the available goals
3. Set at least half of the available goals
4. Achieve those goals
5. Report achievement in Rotary Club Central by 30 June.
6. Pay club invoices in full upon receipt

Once you are in Rotary Club Central, go to **Club Goals** on the left side of the page if you are not there already, select the **year**, and click on the **All tab** to see the goals. Eligibility will be determined based on goal achievement as of 30 June.

| Enhance Participant Engagement | |
|-----------------------------------|---|
| Goal | Description |
| Service participation | How many members will participate in club service activities during the Rotary year? |
| Rotary Action Group participation | How many club members will be members of at least one Rotarian Action Group (RAG) during the Rotary year? |
| Rotary Fellowship participation | How many club members will be members of a Rotary Fellowship during the Rotary year? |
| District conference attendance | How many members will attend your district conference? |

| | |
|--|---|
| District training participation | How many of your club's leaders will attend a learning event to prepare for their role |
| Leadership development participation | How many members will participate in leadership development programs or activities during the Rotary year? |
| Social activities | How many social activities will your club hold outside of regular meetings during the Rotary year? |
| Use of official Rotary promotional materials | Did your club use Rotary International's advertising and public service materials, such as broadcast videos, print ads, and other official materials available in the Brand Center, to promote Rotary in your community during the Rotary year? |

| Increase our Impact | |
|----------------------------------|--|
| Goal | Description |
| Service Projects | How many service projects will your club complete during the Rotary year? |
| Inbound Youth Exchange students | How many Rotary Youth Exchange students will your club host virtually or in person during the Rotary year? |
| Outbound Youth Exchange students | How many Rotary Youth Exchange students will your club sponsor virtually or in person during the Rotary year? ¹ |
| Annual Fund contributions | How much money will be contributed to The Rotary Foundation Annual Fund by your club and its members during the Rotary year? |
| PolioPlus Fund contributions | How much money will be contributed to The Rotary Foundation PolioPlus Fund by your club and its members during the Rotary year? |
| Major gifts | How many single outright donations of US\$10,000 or more will be made by individuals associated with your club during the Rotary year? |
| Bequest Society members | How many individuals or couples will inform The Rotary Foundation of their plans to leave US\$10,000 or more to The Rotary Foundation through their estate? |
| Benefactors | How many individuals or couples will inform The Rotary Foundation of their estate plans to include the Endowment Fund as a beneficiary or will make an outright gift of US\$1,000 or more to the Endowment Fund? |

¹ Any club participating in Rotary Youth Exchange must adhere to RI policies and Rotary Youth Exchange certification standards, and must operate under the direct supervision of the district Rotary Youth Exchange program.

| Expand our Reach | |
|-----------------------------------|--|
| Goal | Description |
| Club membership | How many total members does your club want by the end of the Rotary year? |
| New member sponsorship | How many members will sponsor a new club member during the Rotary year? |
| Rotaract clubs | How many new and existing Rotaract clubs will your club sponsor during the Rotary year? |
| Interact clubs | How many new and existing Interact clubs will your club sponsor during the Rotary year? |
| RYLA participation | How many individuals will your club sponsor to participate in Rotary Youth Leadership Awards (RYLA) events during the Rotary year either in person or virtual? |
| Media stories about club projects | How many media stories will cover your club's projects during the Rotary year? |

| Increase Our Ability to Adapt | |
|---------------------------------|--|
| Goal | Description |
| Strategic plan | Does your club have an up-to-date strategic plan? |
| Review club bylaws | Do your club bylaws reflect your members and other participants needs? |
| Online presence | Does your club's online presence accurately reflect its current activities? |
| Update website and social media | During the Rotary year, how many times per month will your club's website or social media accounts be updated? |

Questions? Read responses to [frequently asked questions](#) for more information.



STRENGTHENING YOUR MEMBERSHIP

Great clubs don't happen by chance. They're a result of careful planning, thoughtful actions, and dedicated efforts to ask for feedback, try new ideas, and adapt. Great clubs also have a strong, thriving membership and can demonstrate long-term impact.

INTRODUCTION

GETTING STARTED

We recommend that you start with the “Getting Started” section to help you determine which approach to try first.



This guide includes strategies for growing membership that you can use in your club. These three approaches below all align with our strategic priorities:



ATTRACTING NEW MEMBERS

Welcoming new and more diverse members to our clubs is critical to expanding our reach as well as increasing our impact. The strategies in this guide will help you identify how you can make your club more appealing to prospective members. We need to make participants central to what we do, ask them how they want to engage with us, and make sure they know that we value their participation.



OFFERING VALUE TO EXISTING MEMBERS

When we provide a fulfilling club experience, members feel valued and stay excited about Rotary's work. In a typical year, we welcome about 150,000 new members into Rotary clubs — and lose a similar number each year. Approximately 10% of new Rotary club members leave within a year of joining. Although this varies regionally, it's a long-standing issue. Intentional efforts that enhance participant engagement can help increase our retention rates.



STARTING AND NURTURING NEW CLUBS

New clubs demonstrate our ability to adapt and allow us to expand our reach. New clubs can accommodate diverse needs and interests and offer more meeting times and formats. New clubs have traditionally driven our growth and on average, 88% of charter members of new clubs are first-time members. And although many new clubs are started by district leaders, all of us can help them be successful.

YOUR SUPPORT FROM ROTARY

Because growing Rotary is our top internal priority, you have many people in your region and throughout Rotary who want you to succeed and can help you reach your membership goals. Your district membership committee, governor and assistant governor, Rotary coordinator, and the Rotary International staff can all help clubs be vibrant and grow. Rotary leaders and staff members can answer questions and advise your club on formulating an effective membership plan. You can [submit a question to RI staff](#) and find contact information for your district and zone leaders on the district and zone websites or in the [Official Directory](#).

Throughout this resource, you'll find links to resources including courses on Rotary's Learning Center. To access courses directly through these links, please log into the Learning Center first.

GETTING STARTED

The first step in building a stronger, more vibrant club is recognizing that making improvements will require some effort. Some parts will be easier, like making sure participants and visitors know how to find your meetings. Some parts will be more challenging, like assessing your club to understand how you can be more inclusive to current and prospective members. Use the [Your Membership Plan worksheets](#) at the end of this guide to develop a plan that works for your club.



GETTING STARTED

Why should strengthening membership be one of our top priorities?

Growing membership will always be one of the most important goals for a club. Why is that? A club with more members has more people available to plan and carry out service projects and events. It offers the chance for members to make more interpersonal, community, and professional connections and build more friendships. A club with more members includes more people's perspectives and experiences, which contribute to better decisions and outcomes. And having more members means clubs can give more to The Rotary Foundation, which lets members amplify their impact through grants.



ON YOUR OWN:

Go to My Rotary and find the Club Membership Profile report in the Membership and Foundation Reports section. This will show you how many members your club has lost and gained over the past four years.



WITH CLUB OFFICERS:

Discuss the report's findings. What insights or questions do they have about the trends? What additional data do you need before assessing other areas of your club? Encourage all club officers to [subscribe to the Membership Minute newsletter](#), which features membership development strategies, club success stories, and member profiles.



WITH YOUR CLUB:

Have an honest conversation about whether members feel ready to focus on growing membership. Don't try to solve any concerns at this point, just allow people to talk. Commit to being candid with them about what strategies you want to pursue.

PAUSE AND REFLECT

Think about what your club would be like with more members, having vibrant and fun events, and making a bigger difference in your community. Now consider what actions or changes will be necessary to achieve that. How confident are you in your club's ability to commit to growing membership?

GETTING STARTED

How do we start strengthening our membership?

After you've found and discussed the data, schedule some time to assess other aspects of your club to help you identify areas to focus on. A thorough assessment is a lot of work, but worth it to create a strong, sustainable club!



ON YOUR OWN:

Complete the [Is Your Club Healthy? course](#) in the Learning Center. This will help you think about the member experience and start conversations with club leaders and other members.



WITH CLUB OFFICERS:

Ask club leaders to complete the [Club Health Check](#). It's designed to be a quick but methodical way to determine what your club is doing well and what changes you might want to make. After your officers have completed the health check, discuss their findings and ideas about what to do next.



WITH YOUR CLUB:

Use an [online member satisfaction survey](#) to gather feedback from members, which is essential to keeping your club vibrant. Involving members also shows that you care about their expectations and value their opinions. You may want to ask a trusted person outside your club, such as an assistant governor or district membership chair, to facilitate the club assessment so that people are more candid. Then, be prepared to act on the feedback you receive.

PAUSE AND REFLECT

Think about how you'll get feedback from your members. Some effective formats are small- or large-group discussions, surveys, and focus groups. Consider asking someone with experience in facilitation to lead these discussions.

GETTING STARTED

How do we form a club membership committee?

To accomplish your membership goals, you'll need a strong team with the time, dedication, and skills to develop a plan and carry it out. Establishing a club committee gives you more opportunity to successfully implement the strategies in your plan and involve club members in the endeavor. If you have a large club, consider creating subcommittees for distinct types of membership activities.



ON YOUR OWN:

Make sure everyone on the committee has completed the [Club Membership Committee Basics learning plan](#). This is a great way for them to learn strategies to attract and engage members.



WITH CLUB OFFICERS:

Think about the work of current and past club membership committees. Develop a process to review your club's membership plan, talk with the membership committee on a regular basis, assess what membership initiatives went well and what opportunities exist for improvement, and make changes based on that feedback.



WITH YOUR CLUB:

Schedule time at meetings for the club membership committee to report to members on their work and get feedback. Emphasize that all members have a part in strengthening the club's membership. Share the [Club Membership Committee Checklist](#) and make sure that members who want to join your club's membership committee know what the process is in your club.

PAUSE AND REFLECT

Learn more about the membership committee's responsibilities with the [Club Membership Committee Checklist](#). Which of these things does your club already do well? Which would you like to improve?

GETTING STARTED

What if some members don't want to change?

The same diverse perspectives that let us think about issues in different ways and solve them more creatively can also lead to instances of disagreement. If this occurs, make sure to listen and emphasize the value of diverse perspectives. You may have to approach an issue more slowly or in a new way. Allowing members to contribute to these decisions in meaningful ways will foster enthusiasm and make it more likely that your plan is implemented successfully.



ON YOUR OWN:

Complete the [Essentials of Understanding Conflict Resolution course](#). You'll learn how to understand, manage, and resolve conflict.



WITH CLUB OFFICERS:

Ask club leaders to complete the [Rotary's Change Model course](#) to build their problem-solving and mediation skills and know how to plan for change, engage people in the process, and respond to resistance. If your club is making changes, talk candidly about the resistance you may encounter and identify people who can serve as advocates for the change.



WITH YOUR CLUB:

Talk honestly with members who may resist change to understand what they value, what they believe is at risk, and the source of their worries. If people feel understood, that usually fosters goodwill — even if there's still some disagreement. Think about how to acknowledge their perspective and offer a compromise or another way of thinking about the issue that could address their concerns. If their resistance is about trying something new, suggest a trial period and an assessment.

PAUSE AND REFLECT

Resistance to change is a natural reaction. For changes to be successful, people who are leading the change need to engage those who will be affected by it. Showing commitment and using communication and coaching can help keep the focus on the effect the change will have on people.

Think about how ready your club is to change. What will be the biggest challenges? Where are the opportunities to excel? Then, refer back to [Rotary's Change Model course](#) for possible next steps.

Record your ideas from this section in the [Your Membership Plan worksheet](#).

ATTRACTING NEW MEMBERS

The Rotary Club of Boothbay Harbor, Maine, USA, realized it needed to innovate during the COVID-19 pandemic, so members converted their big annual secondhand sale fundraiser into a smaller weekly event. The new approach became a way to engage current members while serving the community and attracting prospective members. [Learn more about how they adapted.](#)

Now, find out how you can attract new members to your club.



ATTRACTING NEW MEMBERS

How can we be more diverse?

When clubs include a representative mix of the age groups, genders, professions, backgrounds, and ethnic groups in their community, they benefit from a wider range of skills and greater volunteer resources, leadership prospects, and fundraising potential. Rotary and Rotaract clubs that bring together people with diverse perspectives better address the needs of their communities.



ON YOUR OWN:

Become familiar with [Rotary's Commitment to Diversity, Equity, and Inclusion](#). Complete the [Creating an Inclusive Club Culture course](#) and consider whether people from groups that are currently underrepresented would feel welcome in your club. Then, take the [Diversify Your Club course](#) to learn about leading with empathy and integrity, and building authentic relationships.



WITH CLUB OFFICERS:

Gather demographic information about your community so you have reliable data to know which groups are underrepresented in your club. Discuss the advantages of having a diverse membership and which actions listed in the [Creating an Inclusive Club Culture course](#) your club is willing to take.



WITH YOUR CLUB:

Present the findings of your demographic investigation. Discuss that data, ways to include people from underrepresented groups, and how you can create a club that better reflects your community. The [diversity assessment](#) can help. When you invite new members from underrepresented groups, consider inviting several people at one time. Help them get involved in the club right away and be receptive to their feedback.

PAUSE AND REFLECT

One aspect of making sure that your club is welcoming to new members who have different backgrounds is recognizing microaggressions and addressing them appropriately. Complete the [Microaggressions course](#) to understand what they are, then discuss your thoughts with other members.

Think about a situation when you witnessed a microaggression. How might you have addressed it differently?

ATTRACTING NEW MEMBERS

Where do we find prospective members?

Every club needs new members in order to stay vibrant and active. These members introduce innovative ideas, offer different perspectives, and expand your reach in the community. You can find new members by asking people you know, contacting your online membership leads, building relationships with groups that are underrepresented in your club, cultivating new connections, and using social media.



ON YOUR OWN:

Complete the [Strategies for Attracting New Members course](#). You'll learn how to make your club more attractive and accessible by updating the experience you offer and showing people what your club does well. If you can do this, you'll be able to add members while having fun and thriving as a club.



WITH CLUB OFFICERS:

Consult the [Engaging Younger Professionals Toolkit](#) for ideas on how to work with younger leaders who are more likely to use Rotary's online resources to express their interest in joining. Ensure that you can create a positive experience for prospective members, even those who don't ultimately join a club.



WITH YOUR CLUB:

Complete the [prospective member exercise](#). This will help you develop a group of candidates, determine how to introduce them to your club, and understand what they want in a club so you can fulfill those needs. Practice talking to prospective members about your club.

PAUSE AND REFLECT

Encourage people in your club to invite prospective members to service activities, social events, and club meetings so they can learn how your club works with the community and provides opportunities for friendship and connection. You may also want to host [prospective member events](#) to share more about Rotary.

What are the benefits of maintaining an active list of prospective members and being intentional about interacting with them, even if they don't join your club?

ATTRACTING NEW MEMBERS

How do we welcome new members?

When a person becomes a Rotarian or Rotaractor, it's special for both the member and the club. Whether you mark this event with a separate ceremony or induct new members at a club meeting, make sure you acknowledge and celebrate their involvement in Rotary.



ON YOUR OWN:

Learn how new members can get involved by using the [Designing Your Rotary Experience guide](#). Encourage new members to participate in ways that match their interests. Offer to sponsor or mentor a new member or help with orientation sessions.



WITH CLUB OFFICERS:

Review your current orientation process and consider how to improve or standardize future programs. Find tips in our [new member orientation materials](#). Think about how to involve your [club membership committee](#) in this process.



WITH YOUR CLUB:

Distribute the [member interest survey](#) to learn about new members' skills and interests so you can involve them in activities and projects that are meaningful to them. Get acquainted with new members and encourage other members to get to know them, including people's backgrounds and interests.

PAUSE AND REFLECT

Many new member orientations likely discuss Rotary's history, structure, and areas of focus. But it's also a great opportunity to talk about how new members can get involved beyond their clubs. Tell people about opportunities the district offers, such as serving on a district committee and attending district conferences and learning events. Share the [Designing Your Rotary Experience guide](#) for a full list of ways to get involved.

What have you done to get involved outside of your club, and how has that enriched your Rotary experience? How can you inspire new members with those stories?

Record your ideas from this section in the [Your Membership Plan worksheet](#).

OFFERING VALUE TO EXISTING MEMBERS

The Rotary Club of Jefferson City Evening, Missouri, USA, understands that each member values something different about their Rotary experience, whether it's flexibility, friendship, family involvement, or serving the community. Club leaders show members that what they want and need matters — which leads to engaged members and higher satisfaction with the club experience. [Learn more about how the club prioritizes fun.](#)

Now, learn more about how you can offer value to existing members.



OFFERING VALUE TO EXISTING MEMBERS

How do we better engage current members?

Rotary's research confirms that the most important factor in member satisfaction is the club experience. Try your best to offer an experience that keeps members engaged and excited. Engaged members participate in club activities, meetings, events, projects, and club leadership. They also feel a strong attachment to their club because they enjoy the friendships and connections that are part of being a member. They're motivated to put extra effort into club activities and projects and are proud to tell others about the impressive work their club is doing.



ON YOUR OWN:

Complete the [Best Practices for Engaging Your Members course](#). This will help you develop strategies to keep people engaged. Learn more about [flexible options for clubs](#) and the different experiences you can offer to members, such as alternative membership types and meeting formats.



WITH CLUB OFFICERS:

Review the [Engaging and Keeping Members guide](#) to understand how to involve people at each phase of their membership. Then, use the exit survey in [Understanding Why Members Leave](#) to help you determine why people resign from your club.



WITH YOUR CLUB:

Discuss [what makes up the club experience](#). Have a discussion about what works well and what could be improved. Then use the [member satisfaction survey](#) to get additional feedback about each factor.

NOTES

OFFERING VALUE TO EXISTING MEMBERS

What can we do to make our meetings more fun and interesting for everyone?

While inviting someone to a social event or a service activity before they come to a meeting might be a better way for prospective members to learn about your club, the club meeting is often their first Rotary experience. Attending a meeting lets someone experience what it's like to be a member and observe the club's culture. Whether your meetings have a similar structure from week to week or vary every time, it's good to regularly analyze your practices and the components of the meeting. This helps you determine what's working and what you might change to ensure that everyone is engaged and the experience is meeting or exceeding their expectations.



ON YOUR OWN:

Think about your club meetings and how they can be improved. Explore the speakers from recent Rotary events on the [Club Programming Channel](#) and consider how you can incorporate content like this into your meetings.



WITH CLUB OFFICERS:

Remember that many people join Rotary to develop friendships and expand their networks. Are you giving members enough time to focus on and strengthen their relationships? Also discuss how your club's practices might affect its image in the community. Use materials from the [Brand Center](#) to promote your club and explore the different [club types](#), [meeting formats](#), and [models](#) that can make your club more appealing.



WITH YOUR CLUB:

Review the member satisfaction survey results and have an honest conversation about your meetings, what parts members like more, and what they like less. Try other formats and ideas to find what works best. This could be focusing on service projects, leadership development activities, committee work, social gatherings, member professional talks, or vocational visits to local businesses and organizations. Find an effective balance between new ideas and important traditions.

NOTES

OFFERING VALUE TO EXISTING MEMBERS

How do we raise awareness about Rotary and our club?

Building an appealing public image is vital to any organization's success. Promoting Rotary and your club in your community builds understanding and recognition of its contributions, both locally and worldwide. Research indicates that people are more likely to give time and money to an organization with a proven record and evident results. You can raise awareness of your club's successes and activities using Rotary's resources and through compelling storytelling.



ON YOUR OWN:

Learn more about how people perceive your club. Talk to friends and family members to find out what they know about Rotary and your club. Ask someone you know to find basic information about your club using its Facebook page or website, or with Rotary's [Club Search tool](#). Ask them how easy it was and what impression they got of your club.



WITH CLUB OFFICERS:

Ensure that your club's meeting time and place and other information is current on My Rotary, on your website, and on your social media pages. Assess your promotional materials and discuss how to make them more compelling. Use the [Brand Center](#) materials to help you plan an event, find compelling images and videos, and discover customizable items including a club brochure.



WITH YOUR CLUB:

Talk to members about how they can tell Rotary's story in your community. This might be through one-on-one conversations, events, news stories, your website, or social media. [Use tips from this webinar](#) to learn more about effective storytelling. Make sure your audience knows how it can learn more or find more information.

PAUSE AND REFLECT

Do you share on social media about the opportunities your club offers to the community? If not, why not? If you do, how can you use your posts to attract prospective members? Think about activities that are relevant to your community, such as service projects and social events. Consider making your posts shareable and including a link to your club website so people can learn more.

How well does your club publicize its events and opportunities for partnership with others in the community?

OFFERING VALUE TO EXISTING MEMBERS

How can we share our stories in a compelling way?

Every club member has a story. Think about your own: Why you joined, why you stay, and how your involvement, your service, or your friends in Rotary improve your life. Why tell your story? It gives participants a chance to learn what Rotary or Rotaract means to you. You can strengthen your bonds with other members and deepen your club's sense of community by telling a story that affects everyone. You can share Rotary's impact more effectively if you share a powerful narrative about why the funds we raise matter.



ON YOUR OWN:

In considering your Rotary or Rotaract story, what moments best illustrate the satisfaction you've gotten out of your experience? Consider how you would tell the story succinctly to someone you just met. Then, share your story on your personal and the club's social media pages with a link to the [Join page](#).



WITH CLUB OFFICERS:

Ask your club public image committee to use resources on the Brand Center, [such as these social media tips](#), to promote your club.



WITH YOUR CLUB:

Encourage members to think about their Rotary or Rotaract stories and the impact Rotary or Rotaract has had on their lives. One way to do this would be to dedicate the first 10 minutes of each meeting to a member speaking about why they joined or an experience that affected them. Everyone has a different story to tell!

NOTES

OFFERING VALUE TO EXISTING MEMBERS

How can we make our club more appealing to the community?

Creating and sustaining a club that community members want to join involves several factors. Clubs with a clear purpose that align their activities with their values can be more appealing than clubs that have practices that are no longer relevant. Clubs that are engaging, that consider the needs of members and nonmembers, and that act on the feedback they receive are also more appealing.



ON YOUR OWN:

Complete the [Vibrant Clubs in Action course](#) to learn tips to appeal to prospective members and keep current members engaged. Identify ways your club can improve. Continue sharing stories on social media to raise awareness about the work your club does in the community.



WITH CLUB OFFICERS:

Use the [Leveraging Local Events to Grow Rotary guide](#) to raise awareness about Rotary before a large local event. You can also survey the community about your club. Consider hiring a professional to conduct focus groups with nonmembers or asking if club members know an expert who would donate their services to do so.



WITH YOUR CLUB:

Evaluate your club service projects and assess how you're helping your community. Meaningful service projects that make a difference prompt more interest from prospective members. You can also encourage members to print the [What's Rotary wallet card](#) to give to people they meet.

NOTES

OFFERING VALUE TO EXISTING MEMBERS

How can we balance tradition with innovation?

Your club's success depends on its ability to evolve and stay relevant. Members are more likely to stay with Rotary if they believe their club is stable but also willing to accommodate their interests and evolving work, family, and personal needs.



ON YOUR OWN:

Consider what has changed since you joined and if there are ways the club can better accommodate you and other members. Talk to members from other clubs to learn what they do to innovate.



WITH CLUB OFFICERS:

Assess the experience that your club offers members and think about what you can change. Consider varying your meeting times and locations, holding virtual meetings, reducing fees for members, varying your service projects, and offering different kinds of membership. Think about club practices that may deter people from joining, such as meal costs, recitations and songs, or attendance rules.



WITH YOUR CLUB:

Develop a vision for your club and decide what you want the club to be like in the short and long term. Use the [Strategic Planning Guide](#) to help you convey the vision and plan what to do next. Articulating this vision will give members an understanding of the club's goals, the motivation to work together, and a sense of belonging.

PAUSE AND REFLECT

Think about your club and answer these questions:

What is our club good at?

What would I like our club to be known for?

How would I like a newcomer to describe our club after a visit?

OFFERING VALUE TO EXISTING MEMBERS

Why are our members leaving?

When members leave your club, it's important to understand whether it's because of something the club can control. Knowing how long members tend to stay in your club and understanding why members leave can help you focus on specific areas in your membership plan.



ON YOUR OWN:

One reason people leave a club is because their expectations aren't being fulfilled. Think about what your club expects of members and how to be clearer about those expectations. This might be the cost of membership, participation at meetings, or other ways members get involved.



WITH CLUB OFFICERS:

Discuss the process you use when a member leaves. If you don't have one, ask the membership committee to implement one. Make sure someone talks to the departing member about whether the club could have better accommodated them. Use the [exit survey](#) to learn more, and be sure to act upon the results.



WITH YOUR CLUB:

Ask members to share what they wish they had known about your club before they joined. This will help you understand anything you should be clearer about to better meet people's needs and expectations. Then, ask members to suggest specific strategies and activities to keep people engaged and involved.

NOTES

Record your ideas from this section in the [Your Membership Plan worksheet](#).

STARTING AND NURTURING NEW CLUBS

Helping create clubs can benefit your own club and the larger community. District 9213 in Uganda actively works to start clubs outside Kampala, the capital, where most of the nation's clubs are based. The district asks active members in Kampala who aren't originally from the city to help start clubs in their hometowns. These connections expand Rotary's reach beyond big cities.

Now, learn how you can make an impact by starting and nurturing clubs in your region.



STARTING AND NURTURING NEW CLUBS

How should we support the development of new clubs?

New clubs expand Rotary's reach so members can do more good around the world. They give others an opportunity to experience the personal and professional growth that comes with being part of Rotary and Rotaract. If you have a group of prospective members who prefer a different meeting time or club format, a group of members who want a new club experience, or people interested in a particular cause or focus, that's an opportunity to start a new club.



ON YOUR OWN:

Learn more about how to start or sponsor a club by reviewing the [Starting a Rotary Club guide](#) and [Sponsor Clubs flyer](#). Share these with others in your club who might be interested in growing Rotary in this way.



WITH CLUB OFFICERS:

Have an honest conversation about your ability to support new club development. This could mean identifying opportunities to form new clubs, sponsoring new clubs, [starting a satellite club](#) to offer a different experience, or partnering with your district membership committee to support new clubs.



WITH YOUR CLUB:

Discuss the benefit of having more clubs for prospective members to choose from that offer [different experiences](#) and appeal to a broader range of people. Encourage members to collaborate on projects with new clubs or engage them in social activities.

PAUSE AND REFLECT

How would serving as a new club sponsor strengthen your own membership? How could this offer new leadership opportunities to engage your members?

STARTING AND NURTURING NEW CLUBS

Would our community benefit from a new Rotaract or Interact club?

Forming new Interact clubs (for people ages 12-18) and Rotaract clubs (either community- or university-based) are great options for building relationships and partnering with younger leaders in your community. Younger leaders can add their perspectives about how to address the challenges in your community. Engaging them in meaningful ways is the key to making sure their experience in Rotary is positive.



ON YOUR OWN:

Gather information about current Interact or Rotaract clubs in the community. Talk to the leaders of those clubs about the projects they're doing and how you might work together.



WITH CLUB OFFICERS:

Discuss the benefits and challenges of starting these types of clubs and whether your club is capable of and interested in being involved this way.



WITH YOUR CLUB:

Discuss the benefits of Interact and Rotaract. If a member of a Rotary club was previously part of an Interact or Rotaract club, ask them to speak at a meeting about their experience and how they think your club can support young leaders. And do the same in Rotaract clubs if you have former Interact members. Ask for volunteers to serve as sponsors and advisers.

NOTES

STARTING AND NURTURING NEW CLUBS

What if people leave my club for the new club — or any club?

People can leave or change clubs for any reason. While it may be difficult, try not to take it personally. You'll find that being in a more flexible and accommodating club will make members more loyal to, and enthusiastic about, Rotary and the club. Consider varying your meeting times and locations, easing attendance rules, reducing fees for new or younger members, varying your service projects, and offering diverse kinds of membership. Making these kinds of changes can help you retain more members.



ON YOUR OWN:

Visit the new club to see what you might learn from how its leaders conduct the meetings. Meet with those leaders to learn about their signature projects and how your clubs might collaborate.



WITH CLUB OFFICERS:

Review the Why Members Leave and Tips to Retain Them section of the [Engaging and Keeping Members](#) assessment to better understand why people leave Rotary at various times. Develop strategies to engage members in ways that are meaningful to them.



WITH YOUR CLUB:

Ask members for ideas about making people feel valued, staying connected, and responding to feedback. Discuss the importance of evaluating your club regularly and making changes to stay relevant. Identify what makes your club distinctive and market these characteristics.

PAUSE AND REFLECT

Review this [chart of club types, formats, and models](#). What can you learn from new clubs that form in your area? If you were starting your club now, what would you include?

Record your ideas from this section in the [Your Membership Plan worksheet](#).

YOUR MEMBERSHIP PLAN: GETTING STARTED

Use this worksheet to record your goals for membership growth. Be realistic about the number of goals you choose and share them with your club. Updating club members periodically about your goals keeps people informed and keeps you on course.

Which recommendations do you want to add to your plan? Consider adding your own ideas as well:

- Gather data from Rotary reports to understand whether your club is losing members, gaining members, or has remained stagnant.
- Ask members for feedback using the member satisfaction survey.
- Prepare for change by completing courses about resolving conflict and identifying people who will advocate for the change.

| ACTION | GOAL | WHO IS RESPONSIBLE | BY WHEN | RELEVANT RESOURCES |
|--|--|--------------------|---------|--|
| <i>Example: Conduct a club assessment.</i> | <i>Identify aspects of the club that are working well and those that need improvement.</i> | | | <i>Club Health Check Is Your Club Healthy?</i> |
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YOUR MEMBERSHIP PLAN: ATTRACTING NEW MEMBERS

Use this worksheet to record your goals for membership growth. Be realistic about the number of goals you choose and share them with your club. Updating club members periodically about your goals keeps people informed and keeps you on course.

Which recommendations do you want to add to your plan? Consider adding your own ideas as well:

- Conduct a diversity assessment and use the results to identify groups to build relationships with.
- Contact people on your list of prospective members and invite them to a club activity.
- Use the [member interest survey](#) to understand the needs and expectations of prospective and new members.
- Enhance your new member orientation program to make sure expectations are clear — and so are the benefits of membership.

| ACTION | GOAL | WHO IS RESPONSIBLE | BY WHEN | RELEVANT RESOURCES |
|---|---|--------------------|---------|--|
| <i>Example: Conduct a diversity assessment.</i> | <i>Understand the diversity in our community and how to engage with new participants.</i> | | | <i>Creating an Inclusive Club Culture Understanding How Your Club Represents Your Community (diversity assessment)</i> |
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YOUR MEMBERSHIP PLAN: OFFERING VALUE TO EXISTING MEMBERS

Use this worksheet to record your goals for membership growth. Be realistic about the number of goals you choose and share them with your club. Updating club members periodically about your goals keeps people informed and keeps you on course.

Which recommendations do you want to add to your plan? Consider adding your own ideas as well:

- Talk to members about their club experience, which aspects they think are valuable, and which they want changed.
- Assess how well-informed the community is about your club's work and how you might strengthen your public image.
- Practice telling compelling stories that engage people and show the difference your club makes.
- Interview members who are leaving the club to understand why and what you might change.

| ACTION | GOAL | WHO IS RESPONSIBLE | BY WHEN | RELEVANT RESOURCES |
|--|---|--------------------|---------|---|
| <i>Example: Talk about aspects of the club experience.</i> | <i>Understand how people feel about traditions so you can balance that with change.</i> | | | <i>Strategic Planning Guide Chart of different membership types</i> |
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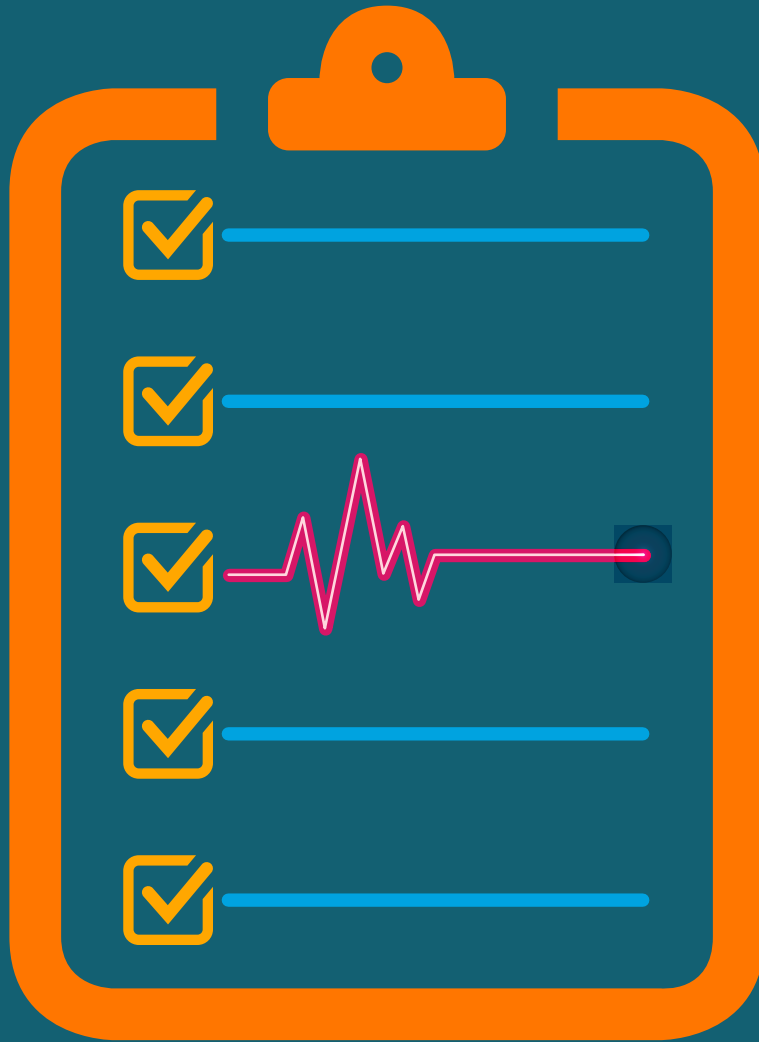
YOUR MEMBERSHIP PLAN: STARTING AND NURTURING NEW CLUBS

Use this worksheet to record your goals for membership growth. Be realistic about the number of goals you choose and share them with your club. Updating club members periodically about your goals keeps people informed and keeps you on course.

Which recommendations do you want to add to your plan? Consider adding your own ideas as well:

- Assess your readiness and ability to sponsor new clubs.
- Discuss the benefits of new club development with members of your own club.
- Consider what you can learn from new clubs in your area and how you can partner with them.

| ACTION | GOAL | WHO IS RESPONSIBLE | BY WHEN | RELEVANT RESOURCES |
|--|--|--------------------|---------|---|
| <i>Example: Learn how to sponsor a club.</i> | <i>Understand whether your club has the capacity to start or nurture a new club.</i> | | | <i>Starting a Rotary Club guide Sponsor Clubs flyer</i> |
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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. This resource is intended to help club leaders assess their clubs. In using it, you're taking a step to maintain your club's health and preserve its value for members and the community. Mark the boxes next to the statements you consider to be true, based on the past 12 months. Then discuss the results with your fellow club officers. If you left more than five of the boxes in any section blank, that area should be addressed. Act on the suggested remedies for any problem areas you've identified.

YOUR CLUB EXPERIENCE



Members who have a positive club experience are more likely to stay. In turn, they create a positive 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 and other club activities.
- ☐ Our club meeting programs are relevant, interesting, and varied.
- ☐ We have a greeter or greeters who welcome members and visitors to meetings.
- ☐ Our meetings are organized and are run professionally.
- ☐ Members make an effort to meet and talk with different people at each meeting.
- ☐ I've made several new friends in the club.
- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.
- ☐ We are inclusive in who we invite to our club, how we welcome guests, the topics we discuss, and the service we focus on.
- ☐ Members other than club leaders participate in Rotary events at the district or international level.
- ☐ Most members are aware of Rotary's Avenues of Service and areas of focus, take part in projects, and feel proud to be a part of the club.
- ☐ We raise funds in a way that allows members to contribute what they wish.
- ☐ We recognize members' service, engagement, and donations by nominating them for and presenting them with awards.
- ☐ I have made international connections through Rotary.
- ☐ Guests are asked to introduce themselves and are invited back.
- ☐ We provide members with flexible meeting opportunities (attending virtually or in person or watching recordings if they miss a meeting).

COMMENTS

**SEE THE NEXT PAGE FOR YOUR
PROGNOSIS AND REMEDIES**





If members are not having a good experience, your club is at risk of losing them. Look at the boxes you left blank and consider trying those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|-----------------------------------|---|
| Club meetings | <ul style="list-style-type: none"> + Try something new at a meeting. For example, show one of these inspirational speeches and have a discussion afterward. + Hold online meetings when in-person meetings aren't feasible, or allow some members to connect virtually and others to attend in person. + Find a skilled person in the club or district who can facilitate and run online meetings. + Contact your Club and District Support representative or your regional membership officer for ideas. |
| Rotary experience beyond the club | <ul style="list-style-type: none"> + Sponsor another Rotaract or Rotary club. + Start or get involved in an Interact program. + Connect members to Rotary's various programs. Sponsor an Interact club, organize a RYLA event, create a scholarship, or start an exchange. + Remind members that they can join a Rotary Fellowship or Rotary Action Group. + Promote district events that are open to all members. Have someone who has attended in the past talk about the experience. + Promote the work that Rotary and Rotaract do both globally and locally, including polio eradication. + Work with your local Toastmasters club to build leadership and communication skills among members. + Visit other clubs to connect with new people and see what they're doing that your club could try. |
| Unmet expectations | <ul style="list-style-type: none"> + Find out what experience your members want to get out of your meetings by using the Member Satisfaction Survey, and then give them that experience. + Encourage members to develop leadership skills by taking online courses developed by Toastmasters International. |

SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons members join and stay involved in Rotary. The healthiest clubs vary their activities and offer a number of 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 (in addition to club meetings) for socializing and networking.
- ☐ Our club encourages members to bring partners, spouses, friends, and family members to club meetings and events.
- ☐ Our club offers members leadership opportunities and professional development.
- ☐ Our club invites members of the Rotary family (such as Interactors, Rotary Youth Exchange students, and Rotary Peace Fellows) to participate in meetings and events.
- ☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Rotary Youth Exchange student, is involved with New Generations Service Exchange, or organizes a Rotary Youth Leadership Award (RYLA) event.
- ☐ Our club has direct communication with partners, friends, and alumni.
- ☐ We consult community leaders and community members to determine needs before choosing a project.
- ☐ We visit My Rotary Discussion Groups, attend project fairs, or consult The Rotary Foundation Cadre of Technical Advisers to look for ideas and partners before we choose a new project.
- ☐ Our club has a service project in progress.
- ☐ All members can give input, such as their vocational expertise, on service and social activities.
- ☐ Our club service projects align with Rotary's areas of focus.
- ☐ Our club has applied for or used Rotary Foundation grant funds for a service project.
- ☐ At least one member of our club attends a Rotary Foundation grant management seminar each year.
- ☐ Our club contributes to The Rotary Foundation.
- ☐ Our club has a Rotary Foundation committee chair and a service projects committee chair.

COMMENTS



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 you left blank and consider trying those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|---------------------------|--|
| Opportunities for service | <ul style="list-style-type: none"> + Sponsor an Interact club, organize a RYLA event, create a scholarship, start an exchange, join a Rotary Action Group, or support the Rotary Peace Centers. + Let members know about Rotary's exchange programs. |
| Quality of projects | <ul style="list-style-type: none"> + Use Community Assessment Tools and A Guide to Global Grants to improve the quality of your projects. + Connect with your Cadre advisers to get guidance on service projects. + Evaluate your club's service projects to determine if repeating them is worth the effort. |
| 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. + Find or create a variety of events with different times or formats. |
| Leadership | <ul style="list-style-type: none"> + Help your members develop and practice their leadership skills. Promote the Learning Center's professional development catalog. + Give new and young members leadership roles. |

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. Consult your club's membership profile in Rotary Club Central for the most recent statistics.

- ☐ Our club has had a net increase in members in the past year.
- ☐ Our club has had a net increase in members who represent diverse groups.
- ☐ Our club represents the racial or ethnic diversity of our community.
- ☐ Our club seeks to attract members from professions in the community that are underrepresented in the club.
- ☐ New members are officially inducted and are given an orientation, informational materials, and opportunities to get involved.
- ☐ Our club actively engages Rotary alumni (former Rotaractors, Rotary Youth Exchange students, Rotary Peace Fellows, and participants of other Rotary programs).
- ☐ Our club shows its appreciation of each member's unique contributions.
- ☐ Our club retains at least 90% of its members each year.
- ☐ At least 75% of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
- ☐ A designated person checks and follows up on membership leads assigned to our club.
- ☐ Member benefits are explained and promoted to new and continuing members.
- ☐ Newer and seasoned members are paired for mentoring relationships.
- ☐ We ask members to speak at meetings about their vocations or other topics of interest.
- ☐ Our club has a membership committee whose chair and members are dedicated to attracting and engaging club members.
- ☐ Members attend district events and seminars on Rotary topics that interest them.

COMMENTS



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 you left blank and consider trying those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|----------------------------------|---|
| Member diversity | <ul style="list-style-type: none"> + Attract a wide array of members by using Diversifying Your Club: A Member Diversity Assessment. + Learn about Rotary's Commitment to Diversity, Equity, and Inclusion and related efforts. |
| Professional diversity | <ul style="list-style-type: none"> + Expand the skill sets of your members by recommending professional development courses. |
| Stagnant or declining membership | <ul style="list-style-type: none"> + Create a membership development plan. + Learn how to connect to prospective members and manage your membership leads in one place. + Target prospective members using this exercise. + Teach members your club's process for proposing new members and explain that they can also refer qualified prospects to other clubs. + Make sure that members are aware of all the ways they can be involved with Rotary besides through attending club meetings. |
| Members leaving | <ul style="list-style-type: none"> + Start with the Enhancing the Club Experience: A Member Satisfaction Survey to improve current members' experience. + Learn and act on trends using the Improving Your Member Retention: A Retention Assessment and Analysis. + Use the exit survey in Understanding Why Members Leave to consider the reasons your club can address. + Let resigning members know they can rejoin or change clubs when they are ready and stay in touch in the meantime. + Encourage Rotaractors to consider dual membership. |
| Orientation and Rotary knowledge | <ul style="list-style-type: none"> + Offer new member orientation, professional development, and ongoing learning opportunities from Rotary's Learning Center. |

IMAGE



Clubs that have fun and make an impact are more enjoyable for members and more attractive to potential ones. A positive public image improves your club's relationship with the community and prospective members. Make sure your club is getting credit for the service it provides. Demonstrating that your club meets real needs confirms your value to your community.

- ☐ We have a public-facing, visually appealing club website that explains what the club does, who its members are, and the benefits of membership.
- ☐ We have social media accounts that show our followers the difference we make in our community.
- ☐ Our social media accounts reach a range of audiences.
- ☐ Our club appeared in the local media several times last year.
- ☐ We promote our club and Rotary through various media in the community (television, radio, billboards, etc.).
- ☐ Our club invites members of the media to cover our service work.
- ☐ Our club materials follow Rotary's brand guidelines.
- ☐ We use materials and templates from Rotary's Brand Center that show our members as people of action.
- ☐ We use marketing materials from Rotary International, such as public service announcements, videos, images, and logos.
- ☐ We display Rotary or Rotaract signs and banners at our meeting place, service project sites, and events.
- ☐ Our club's presence is known in our community.
- ☐ The club brochure we give to community members and prospects shows the impact we make.
- ☐ Our club has members who have marketing expertise.
- ☐ We build Rotary's public image by making sure our guests and the public have positive experiences with our club.
- ☐ Our club has a public image committee whose chair and members are dedicated to public image and outreach.

COMMENTS



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 you left blank and consider trying those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|---------------------|---|
| Community awareness | <ul style="list-style-type: none"> + Find resources in Rotary's Press Center and use them in your community's media. + 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"> + Find editable club brochures and membership materials in Rotary's Brand Center. + Follow the Visual and Voice Guidelines in any materials your club creates. + Use Rotary videos and images of your members in your materials. |
| Online presence | <ul style="list-style-type: none"> + Find a member with the skills and time to create and manage your club website and social media pages. + Take the course The Rotary Brand in the Learning Center. + Use Rotary videos and images and videos of your own members. + Use Rotary's Social Media Toolkit to update your digital presence. |
| Marketing expertise | <ul style="list-style-type: none"> + Find tips in Club Public Image Committee Basics and put members with public relations expertise on the committee. + Recruit professionals with marketing expertise using ideas from Finding New Club Members: A Prospective Member Exercise. + Refresh your club's social media presence using the Social Media Toolkit in Rotary's Brand Center. |

BUSINESS AND OPERATIONS



When your club runs smoothly, it's likely that you have good leaders who are thinking about the club's future. The leaders shape the club, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development, strategic planning, and succession planning are also ways to fortify your club.

- ☐ Our club has a strategic plan that we update regularly.
- ☐ We set annual goals and enter them in Rotary Club Central.
- ☐ Our club strives for and often earns the Rotary Citation.
- ☐ Our club board meets at least quarterly to review our strategic plan, measure our progress toward goals, and adjust bylaws and other documents as needed.
- ☐ Our club board changes what isn't working well and updates club bylaws accordingly.
- ☐ We have a process for ensuring continuity that includes identifying future club leaders and preparing them for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
- ☐ Our club president attends the presidents-elect training seminar (PETS), and club leaders attend the district training assembly.
- ☐ Club leaders use My Rotary or integrated club management software to conduct Rotary business.
- ☐ Our club elects incoming officers by 31 December and reports them to Rotary International no later than 1 February.
- ☐ Our club secretary reports new members within 30 days after they join.
- ☐ 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 and use the results to shape the club.
- ☐ More than half of our club's members have a My Rotary account.
- ☐ Our club has a club administration committee chair.

COMMENTS



Clubs that don't have skilled members in leadership roles or that neglect members' needs risk 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 you left blank and consider trying those suggestions as well as these:

| PROBLEM AREA | PRESCRIPTION |
|--------------------------------|---|
| Planning and goal setting | <ul style="list-style-type: none"> + Create a vision for your club and set long-range and annual goals using the Strategic Planning Guide. + Strive to achieve more than half of the goals in Rotary Club Central to earn the Rotary Citation. + Rotaract clubs should use the Citation Goals and Instructions worksheet. + Select goals that are meaningful not just to the club's board but to the club as a whole. + Use Strengthening Your Membership to make a membership development plan. |
| Innovation | <ul style="list-style-type: none"> + Update your club bylaws to include new membership types, such as family memberships. + Review the Club Types, Formats, and Models resource to review the experience your club strives to offer its members. |
| Processes | <ul style="list-style-type: none"> + Develop standard processes for inducting and orienting new members, following up with prospective members, proposing a new member, leadership continuity, etc. + Use the member satisfaction survey. |
| Leadership | <ul style="list-style-type: none"> + Find tips and resources in online learning plans for club leaders. + Offer leadership development opportunities and promote self-paced learning with Rotary's online professional development courses. |
| Managing funds | <ul style="list-style-type: none"> + Take the Club Rotary Foundation Committee Basics online course to learn about giving options. + Find best practices in Club Treasurer Basics. |
| Managing your club on MyRotary | <ul style="list-style-type: none"> + Use the Club Administration section of My Rotary to get reports; add, edit, or remove a member; pay your club invoice; and track your membership leads. (Note: For Rotaract, only club presidents can use the Club Administration page on My Rotary.) |

WHAT'S NEXT?



Using the Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most 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, clubs have to adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

NEXT STEPS

1. Score each section. Each mark is worth one point.

| Category | Score |
|---------------------------|-------|
| Your club experience | |
| Service and social events | |
| Members | |
| Image | |
| Business and operations | |

2. Look at the categories with the lowest scores. How can your club turn the suggested remedies into action? Enter your next steps below.

| Action | Time frame | Person responsible |
|--------|------------|--------------------|
| | | |
| | | |
| | | |

FEATURED RESOURCES

[Club Planning Assistant](#)

[Membership Assessment Tools](#)

[Membership resources](#)

[Brand Center](#)

[Learning Center](#)



MEMBERSHIP ASSESSMENT TOOLS



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.

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.

UNDERSTANDING HOW YOUR CLUB REPRESENTS YOUR COMMUNITY: A DIVERSITY ASSESSMENT



Rotary is committed to diversity, equity, and inclusion (DEI). Thinking about whether your club is diverse means evaluating how well it reflects factors such as the different ethnicities, ages, and professions in your community and whether it has an appropriate gender balance. This assessment will help you identify people, skills, and experiences that are underrepresented in your club and develop a plan to address that. It's equally important to provide the support each person needs so they can have the same kind of experience, which is what we mean by equity. We always want to create a culture of inclusion, where people's differences are respected, supported, and valued.

WHAT YOU'LL GAIN

Conduct this diversity assessment and act on its results to:

- Raise your members' awareness of the diversity in your community
- Build member support for diversifying your club
- Make adjustments so that your club better represents the community

GETTING ORGANIZED

Learn more about diversity and Rotary's recommendations for your club by taking these courses in the Learning Center: [Creating an Inclusive Club Culture](#), [Microaggressions](#), and [Diversifying Your Club](#). Then plan how you'll carry out the assessment, such as by dedicating time at a series of club meetings to each step of the process. Use the Club Action Plan in appendix 1 to track your progress.

Choose a facilitator (such as a DEI expert outside your club) who is comfortable talking about diversity and why it's important. This activity should involve all club members so that everyone has a stake in the process. Including your club members in this process now will increase awareness and support for more action in the future.



Diversifying your club isn't just about changing the mix of people. It also needs to involve making everyone feel valued and welcome, or they won't stay with Rotary.

GETTING STARTED

Step 1: Discuss the advantages of having diverse members.

Talk about the benefits of diversity and celebrate how it has helped you in the past. For example, highlight a project that was more successful because it involved members with diverse professional skills. Or acknowledge a member who identified a club bylaw that could exclude some people and talk about how your club changed it. Discuss how diverse perspectives aid your club's ability to address local needs. Reflect on your club's representation by profession, gender, age, ethnicity, and culture in your community.

Step 2: Collect information.

At the next meeting, summarize your previous discussion and briefly reiterate the positive effects of having diverse members. Explain that the next step is researching your community's demographics so that you can better understand your community's composition by age, gender, ethnicity, income levels, sexual orientation, and more. Distribute the Member Diversity Worksheet. Split club members into groups and ask each group to gather the specified information and complete what they can of the worksheet before the next meeting. You could organize the groups this way:

- **Group 1** gets data on the demographics of the community from a local business association, such as the chamber of commerce.
- **Group 2** gathers information about the community's cultural and demographic composition from the local tourism bureau.
- **Group 3** gets socioeconomic statistics from local economic development experts or the city government.
- **Group 4** gets the most recent census results, which may include information on the age, gender, profession, and ethnic identity of the area's residents.

Step 3: Discuss the findings within each group.

At the following meeting, ask each group to discuss what it found, share what it completed on the worksheet, and compile the findings. Then have each group choose a representative to present its data to the club later on. The goal is to have reliable data about the diversity in your community.



Remember as you try to assess the diversity in your club and community that there is a lot of nuance. People can belong to more than one ethnic group or have disabilities that aren't evident. Avoid making assumptions, such as about someone's sexual orientation or gender identity.

Step 4: Report the results and discuss their implications.

Give each group about five minutes at a club meeting to present its findings. Lead a discussion about the information and what it shows.

Talk about whether your club's members reflect:

- The ages of your area's population
- The gender composition of the community's working professionals
- The ethnic and cultural diversity of the community
- The varied socioeconomic levels of the community
- The various types of professions in the community
- The proportion of professionals who have disabilities



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

Step 5: Develop a member diversity action plan.

Now that you've determined who is underrepresented in your club, find ways to connect with these members of your community. You could invite someone to speak to the club about their perspective on the area and the issues you might work on together. Ask people about their experiences and if they are willing to share what they believe the community needs. Determine their interest in joining, how they could contribute to your club, what your club could offer them, and how your club could accommodate their needs. Document your plan and assign tasks to people on the membership committee or other club members. Set goals for how you want to diversify your club, monitor your progress, and keep club members updated.

Want to do other assessments?

[Member Interest Survey](#)

[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.

MEMBER DIVERSITY WORKSHEET

1. What sources did you consult to find data about your community's demographic composition?

2. What data did you find about:

Age:

Gender:

Nationalities (what countries are represented?):

Ethnic background:

Professions:

Sexual orientation:

People with disabilities:

Socioeconomic status:

3. Does this data correspond to the current composition of your club? Explain your evidence.

4. What fact or statistic did you find most interesting?

5. What surprised you the most?

6. What surprised you the least?

7. Which demographic groups are underrepresented in your club?

8. What can your club do to better represent your community?

9. Do you think people from groups that are currently underrepresented would feel welcome in your club?

10. What do your club materials, website, and social media posts show about your club's diversity?

11. How can you integrate your findings into a plan of action?

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: _____

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

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: _____

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.

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.



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.

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.

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"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Length | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Frequency | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Format (online, in person, or hybrid) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Time for socializing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional connections and networking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Content variety | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Location | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meeting time and day | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meals or other food options | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Opportunities to offer input and have discussions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <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?

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"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <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"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <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"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <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"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <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"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <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"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Length | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Frequency | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Format (online, in person, or hybrid) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Time for socializing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional connections and networking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Content variety | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Location | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meeting time and day | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meals or other food options | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Opportunities to offer input and have discussions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <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"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <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

☐

Not at all

2

☐

3

☐

4

☐

5

☐

6

☐

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.

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> |
| | | | | | |
| | | | | | |
| | | | | | |

ROTARY INTERNATIONAL

One Rotary Center
1560 Sherman Avenue
Evanston, Illinois
60201-3698 USA
[Rotary.org](https://rotary.org)

Rotary International Harassment Policy

What is harassment?

Rotary has a harassment policy to ensure that we provide a safe, fun, and inclusive environment for all. It defines harassment as any conduct — verbal or physical — that denigrates, insults, or offends a person or group based on characteristics that include age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, and gender identity.

Harassment can take many forms. When a behavior becomes pervasive or extreme, it is harassment. Here are some examples:

- Using insulting words, whether spoken or written, including in email or on social media
- Bullying, including verbal or physical threats or intimidation
- Making derogatory remarks on social media or in email
- Engaging in gossip, including insulting statements about people's private lives that could damage their reputations
- Deliberately impeding a person's movements
- Asking questions or making comments about a person's sexual activity or experiences
- Making jokes or using derogatory language about someone's age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity
- Making or threatening unwelcome physical contact, such as brushing against, embracing, or pinching
- Making unsolicited comments about a person's attractiveness or appearance
- Leering or whistling
- Using, displaying, or sharing sexually suggestive or offensive words, objects, pictures, articles, letters, emails, texts, or websites
- Making references to age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity

It's important for all club and district leaders to take all allegations of harassment seriously and address the situation.

Creating a harassment-free environment

Making sure that your club meetings and social events are free from harassment is something everyone should be a part of. The introduction to this course and the section that defines harassment discussed Rotary's commitment to preventing harassing behavior. District leaders, including governors, assistant governors, and committee chairs, must work with their clubs to maintain an environment that promotes safety, courtesy, dignity, and respect for all.

Here are some steps you can take to create a harassment-free atmosphere:

- Club leaders should discuss Rotary's policy on creating an environment free of harassment (included in its entirety at the end of this course) at a club board meeting, and determine how you want to talk about it with members.

- Talk about the policy at your club assembly. Before starting the discussion, set a list of rules that everyone agrees on to guide what could be an uncomfortable discussion. Some possible rules: talk about your own experiences and feelings, ask questions in a way to help you understand, and have only one person speak at a time.
- Club leaders should acknowledge any instances in the past that would have qualified as harassment and make it clear that such behavior will not be accepted.
- Club and district leaders should emphasize the message that Rotary will not tolerate harassment.
- Members should feel empowered to stand up to harassment when it's occurring and report it to law enforcement officials or to club or district leaders if necessary.
- Club leaders should tell members how club or district leaders will respond to reports of harassment.
- Reiterate that it is everyone's responsibility to create a harassment-free environment.

Rotary's founding ideal of bringing together leaders of different backgrounds in order to improve their communities can be accomplished only in a safe, harassment-free environment.

What to do if you're harassed

- If your safety is in doubt, contact local law enforcement
- Tell someone on the club's board, a district leader, or a zone leader
- Report the incident to Rotary International
 - At a Rotary International-sponsored event like the International Assembly or the Rotary International Convention should be reported to Rotary's general secretary.
 - Any allegations of harassment by district governors, governors-elect, governors-nominee, directors, or trustees must also be reported to the general secretary. Contact your **Club and District Support** representative.
 - Other incidents should be reported to your club, district, or zone leaders. If they do not respond, notify your Club and District Support representative. They can contact the district and zone leaders for further investigation and encourage them to help resolve the issue.

As a reminder, any allegation of harassment involving our youth must be reported to Rotary International at youthprotection@rotary.org within 72 hours.

How to handle reports of harassment

Allegations of harassment should be taken seriously every time.

- Acknowledge every report with respect
- Report the allegation to the appropriate person or committee
- Review the complaint and determine who to interview
- Conduct a thorough investigation
- Write a summary of the incident including any action you recommend
- Remove the accused person from youth activities
- Terminate a person's club membership

Additional Resources:

The Rotary Learning Center- Preventing and Addressing Harassment

<https://learn.rotary.org/members/learn/course/575/PreventingandAddressingHarassment>

Rotary Code of Policies- Article 26.120. Harassment-free Environment

[illegible]