


WORKSHEET: UNDERSTANDING MEMBERSHIP REPORTS



Most of the reports you'll use for your membership work can be found in Rotary Club Central:

1. Go to **My Rotary**. (Type my.rotary.org into a browser.)
2. Choose **SIGN IN TO MY ROTARY**.
3. Enter your sign-in email and password.
4. In the **Manage** tab, under **Club & District Administration**, choose **Rotary Club Central**.

Getting reports:

5. The Dashboard for your club will appear. To see the Dashboard for your district, under the Dashboard heading, choose **district**.
6. In the menu on the right, choose **Reports**.
7. Select the **district report** you want to see.
8. If you want to export the data, click the  button. Under **file type**, choose **Excel** to sort the data, or **PDF** to make a read-only copy. The report will download to your computer.

There are also two reports about membership leads. They can be found on My Rotary, on the [Club & District Administration page](#):

- **Membership Leads Report** — A list of active and historical leads and all associated data
- **Membership Leads Executive Summary** — Details on how leads heard about Rotary, their progress, demographic information, and the average time it took to contact, assign, and admit them

District Membership Profile, NEW as of April 2020: This report combines the information from at least four other reports. It allows you to quickly see key information on a variety of factors and assess how your district is doing within minutes.

Open the report and select the most recent month. Export it as a PDF.

<p>TABLE 1: Key Metrics</p> <p>Displays key metrics, including retention, gender and age distribution, and changes in numbers of both clubs and members. Data is given for the past four full Rotary years and the current year up to month you select.</p>	
<p>The chart in the report shows 10 years of data and allows you to quickly see district trends. This should help you gauge what expectations are reasonable and how high you'll need to set your goals in order to achieve a net gain in members.</p>	<p>TABLE 2: Membership Gains & Losses</p> <p>Displays changes in membership since 1 July, detailing additions, losses, and readmissions. This table highlights areas for improvement by showing when your district is losing members.</p>
	<p>TABLE 3: Membership Termination by Years of Membership</p> <p>Lists former members and how long they were members. This table can reveal any groups of members that might benefit from extra efforts by your committee. For example, if many members leave during their first year, consider working to improve the experience of new members. If members tend to leave after many years, you might decide to ask long-term members what would improve their experience.</p>
<p>TABLE 4: Member Termination – Reason</p> <p>This report shows the reasons that are most often given for leaving a club, whether they are family or business obligations or personal or other reasons. It does not list all reasons that are given, and the data may not add up to the total number of terminations. High numbers in these could mean that clubs are not very flexible. In such cases, you might suggest that clubs try alternative types of meetings to better fit people's schedules and lifestyles. You might also consider conducting in-depth exit surveys or creating more flexible clubs in your district.</p>	

Club Viability and Growth: This report spans five years and compares the number of clubs on last 1 July and 1 July five years earlier. It details the number of clubs that were added, terminated, and readmitted during that time span. This report quickly shows you whether or not your district is starting new clubs.

Other reports to explore:

Report	Description and tips:	Notes and questions
Club Growth	<p>Columns C and D compare member numbers for each club at the starts of the current year and the last Rotary year.</p> <p>The next few columns give the number of members gained or lost and the percentage growth, whether positive (black) or negative (red).</p> <p>The last row gives the district’s total member count.</p>	
Member Viability and Growth	<p>Enter 7/1/2016 as the start date and 6/30/2019 as the end date.</p> <p>This report uses three years of data to calculate club and district retention rates for new and longer-term members.</p> <p>Pay special attention to clubs that have the lowest retention rates.</p>	
Membership Termination Profile	<p>This report spans five years and shows:</p> <ol style="list-style-type: none"> 1. How long people were members before they left Rotary 2. The reason that was reported for their leaving <p>Note: The reason for termination is often reported by the club secretary and may not reflect the reason the member would give.</p>	
Listing of Sponsored and Satellite Rotary Clubs	<p>Shows the history of club sponsors of new Rotary and satellite clubs. Tab 1 shows the details for any satellite clubs in the district.</p>	

Report	Description and tips:	Notes and questions
	<p>Tab 2: Columns D and E list the club that sponsored the new club. Find new club information in columns H and I.</p>	
<p>District Membership Progress to Goal</p>	<p>Enter 2020-2021 as the year and the last full month.</p> <p>Along with your district dashboard, this report allows you to see the percentages of members who are female and who are under 40. It also compares the district’s membership goal to the current membership count.</p>	
<p>5 Year History of Membership Start Figures</p>	<p>Tracks the number of members of each club and, in the last row, the district on each 1 July for the past five years.</p>	
<p>Membership Comparison to 1 July</p>	<p>PROMPT MONTH: Last month PROMPT YEAR: Current</p> <p>Compares the month you choose with membership figures as of 1 July. Columns C, D, and E show the same comparison for the previous Rotary year.</p> <p>You can run this report each month to see current fluctuations in membership.</p>	
<p>Membership Progress to Goal</p>	<p>This report allows you to see which clubs have set specific membership goals in Rotary Club Central and the progress they’re making toward their goals.</p>	