Getting and Keeping Good Rotarians

For

Membership Recruitment
Retention through Mentoring,
Education, Involvement,
Fellowship and Recognition
Club Membership Leader’s Sourcebook
Focusing on Membership Recruitment, Mentoring, Retention, Education, Involvement, Fellowship and Recognition

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Editor
District Membership Chair
2005-2008
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5020 Membership

Membership is the ‘single most important thing’ in Rotary.

Without members, we cannot contribute to Foundation.
Without members, we cannot continue to provide ‘service above self’.
Without members, the good that Rotary does at home and around the world would disappear.

All the steps you and your Rotary club take to grow and maintain your membership will be the most important work you do.

The Membership Sourcebook is designed as a guide to help you. The tools and resources available from Rotary International and other Rotary clubs are very valuable so constantly refer to them as well. Accompanying this Sourcebook is a CD designed to expand on the information, as well as give you tools you can customize for your club.

Rotary provides you with a variety of printed material you can order or download, a section on the RI website for sharing ideas (Best Practices) and of course the expertise of fellow Rotarians. There are Zone Membership Coordinators and the District has a Membership Chair and committee who are willing to help and/or provide programs for your club. To contact the District Membership Team check out the District website under Membership.

I hope you will find this a useful tool worth sharing with others. Each time we open the door to Rotary for someone the effect it has ripples around the world. Rotary membership is a gift worth receiving. It changes lives, both for the Rotarian and the ‘service above self’ he or she will do for others.

Yours in Growing Rotary,

Maureen Fritz-Roberts

Chair 2005 - 2008
Rotary District 5020 Membership Committee
mofritzroberts@shaw.ca

Cheshire House, Ethiopia – NID trip 2006
(I’m the one on the right)
INTRODUCTION TO MEMBERSHIP

Membership CD

There are three types of documents on the accompanying CD. There are power point presentations you can use for club programs or as training tools. There are PDF documents that you can print. There are Word and/or Excel files that you can edit and personalize to use for your Rotary club. This information is intended to be shared, so please use and circulate it. There is an index for the Membership CD in the appendix section at the back of this sourcebook.

Types of Membership

Rotary International recognizes two types of members: active and honorary.
Active member — An active member is a person who is elected to membership under a classification of business or profession and has all the obligations, responsibilities, and privileges of membership as provided for in the Constitution and Bylaws of Rotary International.
Honorary member — An honorary member is a person who, by advancing Rotary ideals, is elected to membership in a club but does not have the obligations, responsibilities, and privileges of active members. Honorary members are exempt from paying fees and dues and cannot vote or hold office. The term of honorary membership is determined by the club board.
As of 1 July 2001, members formerly regarded as additional active, senior active, or past service members became active members. This enactment also amended provisions in RI constitutional documents about how many Rotarians may have the same classification in one Rotary club. For more information, consult the Manual of Procedure or the RI Web site at www.rotary.org

Membership Club Committee

Each club is individual in its approach to committee structure. If you are setting up a Membership committee or are making changes the following format may be of help to you and your team.

1. Establish your Membership committee. Consider breaking the committee into two key areas, recruitment and retention. Retention can be divided into four areas: mentoring, education, involvement and recognition. To ensure your committee can manage this challenging and important task of getting and keeping good Rotarians, have at least five members who can each be assigned a specific area of responsibility.

2. Meet with your Club President and executive. Find out your club goal for the coming Rotary year for recruiting new members. The District Governor meets with every Club President to set a Membership goal. Membership is more than just numbers so ensure that you will have the support of the President and the executive to have time on the weekly agenda to promote membership and other steps such as conducting member satisfaction surveys.

3. Develop a Membership Plan. Use this plan to structure how your committee will meet the goals for new members and for retention of existing members. You will find a Membership plan for Getting and Keeping Good Rotarians in this guidebook.

4. Set a budget. Consider the expenses of mailing invitations to potential Rotarians, hosting information evenings and having Membership Committee Members attend the DLTA and the District Membership training seminars. Have your budget approved by the club executive.

5. Present your plan to the club for their approval. This step makes everyone in the club aware of what your committee’s goals are and gives them a chance to be part of the success.
Membership Plan

Rotary works because it is built on members who understand the value of having a plan. The Membership committee for each club is essential in this planning process. Setting goals for “Getting and Keeping Good Rotarians” is the first step.

- At your 1st club Membership committee meeting develop your Membership plan
- Establish what needs to be done, who will do the work and when each activity will complete
- Consider doing an evaluation of your club – both how it would look to a prospective member and how it is working for current members
- Continually refer to the Membership plan as you meet throughout the year.
- Measure your successes.
- Change or adjust the plan
- Attend the District Membership workshops in the fall. Ensure your entire committee comes out for this leadership training.
- Constantly tell the members of your club whether you are meeting your goals and ensure they feel part of the process of getting and keeping Good Rotarians

A Membership Plan is provided in the appendix to help establish goals and assign responsibilities.

See CD for Getting & Keeping Good Rotarians Membership Plan
See Appendix for Getting & Keeping Good Rotarians Membership Plan

How Does Your Club Stack Up?

Conduct a review of your club annually. When you are working on attracting new members have you considered “How your club stacks up?” What image does your club project?

First:
- Evaluate Your Club as to how well it projects its strengths to its visitors and its community. What are its five greatest strengths and how are these conveyed?
- What are its three most notable weaknesses and what is being done to improve in those areas?
- And then for the groups you are targeting for new members:
  - Does your club appear as attractive as it should?
  - Does your club and each its members take personal and positive actions to welcome visitors and prospects?
  - Do you assign a suitable Rotarian, from that first meeting, to guide and mentor the prospect?

Involve your members to ensure they see the need to make changes. Come up with strategies to highlight the five strengths you identified and ways to overcome the weaknesses that cost your club existing members as well as those that are part of the reason you cannot attract new ones.

MEMBERSHIP TIP

Assessing Your Club

Take the opportunity to look at your club both from the prospective of what keeps your current members and what it would take to attract new ones.
- Survey your current members and get them to rate the club. It is a great way to start. There is a Member Satisfaction survey in the appendix or you can download one from the RI website.
- Another option is to form committees to assess the relevance of current club projects, efficiency of club administration or the amount of involvement at the district level.
- Seek out young potential members in your community that you would like to see in your club. Ask them to attend meetings and to meet with the Directors of the club to conduct an Impression of Rotary assessment for the club. A sample titled “Impression of Rotary Survey” is in the appendix section of this sourcebook.
Act on the Information

Once you know both what your members want and how potential young members view the club, it is important to ensure that action is taken on the findings. Construct a plan that comprises a list of strategies and resources that includes members of the district membership development committee, assistant governors, and past district governors as well as club leaders. Develop a step-by-step action plan that includes goals, target completion dates, and follow-through procedures. Keeping those good Rotarians you have will happen and if you really want younger members then taking the steps to attract them will pay off.

See CD for Membership Development Resource Guide 417EN for further suggestions
See Appendix for Rotary Member Satisfaction Survey
See Appendix for “The Club Health Check”
See Appendix for “Rotary Club Clinic”

LEADERSHIP

Thank you for taking on a Leadership role in Rotary. By helping your club with membership you are working on the single most important thing in Rotary.

Roles and responsibilities of Club Leadership

• Develop long and short-term goals and action plans.
• Annually link club’s goals to Rotary International and District goals.
• Challenge each member to recruit one new member this year.
• Identify the basic factors that impact the club’s membership recruitment, development and retention (including: club and committee leadership, the relevancy of programs and activities, and the effectiveness of communications within and from the club).
• President-Elect may consider serving on the club’s Membership Committee and participate in the club’s membership initiatives.
• Consider all options for Mentors. Perhaps involving past-presidents and senior club members to mentor the club newest members or to participate in organizing a Mentoring workshop will serve both to help new members and involve experienced Rotarians.
• An effective communication program is designed to tell what Rotary is and does. It begins with the club’s meetings, web site and newsletters. It takes advantage of free advertising opportunities provided by mass media. Ensure the Membership committee participates in this program.
• Present recruitment information should be placed on the club’s web site, in print media, on television, and via the Internet’s information superhighway. Consider producing a video that potential members can view when logging onto your club’s website.
• Open the Rotary Club up to the community and reduce the mystery clouding the activities of the Rotary and Rotary International.
• Seek out “transfer” opportunities as Rotarians move into your community. Rotary International receives these and forwards them to the District Governor and District Membership Chair. If you receive one act on it as this is an individual who wants to be part of Rotary, either transferring from another club or new to Rotary.
• Remove the myth that Rotary is a “white color and collared men only club”
• Advertise “Rotary Service” at community fairs, on posters, in the newspaper, and with TV ads like “Spotlight on Rotary.”
• When your club is fundraising in the community or doing projects have signs that advertise it is “Rotarians At Work” in their community. With a name and phone number to contact for more information on the club.
• Develop multiple club PR and service projects, award banquets, and fundraisers.
• Reward top recruiters with plaques, certificates, paperweights, newsletter bios and interviews.
RECRUITMENT

Qualifications for Membership

The identification and selection of qualified members are the first steps of a productive and fulfilling recruitment process. Proper selection will increase your club’s rate of retention and reinforce a positive attitude towards recruitment.

Qualified potential members are:
- Men and women of good character who possess an excellent business or professional reputation
- Individuals whose residence or place of business is in, or immediately adjacent to, the club’s locality

For more information regarding qualifications for membership, consult the Manual of Procedure.

The Classification Principle

The classification principle is designed to ensure that Rotary club membership reflects the diversity of a community’s professional and business interests. A member’s classification covers the principal and recognized activity of the firm, company, or institution with which the member is connected, or the member’s own principal and recognized business or professional activity.

The classification principle works best when viewed as a guide, not as a rule. Qualified members may be admitted under new classifications. With the advent of new technologies over the last several years, many new kinds of jobs have been created, and classifications need to be updated regularly to ensure that these new professions are represented in your club’s membership. Maintaining diversity in classification encourages the club to have a membership that is composed of different views, skills, and expertise.

Sponsoring a Prospective Member

Recruitment starts with a sponsoring member inviting a prospective member to one, two or more meetings prior to proposing this individual for membership. After the prospective member’s name is submitted to the club’s board of directors, the board ensures that the person is fully qualified and approves or disapproves the proposal within 30 days. Upon approval, the club’s secretary will notify the nominating member, and the prospective member will be invited to meet with the membership committee to learn about Rotary membership and to give his or her written permission to publish his or her name and proposed classification to the club’s membership. And if no objection is received within seven days following the publication of the candidate’s name, the person becomes a new member, upon payment of all membership fees.

There are variations to this procedure to allow clubs to introduce mentoring and educating prior to being accepted as a member.

Membership in Rotary has many benefits:
- Fellowship with men and women of like ideals
- Valued service to our local and world communities
- Opportunities to promote international peace
- Friendship through the acquaintance with community and business leaders.
- Participation in informative and stimulating weekly meetings with neighbors and community leaders
- Social opportunities with Rotary Youth Exchange students, Rotary Ambassadorial Scholars, and men and women participating in the Group Study Exchange Team program
- Attendance at area, district, regional and international assemblies, seminars, and conferences.

5
MEMBERSHIP TIP

Mentoring BEFORE a Potential Member Joins Your Club

Rotarians are excellent people. We have the ability to cite all the wonderful reasons a person would want to be involved with this incredible organization. We attract many new members but we don’t keep them all.

In our haste or excitement of recruiting a potential member we often fail to evaluate if the potential candidate is the right person for our club, we fail to consider if the club will meet the candidate’s expectations. Before going through all the steps of approving and inducting a new member, it is worthwhile to have a plan for educating the individual about Rotary and about the club.

Just because someone takes the time to learn about Rotary doesn’t mean your club has to automatically approve him/her as a member, but proposing an informed candidate has the potential of inducting a new member who understand Rotary and will be retained by your club.

When developing the club’s mentoring program consider a ‘Pre-Proposal’ stage where a potential member has an opportunity to receive information and ask questions. Be clear on the expectations of the club so the correct information is given. At the same time discover what this potential member is looking for. Perhaps it is networking, or a chance to do service work or maybe it is to improve his/her resume. There is no wrong reason for joining Rotary but there has to be a clear understanding of what the club will expect of that. They need to know ahead of joining if they are willing to meet the club expectations. It could be that although they want to improve their resume that they are not willing to put in the effort that being a Rotarian requires.

The time spent on pre-mentoring may reduce the number of members who leave within the first five years of joining the club.

For more information go to the Mentoring section of this handbook under Recruitment.

See CD for a sample Club Handbook you can customize for your club

Some of the Best Recruitment Strategies used by District 5020 Clubs

In District 5020 Rotary Clubs are practicing many effective recruitment and retention strategies. Here are some of the ideas we have gleaned from our surveys and membership seminars as well as from the RI website

Invite people who already know Rotary.

Consider all the opportunities when you or your club could promote membership. Perhaps it is during a fundraiser or community project or inviting people to attend a meeting with you. Perhaps have an annual meeting where you recognize other volunteers in the community or the parents of the Interact club. There are countless suggestions, here are a few that have been put forward by other Rotarians in this District.

- Have membership applications out on tables at every meeting for guests.
  See CD for Membership Application document “How to Propose a New Member” 254EN

- Consider speakers as potential club members.
- Invite spouses and family members of Rotarians.
- Invite Foundation Alumni for membership, especially Group Study Exchange (GSE) team members, and Ambassadorial Scholars. Many, now advanced in their professional careers, have never been asked to become Rotarians.
Get everyone in the club involved in Membership

- Have five Rotarians work together with the goal of recruiting one new member.
- Have Past Presidents and retired members of the club propose a new member from their profession or former profession.
- Make it a point of honour to propose a new member. Recognize the proposer in the club bulletin or at the weekly meeting.
- Visit the Membership Development or Best Practices section of the RI Web site at www.rotary.org to learn ideas that other clubs have used successfully. You might also use the RI Web site to share your membership development success story with other clubs. If a prospective member is unable to attend meetings at a luncheon club, suggest a breakfast or dinner club.
- Have the club president ask three members, as a personal favor, to propose one new member each. After one of these three proposes a member, have the president make the same request of another club member, so that the club always has three members working on a personal pledge to the president.
- Review past club bulletins for speakers who might be good potential members.
- Put a blue dot on each member’s watch face as a reminder to propose a new member.
- Put a red dot on the badge of every member who has proposed a new member in the current year, or present a special badge to such members that reads “I Shared Rotary.”
- Scan local business journals for names of influential and community-minded people.
- Watch “People in the News” columns in newspapers for people newly promoted who could be prospects.
- Send a welcome letter to new businesses in your area.
- Ask each member to submit three names to the club board.
- Have each member carry a business card for the club with the day and time of your club’s meeting to give to prospective Rotarians.
- At a club assembly or meeting, have the president or membership chair distribute three-by-five-inch index cards to each member and ask everyone to list five possible candidates on the card. Have club members submit their lists to the membership chair.
- Remind club members to tell prospective members about successful club projects.
- Have every Rotarian invite an outstanding business, professional, or community leader whom they know to join Rotary.
- Produce a brochure highlighting the community and international service accomplishments of your club.
- Identify and induct at least two new members who had previously participated in a RI or Rotary Foundation program. Work with the district foundation alumni chair, district Rotaract chair, and Rotaract club leaders to identify these potential members.
MEMBERSHIP TIP

Consider creating a membership team charged with recruiting Group Study Exchange team members

Last year and this year, each of our districts will have 8-10 young businessmen and women participating in Group Study Exchange. Over a 5-year period, this program touches 20-25 young business people. Many of those individuals have been speaking at Rotary Clubs in our Districts. All were sponsored in some fashion by a Rotary Club. We have the opportunity to proactively bring them into Rotary—now while their experience is fresh. Create a membership team charged specifically with recruiting GSE team members (perhaps composed in part by Rotarians, who were former GSE team members). Ask this membership team to focus initially on recruiting the 8-10 people involved in the past two GSE exchanges.

A survey by RI’s Membership Development Division determined that 2/3 of RI and Foundation program alumni and 85% of current participants would like to join Rotary. But, only 3% of Rotary’s worldwide membership is made up of these alumni. Even more to the point, only 42% of GSE alumni have been invited to join. Let’s ask them.

The GSE alumni recruitment team would need to deal with factors identified as impediments to joining but these GSE alumni have seen Rotary’s work in action and, with a bit of work, we could overcome the initial factors cited for difficult recruitment. This team will need to work one-on-one with the GSE alumni—and take them to numerous clubs in order to find a match. And they will need to be persistent.

<table>
<thead>
<tr>
<th>Reasons cited by alumni for not joining Rotary</th>
<th>What you could do (Some suggestions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not asked</td>
<td><strong>Ask after they return.</strong> Introduce them to various clubs, until they find one which clicks for them.</td>
</tr>
<tr>
<td>Have too many other commitments</td>
<td>We make time for what we believe in. Rotary Alumni who join Rotary do so to “give back to the community”. Find out their interests and connect them to Rotary, before they get involved in other service commitments. <strong>“Tell the Rotary story” and “connect with their passion”</strong></td>
</tr>
<tr>
<td>Age difference between alumni and current Rotarians</td>
<td>Connect them with a club with younger members: shop around. Take them to numerous clubs—to experience the different personalities of each club. Create a “club in a club” of younger GSE team members—many with similar experiences joining the same club.</td>
</tr>
<tr>
<td>Weekly meeting attendance is difficult</td>
<td>Make sure they know that “attendance” really means “involvement” such as family events, service activities. Rotary is about “service” not about “weekly meetings”.</td>
</tr>
<tr>
<td>Membership is too expensive</td>
<td>All clubs are not the same: some are more expensive than others. Know the cost differences when you take GSE team members to various clubs. Larger clubs have initiated programs that reduce dues and other fees for younger business people. <strong>Don’t let $$ be the reason to lose these individuals.</strong></td>
</tr>
<tr>
<td>Clubs are mostly men</td>
<td>Introduce them to clubs more evenly balanced with men and women.</td>
</tr>
</tbody>
</table>

See CD for report on the “Recruitment of RI and TRF Alumni as Prospective Rotarians”
Attracting Younger Rotarians

Invite young people and consider minority groups from your community or any other group your club has not yet attracted. Make it easier for new members to join your club.

- If you have young members in your club already, have them recruit from their age group or to be speakers at your club meetings.
- Consider young people in the 25-35 age group for membership, based on demonstrated leadership and community service accomplishments rather than professional status.
- Invite a “silent shopper” to look at your club from the eyes of potential members under the age of 30, or as a minority group member, and help you determine what changes would be appropriate if your club wishes to attract these individuals to join. It is also an opportunity to find out from your current members why they stay.

Many Rotary International Presidents joined when they were in their twenties or early thirties. Rotary is for young people. There are some myths to overcome such as they can’t afford it, they will want to change things, they don’t work as hard as we did when we were twenty and so forth. The truth is that young people are just as capable of paying Rotary dues as Paul Harris was in his day. If it has value they will pay for it. They will want to make changes and they will want their opinions considered and recognized. They will work just as hard on a project they believe in as any Rotarian has in the past. Younger Rotarians tend to pick different projects. They like to be involved with education or playgrounds as opposed to parks or other beautification projects. They are also very keen to be involved at an international level.

Ideas for Recruiting and Retaining Younger Members

- **Induct several young members at once, instead of recruiting them one at a time.** If your club has no younger members, inducting several at the same time gives these new members an immediate peer group in the club.

- **Conduct service projects that are likely to appeal to younger members.** The Australian Bureau of Statistics found that volunteers in two age groups, 25-35 and 55-65, do the same amount of service work. Younger volunteers were more likely to focus on areas such as education, sports, and family matters.

- **Recruit Rotaractors, GSE team members, and other Rotary program alumni.** Their participation in RI programs shows that they already know about Rotary’s ideals and are interested in pursuing its mission.

- **Consider lowering the total cost of membership in your club.** Some younger members have trouble meeting the financial obligations of club membership. To combat this problem, some clubs have lowered their fees or have a meal only once or twice a month instead of every week.

- **Consider waiving certain fees or expenses for the first year or two.** Younger members who aren’t yet fully invested in Rotary may be more apprehensive about committing to all of the financial obligations of club membership. Once they become involved in your club and dedicated to Rotary’s mission, they may be more willing and able to pay the full amount.

- **Make sure meetings are efficient and productive.** Younger members, who often have competing priorities, are more interested in attending meetings that are conducted efficiently with have an appropriate balance of hands-on projects.

- **Recruit “up-and-comers.”** Managers on their way to becoming important business and professional leaders are often interested in the networking and professional development benefits of Rotary. Getting them invested in Rotary now can help ensure their dedication when they reach top-level management or ownership.

- **Be open to the new ideas of younger members.** Maintaining the status quo in your club may bore and discourage them. Younger members will be more likely to stay in your club if their opinions are valued and appreciated — and if they aren’t treated like junior members.
Values

Zone 23 Membership Coordinator Rosemary Barker Aragon has been working on recruiting younger Rotarians. She suggests we consider what they value. To ensure there is Rotary in the future we need to appeal to the values of the younger people we want to recruit..........not tell them what we want to say about our organization. Clubs may have to revisit their approach to recruitment to attract all generations.

Here are some high level generalizations about what each of the 4 Generations value:

<table>
<thead>
<tr>
<th>Generations</th>
<th>Values</th>
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</thead>
<tbody>
<tr>
<td>Traditionalists</td>
<td>consistency, worthy venture, respect for their experience, structure</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>leadership opportunities, good cause, friendly atmosphere, opportunity to prove themselves</td>
</tr>
<tr>
<td>Gen X'ers</td>
<td>development opportunities, mentoring (advice when they ask for it), flexibility, efficiency—time well used, informality</td>
</tr>
<tr>
<td>Millennials</td>
<td>collaboration, fun, future-oriented, positive, flexibility, challenging</td>
</tr>
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</table>

Ask yourself: is my club organized in such a way that would appeal to individuals interested in being part of the decision making? People for whom time is scarce? How should we approach these young people?

Play this awareness game: which value message appeals to which generation?

<table>
<thead>
<tr>
<th>RECRUITMENT Message re VALUE</th>
<th>Match</th>
<th>Appeals to which Generation?</th>
</tr>
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<tbody>
<tr>
<td>1. “We need your energy, ideas, and desire to help those in need. Flexible schedules are available...After all, even a little help can go a long way”</td>
<td>a. Traditionalist</td>
<td></td>
</tr>
<tr>
<td>2. “Here is an Assignment IF you chose to take it on: you will travel 9,800 miles and exchange your experience for experiences. You will work with students. You will help a former factory worker develop his skills...and though your resume might never truly reflect what you’ve accomplished, the resume of a former factory worker will. How far are you willing to go to make a difference?”  {Peace Corps ad}</td>
<td>b. Millennial</td>
<td></td>
</tr>
<tr>
<td>3. “A career called life: where is the line between work and life? We realize that you have responsibilities outside of work...they speak not only to who you are, but also to who you will be...and how you can change the world. Many of our best members successfully balance their lives at work and their service activities beyond the job”</td>
<td>c. Boomer</td>
<td></td>
</tr>
<tr>
<td>4. “The Premier service organization for businessmen”</td>
<td>d. X’er</td>
<td></td>
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</tbody>
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Some concepts from Lancaster & Stillman When Generations Collide

Answer: 1(d), 2 (b), 3 (c), 4 (a)
Rick Russell (PDG of District 6930) has gathered value information for Rotary when recruiting younger members. He suggests we will do better at recruiting younger members if we understand how we appear to ourselves and to others.

VALUES

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<tr>
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<tr>
<td>Depression</td>
<td>Civil Rights</td>
<td>Latch-Key Kids</td>
<td>Technology</td>
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<td>World War 2</td>
<td>Vietnam</td>
<td>Massive Layoffs</td>
<td>Over Planned Lives</td>
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<tr>
<td>Korean War</td>
<td>Woodstock</td>
<td>Terrorism</td>
<td>Stress</td>
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Heroes

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<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Roosevelt</td>
<td>Gandhi</td>
<td>None</td>
<td>Bill Gates</td>
</tr>
<tr>
<td>Babe Ruth</td>
<td>JFK</td>
<td>John Glenn</td>
<td>Mother Teresa</td>
</tr>
<tr>
<td>Superman</td>
<td></td>
<td></td>
<td>Christopher Reeves</td>
</tr>
</tbody>
</table>

Values

<table>
<thead>
<tr>
<th>Civic Duty</th>
<th>Work</th>
<th>Balance</th>
<th>Civic Duty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Work</td>
<td>Youth</td>
<td>Self Reliant</td>
<td>Diversity</td>
</tr>
<tr>
<td>Law &amp; Order</td>
<td>Optimism</td>
<td>Informal</td>
<td>Optimism</td>
</tr>
</tbody>
</table>

Assets

<table>
<thead>
<tr>
<th>Loyal</th>
<th>Driven</th>
<th>Independent</th>
<th>Collective Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stable</td>
<td>Service</td>
<td>Creative</td>
<td>Heroic Spirit</td>
</tr>
<tr>
<td>Thorough</td>
<td>Team Players</td>
<td>Techno-Savvy</td>
<td>Techo-Savvy</td>
</tr>
</tbody>
</table>

Liabilities

<table>
<thead>
<tr>
<th>Inept with Change</th>
<th>Self-centered</th>
<th>Impatient</th>
<th>Need Supervision</th>
</tr>
</thead>
<tbody>
<tr>
<td>&amp; Ambiguity</td>
<td>Judgmental</td>
<td>Cynical</td>
<td>Need Structure</td>
</tr>
</tbody>
</table>

HOW GENERATIONS PERCEIVE ONE ANOTHER


VETERANS

Dictatorial, Rigid, inhibited, techno-dinosaurs

Self-absorbed, should keep details of their personal lives private

Don’t respect experience, don’t follow procedures, don’t know what hard work is

Good manners, smart little critters, need to toughen up, watch too much TV with crude language and violence

BOOMERS

They’re cute, need more discipline, need too much attention, could they do my web page for me?

Self righteous workaholics

Rigid, techno-dinosaurs they’ve got all the money

Self absorbed, neo-boomers, another generation of spoiled brats.

GENERATION X

Rigid, techno-dinosaurs they’ve got all the money

Self righteous workaholics too political, clueless, don’t walk their talk

GENERATION Y

Trustworthy, good leaders, brave

They’re cool, they work too much

Cheer up!
Proactively seek members beyond the "circle of acquaintance" of club members.

- Look to and beyond traditional religious, professional, civic, trade leaders.
- Read business weeklies and local newspapers for profiles of successful leaders in the community. Check who in the community is already donating their time to charity.
- Encourage members to approach the owners of businesses that they normally frequent, including dry cleaners, restaurants, hardware stores, beauty and barber shops, schools, electricians, gas stations.
- The occupations of volunteer and homemaker (male or female) should be Rotary classifications.

What Rotary Actually Costs

New members are often surprised by the actual costs involved in being a Rotarian so avoid that disappointment by providing a worksheet that outlines these expectations.

Sample Financial Information Sheet for Prospective Members
Prospective members should be well informed of the financial obligations of membership before being inducted.

<table>
<thead>
<tr>
<th>Financial Obligation</th>
<th>Amount</th>
<th>Payment Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club dues</td>
<td>$ ____</td>
<td>paid (annually/biannually/monthly)</td>
</tr>
<tr>
<td>District dues</td>
<td>$ ____</td>
<td>paid (annually/biannually/monthly)</td>
</tr>
<tr>
<td>Cost of meals</td>
<td>$ ____</td>
<td>paid (annually/biannually/monthly/weekly)</td>
</tr>
<tr>
<td>Average annual contributions to The Rotary Foundation</td>
<td>$ ____</td>
<td>paid (annually/ biannually/monthly)</td>
</tr>
<tr>
<td>Average cost of participation in district events</td>
<td>$ ____</td>
<td>paid (annually/ biannually/monthly)</td>
</tr>
<tr>
<td>Average cost of participation in club events</td>
<td>$ ____</td>
<td>paid (annually/ biannually/monthly/as required)</td>
</tr>
<tr>
<td>Fines levied by the Sgt. At Arms or Club assessments</td>
<td>$ ____</td>
<td>paid (annually/ biannually/monthly/as required)</td>
</tr>
</tbody>
</table>

TOTAL $ ________

Less: $______ *

*Special Deductions for New Rotarians or Rotarians under 30 years of age

FINAL TOTAL $ ________
Rotary’s Public Image for Recruiting

The perception of Rotary within each community directly affects the ability of our Rotary clubs to attract and retain members. Attracting the public’s and the media’s attention requires hard work. Each Rotary story must have significant news value. The spokespeople must be articulate and knowledgeable. Work with your club Public Relations director and committee to help attract the individuals who will make good members of your Rotary Club. There are vast resources through the District and Rotary International to help you develop a good public image. Use the www.rotary5020.org or www.rotary.org to tap into these resources.

See CD for report on “Public Relations and Membership Recruitment”

Working with the Media

Use the media to promote club and district activities that address important community issues. Each time Rotary is mentioned in the news, hundreds, thousands, and sometimes millions of people are reached. More than just enhancing Rotary’s image, public relations can help gain support for projects, attract members, and improve the quality of service that Rotarians provide. In order to take full advantage of the media, Rotary news must be presented properly. Consider the following tips for effectively promoting Rotary in the media:

Approach the media strategically
Link your story to a larger trend or current news events. When presenting a story idea to the media, make sure it is brief and to the point. Think of how to best present Rotary in a 30-second sound bite. Tailor your idea to a specific journalist, publication or broadcast program, such as an international news program or a health segment on a local news channel.

Offer knowledgeable Rotary spokespeople
When suggesting a story to the media, make sure you can offer articulate local spokespeople who are actively involved in Rotary and able to inform others.

Identify newsworthy story angles
Every Rotary story must have significant news value. The best public relations for Rotary is effective service. How Rotary addresses real needs in the community is the kind of story that interests journalists. It helps to support your story idea with background materials, such as fact sheets or brochures, which are available from the international office in your area.

Make your club visible and respected in the community.

- Publicize projects and identify them by displaying the Rotary emblem.
- Ask club members to wear their Rotary pins every day—the pin shows respect and pride.
- Invite the editor(s) of the local paper(s) or owners of local TV and radio stations to attend as guests and/or join the club.
- Educate club members about Rotary with brief presentations at each meeting; distribute club and district newsletters.
- Provide copies of the Rotarian magazine for the public library and places of business. Attach a label to give interested individuals a contact name and number.
- Do a good job…and tell people about it!
- Award excellence in business and community service.
CLUB in a CLUB – GROUP Approach to Recruiting

There are many good programs to help you attract new members to your club. One that has an established plan is Club in a Club.

Rotary has been growing over the past years while other service organizations have not. 
• The main growth has been through the creation of new Rotary clubs.
• Club in a Club is a system that takes all those great ideas for starting a new club and uses them to bring a group of people into an existing club.

How to increase your Rotary club membership easily by 10% - 35% or more at one time – unbelievable but true!
There are lots of credible ways to grow the membership of your club. What makes Club in a Club work is that your entire club develops a plan and everyone pitches in to make it work. With everyone focused on ‘membership’ you will succeed.

• Go to the Club in a Club website by connecting through the District site www.rotary5020.org or go direct at www.clubinaclub.com.
• Get your entire club involved. Form a committee to make it happen but get everyone involved. Let them know the idea will only work if everyone believes it in and helps. You are passing on the world of Rotary to new members, your club is the ambassador of this message make it a positive one.
• Take at least two meetings where your President gives you time for each member of your club to fill out a list of potential members. Ensure your club knows the demographic (the age group, the dedicated volunteer type, maybe more women), if you have identified one, so the names you receive will fit that goal. Keep it simple; just ask for names and occupations, you can track down addresses later.
• Take the same care when using this program that you would picking any potential member for your club. Correlate the names and circulate the list to the Board, the Classification Committee and the Club members for comment.
• Plan an information meeting for your potential members to learn about Rotary and your club.
• Personalize your letter of invitation. Make the potential Rotarian receiving it feel welcome and special.
• Personalize your program. Consider what these potential Rotarians want to know at this first meeting. Will you entertain them? Will you feature Rotary? Give them information about time and financial commitments, and let them know what you do in your community and the world.
• Phone each guest. The personal touch is worth the effort. Form a committee who will phone to ask the guests to attend. Phone to thank them for attending. Use the time to discover if they wish to join and discover if they would like to come to another meeting if they are unable to attend your current event.
• Have a follow-up plan. If some attendees indicated they would be interested in becoming a Rotarian at a later date, set up a calendar for future contact.
• Induct and continue to mentor ... mentor ... mentor. Establish a plan to keep your new members active and interested.

Always take the time to educate potential Rotarians on what the expectations of your club are. Take the time to find out what the expectations of the potential Rotarians are. It has to be a win-win relationship to grow a strong club.
Here are the 13 Easy Steps to create a “CLUB IN A CLUB” plan

**TASK**

<table>
<thead>
<tr>
<th>Task</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Get agreement from the entire Club to use this program &amp; agree on “who” you want to recruit</td>
<td></td>
</tr>
<tr>
<td>[ ] Collect NAMES of potential members</td>
<td></td>
</tr>
<tr>
<td>[ ] Get forms circulated among all members</td>
<td></td>
</tr>
<tr>
<td>[ ] Collect the lists of names</td>
<td></td>
</tr>
<tr>
<td>[ ] Confirm addresses &amp; phone numbers</td>
<td></td>
</tr>
<tr>
<td>[ ] Confirm they are not members of another Club</td>
<td></td>
</tr>
<tr>
<td>[ ] Type list and present list to Board for acceptance</td>
<td></td>
</tr>
<tr>
<td>[ ] List to Classification Committee for acceptance</td>
<td></td>
</tr>
<tr>
<td>[ ] List circulated to Club members for acceptance</td>
<td></td>
</tr>
<tr>
<td>[ ] Set Date for Meeting &amp; Send Invitations</td>
<td></td>
</tr>
<tr>
<td>[ ] Wording of the letter of invitation</td>
<td></td>
</tr>
<tr>
<td>[ ] Type invitations and mail them</td>
<td></td>
</tr>
<tr>
<td>[ ] Make follow-up invitational phone calls</td>
<td></td>
</tr>
<tr>
<td>[ ] The SPECIAL MEETING place</td>
<td></td>
</tr>
<tr>
<td>[ ] Ensure entire club knows when it will be held</td>
<td></td>
</tr>
<tr>
<td>[ ] Arrange for caterer/menu</td>
<td></td>
</tr>
<tr>
<td>[ ] Plan the SPECIAL MEETING items</td>
<td></td>
</tr>
<tr>
<td>[ ] Information brochures/Rotarian magazine, etc.</td>
<td></td>
</tr>
<tr>
<td>[ ] History of Club display</td>
<td></td>
</tr>
<tr>
<td>[ ] Set the SPECIAL MEETING agenda</td>
<td></td>
</tr>
<tr>
<td>[ ] Master of Ceremonies</td>
<td></td>
</tr>
<tr>
<td>[ ] Topics/scripts of speeches by club members</td>
<td></td>
</tr>
<tr>
<td>[ ] Invitation to join the Club</td>
<td></td>
</tr>
<tr>
<td>[ ] Create the MENTORSHIP PLAN</td>
<td></td>
</tr>
<tr>
<td>[ ] Set date/time/place for all members to attend “Mentoring workshop”</td>
<td></td>
</tr>
<tr>
<td>[ ] Set Mentoring Workshop agenda – contact District Membership committee for assistance</td>
<td></td>
</tr>
<tr>
<td>[ ] Prepare mentoring responsibilities/guidelines</td>
<td></td>
</tr>
<tr>
<td>[ ] Follow-up after the Special Meeting</td>
<td></td>
</tr>
<tr>
<td>[ ] Letter to those who did not attend to visit the Club</td>
<td></td>
</tr>
<tr>
<td>[ ] Phone call to those who attended to invite to join</td>
<td></td>
</tr>
<tr>
<td>[ ] Set date to induct NEW members</td>
<td></td>
</tr>
<tr>
<td>[ ] Invite DG or ADG to attend</td>
<td></td>
</tr>
<tr>
<td>[ ] Mentoring Process for NEW members</td>
<td></td>
</tr>
<tr>
<td>[ ] Rotarizing or Fireside session</td>
<td></td>
</tr>
<tr>
<td>[ ] Assign mentors or plan group mentoring sessions</td>
<td></td>
</tr>
<tr>
<td>with educational component for new Members</td>
<td></td>
</tr>
<tr>
<td>[ ] Assign new Members to a Club Committee</td>
<td></td>
</tr>
</tbody>
</table>
To get started - Know WHO you are recruiting

A wise Rotarian suggested using this little exercise when you are planning your club’s future. Close your eyes – and imagine it is 5 years into the future – your ideal Rotary Club

What does your Rotary club look like?
Have members left?
Are there lots of new young members?
Is there an equal mix of men and women?
Are the meetings busy and the programs good?
Is the club doing good community projects?
Is this the club you would want to join?
Is it a club where everyone pitches in to get the job done?

Once you have the vision of the club you want to be in five years then take the steps to make it happen.
You are a business leader. You know how to hire, how to recruit, how to write job descriptions, how to make a business plan, you have the skills to build the club you envisioned.

Know WHO you are

- If you are a club where most members are over 45 do you want to attract young people between 25 and 35?
- If you are a club of mostly men do you want to attract female members?
- If you are a club that does hands on medical projects in 3rd world countries do you want to attract people in the medical profession as members?

Know WHO you want

- Invite several people from the same demographic to join at the same time. This approach will increase their comfort level. Club in a Club is a best practice tool that can help you achieve this.

Use the resources of District 5020 and Rotary International to help you build the club you envision for the future.
Go onto the website: www.rotary5020.org
Contact the District Membership Chair

Put together a team and set goals.

At PETS (President Elect Training Seminar) the club President received a planning formula that included a goal for the number of new members the club would attract in the current year. Using the Club in a Club approach will allow the club to reach that goal with a proven formula for success. Set up a meeting with the club President, President-Elect, and the Membership committee to reach the membership growth goal. Equally important as the number of new members is determining “who” your club wants for members. At this point you need to have a committed team to make Club in a Club work and you need to have identified “how many” and “who” you want for new club members.

Set up a Time Line.

Using the information and guidelines from the Club in a Club develop a time line for reaching your membership goal. What if your club resists the idea? Be ready for this possibility by considering all the reasons your club may not want to increase the existing membership by the number you are proposing. Also consider all the reasons your club may not want to attract the age or type of members you are proposing. You have to be prepared to help your club overcome their fears and concerns if you want to move forward with Club in a Club. Remember “change” is never easy. Nothing worth doing is ever easy.
Get your Club members excited and involved.

Get your entire club involved in the membership growth. Let them know the goal for new members and let them know the target group you have identified as potential members. Share how you arrived at these goals and let them express any concerns they have. Allow your members to get their “fears” answered so they feel better about participating in this membership growth plan. Let them know the goal will only work if everyone believes in it and helps make it happen. Remember you are passing on the World of Rotary to a new group of people – the whole club is the ambassador of this message. Use this opportunity to have each member of your club fill out a list of potential members who fit your target group. Keep this simple. Only ask for names and occupations, tracking down the addresses and phone numbers can be one of the jobs from your timeline that is assigned for later. Repeat this process of requesting names at one or more club meeting. You will need at least twenty names for each new member you want to attract. If your goal is five new members you will need at least one hundred names. If you need help contact the District Membership Chair. Arrange for the entire club to participate in a mentoring workshop. This session will bond the club in a common responsibility for the new members who are joining. It is also an excellent opportunity for your club to confirm your expectations of new members. This way new members hear the same answer from all club members. Rotary changes and sometimes we fail to pass this information onto all club members. The mentoring workshop is a great opportunity to discuss everything from Rotary Foundation to membership dues.

Work on making Club in a Club match your club.

Personalize your letter of invitation. Ensure the potential Rotarian receiving it will feel welcome and special. Even if they decline to become a member of your club they will have received the type of invitation that makes them feel like a valued member of your community. See the sample letters provided in this guidebook.

Decide if you will entertain or inform your potential members.

The Club in a Club website suggests an entertaining program for your potential members is a good idea. You can definitely use that approach. You can also opt to inform them about your club with honest information about time commitments, financial commitments, and the work you have done in the community and the world. You can tell them about your fun and fellowship.

Take the time to make human contact.

Set up a committee to phone each guest. The personal touch is worth the effort. Phone them to confirm if they are able to attend. Phone and thank them for attending. Use the time on the phone to discover if they would like to join your club. Find out if they would like to be contacted again in the future.

Have a follow up contact plan.

Have a plan for contacting all those potential members who did not join at this time. Set up a calendar for future contact. This can range from sending them occasional copies of your club bulletin, inviting them to future meetings and newspaper clipping of projects your club has completed.

Induct, develop, mentor and retain all those new members.

Getting new members into your club is the smallest part of the membership growth plan. Keeping those new members will be the measurement of your success. There is a built in retention aspect with Club in a Club. They join as a group and become connected by that common bond. Create or use your established club procedures for keeping your new club members active and interested. Induct them with flourish and announce to the club the committee they will be on. Invite the entire club to come up and shake the hands of their new members. Make it an event that will remain in their memory for years. The entire club should help mentor this new group but you should also assign individual mentors to ensure success. Give each new member goals to attain that will help them understand both the club and Rotary International. Rotarize them! Develop Mentor roles, new member goals, etc. If you keep your new members active and interested they will see the value in being a Rotarian in your club.
On the following page is the Prospective Member form. Here are some suggestions when filling out that form. They could be printed on back of the form to help trigger names.

- Neighbors across the street
- Neighbors to your right, as you face the street
- Neighbors to your left, as you face the street
- Neighbors to the back of your house
- Other neighbors you know
- Name of your immediate supervisor (if you have one)
- Name of his or her immediate supervisor (if he or she has one)
- List names of your:
  - Physician, Dentist, Banker, Minister, Attorney, Chiropractor, Veterinarian, CPA,
  - Your best friend in this town and the Person you admire most in this town
Club in a Club - Prospective Name's List

We are about to grow our Membership with Club in a Club. These sheets will be handed out at least 2 of our Club meetings. Please think of people who would make good Rotarians and propose them on this sheet.

**Types of Membership:**

<table>
<thead>
<tr>
<th>Target Age Groups:</th>
<th>Target Classifications</th>
<th>Other:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who do we need?</td>
<td>Remember we are allowed a minimum of 5 people per classification</td>
<td></td>
</tr>
<tr>
<td>Women?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members under 40?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Insert your name:**
(This is used to help CIC committee with contact for further details if needed)

Try to complete as many names as possible (as they come instantly to mind! - don’t try to remember addresses, phone numbers at this time) - include names even if they have been asked before, or if you think that they are too busy. Go through your business card holder to remind you of additional names, ask your partner. If you don’t have complete details such as address etc., don’t worry, these can be found later, but make sure the Club In a Club committee has your name to make follow-up easier. THANK YOU for helping to grow our membership!

<table>
<thead>
<tr>
<th>Prospective Member's Name</th>
<th>Prospective Member's Address, Phone etc (if details not at hand, don’t worry)</th>
<th>Occupation and Employer</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
SAMPLE INVITATIONAL LETTER

Rotary Club of ______________________________

Address

City, State/Province, Code

President: NAME

Secretary: NAME

March 24, 200_

Potential Rotarian
Any Avenue
Any Place in District 5020

Dear Sue:

Your name has been suggested to the Rotary Club of Comox as a person who would make a good Rotarian. A Rotarian is someone who has shown to be a leader in both their profession and their community at large. Since we are told that you have those qualities, we would like to invite you to attend a special meeting of the Rotary Club of Comox.

Rotary is a worldwide organization that provides humanitarian service, encourages high ethical standards in all vocations, and helps build goodwill and peace in the world. Approximately 1.2 million Rotarians belong to more than 31,000 Rotary clubs located in 166 countries, making it one of the most important non-governmental, non-profit, non-religious, non-political organizations on the planet.

The evening will be held on DATE at PLACE. There will be a no-host bar and a chance to make acquaintances with our club and other potential members at 6:00 p.m., after which you will be our guest for dinner at 6:30. You will have the opportunity to meet and talk to individual Rotarians. Through an informal presentation you will learn about the activities and projects of Rotary International and the Rotary Club of__________________. You will hear about our club, about “Service Above Self” and hopefully discover that you may wish to become a Rotarian.

Your reply to this invitation would be appreciated by April 10. Please call ROTARIAN at 703-0048 or email rotarian@shaw.ca. If you are interested in learning more about becoming a Rotarian, but are unable to attend the DATE evening, please call ROTARIAN so we may arrange another opportunity for you.

We look forward to having you join us for this relaxed introduction to the world of Rotary at the “best little Rotary Club in the world”. DATE, TIME, PLACE. Please RSVP by DATE.

Yours in Rotary,

President Elect
SAMPLE AGENDA FOR SPECIAL MEETING

(Hint for Success: use Club Members who are good at Public Speaking!)

Club in a Club Meeting Agenda
DATE

President
Ring bell and welcome
Oh Canada or Star Spangled Banner
Invocation

Sgt At Arms
Introductions
Outline of evening
Order of dinner

Exchange Student

Sgt at Arms
Fines (with explanation) accompanied by ?

No break – no birthdays – no business – no announcements

President
50/50 draw or other club regular activity

President
Introduce Master of Ceremonies

Master
Introductory remarks (2 minutes)

Master
A short history of Rotary (5 minutes)

Past Pres
History of the Rotary Club and 4 Avenues of Service

Director
Personal anecdotes about 1 Avenue of Service

Director
Club Service - Fun activities

Club Member
Responsibilities and Commitments (costs/attendance)

Pres Elect
Invitation to join Rotary

President
Adjourn – hope to see you all next week when the program will be ______________________

This membership building program is so simple people say
“why didn’t we think of this before”
Follow up Letter for the Guests who could not attend the SPECIAL MEETING

ROTARY CLUB OF ____________________________

Name of Potential Rotarian
Anywhere in District 5020

Date

Dear Sam:

You received an invitation to attend a special information night at the Rotary Club of _____ because you were suggested as a person who would make a good Rotarian.

Our meeting on DATE was not convenient for you so I would like to offer an open invitation to you to attend one of our regular club meetings.

Our regular meetings are held at PLACE & ADDRESS. We start with a no-host bar and a chance to make acquaintances with our club members at TIME, after which you would be our guest for dinner at TIME. This is an opportunity to meet members of our club and to learn about “Service Above Self” and hopefully discover that you may wish to become a Rotarian.

Your reply to this invitation would be appreciated.

Please call ROTARIAN at 703-0048 or email rotarian@shaw.ca.

We look forward to having you join us for any of the scheduled meetings listed below. We would like to introduce you to the world of Rotary at the “best little Rotary Club in the world”.

<table>
<thead>
<tr>
<th>DATE</th>
<th>SPEAKER</th>
<th>TOPIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 13th</td>
<td>Bob Thompson</td>
<td>Senior Secondary Skill Development</td>
</tr>
<tr>
<td>May 20th</td>
<td>Annette Bossom</td>
<td>Interact Charter Night</td>
</tr>
<tr>
<td>May 27th</td>
<td>David Laundy</td>
<td>Why Smoke? (Tobacco Lobbyist)</td>
</tr>
</tbody>
</table>

For your convenience I have enclosed a recent information handbook on Rotary and we look forward to seeing you soon at TIME, PLACE.

Yours in Rotary

PRESIDENT ELECT
New member initiation and induction

Please refer to Retention through Recognition for suggestions for initiation and induction steps.

There are so many steps that follow the recruitment of a new member. Mentoring them both before and after they are a member. This is covered in the Retention section of this handbook. Retention also includes education which is a step you will use during recruitment as part of the mentoring process. Basically most of the Recruitment and Retention steps are interrelated and so as a Membership committee you need to work together to ensure the success of bringing new people into Rotary.

Induction into the club should not be unduly delayed. This is an important step towards feeling a part of the club for the new member. It is also an opportunity to involve the new member’s family but inviting them to the induction and recognizing them as well. There are several excellent induction scripts available on Rotary’s website.

See CD for Induction Scripts for New and Transferring Rotarians
RETENTION

The retention portion of the Membership plan is divided into four areas: Mentoring, Education, Involvement/Fellowship and Recognition. If you don’t have a committee large enough to assign an individual for each of these four important retention areas then double up with committees your club already has in place. Education is a great place to start. If you look at your membership you may be surprised to find 30% have been Rotarians for less than five years. They need education so the more places it appears the better. If there is a Rotarian in charge of the weekly programs ask him/her to have at least one speaker a month talk about an area of Rotary. This can be anything from a returning GSE team member to a Rotarian who has been on an international project. Ask your Club Bulletin editor to include a monthly article about Rotary from the RI website. Be creative and involve as many members of your club as you can to cover Mentoring, Education, Involvement and Recognition.

RETENTION through MENTORING

Sponsor Versus Mentor

The Rotarian who sponsors a new member to the club is not automatically the mentor for this new Rotarian. There are Rotarians who have brought as many as 90 members into their clubs. It would be a challenge for that recruiter of Rotarians to also have time to do a good job mentoring all 90. If you have a Rotarian who is good at being a sponsor it is possible that individual is also a people person. This Rotarian is most likely someone comfortable with meeting new people but may not enjoy going through the steps involved with mentoring a new Rotarian. If you give a good recruiter the task of also being the mentor for the new members he/she proposes the result may be he/she no longer has the time or inclination to continue recruiting.

Variety of Ways to Mentor

Determine how your club will approach mentoring. Consider establishing a mentoring program for prospects so they know enough about Rotary and your club to make an informed decision to become a Rotarian. Use this mentoring time for your club to make an equally informed decision about whether this candidate is a good addition to your club. You can have one on one or group mentoring or both.

- Discuss Club Expectations in candid give and take with each candidate Rotarian, before their commitment and induction.
- Assign Mentors to prospects before induction either formally or informally. Mentoring should begin when an individual is first interested in joining.
- Monitor your Mentors performance in all cases; have clear expectations for Mentors.
- Train your mentors.
- Recognize Mentors for their efforts and their successes.

Ensure that good mentoring relationships exist; don’t let formal mentoring procedures substitute for great relationships.

Choosing A Mentor

Ken Balsley suggests the choice of a mentor is key if he or she is to be effective. Mentors must be willing to perform the task. Too often we select mentors because we think they may fit the need. We often assign mentors without much thought. However, a mentor should be willing to perform the task and understands his or her responsibilities. Mentors must be someone who understands Rotary. The understanding of basic Rotary information is important. No matter how well a new member is Rotarized before entering Rotary, questions about Rotary will often need to be answered. This is particularly true regarding questions about the Rotary Foundation, which is often confusing to most Rotarians. Mentors must be a person with whom the new member can communicate. Simply assigning a senior Rotarian to be a mentor is not enough. The mentor and the new member should have something in common. Sometimes they can work in the same field, although they shouldn’t be competitors. They can go to the same church, or have children who belong to the same sports team. A mentor and his or her new member should be able to talk with one another, particularly during those first few difficult months. Mentors should be of the same gender.
if possible. While those of opposite genders can be mentors and often work quite well, those of the same gender can make each other feel at ease. This is particularly true, when the new member is shy or tends to be very quiet. A member of the same gender can understand better the complexities of career problems.

**Mentors Role & Responsibilities**

The first months after induction are a critical time for assimilating new members into your club. Mentoring a new club member requires involvement for at least six months while the newcomer becomes aware of and involved in club activities, committee assignments, attendance procedures and requirements, and becoming acquainted with his/her fellow Rotarians. In general, the mentor should assume the following tasks:

1. **Keep track** of the new member’s comfort level with and involvement in the club through periodic phone calls and personal contact.
2. **Breakfast** with the new member periodically and introduce him/her to other members.
3. **Explain the various Rotary committees** and identify the four service directors so the new person can meet with the director to help decide on a committee assignment. The mentor might discuss what committee assignment appeals to the new member—sharing his/her enthusiasm for a committee activity if the new member has not selected a committee—and invite the new member to join the mentor at a committee meeting.
4. **Inform the new member about special meetings** such as Firesides and attend the Fireside the new member attends. Be sure to tell the new member that spouses/significant others are also invited and encouraged to attend the Fireside and follow-up with a letter specifically inviting the spouse/significant other to attend. In addition or instead of Firesides your club may hold Rotarizing sessions (educational sessions where club members meet to give information about upcoming club events and to involve the new member(s) in the process.
5. **Keep track** of the new member’s attendance. If meetings are missed, offer to go along on a makeup.
6. **Keep track** of the new member’s involvement. If the member isn’t attending fundraisers or social events make a point of offering to travel with them to these.
7. **Mentors** should be advised to assist all new members.

**Mentors should reflect “Club” expectations**

Expectations are found in your attitudes, NOT on a piece of paper. Club Leaders and the Membership Team should analyze what expectations they wish to inculcate in new members. Agreement on this is an important step and shouldn’t be overlooked. If everyone in the club knows what traits and efforts a new member is expected to emulate then there will be a group effort to help new members reach those goals.

- In some clubs, many expectations are broadly shared.
- In others, only a few ‘essential’ expectations are shared.
- Sometimes, there are tremendous differences – and conflicts over – what should be expected of a Rotarian.
- What values and expectations do you want your Rotary candidates and new Rotarians to adopt?
- Select and train your Mentors accordingly

When you are establishing your expectations of a member of your club remember that the standard must apply to both your existing members and those you hope to attract. Do not set a standard for new members which is different from what you currently expect from existing members. A double standard never works so it is important to ensure the expectations you agree upon are how you currently measure your members. If you tell a new member that they must attend one hands on fundraiser a year to maintain membership then this must apply to all current members as well.
Some sample expectations:

**All Rotarians should:**
- Pay their dues promptly
- Attend all weekly meetings or makeup for absences
- Regularly contribute to the Foundation, even if modestly
- Be active as board member, committee chair or member.
- Participate in Service projects at least once a quarter
- Attend fellowship events at least once a year
- Chair or staff special events, i.e. fundraisers or fellowship
- Attend District Events
- Recruit new members
- Mentor prospects and new members

**Some sample expectations for First Year Rotarians:**
- Actively participate in at least one club committee
- Participate in at least one service project
- Attend several meetings of other clubs
- Attend club fellowship event
- Observe a club board meeting
- Attend at least one District event
- Do short classification talk before club members
- Read assigned Rotary material

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**Provide a Mentor Training and Information Package**

Provide the mentor with a Mentor Package (see below for possible mentor information) and ensure they attend the first Rotarizing or Fireside session with the new member.

Create a club Mentoring worksheet based on the values of your club. Ensure the mentor has a copy of the Mentoring worksheet as well as one to give to the new member. The mentor will be using this to help evaluate the new member’s progress and comfort level with the club.

Consider developing a club Information Handbook so the information the Mentor relays to the new member matches the expectations of the entire club.

See CD for Sample Club Handbook (this is a Word document you can adapt to your club)
See CD for Mentoring Package (this is a Word document you can adapt to your club)

**The club’s responsibility to Mentors**

Assigning mentors to new members isn’t the only responsibility of the club.

The club must use the mentor as a means of communicating with the new member. The mentor should be present whenever there is official club contact with a new member.

Whenever the secretary needs information on a new member, he or she should go through the mentor. If attendance becomes a problem, the club should use the mentor. If dues are not paid, or if contributions to the Rotary Foundation are not made, the club should use the mentor.

The club also has a responsibility to recognize the mentor. Recognition is the only pay that volunteers receive. Whenever the new member is recognized then the mentor should be recognized as well. When the new member gives his or her classification talk, the mentor should either stand on the platform alongside the new member, or be given appropriate recognition by the club president following the presentation.

**Celebrate Mentors Role**

Every club member should recognize the importance of being a mentor, the duties required and the responsibility. Choosing mentors carefully, giving them the authority to deal with new members and recognizing them for their efforts, will go a long way towards creating informed members, increase retention and make better Rotarians of both the mentor and the new member.
Welcome to Rotary – Mentoring Worksheet

NAME ____________________________________

The members of the Rotary Club of _______________ are pleased to help you learn and explore the many facets of Rotary. _______________ has been assigned as your mentor, who will answer your questions about procedures and help you succeed in providing service to others. Completion of items listed below within six months will expand your vision of opportunities for Rotary service.

Date Completed

1. Attend new member orientation meeting (Rotarized)   __________

2. Read the New Member handbook and log onto the Rotary website
   Rotary Handbook
   www.rotary5020.org
   www.rotary.org
   www.yourclubwebsite

3. Attend one or more of the following club functions
   Directors Meeting (additional to your 1st one!)
   Committee Meeting
   Fellowship Activity
   Other ____________________________

4. Complete one or more of the following tasks
   Serve as a Greeter at a club meeting
   Introduce or thank a guest speaker
   Give a classification talk at a club meeting
   Participate in a Club Service project

5. Make up a meeting at another club
   To replace a meeting you miss at the club

6. Extend Rotary to others (at least one)
   Invite a guest to Rotary
   Propose a new member

7. Experience the internationality of Rotary (at least one)
   Host a Youth Exchange student for a meal or other activity
   Host an outgoing, returning or visiting Group Study Exchange team member for a meal
   Invite a business or professional non-Rotarian to apply for Group Study Exchange

8. Attend one or more district meetings (listed in priority)
   District Assembly (Date______________)
   District Conference (Date______________)
   Foundation or Membership Seminar (Date______________)
   Other District meeting ________________________

9. Choose a committee on which you would like to serve

10. Accept an assignment to serve on a club committee

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RETENTION through EDUCATION

Retaining good members is critical to Rotary’s future. Retention begins with a positive induction experience and continues with frequent and meaningful communications, participation in club and district training activities, and regular attendance at weekly club meetings. Knowledge is power. Ensuring prospective, new and experienced Rotarians have access to current information on Rotary is a way to empower the club. Assigning someone on the Membership committee to create this attitude of ‘life long learning’ will enhance the Rotary experience for everyone.

Education for Potential Rotarians and Pre-induction Orientation

Proper member education should begin well before the induction ceremony. Educating potential members about the basics of Rotary club membership provides them with realistic expectations about the benefits and obligations of membership. Many clubs make special presentations to new members to inform them of the structure and history of Rotary, RI and district activities, as well as the club’s activities. These presentations provide an orientation for new and prospective members and their spouses and can feature current or past club leaders discussing various aspects of Rotary.

See CD for RI documents What’s Rotary (419) and This is Rotary (001)

In general, an information program for new members should cover the following subjects:

- The history and organization of Rotary International
- The two types of membership and the criteria for each
- The mission of Rotary
- The elements of an effective club and how clubs fulfill the purpose of each element
- Club projects — past and present
- Club and district structure and current officers
- Financial obligations that come with membership
- RI programs, with information on how members can get involved
- The Rotary Foundation of RI — its humanitarian and educational programs and how they are supported

Suggestions for New Member Education

- Before final approval for membership, provide each proposed member with a clear description of a member’s roles and responsibilities, the costs of membership in time and dollars, and assign the member to a committee of his/her interest when possible.
- Intentionally mentor, teach and model for new members. (In other words don’t let it happen by chance – give them a formal mentoring program so they learn the important basics of membership in your club and in Rotary)
- Conduct frequent and meaningful communications, participation in club and district training activities, and regular attendance at weekly club meetings.
- At each meeting share “What’s happening in Rotary” with newsletters, programs, “Rotary Moments” and awards. Membership Development happens when everyone feels involved.
- Get members to attend club firesides, social activities, district assemblies and conferences.
Continuing Education for Members

Research has shown that a positive program of continuing education can help increase a club’s overall retention rate. This would include some of the following components:

- Frequent communication of Rotary news and information
- A set number of club programs focused on continuing education, per year
- Attendance at multi-district meetings that address continuing education
- At least two informational club assemblies a year
- Attendance at meetings of other clubs
- Personal involvement of Rotarians in club and district projects and activities, particularly those that require hands-on action
- District-level seminars on continuing education
- Stimulating and efficiently run weekly meetings
- Sharing of ideas and information on Rotary programs, projects, and activities at regular committee and informal meetings

Members will feel more a part of the club and Rotary’s mission if they are kept abreast of changes and events. Use your club and district Web sites, weekly meetings and e-mails, and club bulletins to share information from your district governor or the RI Secretariat. Make sure everyone knows about such RI programs as Youth Exchange, Ambassadorial Scholars, and World Community Service. Becoming involved in one of these programs can spark a lifelong commitment to Rotary. Encourage all members to attend the district conference and the RI Convention as a way of meeting many Rotarians and learning more about Rotary’s activities worldwide.

RI publications are also excellent continuing education tools. By reading publications such as THE ROTARIAN, regional magazines, and Rotary News Basket, club members can stay up-to-date on Rotary activities worldwide. Members should be encouraged to access the RI Web site (www.rotary.org) to keep abreast of current events and resources.

All clubs are urged to establish and maintain a club library of current RI materials.

See CD for resources that all Rotarians should have access to including Official Directory (007EN), Catalog (019EN), Manual of Procedure (035EN), Rotary Fact Pack (267EN), The District Rotary Foundation Manual (300EN) and Rotary Basics (595EN)

MEMBERSHIP TIP:

Involve Past Presidents in the Educational Process

Invoking your Past Presidents in the education process can be rewarding for this group as they have a wealth of knowledge and experience to share. Get them involved to help nurture the health of the club through education. Devote one club program per month to ‘Rotary Education’. For example, the Past Presidents could find a speaker from outside the club such as an Ambassadorial Scholar or returning Group Study Exchange participant or a District resource person such as the Foundation Chair.

A Past President could present a program on a specific area of Rotary by researching the topic. The Rotary International website is a good resource as the current changes are featured there.

Another option is to use the game “Know When to Hold ‘Em”. The intention of this game is to get the entire club enthused and involved in the education process.

See CD for ‘Know When to Hold ‘Em’ education program
RETENTION through INVOLVEMENT and FELLOWSHIP

Measuring Member Involvement – Engage Your Club Members
Rotary has traditionally measured the number of meetings members attend. There are special badges for 100% attendance and this recognition is valued by those who have attained this either yearly or perhaps through their entire Rotary involvement.

But is attendance enough? If a Rotarian is just attending the club meetings but not participating in the fellowship events, club committees, club mentor programs, fundraisers or community and international projects – is that person really a Rotarian? Are they getting enough out of Rotary? Is the club getting value from that member? Continue to track attendance and ensure your members are at the meetings but also consider tracking how engaged they are. If you keep records of what each member has been involved with during the year you have the opportunity to learn two things. One, which Rotarians need help finding their niche or true interest in Rotary so they won’t leave for lack of involvement. Two, which Rotarians may be doing more than their fair share and may leave because they are over involved and burning out.

There are many ways of approaching the concept of Engaged Rotarians in your club. You can determine the activities that make up the core of your club. These are the activities or tasks you expect all of your club members to participate in. Then you can define the activities or responsibilities that are valuable but not mandatory. Then there are the bonus activities or tasks that allow members to do something special or different to add value to the club that is above and beyond what is needed or expected.

Given these three areas you can have your club members indicate which they participated in each week and collect this information from the Rotarians who are your club’s welcoming committee each week. When the information relates to new members share it with their mentor. If you prepare a quarterly report for the executive they will benefit from knowing how involved the club is. It can also be an indicator of which club projects are more popular.

See CD for Engaged Rotarian Tracking Form (this is an Excel document you can edit)

Involving New Members
Involving all Rotarians in club committees, club fundraisers, board meetings, club meetings, and club social activities.
It is a very unfortunate occurrence to receive a letter of resignation from a member who didn’t feel “a part” of the club. Consider the following methods of getting new members involved in the affairs and activities of the club:

- Develop programs such as STAR (Special Training for Action in Rotary). By creating a friendly and informal atmosphere through small group meetings, programs such as STAR help new members get acquainted with each other and some of the club’s more experienced Rotarians. See CD for STAR and Blue Badge training programs
- Create special name badges for new members to wear for one year. Encourage other members to look for the badges and make a special effort to talk with the new members.
- Assign a new member to be a greeter or to introduce a guest speaker.
- Have a new member serve as a delegate to the district conference, as a club service assignment. A new Rotarian learns much about the world of Rotary and the vast projects beyond the borders of his or her own club by attending the district conference. Some clubs assist the new member by paying part or all of the registration fees and costs of the conference. After the conference, ask the new members to give a report to the club.
- Introduce a “commencement” program, where all club members who join in the same Rotary year work together on a project or meet on a special occasion.
- Encourage them to experience the internationality of Rotary by: hosting a Youth Exchange student, Ambassadorial Scholar, or a Group Study Exchange team member for a meal or other activity; hosting a Rotarian from another country in their home; inviting a business or professional non-Rotarian to apply for Group Study Exchange; or inviting a non-Rotarian to apply for a Rotary Foundation scholarship.
- Ask new members, especially younger ones, to find two or three other new members from among their peer group. When new members promote the Rotary idea to their friends, they become stronger and more enthused about Rotary. We therefore address both the need for retention and the challenge of membership growth and diversity.
In all of this, many clubs find it wise to involve the new member’s sponsor. The sponsor keeps close contact with the new Rotarian for at least the first six months, until the new member is truly involved in the club. This is a win-win situation because you are involving both a new member and valuing the experience of the mentor who has likely been a Rotarian for a few years.

Involving All Rotarians

- Establish a new member group, task force or committee. Work with the new member group to identify some new member projects. Have an experienced Rotarian coordinate with the new members. This involves both new and experienced members.
- At each meeting share “What’s happening in Rotary” with newsletters, programs, “Rotary Moments” and awards. The more new Rotarians learn the more reason they will have to be excited about Rotary.
- At regular club meetings report the district and Rotary International conferences, share the outcomes and results of club projects, conduct committee planning sessions, share “sources of pride” and involve members in goal setting, needs assessments, and award programs.
- The perception of Rotary within each community directly affects the ability of our Rotary clubs to attract and retain members. People are attracted to what they ‘think’ Rotary is about so ensure your club is sending out a clear and constant message to your community. Help your new members be ambassadors of this message by ensuring they know what image the club wants to project. For example younger members are attracted to clubs that are ‘doing things’ in the community and internationally.
- Attracting the public’s and the media’s attention requires hard work. Each Rotary story must have significant news value. Don’t wait for someone to interview your club members or print an article for your club, take proactive steps with the Club Public Relations Director to get articles into the local papers and radio stations on a monthly basis. Involve new members in this process. Find out what attracted them to the club and promote those programs or projects. Blow your club’s horn!
- Compare “hands on” service versus $$$$ fundraising so new members know that their time is valued. Measure the involvement level of all members by what they are doing within the club. Have them share their new experiences – first hands on project – first time organizing a fellowship event – first time working with the Interact club, etc.
FELLOWSHIP

Club Service is the cornerstone of an invitational, friendly and active Rotary club. Club Service is a commitment to quality membership and service. Rotary’s success can only be achieved through a membership that has fully engaged their head, heart, and hands in service to their work, family, friends, and mankind.

Club Service leadership must keep the club’s leadership and membership aware of and working to improve the club’s culture, programs, and fellowship activities, as well as its membership recruitment, development and retention initiatives. Cooperation is a two-way street. We get the best out of people when we ask a more of them that they think they can do. Club Service and Membership leadership must challenge, stimulate, cultivate, teach and recognize members to be and become more than they believe they are and can do. Satisfaction and pride results are an individual’s best motivational resource.

A quality Club Service Plan reflects deep commitment to the club’s members, a genuine concern for the member’s families, and a set of values that supports Rotary International’s 4-Way Test, international service programs, and the club’s role in and responsibility to its community. The Annual Plan should a blueprint that is designed to inform the membership and the community about Rotary’s history, mission, local and worldwide services and achievements. A well thought out and supported Club Service Program can contribute significantly to a satisfied, inspired, diverse, and active membership. It can teach and organize its membership to welcome, encourage, and care for its members and guests. Through its meeting agendas, awards programs, newsletters and PR initiatives, it can help its membership take pride in the club’s members successes, good health, and self-worth.

At the Club Level

The Club Service Committee promotes the spirit of acquaintance. Fellowship is created through special events and activities that bring the club’s membership together in informal as well as formal activities. Fellowship is an important part of every weekly club meeting. Club firesides, “hands-on projects, family activities and special events including the celebration of club anniversaries create fellowship. The responsibility to create “fellowship” begins with the president and is shared with the greeters, officers, fine master, and every member of the club. The Club Service Committee is responsible to helping create a caring, sharing and daring Rotary Club. It is responsible for bringing and keeping the membership together and growing.
RETENTION through RECOGNITION

When and How to Recognize Rotarians

There are a variety of opportunities to recognize Rotarians. The first is a member’s induction. After induction there should be a systematic approach. Create a list of goals from attendance to leadership roles, and design a system to recognize those who exemplify and carry out these roles or tasks. Ensure the system your club creates is consistent. Publish the criteria for this recognition program so Rotarians have benchmarks to aim for.

New member initiation and induction

The initiation and induction of new members must present a clear and accurate message about what makes Rotary unique. It must explain the international focus of Rotary’s service and fellowship as well as our high standards for integrity in the professions and business. The information should describe the unique qualities of Rotary and underscore the benefits and responsibilities of membership. When the induction ceremony is meaningful and dignified and the new member participates in programs and activities designed to promote a very involved and knowledgeable membership, new members feel accepted and committed.

Some clubs have a Membership committee member who has memorized the induction script so they are talking face to face rather than reading.

Suggestions for New Member Initiation & Induction

1. Acquire a nametag for new members as quickly as possible along a “new member” tag. Explain this tag can be removed when they have attended a Directors Meeting, visited another Rotary Club and completed a Rotarizing or Fireside session. The mentor and/or nominator should accompany the new member at their induction to speak about them.
2. A Rotarizing or Fireside session should present a clear and accurate message about what makes Rotary unique. It must explain the international focus of Rotary’s service and fellowship as well as our high standards for integrity in profession and business. Along with this should be the benefits and responsibilities of membership. Ensure the new member understands the financial and time commitments. The President’s help with the annual committee lists is very valuable. This is the opportunity for a new member to pick the area of service they wish to be involved in. It is also the opportunity to have them pick the club committee they wish to help with.
3. The Induction ceremony should be meaningful and dignified so new members feel accepted and committed. All Rotarians should shake the hand of a new member and welcome them to the club.

Supplies & Procedures for Induction Ceremony

- Present a New Member package complete with pin, copy of the 4-Way Test, list of club members, membership certificate, and club information guide.
- Invite the new member’s spouse or family or employer and recognize them for their importance and support. Describe clearly and briefly the member’s responsibilities.
- Do not unreasonably delay the induction ceremony.
- Announce which committee the new member will be participating in.
- Have someone take a photo of the new member and publish it the local newspaper, on the club Website and in the club bulletin.
- Coordinate the induction with the President to ensure the evening runs smoothly. Together pick a club member or visiting Rotary dignitary (ie: DG) to perform the induction.
- Call on the nominator or mentor to say some welcoming words of introduction about the new member.
NEW MEMBER INDUCTION SCRIPTS

____________________, you have been selected by the Rotary Club of ______________ to become one of us.

Membership in Rotary is an honour and a privilege and, with all things worth doing in life, it comes with duties and responsibilities. You will be expected to participate in club activities and to attend club meetings on a regular basis. When you are unable to attend you will be expected to seek out another Rotary club meeting to make up your attendance. Making up this club meeting is not a problem in the World of Rotary because with some 31,000 clubs around the world there will always be a Rotary club waiting to meet you.

____________________, today you become an ambassador of our club and your ideals. Knowing you to be a Rotarian, the world will now judge Rotary by your conduct.

We trust you will be inspired and stimulated by the friendship you find here and throughout the Rotary world. We are giving you a club banner for your next trip, be it business or pleasure. Visit a club where you are traveling and present this banner. We look forward to you bringing back your story of this Rotary experience.

Fellow Rotarians, please rise and welcome ____________________, at this moment the world’s newest Rotarian.

ROTARIAN INDUCTION SCRIPT

____________________, you have elected to the membership of the Rotary Club of ______________ because your fellow members believe you to be a worthy representative and you possess qualities that will permit you to exemplify the true spirit of Rotary in your public, business, social and private life.

I wish to impress upon you that you have been admitted not only to the Rotary Club of ______________, but also to a worldwide association; and by virtue of your membership in this club, you will be welcomed into the fellowship of any Rotary club in the world.

The honour and privilege of Rotary membership carries with it duties and obligations. You will be expected to attend the club’s meeting regularly, to perform your share of club service and to place your knowledge and talents at the disposal of the club in its task of carrying the principals of Rotary into the daily life of the community.

Fellow Rotarians, please rise and welcome ____________________, at this moment the world’s newest Rotarian.

FORMER ROTARIAN INDUCTION SCRIPT

Thank you, __________________, for accepting the invitation of membership in the Rotary Club of ______________ to rejoin the worldwide fellowship and service work of Rotary. This invitation is extended to you because we believe that your leadership qualities prepare you to interpret and impart the message of Rotary in this community.

We look forward with confidence to your participation in the contribution to the ______________ Club programs, projects and activities. Much is expected of you in help and inspiration to enable us to better serve your community. I congratulate you and offer you the right hand of Rotary in fellowship.

Fellow Rotarians, join me extending a warm welcome to our new member, ______________.
Recognition at Every Opportunity

Rotarians are known for ‘service above self’. They don’t tend to be looking for acknowledgement of what they achieve. It is probably one of the reasons clubs don’t concentrate on Public Relations. Rotarians tend to not want to ‘blow their own horn’. While this is admirable it can limit the community’s awareness of Rotary. When members of your club work on a project or participate in any Rotary program (internationally, district level or in your club) there should be a system to recognize what has been achieved.

Establish a formal program for acknowledging achievements within your club. Take it one step further by creating a formal system for acknowledging these achievements and those which take place at the District or International level to advertise to the general public. Work with the club Public Relations director to achieve this worthwhile program of recognition.

Potential members will be drawn to a club that ‘gets things done in the community’. Members of the club will be known in the community as ‘people you can count on’. This will increase the sense of pride in your Rotary club.

Recognition suggestions:

- Recognize the work of model members with awards at regular meetings and special dinners so new members will recognize the values of the club.
- Take on the challenge of achieving the requirements of the Presidential recognition program. This can be downloaded from the RI website or contact your District Membership Chair. Did you meet your growth numbers? Did you attract new members through a unique recruiting program you can share? Do your new members have suggestions for retention programs you can implement that fit the recognition awards?
- Track the involvement of members in the activities and projects of the club. Recognize members for the contributions they make. Track this for community, international and fellowship involvement and acknowledge it at meetings or in the club bulletin.
- When a member of the club receives professional acknowledgement ensure it is featured within the club through the bulletin or at a meeting.
- Rather than photos of a completed project, send photos of club members working on a project for the press releases to the media. This is a way of recognizing Rotarians at work in their community.
- Recognize first time achievements of Rotarians, such as first contribution to the Rotary Foundation.
Why Leave Rotary?

Even though your club has taken all the suggestions outlined in this sourcebook as well as other steps to ensure you have your members engaged ... Rotarians still leave. Why would they leave? Rotary International has researched that question too. There seem to be the top ten reasons and they vary in order but the one major reason they go is “Lack of Leadership”.

Those three little words say a lot.
Lack of Leadership can mean:
No plan
A plan but it isn't shared
A plan that is shared but isn't measured
Lack of a vision
Simply a club that isn’t doing things

There are lots of ways you can look at Lack of Leadership or any of the other reasons Rotarians have given for leaving. The way for your club to find out why Rotarians leave is to ‘ask them’.

There are a variety of ways to do this.
1. Informal meeting to discuss why they are leaving
2. A formal exit survey with an enclosed stamped envelop
3. A formal exit survey and a follow up chat in person or by phone

Regardless of how you ask, the key is to ensure you find out what would have kept that Rotarian in the club. Discover the things that might keep other Rotarians from leaving.

This goes back to assessing your club. Once you have this information from a Rotarian who has left, act upon it.

Don’t fall into the rut of denial. It is common to become defensive about comments. Your Rotary club may be too close and personal and it is easy to want to protect it. The comments from a Rotarian who is leaving are valid. If the club has a committee that will review exit surveys or comments and consider change or solutions you may have discovered the true way to retain your members.

Have a membership committee, a membership plan, coordinate this plan with the overall club plan and ensure the Rotarians in your club know if the goals for Membership are being met. All the goals from the number of new members for the year, the percentage of members the club retains in the year and the other retention goals such as mentoring, education, recognition and involvement.

See CD for Resigning Member Questionnaire
Resigning Member Questionnaire is included in the Appendix at the back of the sourcebook
APPENDIX
Shared Suggestions for Member Development and Retention from District 5020 Rotarians

• Involve each member. Seek out “unheard voices” prior to making major decisions.
• Acknowledge individual member ideas and concerns.
• Honor and use the historical and organization memory and leadership skills of past-presidents and officers of your Rotary club.
• Our clubs are compendiums of process. Board meetings, assemblies, retreats, conferences, committee meetings, club meetings and conventions can keep members involved, contributing and learning. We must have a unifying VISION to give our members purpose. In the world of Rotary, the club president provides this VISION and keeps the club’s members actively pursuing the vision and the club’s goals and action plans.
• If you ask a member to serve on a committee or volunteer to do a job, make sure that the member understands the assignment, that the committee meets, and that the job is a worthy use of the member’s time.
• Pay attention to members who do not have good attendance and who are late renewing their membership.
• Send members renewal reminders long before it is time to pay dues.
• Hold “assemblies” in the town meeting format to provide the club’s membership an open forum to discuss anything that they want with club leaders.
• Recognize the service and professional accomplishments of club members and send them congratulatory notes.
• Send thank you notes to members when they complete a project.
• Conduct exit interviews with or send a questionnaire to members who resign.
• When a member is leaving to move to a new community, send a letter of introduction to the Rotary clubs in that area.
• Always make past-members feel welcome to visit your club and participate in projects.
• Make the family always feel welcome…Rotary must become a family membership and commitment. Hold family events and plan family involvement projects.
• Make-ups…create opportunities for cyberspace member activities and make-ups.
• Highlight at every meeting the “Rotary Moment” and involve past club presidents and officers to tell stories about past achievements and moments in their Rotary membership. What did the club do in the past that they are proud of? Ask them to tell why they value and are proud of being a member of your Rotary club.
• THINK OUT OF THE BOX….create a dinner meeting program “Guess who is coming to dinner”? Use the red to blue badge process to educate and involve new members, plan for succession, and do exit interviews.
• Promote fun and fellowship. Use ice-breakers, mixers, and “Happy Bucks” to inspire and celebrate every member.
• Create a Rotary Club Chat Room on your website.
ROTARY SURVEY RESULTS

If you are contemplating doing exit questionnaires when members leave your club you may want to measure the results against those compiled by Rotary in a 2004-2005 Membership Survey.

![Factors for Membership Loss](image1)

As well as measuring the reasons members left the survey concentrated on the areas where clubs are being the most successful.

![Areas in which Clubs are Excelling](image2)
Membership CD Index
This planning guide is a tool to help your club establish the goals and procedures for both increasing and retaining the membership of your club.

The greatest resource of your club and of Rotary International are individual Rotarians. With them your club can do incredible things - without them there is no future for Rotary. Use this plan to create the sustainability of your club and Rotary. Review it monthly.

**DEMOGRAPHIC INFORMATION**

Number of Club members as of July 1st: ____________ Number last July 1st: __________

Number of Club members who are male: ____________

Number of Club members who are female: ____________

Number of Club members in each of the following age groups:

Under 35: __________ 35-45 yrs: __________ 46-55 yrs: __________

56-65 yrs: __________ Over 65: __________

Club Past Presidents: (Are you successful keeping Past Presidents in your club?)

Still in Club: __________ Deceased or relocated: __________

Classifications in use (change these classifications to match those of your club)

Number Retired: __________ Real Estate: __________ Retail: __________

Building/Trades: __________ Manufacturing: __________

Financial/Banking/Insurance: __________ Legal: __________

Wellness(medical): __________ Other: __________ Other: __________

Number of YEARS IN ROTARY of Club members:

0-5 yrs: __________ 6-10 yrs: __________ 11-15 yrs: __________

16-20: __________ 21-25 yrs: __________ Over 25: __________

This information will give you the “picture” of your club as it is now
THE WHO & HOW of GETTING and KEEPING GOOD ROTARIANS

1. How many members would you like in your Club on July 1st of next year: __________
   How many of your current members will you have to replace: __________

2. Who do you want those members to be?
   Do you need more women or more men? Are local ethnic groups represented?
   Do you need more Rotarians who are under 40 years of age?
   Are there classifications you wish to fill within your Club?

If you set a goal of who you want to attract and how many people you want to have
join your club you will be more successful achieving your results. If you write it down
and monitor it monthly “it will happen”.

Who: ____________________            How Many:  ____________________
   Ages:  ___________________            Classifications:  _________________

3. How will you attract new members? What will your recruitment techniques be?
   [ ] Club in a Club (www.clubinaclub.com)
   [ ] Divide the Club into teams and set a goal for each team
   [ ] Create a Public Relations campaign about being a Rotarian
   [ ] Have every retired Club member propose a member in their former classification
   [ ] ______________________________________________________________________

Use as many recruitments techniques at one time as you want - monitor each separately so you know which is best

<table>
<thead>
<tr>
<th>RECRUITMENT TECHNIQUES</th>
<th>WHO IS IN CHARGE</th>
<th>WHEN WILL IT HAPPEN</th>
<th>WHO WILL FOLLOW UP</th>
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Set a GOAL to follow up monthly on the entire plan - Don’t file it away
It is a “living” document for you to update regularly

GETTING & KEEPING GOOD ROTARIANS

Service clubs around the world are decreasing in size because they haven’t planned for
their future growth. There is truth in the old saying: “failing to plan is a plan for failure”
THE MENTORING PLAN for GETTING and KEEPING GOOD ROTARIANS

The largest loss of new members happens within the first three years of joining a Rotary Club. Surveys show they leave because Rotary didn’t meet their expectations. They did not feel involved or necessary. If your Club is going to go to all the work of recruiting new members then an equal amount of time and energy has to go into “mentoring” them.

1. How will you mentor prospective members?
   [ ] Hold information meetings where the commitments of Rotary are clearly outlined
   [ ] Invite prospects to attend meetings for several months prior to proposing them
   [ ] Hold one-on-one meetings with prospective members to clarify commitment

2. How will you mentor New Rotarians after they join your Club?
   [ ] Hold mentoring workshops to train all the members of the club on how to be a mentor both for one-on-one mentoring and group mentoring
   [ ] Assign a mentor to each New Rotarian
   [ ] Create a mentoring program to monitor the progress of a New Rotarian
   [ ] Create a membership package that includes a Club handbook and RI information
   [ ] Hold Rotarizing meetings with the Mentors and New Rotarians
   [ ] Create satisfaction survey for new members to determine what is working and what is not meeting their expectations within the club

<table>
<thead>
<tr>
<th>MENTORING TECHNIQUES</th>
<th>WHO IS IN CHARGE</th>
<th>WHEN WILL IT HAPPEN</th>
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Your District Membership committee is a resource for material so contact them

GETTING & KEEPING GOOD ROTARIANS

Now comes the tricky part. You recruited new Rotarians, you mentored them, now how do you KEEP THEM? Knowledgeable … Active … Building a Better Community & World …
THE RETENTION PLAN for GETTING and KEEPING GOOD ROTARIANS

EDUCATION COMPONENT

The concept that knowledge is power can be helpful when determining what your Club members would appreciate knowing more about. Things change in Rotary. New programs are created that many Rotarians are not aware of. Existing programs get updated.

Using the concept of ‘life long learning’ you can help your Club members grow.

1. How will you create an interesting approach to educating your Club members?
   [ ] Survey your Club members to discover the areas of Rotary they would like to learn more about
   [ ] Ask Past Presidents and members who have been in the club over ten years to put their Rotary knowledge to work to lead educational sessions
   [ ] Continually offer Rotary International material or website locations for your club
   [ ] Use games such as ‘Know When To Hold ‘Em’ from District 5020 Membership Sourcebook CD
   [ ]

<table>
<thead>
<tr>
<th>EVERY MEMBER NEEDS EDUCATION</th>
<th>WHO IS IN CHARGE</th>
<th>WHEN WILL IT HAPPEN</th>
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There are many Rotarians who will help with the education process for your Club. Contact your District Membership committee for help.

GETTING & KEEPING GOOD ROTARIANS
THE RETENTION PLAN for GETTING and KEEPING GOOD ROTARIANS

INvolVEMENT

To quote Carolyn Jones (first female Trustee of the Rotary Foundation) “They want to do something for their community. I never heard a Rotarian give personal hunger as the reason for joining Rotary. Realistically, if they want to make business contacts, they can join the Chamber of Commerce. If they want new friends, they can join a church or a social club. True Rotarians join or remain because the club is doing something that makes them feel proud to be a Rotarian.”

1. How will you help foster the reasons for a Rotarian to remain in your Club?
   [ ] Encourage current and new members to propose projects both in the community and internationally they would like to participate in or with
   [ ] Survey your members to rate the projects you have done and to consider which could be on going. Ask for new ideas for projects
   [ ] Work with another club on a co-operative project
   [ ] Schedule regular Firesides (Rotary information sessions) to encourage involvement
   [ ] Encourage involvement in Club committees and directorates
   [ ] Track each member’s participation in projects and committees as well as how often they attend club meetings. Discover how ‘engaged’ they are in the club.
   [ ] _____________________________________________________________________

<table>
<thead>
<tr>
<th>EVERY MEMBER NEEDS TO</th>
<th>WHO IS IN CHARGE</th>
<th>WHEN WILL IT HAPPEN</th>
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<td>MAKE A MEANINGFUL CONTRIBUTION</td>
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Attend the District Conference and District Training Assembly and use it as an opportunity to talk to other Clubs to find out what they do to involve members

GETTING & KEEPING GOOD ROTARIANS
FELLOWSHIP AND RECOGNITION

Fellowship is the unexpected bonus of becoming a Rotarian. It was one of the key reasons Paul Harris started Rotary. He wanted to make friends when he moved to Chicago.

1. How will you help foster the fellowship of your Club?
   [ ] Schedule regular social events for the Club
   [ ] Schedule regular projects where Club members work side-by-side getting to know one another while accomplishing something meaningful
   [ ] _______________________________________________________________

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<thead>
<tr>
<th>EVERY MEMBER NEEDS</th>
<th>WHO IS IN CHARGE</th>
<th>WHEN WILL IT HAPPEN</th>
<th>WHO WILL FOLLOW UP</th>
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<td>FELLOWSHIP</td>
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1. How will you recognize or acknowledge the members of your Club?
   [ ] Create a Club committee that researches District/ RI recognition programs
   [ ] Have a weekly Membership Minute where Club members are recognized
   [ ] Make the Induction a special ceremony - invite family & friends
   [ ] _______________________________________________________________

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<tr>
<th>EVERY MEMBER NEEDS</th>
<th>WHO IS IN CHARGE</th>
<th>WHEN WILL IT HAPPEN</th>
<th>WHO WILL FOLLOW UP</th>
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GETTING & KEEPING GOOD ROTARIANS
Membership Satisfaction Questionnaire

This survey is intended for use by the club. All club members should complete this questionnaire to help assess member satisfaction with club activities and projects.

Please return completed forms to the club secretary. Your response is confidential.

Do you feel welcome in our Rotary club? [ ] Yes [ ] No
If no, why not?

(Please mark all that apply)
[ ] I feel demographically isolated:
(Please mark the appropriate response)
[ ] Other members were older younger different gender different ethnicity
[ ] Other demographic reason
[ ] I have not made an effort to meet other members
[ ] Other members have not made an effort to interact with me

Do you feel comfortable sharing concerns with club leaders?
[ ] Yes [ ] No
If no, why not?

(Please mark all that apply)
[ ] Club leaders have so many responsibilities I do not want to burden them.
[ ] Club leaders have their own agenda and are not interested in other ideas.
[ ] I have not been a member long enough to feel comfortable approaching club leaders.
[ ] I do not want to be perceived as a complainer.
[ ] Other

How do you feel about the level of our club’s involvement in the following types of activities?
(Mark appropriate response)

<table>
<thead>
<tr>
<th>ACTIVITY LEVEL OF CLUB INVOLVEMENT</th>
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<tbody>
<tr>
<td>Membership Development</td>
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<tr>
<td>Orientation and Education</td>
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<tr>
<td>Local Service Projects</td>
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<tr>
<td>International Service Projects</td>
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<tr>
<td>Club Public Relations</td>
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<tr>
<td>Fundraising</td>
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<tr>
<td>The Rotary Foundation</td>
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<tr>
<td>Fellowship</td>
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</tbody>
</table>

Have you participated in club projects and activities? [ ] Yes [ ] No
How did you become involved? [ ] I volunteered [ ] I was asked

Please indicate your involvement in the following types of activities:

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>LEVEL OF INVOLVEMENT</th>
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</thead>
<tbody>
<tr>
<td>Membership Development</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
</tr>
<tr>
<td>Orientation and Education</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
</tr>
<tr>
<td>Local Service Projects</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
</tr>
<tr>
<td>Intern'l Service Projects</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
</tr>
<tr>
<td>Club Public Relations</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
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<tr>
<td>Fundraising</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
</tr>
<tr>
<td>The Rotary Foundation</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
</tr>
<tr>
<td>Fellowship</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
</tr>
<tr>
<td>Other</td>
<td>[ ] I am currently involved [ ] I would like to be involved</td>
</tr>
</tbody>
</table>
I am VERY SATISFIED/ SATISFIED/ DISSATISFIED with my participation in club activities and projects. (Circle the appropriate response)
If you are dissatisfied, why? (Please mark all that apply)

[ ] Insufficient knowledge [ ] Lack of resources
[ ] Personality conflicts [ ] Lack of support from other members
[ ] Cost [ ] Insufficient family involvement
[ ] Personal time conflicts [ ] Other

How do you feel about the following costs associated with membership in our club?

<table>
<thead>
<tr>
<th>TYPE OF COST</th>
<th>PERCEPTION OF COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club dues</td>
<td>Excessive [ ] Reasonable [ ] Inadequate</td>
</tr>
<tr>
<td>Cost of weekly meetings</td>
<td>Excessive [ ] Reasonable [ ] Inadequate</td>
</tr>
<tr>
<td>Club fines/assessments</td>
<td>Excessive [ ] Reasonable [ ] Inadequate</td>
</tr>
<tr>
<td>Voluntary contributions to service projects</td>
<td>Excessive [ ] Reasonable [ ] Inadequate</td>
</tr>
<tr>
<td>Voluntary contributions to The Rotary Foundation</td>
<td>Excessive [ ] Reasonable [ ] Inadequate</td>
</tr>
</tbody>
</table>

Do you enjoy our weekly meetings? [ ] Yes [ ] No
Please circle the appropriate response in the following questions:
The amount of Rotary content in our meetings is ADEQUATE / EXCESSIVE / INSUFFICIENT
The length of our meetings is ADEQUATE / EXCESSIVE / INSUFFICIENT
Our club should have MORE / SAME AMOUNT / FEWER fellowship activities.
Our club bulletin contains SUFFICIENT / EXCESSIVE / INSUFFICIENT Rotary information.
Our club bulletin is (please circle all that apply) INTERRESTING / USEFUL / INFORMATIVE / BORING / LIMITED / UNINFORMATIVE.
Our meetings are WELL ORGANIZED / POORLY ORGANIZED.
Our meeting time is CONVENIENT / INCONVENIENT.
If inconvenient, suggestion for an alternate time:
The location of our meeting is CONVENIENT / INCONVENIENT.
If inconvenient, suggestion for a different location:

Which of the following aspects of our meeting place do you find to be unsatisfactory?
(Mark all that apply)
[ ] Service [ ] Decore/atmosphere
[ ] Meal quality [ ] Meal variety
[ ] Parking availability [ ] Safety of the area in which it is located
[ ] Other

Suggestion(s) for change:
The following changes would improve our club meetings:
[ ] Better speakers [ ] More focus on fellowship
[ ] Increased variety of program topics
[ ] Increased emphasis on vocational information
[ ] More involvement of family [ ] Better time management
[ ] More service opportunities [ ] More leadership opportunities

Is there anything else you would like to see changed?
How does your spouse/partner/family feel about your involvement in Rotary?
[ ] Proud of my involvement
[ ] Feels it takes too much of my time
[ ] Wants to know more/be involved
[ ] Feels it is too expensive
[ ] Seeks interaction with other Rotary spouses/partners/families
[ ] Other

Thank you for taking the time to complete this questionnaire and for your commitment to improving our club.

Please hand this survey into the Club Secretary

Membership Satisfaction Survey
Resigning Member Questionnaire

We regret that you are leaving our club. This questionnaire will help us assess your satisfaction with your experience as a member of our club. The information you provide will benefit current and future club members. Please return the completed questionnaire to the club secretary.

Why are you leaving our club? (Please mark all that apply)
[ ] Relocating to a new community  [ ] My fellowship expectations were not met
[ ] Lack of time      [ ] My service expectations were not met
[ ] Competing priorities  [ ] My networking expectations not met
[ ] Financial constraints  [ ] Did not feel included
[ ] Other

If you are moving, would you consider joining a Rotary club in your new place of residence or occupation? [ ] Yes [ ] No
Did you feel welcome in our Rotary club? [ ] Yes [ ] No
If no, why not? (Please mark all that apply)

I felt demographically isolated: (Please mark/circle all reasons that apply)
Other members were OLDER / YOUNGER / DIFFERENT GENDER / DIFFERENT ETHNICITY.
[ ] Other demographic reason
[ ] I did not make an effort to meet other members.
[ ] Other members did not make an effort to interact with me.

Did you feel comfortable sharing concerns with club leaders? [ ] Yes [ ] No
If no, why not? (Please mark all that apply)

[ ] Club leaders had so many responsibilities
[ ] I did not want to burden them.
[ ] Club leaders had their own agenda and were not interested in other ideas.
[ ] I was not a member long enough to feel comfortable approaching club leaders.
[ ] I did not want to be perceived as a complainer.
[ ] Other

Did you participate in club projects and activities? [ ] Yes [ ] No
How did you become involved? [ ] I volunteered [ ] I was asked

I was VERY SATISFIED / SATISFIED / DISSATISFIED with my participation in club activities and projects. (Please circle the appropriate response.)

If you were dissatisfied, why? (Please mark all that apply)
[ ] Insufficient knowledge  [ ] Lack of resources
[ ] Personality conflicts  [ ] Lack of support from other members
[ ] Cost      [ ] Insufficient family involvement
[ ] Personal time conflicts  [ ] Other
How do you feel about the level of our club’s involvement in the following types of activities?

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<thead>
<tr>
<th>ACTIVITY</th>
<th>LEVEL OF CLUB INVOLVEMENT</th>
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<td>Membership Development</td>
<td>[ ] Excessive [ ] Adequate [ ] Insufficient [ ] Unaware</td>
</tr>
<tr>
<td>Member Orientation</td>
<td>[ ] Excessive [ ] Adequate [ ] Insufficient [ ] Unaware</td>
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<tr>
<td>Local Service Projects</td>
<td>[ ] Excessive [ ] Adequate [ ] Insufficient [ ] Unaware</td>
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<tr>
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<tr>
<td>Fellowship</td>
<td>[ ] Excessive [ ] Adequate [ ] Insufficient [ ] Unaware</td>
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How do you feel about the following additional costs associated with membership in our club?

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<th>TYPE OF COST</th>
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Did you enjoy our weekly meetings? [ ] Yes [ ] No

Please circle the appropriate response in the following questions:

The amount of Rotary content in our meetings was ADEQUATE / EXCESSIVE / INSUFFICIENT.

The length of our meetings was ADEQUATE / EXCESSIVE / INSUFFICIENT.

Our club should have held MORE / SAME AMOUNT / FEWER fellowship activities.

Our club bulletin contained SUFFICIENT / EXCESSIVE / INSUFFICIENT Rotary information.

Our club bulletin was (please circle all that apply) INTERESTING / USEFUL / INFORMATIVE / BORING / LIMITED / UNINFORMATIVE.

Our meetings were WELL ORGANIZED / POORLY ORGANIZED.

Our meeting time was CONVENIENT / INCONVENIENT.

Suggestion for change (if appropriate)

The location of our meeting was CONVENIENT / INCONVENIENT.

If inconvenient, suggestion for a different venue

Resigning Member Questionnaire

Which of the following aspects of our meeting place do you find to be unsatisfactory? (Mark all that apply)

[ ] Service  [ ] Decore/atmosphere
[ ] Meal quality  [ ] Meal variety
[ ] Parking availability  [ ] Safety of the area in which it is located
[ ] Other
Suggestion(s) for change
The following changes would improve club meetings:
[  ] Better speakers    [  ] More focus on fellowship
[  ] Increased variety of program topics
[  ] Increased emphasis on vocational information
[  ] More involvement of family    [  ] Better time management
[  ] More service opportunities    [  ] More leadership opportunities

How did your spouse/partner/family feel about your involvement in Rotary?
[  ] Proud of my involvement    [  ] Felt it took too much of my time
[  ] Wanted to know more/be involved
[  ] Felt it was too expensive
[  ] Sought interaction with other Rotary spouses/partners/families
[  ] Other

Is there anything that our club could have done differently to meet your needs?

Would you like us to contact the Rotary club in your new place of residence to notify them that you are interested in joining their club?
[  ] Yes    [  ] No

New place of residence:
City      State/Province     Country

Thank you for taking the time to complete this questionnaire and for your commitment to improving our club.
# THE CLUB HEALTH CHECK

(Please mark in the appropriate column – the scores are shown in brackets next to the question)

<table>
<thead>
<tr>
<th>1</th>
<th>MEMBERSHIP</th>
<th>SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.1 NET GROWTH In Last Year</strong>&lt;br&gt; &gt; 10% (5); 5%-10% (4); 0%-4.9%(3); Net Loss (0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.2 RECRUITMENT – Number of Members Recruited in last year as a percentage of membership number at the commencement of the year.</strong>&lt;br&gt; &gt;20% (5); 11-20% (4); 5-10% (3); 1-5% (2); Nil Inductions(0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.3 GENDER BALANCE in Club</strong>&lt;br&gt;Predominance of one gender over other –the questions refer to the minority gender in your club.&lt;br&gt; &gt;40% (5); 25-39% (4); 10-24% (3); 1-10% (2); All one gender (0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.4 AVERAGE AGE OF MEMBERSHIP</strong>&lt;br&gt;Is the average age of your club members:  &gt;70 (1); 60-70 (2); 50-59 (3); 40-49 (4); &lt;40years (5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.5 PERCENTAGE OF MEMBERS LESS THAN 40 YEARS OF AGE</strong>&lt;br&gt;More than 40% (5); 20 to 40% (4); 10to 19% (3); 1 to 9% (2); nil (0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.6 ALUMNI: No of Alumni in your club as a % of total membership: (Include GSE, Scholars, RYLA, Youth Exchange, Rotaract, Other Rotary Programs) Expressed as a % of Total Membership</strong>&lt;br&gt; &gt;20% (5), 10-20% (4); 5-9% (3); 1-4% (2), 0% (0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.7 RETENTION OF MEMBERS:</strong>&lt;br&gt;Formula:   No of members at end of year / Membership at beg of year PLUS total number of members inducted during year – As a %.  The Example is 23 members at the beginning of the year, you inducted 7 new members – a total of 30 members you had during the year.  You divide the actual number at year end (25) by the total of 30 and multiply by 100 to obtain the percentage outcome.&lt;br&gt;Eg.  25/30 *100 = 83.33%&lt;br&gt;Retention Rate:  &gt;95% (5); 90-94% (4); 85-89% (3); 75-84% (2); 60-74% (1); &lt;60% (0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.8 FRIENDS OR FAMILY OF ROTARY OPPORTUNITIES</strong>&lt;br&gt;Our Club has a Friends of Rotary / Associates /Supporters program in place with key focus on long-term relationships:  Yes (2); No (0)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## 1: TOTAL MEMBERSHIP SCORE

52
## 2 MARKETING & PUBLIC IMAGE

### 2.1 NUMBERS OF PRESS ARTICLES IN LOCAL PAPERS IN PAST YEAR
- >20 (5); 15 to 20 (4); 8 to 14 (3); 3 to 7 (2); 1 or 2 (1); None (0)

### 2.2 DIVERSITY OF MEDIA – Circle and then total how many in column

<table>
<thead>
<tr>
<th>Local Paper</th>
<th>Mainstream Paper</th>
<th>Television</th>
<th>Radio - Major Stations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio – Community Station</td>
<td>Billboards</td>
<td>Community Newsletter</td>
<td></td>
</tr>
</tbody>
</table>

Other - Please Note and include in your number score

### 2.3 CLUB BULLETIN / NEWSLETTER IS PRODUCED
- Weekly (3); Fortnightly (1); Irregularly (0)

### 2.4 BULLETIN CONTENT is diverse, it is professional in layout / presentation and content
- Yes (3); Average (2); Poor (0)

### 2.5 BULLETIN CIRCULATION BEYOND THE CLUB includes:
- Community Leaders, Library, Potential Members (5); Other Clubs & District Personnel & Potential Members (3); Other Clubs & District Personnel (2); Members Only (1)

### 1.6 CLUB WEBSITE
- Do you have a Club Website – is it professional in appearance, easy to navigate and updated weekly?
  - Professional, easy to navigate, updated weekly (5); Professional, easy, updated fortnightly (4); professional, easy to navigate, updated monthly (3); Not as professional looking as we would like (2); Updated each year (0)

### 1.7 ARE YOU SEEN IN YOUR COMMUNITY?
- Are you visible in your community – ie have a Market, Run an Opportunity or Second Hand Shop, Have a stand at the Local Festival, Art Show, Youth or Children Fairs, Working Bees, etc.
  - Yes – have activities in our community at least twice a month – have signage always and wear our club T-Shirts and Hats (5); Yes – monthly, have signage and wear club clothing (4); Yes – we have our signage at all opportunities, but it is generally around once a quarter (3); We have the activities, but only have our T-Shirts – don’t have signage which we take with us (2); We don’t have club T-Shirts or signage – we do the job quietly and don’t worry about the promotion of our work (1)

### 1.8 CIRCULATION OF RI PUBLICATIONS
- Do you put RI Publications in Dentists’, Doctors’, etc Waiting Rooms?
  - Yes – every month (3) Sometimes (2); Rarely (1); Never (0)

### 1.9 ROTARY INTERNATIONAL WEBSITE
- Do you publicize the RI Website?
  - Yes (3) No (0)

### 2: TOTAL MARKETING & PUBLIC IMAGE SCORE

53
### 3 BALANCE IN CLUB

#### 3.1 CLUB ACTIVITIES  
**Avenues of Service Projects**
If 2 in each of the Avenues (5); 1 in each avenue (3), If less than 1 in each avenue (0)

#### 3.2 INVOLVEMENT OF MEMBERS  
In a 6 month period, What % of your club members are involved in a Club Activity?  
100% (5); 90-99% (4); 80-89% (3); 50-79% (2); <50% (0)

#### 3: TOTAL BALANCE IN CLUB SCORE

### 4 LEADERSHIP & DELEGATION

#### 4.1 PRESIDENT
How many times has your club had a President who served as President previously?
Never (5); Once (2); > Once (0)

#### 4.2 SELECTION OF PRESIDENT ELECT
Does your Club select and nominate a President Elect & Nominee without difficulty
Yes – no problems (5); Usually have difficulty, but do have appointments on time (2); Don’t have a PE in place (0)

#### 4.3 ALLOCATION OF COMMITTEE ROLES
Based on Members specific area of interest &/or skill (5)  
By rotation after discussion with members(3) Random allocation (1)

#### 4.4 DISTRICT ACTIVITIES
Our club is represented at District Seminars (PETS, District Assembly, Rotary Membership Seminar, Rotary Foundation Seminar)
Always – 100% (5); 90% eligible attend (4); 50-90% attend (3); <50% attend (2); none attend (0)

#### 4.5 DISTRICT COMMITTEES
Number of members who serve on District Committees – expressed as a % of total membership of the club:
> 15% (5); 10-14% (4); 5-9% (3); 1-4% (2); Nil (0)

#### 4: TOTAL LEADERSHIP & DELEGATION SCORE

---

54
## 5 CLUB SPEAKERS & WEEKLY MEETING PROGRAMME

<table>
<thead>
<tr>
<th>5.1 STYLE &amp; FORMAT OF MEETINGS:</th>
<th>Is it welcoming and inclusive in its style; have structured process for reports from members; well run by Sergeant; no one member is dominant?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, very well structured &amp; welcoming (5); Clear structure, but welcome can improve (4); Very Welcoming to all visitors, but no reports from members (3); Meeting gets a bit out of hand – Sergeant doesn’t control very well, but everything else ok (2); Has one or two who dominate meetings (1); No structure, members stick together and leave guests on their own, lots of in jokes, etc (0)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5.2 LENGTH OF MEETINGS – TIME EFFICIENCY FOR MEMBERS –</th>
<th>Do your meetings run for a reasonable length (ie 1 Hour or 2 ½ hours?)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generally suggest 2 ½ hours is too long (2); 1 ¼ hours to 2 Hours (3); 45 minutes to 1 ¼ hours (5)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5.3 SPEAKERS PROGRAMME is organized:</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Months Ahead (5); 4 Weeks Ahead (4); 2 Weeks Ahead (3); 1 Week Ahead (2); Not organized, usually shows ‘To Be Advised’ (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5.4 BALANCE OF PROGRAM highlights a share of Community Speakers, Business Based, Rotary Speakers and Other Area of Interest.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this program in place? Yes (3), No (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5.5 HAS THE PROGRAM HAD CONSECUTIVE SPEAKERS ON THE SAME AREA:</th>
<th>ie 2 Community Organizations or two less exciting topics two weeks running. If Yes – mark (0); if No – good balance (3)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>5.6 VOCATIONAL VISITS conducted in the past year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes - have 2 or more (3); Have 1 per year (2); None in past year (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5.7 ROTARY INFORMATION - In the past year, does the club have Rotary Information Segments (excluding Guest Speakers):</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least once every two weeks (5); Held once a month (3); Ad hoc (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5.8 MEETING EFFICIENCY – Do your Club Meetings start and finish on time?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always – Every Week without fail (5); Regularly - Say 11 out of 12 (4); Mostly – Say 8 out of 12 (3); About 50% of the time (2); Rarely (1); Never (0)</td>
</tr>
</tbody>
</table>
### 5.9 CLIQUES IN SEATING – Do you regularly have cliques in the Seating Arrangements in the club?
There are always a group who sit together (2); Sometimes (3); We have seating initiatives in place to move members around (4); No Cliques – members move around regularly (5)

<table>
<thead>
<tr>
<th>5: TOTAL CLUB SPEAKERS &amp; MEETING PROGRAMME</th>
</tr>
</thead>
</table>

### 6 FUND RAISING

#### 6.1 ACHIEVING YOUR GOALS – In the last year, our Club set and achieved its Fund Raising Goals as follows:
100% (5); 90-99% (4); 80-89% (3); 70-79% (2); 50-69% (1); raised less than 50% of the goal set (0)

#### 6.2 DIVERSITY OF FUND RAISING ACTIVITIES: Do you have a diversity of fund raising activities in your club?
Yes – funds raised from at least three main sources and several minor sources (5); Funds raised from 1 main and several minor sources (3); Funds raised from more a variety of varying sources (2); All from one project (1)

<table>
<thead>
<tr>
<th>6: TOTAL FUND RAISING SCORE</th>
</tr>
</thead>
</table>

### 7 VENUE

#### 7.1 VENUE: Is your venue easily identifiable – ie Both external and internal signage to assist visitors, guests, etc.
Yes – Both external & internal (5); Partly (3); None at all (0)

#### 7.2 FOOD: If you have food as a part of your meals – honestly assess the standard of the food.
Excellent (5); Very good – always reliable quality at a great price (4); Good meals at a reasonable price – generally similar style, but always nice (3); A bit patchy in quality – but quite edible (2); Poor meals, little variation and quality barely acceptable (0)

#### 7.3 HOSTS: Does your host genuinely welcome you at their venue – or do they see your Rotary Club as a bother or inconvenience.
Yes – our hosts enjoy us being there (3); Generally welcome, but occasionally appear to be a bother around peak seasons (2); Our Hosts see us as a bother (0)

<table>
<thead>
<tr>
<th>7: TOTAL VENUE SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>8 SOCIAL ACTIVITIES</strong></td>
</tr>
<tr>
<td>-------------------------</td>
</tr>
<tr>
<td><strong>8.1 NUMBER OF SOCIAL ACTIVITIES in the club in the last quarter?</strong></td>
</tr>
<tr>
<td>&gt; 10 (5); 7 to 9 (4); 5 or 6 (3); 3 or 4 (2); &lt; 3 (1)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>8.2 NEW SOCIAL ACTIVITIES – Suggested by New Members</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Have you asked your new members for ideas for social activities</td>
</tr>
<tr>
<td>Have you acted on them and involved them in the organization:</td>
</tr>
<tr>
<td>Taken up idea &amp; involved new member (5); Taken up idea, not involved new member in it (3); Not taken up at all (0)</td>
</tr>
<tr>
<td><strong>Total up the two questions and write score in column</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>8.3 INVOLVEMENT OF FAMILY &amp; PARTNERS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Does your club have partners and family attend:</td>
</tr>
<tr>
<td>Always (5); Regularly (4); Occasionally (3); Rarely – once or twice a year only(1)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>8: TOTAL SOCIAL ACTIVITIES SCORE</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>9 PLANNING</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>9.1 DO YOU HAVE A STRATEGIC PLAN FOR YOUR ROTARY CLUB?</strong></td>
</tr>
<tr>
<td>(Formal strategic plan with specific goals and steps on how to achieve them)</td>
</tr>
<tr>
<td>Yes (5) No (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>9.2 OUR STRATEGIC PLAN IS UPDATED...</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes - At least annually (5); Not updated in last year – but did it the year before (3); Not updated for a few years (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>9.3 CLUB LEADERSHIP PLAN: Have you adopted the R I Club Leadership Plan?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes – we have adopted the CLP fully (5)</td>
</tr>
<tr>
<td>We are implementing it next year (3)</td>
</tr>
<tr>
<td>We are not planning to adopt it at all (1)</td>
</tr>
<tr>
<td>We haven't and don’t plan to consider it in our club (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>9.4 CLUB PLANNING DAY is held in our Rotary Club</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes – Annually prior to the start of the Rotary Year (5); Not at all (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>9.5 CLUB ASSEMBLIES are held:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>4 - 1 per quarter (5); 3 – 1 every 4 months (3); 2 – 1 every 6 months (2); 1 per year (1); None (0)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>9: TOTAL PLANNING SCORE</strong></th>
</tr>
</thead>
</table>
## 10 BOARD MEETINGS

### 10.1 FREQUENCY OF BOARD MEETINGS over the past year
Once every month – total of 12 (5); 11 (4); 10 (3); 9 (2); 6 to 8 (1); < 6 (0)

### 10.2 EFFICIENCY & AGENDA OF BOARD MEETINGS
Do you set a clear agenda including timings and then meet them?
Finish on time always (5); Within 10 minutes of estimate on agenda (4); Within 10 to 20 minutes (3); Within 20 to 30 minutes (2); > 30 Minutes longer (0)

### 10.3 CLUB RECORDS
Are Board Meeting Records filed and retained, readily available as required for reference:
Yes (5); Yes – but resolutions not recorded separately (3); Poor filing & historical records (0)

## 10: TOTAL BOARD MEETINGS SCORE

## 11 FINANCES OF CLUB

### 11.1 ACCOUNTABILITY – The Club has separate bank accounts for Administration & Fund Raising (or Projects) Funds.
Yes – totally separate (5); No – but accounts for separately in ledgers and reporting (3); Combined totally (0)

### 11.2 BUDGET - The club has set and approved a Budget prior to the commencement of the Rotary Year (ie in May / June latest)
Yes (2); No (0)

### 11.3 FINANCIAL REPORTS FOR THE BOARD MEETINGS include reporting of actual versus budget with variances – for both Administration and Fund Raising / Project Accounts
Yes (2); No (0)

### 11.4 FINANCIAL REPORTS TO CLUB MEMBERS are provided Monthly
Yes (2); No (0)
11.5 USE OF I.T. AND ELECTRONIC COMMUNICATION are in place in our Club: Please circle those that are available and write total number circled as score in column:

- Direct Deposit for fees
- Direct Deposit for functions / sponsorships
- Credit Card Payments accepted
- Bulletin sent by Email
- Website Updated and source of updates for members
- SMS Communication
- Other (Please write down )

<table>
<thead>
<tr>
<th>Score</th>
<th>11: TOTAL FINANCES OF CLUB SCORE</th>
</tr>
</thead>
</table>

**1 SERVICE ACTIVITIES**

Mark in the column a score of (2) for each one of those listed which you feel you satisfy well in your club:

12.1 Recurring programs – well serviced
12.2 A range of projects are covered, rather than focused on just one or two areas.

<table>
<thead>
<tr>
<th>Score</th>
<th>12: TOTAL SERVICE ACTIVITIES SCORE</th>
</tr>
</thead>
</table>

**TOTAL SCORE OVERALL**
## UNDERSTANDING YOUR SCORE

<table>
<thead>
<tr>
<th>Topic</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Membership</strong></td>
<td><strong>30 or more</strong> – You are doing very well</td>
</tr>
<tr>
<td></td>
<td><strong>23 to 29</strong> – Review your plans and check you are following your plans.</td>
</tr>
<tr>
<td></td>
<td>Invite the District Membership Chair or Committee to give a program</td>
</tr>
<tr>
<td></td>
<td>at your club</td>
</tr>
<tr>
<td></td>
<td><strong>0 to 22</strong> – You need to review your current process and consider</td>
</tr>
<tr>
<td></td>
<td>implementation of Club In A Club and look at assessing why members</td>
</tr>
<tr>
<td></td>
<td>are not remaining in the club and your age profile. Contact the District</td>
</tr>
<tr>
<td></td>
<td>Membership Chair or Committee to have a strategic planning session</td>
</tr>
<tr>
<td></td>
<td>with your club or members of your Executive</td>
</tr>
<tr>
<td><strong>Marketing &amp; Public Image</strong></td>
<td><strong>31 or more</strong> – You are doing very well</td>
</tr>
<tr>
<td></td>
<td><strong>24 to 30</strong> – Review your plans and check you are following them.</td>
</tr>
<tr>
<td></td>
<td><strong>0 to 23</strong> – Review your Bulletin style and content and then diversify</td>
</tr>
<tr>
<td></td>
<td>the distribution; seek training on writing Press Releases; ask the</td>
</tr>
<tr>
<td></td>
<td>District Public Relations Chair or Committee to speak at your club; ask</td>
</tr>
<tr>
<td></td>
<td>for the topic to be included in District Assembly, etc.</td>
</tr>
<tr>
<td><strong>Balance In Club</strong></td>
<td><strong>9 Or 10</strong> – You are doing very well</td>
</tr>
<tr>
<td></td>
<td><strong>6 to 8</strong> – Review your overall service projects and timing to see if</td>
</tr>
<tr>
<td></td>
<td>too clustered and aim to spread out if possible. Look at your club</td>
</tr>
<tr>
<td></td>
<td>composition to see if your projects are when members are around.</td>
</tr>
<tr>
<td></td>
<td><strong>0 to 5</strong> – Review and assess honestly your service profile to aim for</td>
</tr>
<tr>
<td></td>
<td>a balanced service in each area – and identify when your members are</td>
</tr>
<tr>
<td></td>
<td>best able to undertake projects. Avoid heavy clustering at key times</td>
</tr>
<tr>
<td></td>
<td>of the year.</td>
</tr>
<tr>
<td><strong>Leadership &amp; Delegation</strong></td>
<td><strong>22 to 25</strong> – You are doing very well</td>
</tr>
<tr>
<td></td>
<td><strong>19 to 21</strong> – Review your club leadership development and committee</td>
</tr>
<tr>
<td></td>
<td>rotation structures to ensure effective training is occurring.</td>
</tr>
<tr>
<td></td>
<td><strong>0 to 18</strong> – Strongly consider implementing the Club Leadership Plan</td>
</tr>
<tr>
<td></td>
<td>if you haven’t already; implement a process where your members are</td>
</tr>
<tr>
<td></td>
<td>rotated regularly onto committees, commencing with their key area of</td>
</tr>
<tr>
<td></td>
<td>interest &amp; skill. Encourage actively in your club attendance at District</td>
</tr>
<tr>
<td></td>
<td>activities and recommend those members who show an interest in</td>
</tr>
<tr>
<td></td>
<td>District Committees to the Incoming District Governor for inclusion in</td>
</tr>
<tr>
<td></td>
<td>the future.</td>
</tr>
<tr>
<td><strong>Club Speakers &amp; Weekly Program</strong></td>
<td>36 to 39 You are doing very well.</td>
</tr>
<tr>
<td></td>
<td><strong>28 to 35</strong> Review your approach to your Weekly Meetings and double</td>
</tr>
<tr>
<td></td>
<td>check each of the aspects. It is going along, but there may be some</td>
</tr>
<tr>
<td></td>
<td>areas which need fine tuning.</td>
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<tr>
<td></td>
<td><strong>0 to 27</strong> Review your approach – Agendas to ensure meetings are</td>
</tr>
<tr>
<td></td>
<td>not too lengthy, ensure they both start &amp; finish on time, speakers</td>
</tr>
<tr>
<td></td>
<td>are organized around 2 months in advance &amp; members are advised through</td>
</tr>
<tr>
<td></td>
<td>Bulletin; Chairs, Greeters, Desk Duties are clearly set out and</td>
</tr>
<tr>
<td></td>
<td>members know in advance of their responsibility. Encourage Visits off</td>
</tr>
<tr>
<td></td>
<td>site from your meetings and set down parameters &amp; guidelines for your</td>
</tr>
<tr>
<td></td>
<td>Speaker Program to ensure diversity. Establish seating approaches to</td>
</tr>
<tr>
<td></td>
<td>avoid cliques.</td>
</tr>
<tr>
<td>Section</td>
<td>Score</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------</td>
</tr>
<tr>
<td><strong>Fund Raising</strong></td>
<td>8 to 10</td>
</tr>
<tr>
<td><strong>Venue</strong></td>
<td>12 to 13</td>
</tr>
<tr>
<td><strong>Social Activities</strong></td>
<td>16 to 18</td>
</tr>
<tr>
<td><strong>Planning</strong></td>
<td>23 to 25</td>
</tr>
<tr>
<td><strong>Board Meetings</strong></td>
<td>13 to 15</td>
</tr>
<tr>
<td><strong>Finances</strong></td>
<td>17 to 19</td>
</tr>
<tr>
<td><strong>Service Activities</strong></td>
<td>13 to 14</td>
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THE CLUB CLINIC

The Club Clinic is conducted as a part of an annual review undertaken by clubs. The other component of the process is the completion of The Club Health Check by either the Board or the Club. Jenny Coburn (PDG from Australia) suggests this approach to help clubs find out what is important so they keep those things. It also helps determine what it is time to let go of or change.

The Club Clinic is facilitated by a person outside the club. This may be the clubs Assistant Governor, a member of the District Membership Committee or a Past Governor, DGE, etc.

Once the club decides to undertake The Club Clinic, the particular meeting is set aside for this purpose in totality. Members are reminded the week before that the Clinic will be held and what a positive opportunity it is for them to put forward their contributions on the club activities.

At the Meeting:

- Forms are given to all members – noting there is no need to put their name on the form unless they wish to.
- At least ½ hour is provided for members to consider and complete their forms. It is important to allow plenty of time, so that all ideas of the member are put down – especially new ones.
- The forms are then collected by the facilitator.
- Members are thanked for their valuable input.

After the Meeting:

- Facilitator collates the responses – identifying multiple responses on areas where this occurs.
- Prepares a collated report and forwards this together with all the forms to the President of the Club.
- The President together with a small team review the outcomes and consider what changes are highlighted.
- Particular consideration should be taken of the `Start’ section and the members new ideas.
- Be sure to consider the matters which members have indicated to `Stop’.
- The Sub Committee should then prepare a report for the Board of their recommendations and share the outcomes with the club in full.

This is a positive approach to obtaining all members views in a way which encourages all ideas to be put forward.
THE CLUB CLINIC

I would like our club to:

KEEP

STOP

START