

Membership Development, Education, & Retention



Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving beyond the club level is directly related to the strength and size of your club's membership base.

Responsibilities

- As president/president-elect, you have the following membership development responsibilities:
- Appointing and meeting with your club membership committee
- Assessing the current state of your club's membership. See the *Planning Guide for Effective Rotary Clubs* [Appendix I, *President's Manual* pages 120-127] as a guide, and reviewing your club's long-range membership goals
- Setting your club's annual membership goals, which support long-range goals, using the *Planning Guide for Effective Rotary Clubs*, and submitting annual membership growth and retention goals to district leadership
- Identifying and implementing strategies to recruit and retain club members
- Promoting club and district membership education and training for all stages of membership, including:
 - Prospective member education
 - New member orientation and education
 - Continuing member education
- Using available RI and district resources to support membership development efforts and seeking opportunities to organize a new club in your area

As club president, it is important to make **membership** a high and visible priority so that your club has an active and involved membership base to pursue the Object of Rotary.

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Membership Committee

Many different club committees must interact and work closely with club leaders to successfully recruit, retain, and educate club members. Include the membership committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

Appoint Rotarians to the membership committee who have strong connections to a cross-section of the community. Members of this committee should enjoy working with people and have a thorough knowledge of Rotary.

The club membership committee develops and implements an action plan for recruiting, retaining, and educating club members. Check in with the membership committee regularly to determine whether new strategies are needed to achieve your membership goals.

Your membership committee has the following responsibilities:

- Achieving club membership goals for the coming year using the *Planning Guide for Effective Rotary Clubs*
- Educating and training club members about the importance of recruitment and retention of qualified, diverse members
- Conducting classification surveys to ensure the club's classifications are relevant to current business trends
- Conducting club assessments to ensure membership development efforts are effective
- Developing an action plan for the club to act as a sponsor club for a new club organized in the district, if applicable

You'll find more information on the membership committee in the *Club Membership Committee Manual*.

Your club's five-year membership history is available from your district governor or district governor-elect.

The *Membership Development Resource Guide* outlines the action steps necessary for developing an effective membership development action plan. Its online companion, *Club Assessment Tools*, includes suggested activities, such as the Member Satisfaction Questionnaire and the Resigning Member Questionnaire.

Assessing Your Club

As president-elect, you'll work closely with your club's membership committee to assess the current state of your club and plan membership goals. See the *Planning Guide for Effective Rotary Clubs*, [Appendix I, *President's Manual* pages 120-127] as a guide, and other membership assessment tools available in *Club Assessment Tools* at www.rotary.org. To understand your club's membership trends:

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- Review your club's long-range goals.
- Review your club's five-year membership profile.
- Complete a classification survey as early in the year as possible to identify unfilled professions represented in the community.
- Consult with your district governor or assistant governor, as appropriate.

Once you've drafted membership goals, you and your board of directors should develop a membership development action plan.

Recruitment

All Rotarians are responsible for proposing new members. New members bring important benefits to the club, including:

- Increased capacity to serve your community
- Future leaders
- Diversity
- Fresh ideas, interests, and energy
- Long-term continuity of clubs and the organization

Determine which recruitment challenges your club faces by completing the assessments in *Club Assessment Tools* to identify your club's recruitment strengths and weaknesses, and then work with the membership committee to implement strategies for addressing them. See Worksheet 11, *President's Manual* page 69, for club membership recruitment strategies. Also, search rotary.org to find the regional Rotary International membership coordinator serving your area.

Responsibilities

As club president, you have the following responsibilities for raising awareness of the importance of recruiting new members:

- Leading by example, personally recruiting a new member and encouraging each member of the club to do the same
- Appointing active, knowledgeable membership committee members
- Setting ambitious but attainable membership recruitment goals
- Conducting a club assembly on the importance of successful recruiting strategies
- Encouraging full representation of the diversity of the community
- Promoting participation in the district membership seminar
- Encouraging club members to discuss Rotary and its goals with friends, family, and colleagues and to invite qualified candidates to join Rotary
- Promoting community awareness of your club and its activities
- Recognizing club members for sponsoring new members

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Visit the Membership Development Best Practices Exchange

www.rotary.org to view membership initiatives that have worked in other clubs.

Diversity

Your club's membership should accurately reflect the community in terms of profession, age, gender, and ethnicity. One way to ensure diversity in your club is to conduct regular classification surveys and membership diversity assessments to ensure your club accurately represents the community. Having a diverse membership in your club will result in a wider range of experience and knowledge available for your service efforts.

RI policy prohibits limitations on membership in Rotary clubs based on gender, race, color, creed, or national origin. Refer to RI Bylaws Article 4.070. for more information.

Retention

Retention is crucial to increasing and sustaining your club's membership. A high turnover rate in existing clubs is one of the most pressing membership issues facing Rotary today. Current members who are dedicated, active, and motivated support the effective functioning of the club and are also more likely to attract new members.

Determine what retention challenges your club faces by completing the assessments in *Club Assessment Tools* to identify your club's retention strengths and weaknesses, and then implement strategies for addressing them. Successful club retention strategies include member education and keeping club members involved and informed. Work with the membership committee to implement retention strategies for addressing these issues. See Worksheet 12, *President's Manual* page 70, for club membership retention strategies.

Responsibilities

As club president, you have these responsibilities for raising awareness of the importance of retaining club members:

- Making continuing education and training for members a regular club activity
- Involving the club's membership and public relations committees in membership retention efforts
- Appointing a club leader to update club members on the latest Rotary developments
- Conducting a club assembly for member education
- Including local and international Rotary information in weekly club meetings
- Recognizing existing members for their contributions to club projects and activities

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Sponsoring New Clubs

As club president, you should be aware of the possibilities for sponsoring a new club in your area, such as if a group of committed Rotarians would like to meet at a different time or day.

If your club sponsors a new Rotary club, develop an action plan to assign the following responsibilities:

- Assisting the special representative in planning and organizing the administrative processes of the new club
- Helping to organize the new club's programs and projects
- Reporting to the district governor as requested during the club's first year
- Serving as a mentor to the new club for at least two years after its admission to membership in RI

For more information, contact your district governor, district membership committee, or district extension committee.

Education

Knowledgeable members are more likely to take initiative and become more active in your Rotary club and your district. Share information about Rotary with prospective and new members, as well as experienced Rotarians.

Prospective and New Member Education

The club membership committee should provide prospective members with information about Rotary, including its history and ideals, and information about the club and its activities.

The process of new member orientation should build on the information provided to prospective members and should begin immediately after induction. Every member of your club should play an active role in introducing new members to the club. Assign a mentor to each new member to ease their transition into the club.

Refer to *New Member Orientation: A How-to Guide for Clubs* for more information on educating and involving new club members.

Continuing Member Education

Continuing member education ensures that members remain challenged, motivated, and enthusiastic. Work with your membership committee to provide the following continuing education components:

- Regular club assemblies to discuss which activities members want to continue and which they want to change
- Four or more weekly club programs a year focused on Rotary, its history, object, scope, and activities
- Participation of club members in district meetings that address continued education

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Use your club and district Web sites, weekly meetings and e-mails, and club bulletins to share information from your district governor or Rotary International.

Resources

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at www.rotary.org. Download publications at www.rotary.org, or order them through shop.rotary.org, shop.rotary@rotary.org, or your international office.

The following resources are available to help you fulfill your membership development responsibilities:

Membership Development Resource Guide (417-EN) — Outlines basic procedures for clubs to develop a membership action plan and provides suggestions for recruiting and retaining members.

Human Resources

- Assistant governors — Appointed by the district governor to help clubs operate effectively and achieve their goals.
- Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.
- District governor — Provides advice, inspiration, and motivation to help clubs become more effective.
- District extension committee — Rotarians appointed to support club organizing or sponsoring new clubs in the area.
- District membership development committee — Rotarians appointed to support clubs in their membership development efforts.
- District public relations committee — Rotarians appointed to provide resources to club for developing a positive image within the community.
- Regional Rotary International membership coordinators (RRIMCs) — Rotarians serving as the primary membership development resource for clubs and district in a specific region or zone.
- Membership Development Division at RI World Headquarters — Staff members dedicated to assisting clubs and districts in their membership development efforts.
- Other Rotary Clubs often have good ideas and success stories to share

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Informational Resources

Club Resources

- *Club Assessment Tools* — Online supplement to the *Membership Development Resource Guide* that helps clubs plan their retention and recruitment strategies. The following assessment activities are included:
 - Membership section of the *Planning Guide for Effective Rotary Clubs*, [Appendix I, *President's Manual* pages 120-127]. Helps clubs assess their current membership and establish goals.
 - Classification Survey — Encourages clubs to strive toward a balanced and diverse membership across all classifications by comparing the local community's professional make-up to the club's.
 - Membership Diversity Assessment — Promotes developing a club membership that reflects the local community's age, gender, religious, and ethnic composition.
 - 25-Minute Membership Survey — Helps clubs create a list of qualified candidates for membership.
 - Retention Model — Allows clubs to calculate their net membership gain (or loss) over a specified time and to determine its cause.
 - Termination Profile — Illustrates when the majority of a club's terminations occur so it can focus its retention strategies accordingly.
 - Membership Satisfaction Questionnaire — Asks current club members to anonymously comment on what they most appreciate about their club and what needs improvement.
 - Resigning Member Questionnaire — Helps clubs determine how to improve retention efforts.
- *Club Membership Committee Manual* (226B-EN) — Overview of the club membership committee and its responsibilities as well as available resources and specific committee duties.
- *How to Propose a New Member* (254-EN) — Brochure outlining the procedure for selecting and electing members.
- *The Membership Minute* — E-newsletter filled with tips, tools, and the latest membership development research; archives and free subscriptions available at www.rotary.org/newsletters.
- *New Member Orientation: A How to Guide for Clubs* (414-EN) — Resource for Rotarians responsible for prospective and new member orientation programs.

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New and Prospective Member Handouts

- *The ABCs of Rotary* (363-EN) — Compilation of short articles about Rotary history and programs.
- *Introducing Rotary* (982-EN) — Three-minute video that provides an overview of Rotary club membership for new members.
- *Rotary Basics* (595-EN) — Educational publication containing the information every Rotarian should know.
- Rotary E-Learning Center — Brief modules designed for independent study by new members and club officers.
- *This Is Rotary* (001-EN) — Colorful brochure providing a brief overview of Rotary for prospective Rotarians and the public.
- *What's Rotary?* (419-EN) — Wallet-size card answering frequently asked questions about the organization and scope of Rotary; popular as a handout to non-Rotarians.
- Preassembled kits for prospective and new members— Collection of publications of interest to prospective and new members, including some of those listed above; specific contents listed in the *RI Catalog* (019-EN).
 - *Prospective Member Information Kit* (423-EN)
 - *New Member Information Kit* (426-EN)
 - *Membership Video Set* (427-MU) — Videos to showcase Rotary to prospective and new members alike.

www.rotary.org — **The Membership Development** section of running a club includes information about how to find and keep members as well as the Membership Development Best Practices Database.