



STRENGTHENING YOUR MEMBERSHIP

Creating Your Membership
Development Plan

ABOUT THIS GUIDE



This is the 2015 edition of *Strengthening Your Membership: Creating Your Membership Development Plan*, formerly known as the *Membership Development Resource Guide*. It is intended for club presidents, district membership chairs, and club membership committees.

The guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members. It also includes information about sponsoring new clubs and reviews the membership resources that are available through Rotary. As you work through this guide, you will evaluate your club's membership trends, create strategies for attracting new members, and develop programs that focus on member engagement as a method to increase your club's membership retention rate.

Finally, we've included a worksheet composed of checklists of concrete steps your club can take to strengthen its membership.

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INTRODUCTION

A membership development plan is a document that outlines your club's objectives and strategies for retention and recruitment. This document will serve as a guide while you work toward your membership goals and will also allow you to track your club's progress. It is important to create a plan and actively engage your club members in its implementation to ensure your club's strength and vitality.

Clubs around the world approach membership in very different ways. Recognizing and acting on the unique needs, customs, and changes in your community will enhance your ability to bring in new members and inspire existing ones. You are encouraged to review your regional membership plan as you set your club's membership goals and develop your action plan. You can find your region's membership plan at www.rotary.org/membershipplans or get it from your district governor or district membership chair.

Strong membership enables your club to do good in your local community and around the world. A strong membership also raises the public's awareness of Rotary and increases support for The Rotary Foundation and its programs. Building membership is a top priority throughout Rotary, from the RI Board and Rotary coordinators to district leaders (discussed in chapter 6). Focusing on membership is most important, however, for club leaders, because they have the greatest power to improve it.

CHAPTER 1 EVALUATING YOUR CLUB



- Consider using anonymous surveys to ensure candid feedback.
- Be open to suggestions.
- Consider all perspectives.
- Get feedback on your survey's questions before giving it to all club members.
- Be creative and make it fun.



Worldwide, **68%** of Rotary club members are between the ages of 50 and 70. Are there opportunities for younger members in your club?

Club assessment is crucial to keeping your current members engaged and active while also ensuring your club is attractive to prospective members. Taking an objective look at your club regularly can reveal both its strengths and the areas that need improvement. Be sure to involve your members, who are a valuable resource in the continual effort to keep your club fresh and vibrant. You may even wish to ask a trusted person outside of your club, such as an assistant governor or district membership chair, to facilitate your club assessment. Here are a few ways to get feedback from members:

- Face-to-face interviews
- Written or electronic surveys
- Informal discussions, with small and large groups, held in a location other than your usual meeting place
- Focus groups with members, prospective members, or non-Rotarians in your community

Be open to making changes to your club based on the feedback and involvement of your members. Club evaluation is most effective if you and members of your club begin to make changes soon after you gather feedback. Once you ask for members' opinions, they will be eager to see what changes will be made based on their recommendations. If none are made, your members are not likely to be motivated to participate in club evaluation in the future.

Here are a few questions to consider as you evaluate your club.

IS YOUR CLUB DIVERSE?

The most effective clubs reflect the demographics of the communities they serve. Increasing the number of women, younger professionals, and members of various ethnic groups should be every club's goal. Rotary clubs that bring together diverse perspectives address the needs of their communities more creatively. Diverse clubs also have greater credibility in their communities, a wider range of skills, increased volunteer resources, expanded leadership prospects, and enhanced fundraising potential. The following are examples of questions that you may wish to focus on as you assess your club's diversity using the membership diversity assessment in [Membership Assessment Tools](#) (formerly known as Club Assessment Tools). This resource is available as a downloadable pdf on www.rotary.org or for purchase on shop.rotary.org.

- What is the gender balance of your club?
- How many of your club's members are under the age of 40?
- Is the ethnic makeup of your community represented in your club?
- Do your club's leaders reflect the diversity that one would expect based on its members?
- Are different perspectives welcomed?



Almost **80%** of existing members are currently working, while about **20%** are retired. How might your club's demographics affect its recruitment strategies?

IS YOUR CLUB'S MEMBERSHIP BALANCED ACROSS ALL CLASSIFICATIONS?

Understanding the professional breakdown of your membership can lead you to strategies for creating a balanced membership base that reflects the professions in your community. The Rotary Code of Policies requires clubs to include members from a wide variety of professions by classifying each member by his or her current or former business, profession, or type of community service. Use the classification survey in [Membership Assessment Tools](#) to identify professions and skills that are present in your community but missing from your club.

Does your club have any members who work in software engineering or Web development? What about public relations or fund development? Using your members' professional expertise benefits your club and its activities. Don't forget about entrepreneurs, owners of home-based businesses, and community service leaders. Get to know your members' unique skill sets and involve them in your club's committees and projects. Members who have a role to play in the club are more engaged and more likely to stay in it.

HOW CAN YOU ASSESS YOUR CLUB'S MEMBERSHIP VIABILITY AND GROWTH?

Did you know that even if your club membership numbers are constant from year to year, you could still have a retention problem? When a club continually gains and loses members, the resulting revolving-door effect makes it difficult for the club to operate effectively, carry out successful projects, and attract potential members.

To get a true picture of the state of your club's membership, look at information from the past three to five years. You can see membership patterns by going to Rotary Club Central to look at data and reports from several years.

You can obtain more detail by completing the member viability and growth model in [Membership Assessment Tools](#). The model looks at your club's membership activity within a specific time frame to help you identify any significant turnover.

HOW CAN YOU CREATE A MEMBER TERMINATION PROFILE?

Knowing how long members stay in your club can help you identify strengths and weaknesses in your membership development plan. The termination profile in [Membership Assessment Tools](#) groups members according to the length of their membership. For example, you might discover that the majority of your club's former members left within their first two years. With this in



Visit Rotary's **Public Relations page** to learn how to create a media alert or press release about local events and send it to your local newspaper. Often, a local newspaper will publish your story for free.

mind, you can focus on keeping newer members by offering education and encouraging early involvement in club programs and projects.

After a club leader has completed the initial assessment, the membership committee should evaluate the results and discuss them at a club meeting or assembly. Ask members to suggest specific strategies and activities to improve retention.

IS YOUR CLUB INNOVATIVE AND FLEXIBLE?

In a changing world, your club's success depends on its ability to be innovative and flexible. Surveys and focus groups consistently show that prospective members and younger members are more likely to stay with Rotary if they believe that their club is willing to accommodate their interests, as well as their work, family, and personal needs.

Ask yourself if your activities and traditions reflect current interests and what could be changed to make your club more relevant to prospective members. Consider changing meeting times and locations, lowering fees, undertaking a variety of service projects, and planning different kinds of programs for club meetings.

Find practical ideas for making your club innovative and flexible in [Be a Vibrant Club: Your Club Leadership Plan](#).

IS THERE A STRONG AWARENESS OF YOUR CLUB IN YOUR COMMUNITY?

Public awareness is an important part of your club's continued growth and success. Is your club widely known in your community? Do your members identify themselves as Rotary club members to their friends, neighbors, and colleagues? When your community thinks about your Rotary club, what do they think? Consider inviting Rotary prospects to a project to interact with your members and learn more about your club and its work in the community.

Research indicates that people are more likely to give time and money to an organization with a proven record of tangible results. Make sure your club regularly communicates with the public about its community service projects to attract both donations and new members.

Visit the Public Relations page at Rotary.org for resources and tools to ensure that your club and its projects receive the recognition they deserve.

HOW ARE YOU USING DIGITAL COMMUNICATIONS TO PROMOTE YOUR CLUB?

Digital communications are messages delivered through electronic media. Does your club have a website? A Facebook page? Are they regularly updated? Are you tweeting about your club's special events and signature projects? Are you interacting online with Rotary members around the world, as well as people and organizations that share your interests? Have you joined any conversations on LinkedIn?



See the **Social Media** page at Rotary.org for a list of specific Rotary-related pages on social networking sites.

Take advantage of social media to raise awareness of your club in the community, attract members and resources, and keep members informed.

Be creative, consistent, professional, and resourceful with your online communications. Videos, podcasts, and blogs allow you to share valuable information about Rotary and your club. Check Rotary.org and Rotary's blog, [Rotary Voices](#), regularly for content you can use to update your club's website and newsletters. And visit Rotary's [Brand Center](#) to learn how you can deliver clear and compelling messages about Rotary.

If no one in your club is adept at using these communication tools, find a communications professional in your community to advise your club at its next meeting. Here are some of the popular digital communication platforms that are being used by Rotary members around the world to increase visibility and engagement:

Facebook

See what's happening around the world on Rotary's official Facebook page, www.facebook.com/rotary. You'll find links to Rotary news stories, events, and videos. Clubs can use Facebook to find potential members, invite community members to fundraisers, and show the community their projects. They can also link to donation pages, connect with other organizations, and highlight the work of the club and Rotary around the world.

LinkedIn

Network with other Rotarians and friends of Rotary on LinkedIn,

the world's largest professional network. Rotarians can join groups in their region or around the world to share ideas and get their Rotary questions answered. Join [Rotary International's official LinkedIn group](#) to communicate with about 50,000 members.

Twitter

Keep in touch with other Rotarians and friends of Rotary — 140 characters at a time — at twitter.com/rotary. Take part in Rotary events like the international convention while engaging in dialogue with other attendees. You can also use Twitter to maintain contact with your local media and link to articles about your projects in your community.

YouTube

Rotary has a number of videos its own YouTube channel, www.youtube.com/rotaryinternational. Share them or link to them on your club's website or your personal website, on social media outlets, and in newsletters. If a member of your club has the ability to make videos or if you can hire a video professional, you may want to post videos about your own club so that potential members and donors can learn about what you do.

HAVE YOU EVALUATED YOUR CLUB FROM THE PERSPECTIVE OF A GUEST?

Before the meeting

Is it easy for a visitor to find basic information about your club's next meeting? Ask a friend or family member to try to locate the following information about your club:

- When does your club meeting start?

- Where exactly is the meeting?
- Is there someone in the club that a visitor should contact before a visit?
- Is there a cost to the visitor for attending?
- Is a meal included?
- What will the meeting be like?
- When does the meeting end?

If it is not easy to find this information on your Facebook page or website or through Rotary’s [Club Finder](#), you may be missing the chance to connect with prospective members.

At the meeting

Review your club meeting to make certain that it is a welcoming and fun experience:

- Does someone welcome members and guests when they arrive?
- Do meetings begin and end in a timely fashion?
- Is there an agenda for the meeting?
- Are the speakers interesting, insightful, and relevant?
- Is there sufficient variety in speakers and meeting topics?
- Is socializing among members encouraged?
- Do you always have the same kind of meeting?

Your club may even consider using a “mystery shopper” to evaluate a meeting. Ask a non-Rotarian friend or an acquaintance from another club come to a meeting as a visitor, and then provide his or her impressions. This will give you an unbiased perspective from someone outside of your club.

Service projects

Review your service projects. Are they inspiring and enjoyable for everyone involved?

- Does your club have an exciting signature service project that all members are involved in?
- Does your club invite nonmembers (friends, family, colleagues, Rotary alumni, Rotaractors, and other community members) to participate in your service projects and learn more about your club?
- Do your service projects address a current need in your community, as well as suit the interests of your members?
- Do your club members meet the people that benefit from their service?

Focus groups

Every club is different, and the needs of your community are unique. Focus groups are a useful tool for meeting with non-Rotarian members of your community, introducing them to Rotary, and obtaining helpful feedback on how your club can become even better. Hiring an outside professional to conduct the focus group increases the likelihood that the results will be unbiased. Some clubs have even asked an agency to donate this service. If having an outside professional conduct a focus group is not possible, it is important to make sure that the facilitator can be open-minded and objective. Here are some steps that can get you started:

STEP 1: ISSUE AN INVITATION

Compose a list of community members that you would like to invite. Aim to create a diverse group of men and women that includes varying ages

and professions. Invite prospective members as well as Rotaractors, Rotary alumni, and others who know a little about Rotary. Tell them why you are inviting them to your focus group and make sure they know how valuable their opinions are to your efforts to shape future projects and activities.

STEP 2: CREATE THE ENVIRONMENT

Once you have invited your participants, work on creating an environment in which people feel free to speak candidly. The question-and-answer session should be relaxed, more like a discussion among friends than a formal survey. Spend a few minutes introducing yourself, recounting how you got involved in Rotary, and explaining why you've been looking forward to the focus group.

Ask the participants to introduce themselves. Encourage them to mention anything they would like in their introductions, such as their profession, how long they've lived in the community, or whether they're currently involved in any professional or service groups.

STEP 3: HAVE THE CONVERSATION

Be ready with an agenda. It may have just 10 questions you'd like to cover. The best way to prepare is to think of questions that cannot be answered with a yes or a no:

- What attracted you to this community?
- If you had one extra hour per day to give away, how would you spend it?
- What problems do you see in our community?

- What could members of the community do to address that problem?
- If you could help any part of the world, in any way you like, what would you do?
- What are your impressions of Rotary?
- What positive and negative perceptions of Rotary do others have?

Be sure to give everyone a chance to speak, and try not to let a few people dominate the conversation. Tell participants how helpful it is to you and your club to get many opinions from the group. It is important that questions not lead participants to specific responses, and the facilitator must remain neutral. Do call on people who are especially quiet if they look like they want to comment, but take care not to make anyone feel uncomfortable.

STEP 4: SHARE THE RESULTS

Prepare your top five findings from the focus group's discussion. You might present this information during a club meeting, conduct a brainstorming session, and provide your club with a one-page summary for reference.

When you present the findings, you can discuss the focus group's ideas and plan events that would interest prospective members. Show your members, too, that you value their thoughts and opinions, and that one person can make a difference.

CHAPTER 2 CREATING A VISION FOR YOUR CLUB



Take your club through the club visioning process in a fun and new location to foster innovation. Choose a location that is comfortable, spacious, and convenient for your members. Consider asking a planning professional to assist you or using the visioning facilitation process for Rotary clubs at www.rivisionfacilitation.org.

After you determine the current state of your club by completing the evaluations in chapter 1, your next step is to discuss and formulate a vision for your club. Creating a vision means deciding what you want your club to be like in three to five years. Taking the time to create a vision can make your club strong, active, and attractive to new members. Involving club members in this process gives them a sense of ownership in their club, an understanding of the club's goals for the future, and motivation to work together to achieve those goals.

Consider these questions as you develop your club's vision:

- What is your club good at? How can you capitalize on that?
- What are your club's areas of weakness?
- What would you like your club to be known for?
- How do the challenges and strengths of your club shape your strategic priorities?
- What are your short-term and long-term goals?
- Do you have plans in place to help you reach those goals?
- Do you have a strategic team that monitors the progress of your strategic plan and makes recommendations as needed?

Once you have agreed on an ideal vision for your club, the strategic planning process will determine how you can reach that vision. The [Strategic Planning Guide](#) can help your club articulate or modify its vision. It will also help you in setting long-term and annual goals.

CHAPTER 3 ATTRACTING NEW MEMBERS



The top reason that people join a Rotary club is to make a positive impact in their community through service.



Partner with local organizations like young professional networks or professional women's organizations to identify prospective members for your club.

Every club needs new members in order to be vibrant and active. New members introduce new ideas, bring fresh perspectives, and extend your club's reach in the community.

After completing membership assessments from chapter 1 and creating a vision for the future of your club in chapter 2, the next step is to develop strategies for addressing the most critical elements identified in your assessment. For many, it will be attracting new members to the club. Draw on your club's strengths and recognize the challenges you identified through the diversity and classification assessments as you think about recruitment strategies.

WHO ARE YOUR PROSPECTIVE MEMBERS?

Who are the prospective members in your community? In addition to friends, neighbors, and business acquaintances, other groups could be a good fit for your club. For example, consider nonmember volunteers who have participated in your service projects, those who have indicated an interest in your club but never joined, and former members who've left your club or another club in the area. Members often leave for a short time but will return once they are invited. Consider young professionals who have participated in Rotary's

programs, such as former Group Study Exchange or vocational training team members, Ambassadorial Scholars, Rotary Peace Fellows, and Rotaractors, as well as the parents and grandparents of Interactors, RYLA participants, and Rotary Youth Exchange students. Youth Exchange host families may also include prospective members.

Once a year, ask club members to complete the survey to identify prospective members in [Membership Assessment Tools](#). This simple activity asks members to think about people they know in the community who might be good club members.

Use the survey results to talk with members about your club's culture and whether these prospective members would be a good fit. Are their jobs located in the area? Is the club's meeting time convenient for them? Do they exhibit the characteristics of leaders? Do they differ from current club members in ways that would bring some diversity to your membership? A thoughtful selection process can mean the difference between inducting a short-term, inactive member and finding a lifelong, committed, engaged Rotarian.

If you find a promising person but learn that your meeting time or



According to the 2011 Membership Experience Feedback Survey, **86%** of Rotarians joined their clubs through a family member, friend, or business associate. How can you use this information in developing your club's recruitment plan?



Invite a non-Rotarian volunteer to a club service project or event, so that he or she can see that your club is active and involved in the community. Assign a member to follow up with that prospective member after the event. Involving prospective members in community service events is especially effective for attracting younger people.



Get your club members talking and brainstorm the value and benefits of Rotary membership. Use this information to develop sample messages that members can adapt when talking with potential members.

location, for example, is not a good fit, recommend him or her to another Rotary club.

Remember, even if the prospective members you identify do not join, it's worthwhile to engage them as volunteers, donors, or simply friends of your club.

HOW DO YOU APPROACH A PROSPECTIVE MEMBER?

Potential members may be your friends, business acquaintances, Rotaractors, or Rotary alumni, including former Youth Exchange participants. They could also be family members, or even someone you've just met.

Keep your message simple. Don't try to tell prospective members everything there is to know about Rotary before they've attended a club meeting or taken part in a service project. Try starting the conversation by explaining how Rotary has had a meaningful impact on your life, career, or friendships. While facts and figures are useful, personal experiences and stories connect people on an emotional level. Once you've told your story, ask them what they would look for in a Rotary club. They may be most interested in making new friends, taking action on a specific community issue, or developing professional networks. Once you know what they're looking for, you can show how your Rotary club can fill that need.

Think about what kind of event your prospective members would enjoy. Some people might be more comfortable attending a club meeting

or social event, while others might prefer to learn about Rotary by working on a service project or participating in a fundraiser.

HOW DO YOU COMMUNICATE THE BENEFITS OF JOINING YOUR CLUB?

In talking to prospective members, do you consider their interests and needs when you are explaining the benefits of Rotary membership? Here are some popular benefits that Rotary members worldwide have associated with being a part of a Rotary club:

- Making a positive impact on one's community through service projects
- Establishing business connections and lasting friendships
- Developing professional skills, such as event planning, public speaking, and fundraising, or finding a mentor
- Including family members in service projects and events and getting children involved in youth programs in the community or abroad
- Creating a global network of friends, especially when traveling

The following scenarios show how you can use a prospective member's interests as a starting point for introducing Rotary.

Community service

A member of your community is regularly featured in the news for his community service activities. Invite him and other volunteers he may work with to join your next service project, bringing their ideas and experience. The extra help will allow you to make a greater difference, and the people you meet may be good prospective members.

Friendship and connections

Your colleague has recently retired and is feeling a bit isolated. Explain to her how membership in Rotary has kept you active in your community, connected you with business leaders, taught you about topics you wouldn't encounter elsewhere, and resulted in lasting friendships. Invite her to your club's next social event, community service activity, or meeting.

Family involvement

Your neighbor is looking for ways to involve his children in activities that have a positive impact. Tell him how Rotary members involve their families in club activities and explain how Rotary supports students through scholarships and opportunities to travel abroad for cultural exchanges.

International focus

A member of your community is looking to increase her charitable contributions and participate in some international service. Tell her how Rotary clubs around the world connect to provide clean water, health care, education, and more.

HOW CAN YOU EDUCATE A PROSPECTIVE MEMBER?

Studies have shown that members who join a club without some knowledge of Rotary are more likely to leave within a year or two. It is important to educate prospective members on what it's like to be a member of your club before they join. Hold information sessions to give prospective members an opportunity to learn about your club's activities and the benefits of membership. Ask several club members to share their experiences to give prospective

members a sense of your club's culture. Don't assume that prospective members who are Rotaractors, peace fellows, or Rotary alumni know everything about Rotary just because they are part of the family of Rotary. They may not know very much about your club, its culture, or its signature projects. Be sure to tell them about dues, meeting times, how new members are sponsored, and how they can expect to be involved.

HOW WOULD YOU REFER PROSPECTIVE MEMBERS?

If you know someone who is qualified to be a great Rotarian but unable to join your club, refer him or her to another club. If the club is in your area, you may wish to take him or her to the meeting for a personal introduction. If you are unsure which club would be the best fit and the prospective member lives in your district, contact your district membership chair or district governor for assistance.

You can also refer a potential member at www.rotary.org/membershipreferral and Rotary International will facilitate the connection. Your district governor or district membership chair may also give your club referrals from other Rotary members, Rotarian relocation assistance requests, or membership inquiries received through Rotary.org.



Don't forget about alumni of Rotary International and Rotary Foundation programs, including former Ambassadorial Scholars, Group Study Exchange and vocational training team members, Rotary Youth Exchange participants, Rotaractors, and Interactors. Keep them involved in Rotary activities and invite them to become Rotarians.

HOW CAN MY CLUB CREATE A DIVERSE MEMBERSHIP?

In chapter 1, you learned why having a diverse club is important, and you completed a membership diversity assessment. Here are some tips for attracting young professionals and women, two types of members that many clubs are interested in reaching.

10 ideas for attracting younger professionals

Adding younger members is essential to the future of your club. However, younger professionals often have hectic schedules, family obligations, and financial limitations that make it difficult for them to commit to Rotary. Make club membership more attractive and more feasible for younger members:

1. Waive or reduce fees for a period.
2. Create a satellite club with an alternate meeting time or format that is more convenient for prospective members with young families. Consider a Saturday morning meeting or a satellite e-club.
3. Reduce meal expenses or make meals optional. Consider bringing pastries to a meeting, organizing a potluck, or having everyone take turns bringing the food or beverages.
4. Create social and networking activities that are interesting and convenient for younger professionals.
5. Invite groups of younger people to join at the same time to make them feel more comfortable.

6. Create a club environment that is accepting of absences. Perfect attendance is typically not attainable for today's professionals. This may require some changes in your club's traditions or policies.
7. Highlight opportunities to get involved in local community service.
8. Assign a veteran Rotarian to serve as a mentor to make a new young member feel welcome. For information on mentoring, see [New Member Orientation: A How-to Guide for Clubs](#).
9. Get them involved. Young professionals are creative and eager to generate new ideas for solving persistent problems.
10. Offer variety. Talk about the various ways new members can participate in Rotary. Find out about their abilities and interests, and find ways to put them to use in your club's work.

Women in Rotary

According to a 2013 demographic survey of Rotary, 19 percent of Rotarians worldwide are women. In many regions, the percentage is much lower. Rotary research indicates that men and women join Rotary for the same reasons: to make a difference in their communities and to make personal connections. If your club's membership is less than 50 percent women, increasing the number of women will bring a different perspective to your club, create a membership that better reflects the demographics of your community, and expand the power and scope of your service projects.



Take out a Facebook ad to promote an upcoming club service project or social activity. This is a good way to connect with people in your community who are not familiar with Rotary and may be interested in getting involved.

Getting demographic data

For your region's demographic data, including gender and age, see your regional trends supplement at www.rotary.org/membership-resources.

WHAT MATERIALS ARE AVAILABLE TO HELP YOU PROMOTE YOUR CLUB?

Help club members find materials and resources for sharing Rotary with prospective members by adding a resource tab to your club website or Facebook page. In addition to your club's resources, you might be able to use these items, produced by Rotary:

Brand Center

Create brochures and posters customized with your club's information to showcase the work that you are doing in your community or to hand out when hosting prospective members at meetings

What's Rotary?

Cards, from shop.rotary.org, to give to people you speak to about Rotary

Proud Member window clings

Hang in your car, home, or office, also available at shop.rotary.org

HOW CAN YOU HONOR MEMBERS WHO STRENGTHEN YOUR MEMBERSHIP?

Recognize members who work hard to expand your club by bringing in new members. The [New Member Sponsor Recognition Program](#) is an exciting initiative that honors Rotary members who sponsor new members with a specially designed membership pin. A current member who sponsors one new member receives a recognition pin with a blue backer, and as additional members are sponsored, new colored backers are awarded to signify the sponsor's achievement. After receiving the pins, present them at your club meeting to highlight your member's achievement and acknowledge the importance of increasing your club's membership.

Do you want to honor your members in a different way? Develop your own club award, or think of another recognition method that is unique and fun for your club members.

CHAPTER 4 ENGAGING YOUR CLUB'S MEMBERS



Encourage your members to explore **Connect for Good** to learn about the many ways they can get involved with Rotary. Whether it's leading a hands-on service project, hosting a Youth Exchange student, or meeting with other Rotary members at the Rotary International Convention, they will learn how to get the most out of their membership.



The top reason that members stay with Rotary is the valuable friendships and connections that they have made as members.

Attracting new members to your club is crucial, but do not underestimate the importance of keeping existing members. Whether your club is rich in new members, established members, or both, your membership plan should seek to fully engage all of them.

Engaged members participate in club activities, meetings, events, projects, and club leadership. They also feel a strong attachment to their clubs because they enjoy the friendships and fellowship that come with being a Rotarian. They are motivated to put extra effort into club activities and projects and are proud to tell others about the impressive work their clubs are doing.

ENGAGING EXISTING MEMBERS

What if you thought of your members as your best customers? What keeps them coming back? Think of your members as customers and work hard to deliver an experience that keeps them engaged and excited about Rotary. It is well known that engaged members are more likely to stay with your club, so be sure to show your appreciation regularly and make sure that they have a variety of options for getting involved and staying active in your club:

- Make members feel appreciated by recognizing their achievements

and celebratory occasions, such as club membership milestones, work promotions, or birthdays.

- Develop a formalized mentoring program for involved members to support less active or new members.
- Get regular feedback from members to confirm that they are experiencing the benefits they were promised when they joined.
- Encourage them to serve on committees that suit their skills or interests.
- Give members a clear sense of your club's long-range goals and mission.
- Invite them to attend a district conference or seminar.
- Keep a list of service projects, and have members take turns leading projects that interest them.
- Poll members on their interests and schedule speakers who are stimulating and inspiring.
- Feature photographs of your members at recent club projects and events on your club website and Facebook page and in newsletters to recognize their contributions.
- Update members regularly on progress toward club goals as a way to build loyalty, pride, and an understanding of the need for long-term involvement.



53% of terminating members report that their club leaders never asked for member input.



Many terminated members report that they did not receive sufficient information about their clubs. More than half of former Rotarians say they had to rely on *The Rotarian* or their regional magazines for information about their own club.

Everyone's opinion counts

Interviewing club members — especially those who are leaving — can yield useful information to aid your retention efforts. Ask departing members to complete the resigning member questionnaire in [Membership Assessment Tools](#) to help your club prevent such losses in the future. Often, a personal conversation between the exiting member and a member he or she trusts can bring out additional information that is beneficial for club planning.

If departing members are relocating or leaving your club because of schedule conflicts but would like to continue being Rotarians, have them complete relocation forms or refer them yourself to other clubs that might be able to accommodate them.

The membership satisfaction questionnaire in [Membership Assessment Tools](#) is designed to identify what club members like most about your club as well as what they believe could be improved. Ask members to complete the survey, and share the results at a future club meeting. Discuss the findings with your club members, talk with them about changes that can be made, and involve them in implementing those changes.

Communicate with your club

Research shows that keeping members informed and up-to-date can increase a club's overall retention rate. Establish a communication plan to determine what you want to share with members and how. Club e-newsletters, websites, and social media pages are useful

communication tools. Recognize that different members use different communication tools, and try to offer information using more than one method. Members might enjoy learning about:

- Club information — projects, activities, news, and events
- Club financial reports
- International service opportunities
- New Rotary publications (and where they can be found)
- Rotary news highlights

Regularly communicate to your club members about:

- Opportunities to
 - Take on leadership roles
 - Attend club assemblies and district-level seminars
 - Participate in multidistrict meetings
 - Get involved in club and district projects and activities
- Rotary programs, projects, and activities
- Special Rotary events, including the Rotary International Convention and district conference
- Strategies for recruiting members
- The goals and initiatives of the club and district membership committees
- Progress toward membership goals
- Membership awards and recognition programs
- Sponsorship of new Rotary clubs

ORIENTING NEW MEMBERS

The moment a person becomes a Rotarian is special for both the member and the club. Whether you choose to mark this event with a special ceremony or induct new members at a weekly club meeting, make sure you acknowledge and



Include the Doing Good video at vimeo.com/rotary in your orientation. It shows newcomers what is possible through Rotary and how they can participate.



Tell your members to watch for a welcome email from Rotary. It will encourage them to get started as Rotarians by:

- Learning more about Rotary from **Connect for Good**
- Updating their member profiles
- Joining the Rotary conversation on social media

celebrate their involvement in Rotary. Invite the inductee's family, and encourage all club members to participate in welcoming this new member of your Rotary family.

Give new members an understanding of the benefits of membership in your club and the opportunities for service, both in your community and internationally, by organizing a formal orientation program shortly after induction. Include an overview of your club's recent accomplishments and upcoming projects and activities, and ask how they would like to be involved. Read [New Member Orientation: A How-to Guide for Clubs](#) to find ideas for holding memorable induction ceremonies.

NEW MEMBER INVOLVEMENT

Research shows that the more members are involved in Rotary activities, the more committed and connected they become to their fellow members, their club, and the organization. Ask new members what projects or activities interest them, and give them an active role so they immediately feel a sense of connection to your club. Don't assume that a new member will be interested in a role that is related to his or her profession. For example, an accountant may not want to keep the books for the club just because it is her area of expertise. She may be looking for a different experience.

Meaningful service projects

A key reason people are drawn to Rotary membership is the promise of work on meaningful service

projects in their communities and other parts of the world. Clubs that conduct multiple projects can offer more opportunities for involvement, making members feel that they are contributing to an important effort.

Encourage your club to order [Communities in Action: A Guide to Effective Projects](#) to support you in planning, carrying out, and evaluating your service projects. This guide can help you make sure that your club's projects are effective and address important needs in your community.

Rotary Fellowships and Rotarian Action Groups

New club members might be interested in joining a Rotary Fellowship or Rotarian Action Group, where they can have fun:

- Sharing common interests or hobbies
- Working with others in the same profession to make a difference
- Making friends around the world
- Exploring new opportunities for service

Learn more about [Rotary Fellowships](#) and [Rotarian Action Groups](#) on Rotary.org.

Special Rotary events

In addition to weekly club meetings, invite new members to special club, district, and international events:

- Club assembly
- District conference
- District training events
- District Membership and Rotary Foundation Seminar
- Rotary institutes
- Rotary International Convention



Of terminated members, **48%** did not feel comfortable sharing their concerns with club leaders.

Get to know your members

Rotarians value the relationships that are formed within their clubs. This is one of the primary reasons that people stay with Rotary. Encourage members to learn about their fellow members. Make an effort to understand your members' backgrounds and interests in the following ways:

- Ask members which upcoming project or activity they are most looking forward to.
- Interview and introduce a member in each of your newsletters.
- Involve families in meetings, social activities, and service projects.
- Ask members to take turns sharing their Rotary moments at your weekly meetings.

Listen to your members and their concerns. Review the membership satisfaction questionnaire in [Membership Assessment Tools](#) to be sure that you are actively seeking out their opinions and that their voices are being heard. Take prompt action to address the concerns of your members so that their experience in your club is positive.

YOUR CLUB MEMBERSHIP COMMITTEE

In order to accomplish all of your membership goals, you will need a strong team to develop and implement your membership development plan. Establishing a club membership committee will allow you to track and execute the strategies outlined in your plan successfully — and involve club members in the endeavor. Club membership committee responsibilities often include:

- Setting club membership goals for the coming year
- Informing members about the importance of recruitment and retention
- Developing an action plan to improve member satisfaction that includes surveying members and then initiating changes in response to their feedback
- Conducting club assessments to see that membership development and retention efforts are successful
- Working with the public relations committee to create an image of your club that is attractive to prospective and current members, as well as the community in general
- Sponsoring newly organized clubs in the district, if applicable

CHAPTER 5 MENTORING NEW CLUBS

Although the district governor is ultimately responsible for creating new clubs, your club can play a vital role in the process by sponsoring and mentoring a new club. Before undertaking this responsibility, educate your members thoroughly about the process and make sure they are willing to participate.

SPONSOR CLUB QUALIFICATIONS

Although a new club isn't required to have a sponsor club, Rotary strongly recommends it. In selecting a sponsor club, the district governor and district extension team look for a club that:

- Agrees to mentor the new club for at least one year after its admission into Rotary
- Is in good financial standing with Rotary
- Has at least 20 active members
- Maintains a well-rounded program of Rotary service

A new club's success depends on how well the club is organized and how well it operates in its first few months. After a club receives its charter, the sponsor club acts as a mentor, offering guidance for one to two years. Learn more about the process in [Organizing New Clubs: A Guide for District Governors and Special Representatives](#).

SPONSOR CLUB RESPONSIBILITIES

- Assists the district governor's special representative in planning and organizing the administrative processes of the new club
- Serves as an adviser to the club's officers and reports to the district governor as requested during the club's first year
- Familiarizes the new club with Rotary's policies and procedures
- Organizes joint fundraising activities
- Has the sponsor club's president join the special representative in attending the first regular board meeting of the new club
- Assists the new club in planning programs and projects during its first year

Research indicates that new clubs' biggest membership losses, as well as most club terminations, occur during the second year. A new club that has the strong support of a sponsor club well into its second year has a greater chance of becoming strong, self-sufficient, and productive.

THE MENTORING RELATIONSHIP

Sponsor clubs can establish strong, healthy mentoring relationships in these ways:

Set goals with the new club

Honestly examine the challenges and weaknesses that could impede the new club. Once you do, you can help it establish goals that will lead it to success.

Provide structure

Set up regular meetings, complete with agendas, and make sure that each meeting moves the new club toward its goals.

Establish regular communication

Schedule phone calls and meetings with the new club so you can share your advice and guide the club in its early stages.

CLUB SIZE

Rotary has set some standards for the establishment and sponsoring of new clubs:

- A new club must have a minimum of 20 charter members, unless there is sufficient reason for the Board to waive this requirement.
- At least 50 percent of the charter members must reside in the community in which the club is being established.
- A sponsor club must have at least 20 members. If two or more clubs act as sponsors, this requirement applies to only one of them.



CHAPTER 6

SUPPORTING YOUR CLUB: ROTARY RESOURCES AND TOOLS

ROTARY VOLUNTEERS AND STAFF

The following Rotary volunteers and staff members can answer questions and advise your club on formulating an effective membership development plan. Contact information for Rotary staff and your district's leaders are on [Rotary.org](https://www.rotary.org) and in the Official Directory. Find your regional coordinators through www.rotary.org/coordinators-advisers.

REGIONAL LEADER SUPPORT

Rotary coordinators serve as a resource for districts and clubs and are knowledgeable about all aspects of Rotary, including best practices and innovative strategies for attracting and keeping members, regional membership plans, and the priorities and goals of the Rotary strategic plan.

Rotary public image coordinators can offer guidance and resources for enhancing Rotary's public image in a way that will support membership in your club.

Regional Rotary Foundation coordinators serve as a resource on all Foundation-related topics, including grants and grant management, fundraising, and programs such as PolioPlus and Rotary Peace Centers.

Endowment/major gifts

advisers work with regional and district leaders to develop plans for identifying, cultivating, and soliciting major gifts and facilitate events that engage current Foundation supporters and develop prospective ones.

DISTRICT MEMBERSHIP DEVELOPMENT COMMITTEE

The district membership development committee identifies, promotes, and implements membership development strategies for the district. The committee chair acts as a liaison between the governor, the Rotary coordinator, RI, and the clubs in the district on membership development issues.

Your assistant governor or district governor has contact information for this committee. If your district doesn't have a membership development committee, suggest that one be established.

ASSISTANT GOVERNOR

Assistant governors can work closely with your club to make it more vibrant and enable it to attract and retain members. Contact your district governor to find out if your district has an assistant governor.

Share your club's membership goals and successful initiatives with the district committee and your assistant governor. It is just as important for the district to learn about new and effective club-level strategies and tools as it is for you to know about the support and assistance that the district committee can provide you.

CLUB AND DISTRICT SUPPORT REPRESENTATIVES

Every club has a CDS representative who can answer questions about:

- The RI Constitution and Bylaws, Rotary Code of Policies, Manual of Procedure, and RI Board of Directors policy
- Rotary International and the Secretariat
- Rotary Club Central

Find your club's representative at www.rotary.org/representatives.

OTHER SECRETARIAT STAFF

Rotary International's Secretariat includes RI World Headquarters, in Evanston, Illinois, USA, and seven international offices. Staff members can assist you with questions or requests related to membership. Contact them at membershipdevelopment@rotary.org.

ROTARY RESOURCES

Rotary.org

Get the latest news, announcements, and resources on Rotary's website, which also offers:

- Membership resources and publications at www.rotary.org/membership
- Membership survey results
- Prospective member, member relocation, and Rotarian referrals
- Publications (many available as free downloads, others available in print free or for purchase at shop.rotary.org)
- [Webinars](#)
- [Brand Center](#)
- [Club Finder](#)
- Contact information for your [Club and District Support representative](#)
- [Membership Best Practices discussion group](#)
- [Young Professionals Network](#)



The Membership Minute newsletter offers:

- The latest research on membership in Rotary
- Suggestions for finding and attracting qualified, committed members
- Ideas for creating or enhancing orientation programs for new members
- Tips for retaining current members

Encourage club members to stay informed by subscribing to Membership Minute and other email newsletters at www.rotary.org/newsletters.

Rotary Club Central

Rotary Club Central is an online tool that club and district leaders use to set and track goals and activities in three key performance areas: membership initiatives, service activities, and Rotary Foundation giving. By using Rotary Club Central as a planning tool and recording your club and district goals, progress, and achievements, you can help RI measure the impact Rotarians are making worldwide.

Club leaders are encouraged to sign in to Rotary.org and enter their data in Rotary Club Central so that club members, as well as the district governor and assistant governor, can see their progress. Members can also use Rotary Club Central to:

- Donate to The Rotary Foundation
- Manage subscriptions to Rotary newsletters
- Take courses to learn more about Rotary
- Pay dues

Rotary Ideas

Crowdsourcing is a powerful digital strategy that supports the good work of Rotary around the world.

Rotary's own crowdsourcing platform, known as Rotary Ideas and found at ideas.rotary.org, is designed to find Rotary and Rotaract clubs the resources they need for projects. It's a place where clubs can post their projects or ideas and ask for partners, volunteers, funding, or other support.

Rotary Showcase

Let people know what Rotary is doing in your community by spreading the word through social media. [Rotary Showcase](#) allows members of the Rotary family to post club or district service project information — including a description, photos, and video — and publicize it through Facebook and Twitter.

The Learning Center

Take an online course through the Learning Center at learn.rotary.org. Courses include The New Rotary.org, Strengthen Rotary, Rotary Grants, and How to Run a Webinar, among others. You can create a user profile, track your progress through courses, and print certificates for courses you've completed. Each course also has its own online community where registrants can interact with one another and with course moderators. To take a course, sign in to Rotary.org, then choose Learning Center in the Learning and Reference menu. Or go to learn.rotary.org.

MEMBERSHIP DEVELOPMENT PLAN WORKSHEET

This worksheet will assist you in building your club’s membership development plan. Once you have completed the steps for each chapter, you will have identified challenges and opportunities, a vision, and strategies for prospective, new, and established members. Provide more than three responses to each question if you wish.

During a club meeting, inform members about the steps you are taking to strengthen membership, and encourage their continued involvement in the process.



Chapter 1: Evaluating Your Club

We completed the membership diversity assessment and identified the following strengths and weaknesses in our club’s demographic profile:

- 1. _____
- 2. _____
- 3. _____

Our club completed the classification survey and identified at least three professions in our community that are missing from our membership:

- 1. _____
- 2. _____
- 3. _____

Our club completed the member viability and growth model, discussed the results, and formulated the following steps to address our engagement and retention issues:

- 1. _____
- 2. _____
- 3. _____



Our club completed the termination profile, discussed the results, and formulated the following plan to increase retention in the group that we identified as the most vulnerable to termination:

1. _____

2. _____

3. _____

We identified three best practices to make our club innovative and flexible in Be a Vibrant Club:

1. _____

2. _____

3. _____

We have selected a club member to manage our club website.

We have selected a club member to manage our social media content.

We visited the Public Relations page on Rotary.org and will use the following tools to promote awareness in our community:

1. _____

2. _____

3. _____

Our club hosted a focus group in our community. It yielded the following findings:

1. _____

2. _____

3. _____



Chapter 2: Creating a Vision for Your Club

Our club completed the club visioning process and set the following goals:

1. _____
2. _____
3. _____

Our club reviewed the Strategic Planning Guide to help us set long-term and annual goals.

Chapter 3: Attracting New Members

Our club completed the survey to identify prospective members and looked at the information in light of our classification survey and membership diversity assessment results. We have decided to implement these three additional strategies to identify prospective members:

1. _____
2. _____
3. _____

Our club has decided to implement these three additional strategies to introduce Rotary to prospective members:

1. _____
2. _____
3. _____

Our club has assigned a member to manage and update our club website using materials from Rotary's Brand Center.

Based on the results from our membership diversity assessment, our club selected the following benefits to highlight when speaking to prospective members:

1. _____
2. _____
3. _____



Chapter 4: Engaging Your Club's Members

Our club will implement these strategies for engaging existing members:

1. _____
2. _____
3. _____

Our club has asked members to complete the membership satisfaction questionnaire and decided to implement the following changes:

1. _____
2. _____
3. _____

Our membership committee members have read New Member Orientation: A How-to Guide for Clubs and are creating an orientation process that educates new members and involves them in the club. Our orientation process will include the following:

1. _____
2. _____
3. _____

We created a plan to get to know new members that includes the following:

1. _____
2. _____
3. _____

Our club will engage new members by:

1. _____
2. _____
3. _____



Chapter 5: Mentoring New Clubs

- Our club membership committee chair has informed our district governor of our willingness to serve as a sponsor club.
- Our club members have discussed the responsibilities of serving as a sponsor club and agree to commit to this relationship.

Chapter 6: Supporting Your Club: Rotary Resources and Tools

- Our club membership committee communicates regularly with the district membership development committee.
- Our club leaders regularly communicate with our district governor or assistant governor and contact them when we need assistance.
- Our club membership committee members have visited Rotary's website within the past month and routinely use Rotary materials that are relevant to our club.
- Our club has reviewed Rotary resources that can support our club.

QUESTIONS?

If you have questions, comments,
or suggestions about this publication,
send them to:

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membershipdevelopment@rotary.org



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