



# STRENGTHENING YOUR MEMBERSHIP

Creating Your Membership Plan



# ABOUT THIS GUIDE



This guide is for club leaders and club membership committees. It explains the process of creating a membership 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 from Rotary. As you work through this guide, you will evaluate your club's membership trends, create strategies for attracting new members, and develop ways to make your club meetings more engaging to improve your club's member retention rate. Finally, we've included a worksheet that has concrete steps your club can take to build a plan to strengthen its membership.

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## INTRODUCTION

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# INTRODUCTION

Building membership is Rotary's top internal priority, and every member can make a difference. When you have a strong membership base, your club is better able to serve. We need active, engaged, and enthusiastic members and club leaders who can recognize opportunities for growth and act on them.

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 increase your membership.

Creating a membership plan is a way to document your club's vision, goals, and strategies for expanding your membership and keeping your members connected. Be sure to involve all of your members in the creation of your membership plan and consider everyone's ideas. Having contributions from all members will foster enthusiasm and help ensure your plan is well implemented. Once it's created, your plan can serve as a guide to setting your membership goals and tracking your club's progress.

# CHAPTER 1

## EVALUATING YOUR CLUB



Take the course *Is Your Club Healthy?* in the **Learning Center** to implement suggested remedies.



When using the **member satisfaction survey** to evaluate 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.

Determining how your club can improve is crucial to keeping current members engaged and active while making your club attractive to prospective members. Taking an objective look at your club — from the perspective of club members and your community — can reveal both its strengths and the areas that need improvement.

You can start your assessment by having your club officers take the **Rotary Club Health Check**. It's designed to be a quick and easy way to determine what your club is doing well and where you might want to make some changes. Once your club officers have taken the health check, they should discuss their findings and ideas for next steps at your next board meeting.

Then gather your members' feedback about your club. It's essential 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 to encourage candid feedback.

Here are a few ways to get feedback from members:

- Informal discussions, with small or large groups, held in a location other than your usual meeting place
- Face-to-face interviews
- Paper or electronic surveys, such as the member satisfaction survey in **Enhancing the Club Experience**, found in Membership Assessment Tools
- Focus groups with members, prospective members, or non-Rotarians in your community

It's important that your club be open to making changes based on member feedback. 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 is 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?
- Is your club's membership balanced across professions?
- Is your club sustainable?
- Why do members stay in your club, and why do members leave?
- Is your club innovative and flexible?
- Does your community have a strong awareness of your club?
- How are you using digital communications to promote your club?
- How does your club appear to a nonmember?



To understand different ways clubs can increase diversity, visit the **Learning Center's** membership section and take the course Building a Diverse Club.



Worldwide, **52%** of Rotary club members are between the ages of 50 and 69, and another **22%** are 70 or over. How might you welcome younger members into your club?



**71%** of members work, while about **26%** are retired. Analyze the demographic composition of your club and target underrepresented groups in your recruitment strategies.

## IS YOUR CLUB DIVERSE?

The strongest and most effective clubs reflect the demographics of the communities they serve. That is, they include a representative mix of men and women and different age groups, professions, and ethnic groups. Rotary clubs that bring together diverse perspectives address the needs of their communities more creatively. Diverse clubs are also seen by their communities as more credible, and they draw upon a wider range of skills, leadership prospects, and fundraising potential.

Use the assessment in [Diversifying Your Club](#) to gauge your club's diversity. It will prompt you to consider these questions:

- 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?

## DO YOUR CLUB'S MEMBERS REPRESENT A GOOD BALANCE OF PROFESSIONS?

Understanding the professional breakdown of your members can help you create a balanced membership base that reflects the careers in your community. The Rotary Code of Policies requires clubs to include members from a wide variety of professions. To assess your club's professional diversity and make the most of your members' expertise, complete the classification assessment in [Representing Your Community's Professions](#). This assessment reveals 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? Don't forget about entrepreneurs, owners of home-based businesses, younger professionals, bloggers, and community service leaders. Clubs that include members with varied professions gain a cross-section of expertise, perspectives, and skills that increase their capacity to serve their communities. 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.





Find ideas for introducing new members to your club by taking the course Kick-start Your New Member Orientation in the membership section of the [Learning Center](#).

For more ideas about engaging current members, take the course Best Practices for Engaging Members in the membership section of the [Learning Center](#).

Learn more by taking the course Practicing Flexibility and Innovation on Rotary's Learning Center or by visiting [rotary.org/flexibility](http://rotary.org/flexibility).



Use membership reports to make more strategic decisions about where to focus your efforts. [Understanding Membership Reports](#) can help you get started.

## IS YOUR CLUB SUSTAINABLE?

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, that 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 learn more by reading [Improving Your Member Retention](#) and completing the retention assessment and analysis. The assessment helps you look at your club's membership changes within a specific time frame and recognize any significant turnover.

## WHY DO MEMBERS STAY IN YOUR CLUB, AND WHY DO MEMBERS LEAVE?

Knowing how long members tend to stay in your club and [understanding why members leave](#) can help you focus on specific areas in your membership plan. The assessment and analysis in [Improving Your Member Retention](#) 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 mind, you can focus on keeping newer members by encouraging

them to become involved 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 keep members engaged and involved.

## IS YOUR CLUB INNOVATIVE AND FLEXIBLE?

In a changing world, your club's success depends on its ability to adapt and evolve. 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. If you want to attract prospective members to your club, you'll need to make your club relevant to them.

Clubs now have greater flexibility in meeting frequency and format, attendance, and membership types. Consider varying meeting times and locations, loosening attendance rules, reducing fees for new or younger members, varying your service projects, and allowing for different kinds of membership. You'll find that being in a more accommodating club will make members more loyal to and enthusiastic about Rotary and the club.

Use the **Event Planning Guide** in the Brand Center's promotional resources to plan your next public event. Give out **prospective member brochures** to explain what Rotary is, and customize a **club brochure** to introduce your club. You can also show a presentation that helps nonmembers **Discover Rotary**.



See the **Social Media** page on [Rotary.org](http://Rotary.org) for a list of Rotary-related social media channels where you can share your latest stories and join the conversation.

## DOES YOUR COMMUNITY HAVE A STRONG AWARENESS OF YOUR CLUB?

Building a public image is vital to any organization's success. Although global awareness of Rotary's name and emblem are relatively high, the public doesn't have a deep understanding of Rotary and the contributions we make to communities around the world. Building this understanding and recognition starts at the club level.

What can you do to promote what Rotary does in your community? Assessing your club's promotional materials is a good place to start. Do they depict Rotarians as people of action in the community? Do they demonstrate the value of membership and explain how the community and prospective members can get involved? Are your messages consistent? You can find a wealth of resources to help you get started, including messaging guidelines, on Rotary's [Brand Center](#).

Next, ask your members to engage with the community and tell Rotary's story. You can do that through one-on-one conversations, events, news stories, your website, or social media. Make sure your audience knows how it can learn more or become further engaged. Get the community excited about your club and Rotary, and make sure the experience your club offers matches the expectations you've created.

Research indicates that people are more likely to give time and money to an organization with a proven record of tangible results. Use Rotary's resources to raise awareness of your

club and the work it does in your community. Visit the [Brand Center](#) to find customizable materials, including a club brochure and inserts for youth programs. Post your projects in [Rotary Showcase](#) to publicize the good work clubs like yours do locally and globally.

## HOW ARE YOU USING DIGITAL COMMUNICATIONS TO PROMOTE YOUR CLUB?

Does your club have a website? A Facebook page? Do you update them regularly? Do you tweet 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? Having an online presence increases your club's visibility and fosters a deeper understanding of its impact on your community. Make your club website appealing to nonmembers, not just members. Consider having a public-facing section that shows club contact information and is refreshing, free of Rotary jargon, and easy to navigate.

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](#), [The Rotarian](#), and Rotary's blog, [Rotary Voices](#), regularly for content you can use to update your club's website and newsletters.

The power of social media lies in its ability to reach a broad audience. Sharing an inspiring post can spark others to do the same. Find someone





Tell stories from the Rotary community on our [Instagram account](#).



Put a link to [Rotary's Join page](#) on your website for people interested in membership.

in your club or community who is adept at using these communication tools and can help your club with your social media pages. 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, [facebook.com/rotary](#). You'll find links to Rotary news stories, events, and videos. Your club can use Facebook to find potential members, invite community members to fundraisers, and show the community your projects. You can also link to donation pages, connect with other organizations, and highlight the work of your club and Rotary around the world. With Facebook, if you see something you like, you can add your comment and share it with your contacts in a matter of seconds.

### 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 over 64,000 members.

### Twitter

Keep in touch with other Rotarians and friends of Rotary 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 on 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.

## HOW DOES YOUR CLUB APPEAR TO A NONMEMBER?

### Club image

Is it easy for a visitor to find basic information about your club, including your meetings and projects? Ask a friend or family member to try to locate the following information:

- What does your club do?
- How often does it meet?
- Where will the next meeting be, and how long will it last?
- Should a visitor contact someone in the club before visiting?
- Is there a cost to the visitor for attending?
- What will the meeting be like?
- What does your club do besides holding meetings?

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



To learn more, take the Online Membership Leads course in the Learning Center.

## Club experience

Often, our strong brand attracts interested members of the community. But when they visit a club, the experience doesn't match their expectation. Review what happens when your club meets to make sure it is a welcoming and fun experience:

- Is someone responsible for welcoming members and guests to meetings and events?
- Are your club's meetings and events well organized and run professionally?
- Are your club meetings interesting, insightful, and relevant?
- Is there sufficient variety in how you meet and what you do when you meet?
- Do your club's practices accommodate member needs and interests?
- Do you have regular social events?

Your club may even consider asking members to attend other clubs or inviting visitors to come and give you their honest feedback. This will give you an unbiased perspective.

Some nonmembers express their interest in Rotary by finding Rotary.org and clicking or tapping "JOIN."

These candidates for membership are assigned to a district as a membership lead. Your district leaders may assign these leads to your club leaders to review. If you get an email alert, follow the instructions to connect to these interested community members.

## Service projects

Research consistently shows that members join and stay to make a difference in their community and to make connections. Having a strong project will attract new members and engage current ones. Review your service projects. Are they inspiring

and enjoyable for everyone involved? Do they make a significant impact?

- Does your club have a 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 its service projects and learn more about your club?
- Do your service projects address a current need in your community?
- Do they draw upon members' talents and expertise?
- Do your club members meet the people who benefit from their service?

Be sure to follow up with nonmembers who attend your club events and service projects to learn more about them and their interests. Invite them to your club meeting to get to know your club. They may be a good fit for your club. Even if they aren't, creating a positive experience for them will help Rotary's public image. To learn more, see [Creating a Positive Experience for Prospective Members](#).

## Gathering nonmember feedback

An effective way to get helpful suggestions on making your club even better is to talk to individuals or groups face-to-face. Focus groups, for example, can also help you meet non-Rotarian members of your community and introduce them to Rotary. You could hire an outside professional to conduct the focus group to prevent bias. Some clubs ask an agency to donate this service. If having an outside professional conduct a focus group isn't possible, have facilitators do their best to be open-minded and objective.



To learn more about making your club more attractive and finding new members, take the Strategies for Attracting New Members course in the **Learning Center**.

### STEP 1: INVITE PARTICIPANTS

List community members you'd like to invite. Aim for a diverse group of women and men of varying ages and professions. Invite prospective members, Rotaractors, **Rotary alumni**, and others who know a little about Rotary. Tell them the purpose of your focus group and how valuable their opinions are to your efforts to shape projects and activities.

### STEP 2: CREATE THE ENVIRONMENT

Work to create an environment where 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, mentioning anything they would like, such as their profession, how long they've lived in the community, or whether they're involved in any professional or service groups.

### STEP 3: HAVE THE CONVERSATION

Have an agenda, even if it has just 10 questions. It's important that questions not lead participants to specific responses, and the facilitator must remain neutral. 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, how would you spend it?
- What problems do you see in our community? What could community members do to address them?

- If you could help any part of the world, in any way you liked, what would you do?
- What are your impressions of Rotary?
- What positive and negative perceptions of Rotary do others have?

Give everyone a chance to speak, and try not to let a few people dominate the conversation. Tell participants how helpful it is to your club to get many opinions. 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 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 along with members' ideas. Show members that you value their thoughts and opinions, and that the discussion will result in change. This is the starting point for your club membership plan.



# 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 members. Consider asking a planning professional to assist you.

After you determine the current state of your club by completing the evaluations described 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 the immediate future and 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:

- 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?
- Based on your club's challenges and strengths, what are your strategic priorities?
- What changes can be made right away?

- What short-term and long-term goals can help you achieve your vision?
- What plans can you put in place to help you reach those goals?
- Who will work together to monitor progress and make 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 short-term goals. As soon as you have a timeline and people assigned to the tasks on your action plan, you can set your plan into motion.

# 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.

Your club may have prospective members that are waiting to hear from you. Many people express interest in Rotary online and are assigned to clubs for follow-up. Club leaders get alerts when a new lead is assigned to the club. Learn **How to Manage Membership Leads**.

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 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 by your assessment. For many, one of those 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 strategies for attracting new members.

## WHO ARE YOUR PROSPECTIVE MEMBERS?

Ideal prospective members are people who embody Rotary's values, who want to make a difference locally, and who have a good reputation in the community. In addition to friends and co-workers, 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 if 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, Rotary Friendship Exchange participants, and Rotaractors, as well as the parents and grandparents of Interactors, RYLA participants, and Rotary Youth Exchange students, and youth exchange host families.

Once a year, ask club members to complete the exercise in **Finding New Club Members**. This simple activity asks members to think about people they know in the community who might be good club members.

Use the results to talk with members about your club's culture and whether these prospective members would be a good fit. Do they work 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.

Remember, even if the prospective members you identify don't join, it's worthwhile to engage them as volunteers, donors, or simply friends of your club and **create a positive Rotary** experience for them.

If you find a promising person but learn that your meeting time or location, for example, is not a good fit, **refer** him or her to another Rotary club.



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

## 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. Although facts and figures may be useful, personal experiences and stories connect people on an emotional level. After 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. When 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. Use this guide for tips on [Creating a Positive Experience for Prospective Members](#).

## HOW DO YOU COMMUNICATE THE BENEFITS OF JOINING YOUR CLUB?

In talking to prospective members, do you consider their interests and needs when you explain 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 in one's community through service projects
- Establishing business connections, lasting friendships, and mentor relationships
- Developing professional skills, such as event planning, public speaking, and fundraising
- 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
- Getting discounts on a variety of services through the Rotary Global Rewards program

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





Make a list of the benefits of Rotary membership, and discuss them with your members. Develop sample messages that members can adapt when talking with potential members. Incorporate these messages into your [club brochure](#) or a presentation that helps nonmembers [Discover 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 works with to join your next service project. They'll bring 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 wants to increase her charitable contributions and participate in some international service. Tell her how Rotary clubs around the world connect with each other to provide clean water, health care, education, and more.

## HOW OPEN SHOULD YOU BE WITH PROSPECTIVE MEMBERS?

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's important to talk to people about 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. The [Discover Rotary PowerPoint presentation](#) was created for this purpose. Use it and the [People of Action videos](#) to inspire your prospective members at a meeting with a large number of guests or an event where prospective members will be present. Distribute the [prospective member brochure](#) and a [club brochure](#) if you have one.

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. For ideas about what to cover with new members rather than prospective members, see [Introducing New Members to Rotary: An Orientation Guide](#).



Post an upcoming club service project or social activity as a Facebook event. 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.

## 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 them** to another club. If the club is in your area, you may wish to take the prospective member to the meeting to make a personal introduction. If you're 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 [rotary.org/membershipreferral](https://rotary.org/membershipreferral), and Rotary International will facilitate the connection. Your district governor or district membership chair may also direct referrals from other Rotary members, Rotarian relocation assistance requests, or membership inquiries received through Rotary.org to your club. Club leaders should check these leads often, because prospective members may be waiting to hear from them. Learn [How to Manage Membership Leads](#).

## HOW CAN YOUR CLUB DIVERSIFY ITS MEMBERSHIP?

In chapter 1, you learned why having a diverse club is important, and you completed a **membership diversity assessment**. You can find demographic data for Rotary in your region, including gender and age, by checking the reports on Rotary Club Central and the Club Administration area of My Rotary. Here are some tips for attracting young professionals and women, two types of members that are underrepresented in clubs worldwide.



To learn more about attracting and finding new and diverse members, visit the **Learning Center** and take the courses *Strategies for Attracting New Members and Building a Diverse Club*.

## Ten ideas for attracting younger professionals

Adding younger members is essential to your club's future. But 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 that meets at a different time or has a format that's more convenient for those with young families. Consider meeting on a weekend or online.
3. Reduce meal expenses or make meals optional. Consider bringing snacks 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, and invite Rotaractors to become dual members.
6. Relax your club's attendance rules. Perfect attendance is typically not attainable for today's professionals. This may require some changes to your club's policies. To explore this option, see the [Start Guide for Flexible Meetings and Attendance](#).
7. Highlight opportunities to get involved in local service.
8. Assign a veteran Rotarian to serve as a mentor to make a new young member feel welcome. For information on mentoring,

see [Introducing New Members to Rotary: An Orientation Guide](#).

9. Get them involved. Young professionals are creative and eager to generate new ideas for solving persistent problems. [Connect for Good](#) presents a number of ways members can connect and get involved.
10. Offer variety. Talk about all the 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.

For more ideas for accommodating younger members, see the *Engaging Younger Professionals* toolkit at [Rotary.org](http://Rotary.org) and go to [rotary.org/flexibility](http://rotary.org/flexibility).

## Women in Rotary

According to a 2015 demographic survey of Rotary, only 22 percent of Rotarians worldwide are women. In many regions, the percentage is much lower. Rotary research indicates that women and men join Rotary for the same reasons: to make a difference in their communities and to make personal connections. If fewer than 50 percent of your club's members are women, increasing that number will bring a different perspective to your club, make it better reflect the demographics of your community, and expand the power and scope of your service projects.

Younger professionals and women aren't the only two groups to target. Recent retirees may be looking for ways to stay connected to professionals in the community, and could share their skills and expertise with your club.



# CHAPTER 4

## ENGAGING YOUR CLUB'S MEMBERS



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



Encourage members to explore **Connect for Good** to learn about the many ways they can get involved with Rotary. Whether they lead a hands-on service project, host a Youth Exchange student, or meet with other Rotary members at the Rotary International Convention, they'll learn how to get the most out of their membership.

Attracting new members to your club is important for growth and new perspectives, but the key to a strong membership is keeping current members. Whether your club is rich in new members, in 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 club 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 club is doing.

### ENGAGING CURRENT MEMBERS

What if you thought of your members as your best customers? What keeps them coming back? Work hard to deliver an experience that keeps them engaged and excited about Rotary. Consider relaxing attendance policies or changing meeting formats if that's what members want. 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:

- Recognize their achievements and celebratory occasions, such as club membership milestones, work promotions, and birthdays.
- Develop a formalized mentoring program for involved members to support less active or new members.
- Reach out to members with low attendance to understand why they aren't coming and help them re-engage.
- 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.
- Poll members on their interests and incorporate these topics or activities into club meetings or events.
- 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 terminated members report that their club leaders do not consistently seek input from members.



Many terminated members report that they did not receive sufficient information about their clubs.

- Use the member satisfaction survey in [Enhancing the Club Experience](#) to gauge what's working and what's not.

### Everyone's opinion counts

Interviewing club members — especially those who are leaving — can yield information that's useful for your retention efforts. Ask departing members to complete the exit survey in [Understanding Why Members Leave](#) to help your club prevent such losses in the future. Often, a personal conversation between the exiting member and a member she or he trusts can bring out additional information that is beneficial for club planning.

If resigning members are relocating or leaving your club because of schedule conflicts but would like to continue being Rotarians, send them the link to [rejoin or change clubs](#) or [refer them](#) to other clubs that might be able to accommodate them.

The [member satisfaction survey](#) is designed to tell you what club members like most about your club and 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 communicate 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
- Rotary's online tools and resources (and how members can benefit from them)
- 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 attracting new members
- The goals and initiatives of the club and district committees
- Progress toward membership and other goals
- Awards and recognition programs
- Sponsorship of new Rotary clubs



See how a fictional club engages its members, including new ones, by taking the courses *Best Practices for Engaging Members* and *Kick-start Your New Member Orientation*, found in the **Learning Center**.

## 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 club meeting, make sure you acknowledge and 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 them copies of [Rotary Basics](#) and [Connect for Good](#) (sold together in the New Member Welcome Kit through [shop.rotary.org](http://shop.rotary.org)), as well as a member certificate (template available in the [Brand Center](#)).

Organize a formalized orientation program shortly after induction. Give new members an understanding of the benefits of membership in your club and the opportunities for service, both in your community and internationally. Include an overview of your club's recent accomplishments and upcoming projects and activities, and ask how they would like to be involved. Read [Introducing New Members to Rotary: An Orientation Guide](#) for more ideas.

## NEW MEMBER INVOLVEMENT

Research shows that members become more committed and connected to their fellow members, their club, and the organization as they become more involved in Rotary activities. 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's related to his or her profession. For example, an accountant may not want to keep the books for the club just because that's her area of expertise. She may be looking for a different experience. [Connect for Good](#) showcases a variety of ways a member can get involved and connected through Rotary. Be careful not to overwhelm them with too much responsibility right away, though. Talk to them to see how involved they would like to be.

## 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.

## 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 while:

- Sharing common interests or hobbies
- Working with others in their 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 My Rotary.





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



To learn more about their role, club membership committee chairs and members should take the Club Membership Committee Basics course, as well as the membership courses, in the **Learning Center**.

## Special Rotary events

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

- Club assemblies
- District conferences
- District training events
- District membership, public image, and Rotary Foundation seminars
- Rotary institutes
- Rotary International Conventions

## 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 in Rotary. Encourage members to learn about their fellow members.

Make an effort to understand your members' backgrounds and interests:

- Ask members which upcoming project or activity they are most looking forward to.
- Feature a different member in your each of your newsletters.
- Introduce and interview a different member at each meeting.
- 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 member satisfaction survey results 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'll need a strong team to develop and implement your membership plan. Establishing a club membership committee will allow you to succeed at executing the strategies outlined in your plan — and involve club members in the endeavor. Club membership committee responsibilities often include:

- Setting club membership goals for the coming year
- Checking and managing online membership leads and following up with the interested candidates
- Leading new member orientation
- Informing members about the importance of attracting and engaging members
- Developing an action plan to improve member satisfaction that includes surveying members and then responding to their feedback by initiating changes
- 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 (see [Starting a Rotary Club](#))

# CHAPTER 5

## MENTORING NEW CLUBS



Your club can play a vital role in new club development by sponsoring and mentoring a new club. Before undertaking this responsibility, discuss the process with your members and make sure they are willing to participate. To learn more about developing new clubs, see [Starting a Rotary Club](#).

### 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 membership team look for a club that:

- Has been chartered for at least three years
- Has voted 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 (if more than one club acts as a sponsor, this applies to only one of them)
- 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 offers guidance for one to two years.

### SPONSOR CLUB RESPONSIBILITIES

A sponsor club's president joins the new club adviser in attending the new club's first regular board meeting, but there's enough to do to support a new club that every member of the sponsor club can get involved. A sponsor club:

- Assists the district governor and new club adviser 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
- Assists the new club in planning programs and projects during its first year

Research indicates that new clubs' biggest membership losses, and the highest number of 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.

To learn more about being a sponsor club, see **Sponsor Clubs**.

## THE MENTORING RELATIONSHIP

Sponsor clubs can establish strong, healthy mentoring relationships in several 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

Plan to communicate or meet with the new club so you can advise and guide it in its early stages.

## NEW CLUB REQUIREMENTS

Rotary has also set standards for 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.



# CHAPTER 6 SUPPORTING YOUR CLUB: ROTARY RESOURCES AND TOOLS

## ROTARY MEMBERS AND STAFF

The following Rotary members and staff members can answer questions and advise your club on formulating an effective membership plan.

Find contact information for Rotary staff and your district's leaders on [Rotary.org](https://www.rotary.org) or in the Official Directory.

## REGIONAL LEADERS

**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 initiatives, 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 cultivating and soliciting major gifts and facilitate events that engage current Foundation supporters and develop prospective ones.

## DISTRICT MEMBERSHIP COMMITTEE

The district membership 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, and also assigns online membership leads to your club.

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

## ASSISTANT GOVERNOR

Assistant governors can work closely with your club to make it more vibrant and help it to attract and retain members. Contact your district governor if you don't know who your assistant governor is.





Join the **Membership Best Practices discussion group** to swap ideas and connect with other clubs.

Tell the district committee and your assistant governor about your club's membership goals and successful initiatives. 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 Club and District Support representative who can answer questions about:

- The RI Constitution and Bylaws, Rotary Code of Policies, Manual of Procedure, and other RI policies
- Rotary International and the Secretariat
- Rotary Club Central

Find your club's representative at [rotary.org/representatives](https://rotary.org/representatives).

## OTHER SECRETARIAT STAFF

Rotary International's Secretariat includes RI World Headquarters in Evanston, Illinois, USA, and several international offices. Staff members can assist you with questions or requests related to membership. Contact them at [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

## MY ROTARY

Get the latest news, announcements, and resources on My Rotary, which also offers:

- Membership resources and publications at [rotary.org/membership](https://rotary.org/membership)
- **Member Center** (for links to refer members to another club, change clubs, express interest in joining, or use Rotary Global Rewards)
- Publications and other Rotary items available for purchase at [shop.rotary.org](https://shop.rotary.org) (where you can purchase new member welcome kits, printed publications, and more)
- **Webinars**
- **Brand Center** (where you can create your own club brochure, event flier, and more)
- **Club Finder**
- Contact information for your **Club and District Support representative**
- **Membership Best Practices discussion group**



Encourage club members to subscribe to Membership Minute, our email newsletter that features membership development strategies, resources, club success stories and member spotlights. Subscribe at [rotary.org/newsletters](https://rotary.org/newsletters).

## Rotary Club Central

Rotary Club Central is an online tool that club leaders use to set and track goals and activities across several key areas, including membership initiatives, service activities, and Rotary Foundation giving. By using Rotary Club Central as a planning tool and recording your club goals, progress, and achievements, you can provide information to help future leaders make informed decisions. By tracking your club's service activity, you'll also play an important role in helping RI record and measure the impact Rotarians are making worldwide.

Club leaders are encouraged to sign in to My Rotary and enter their goals in Rotary Club Central so that both club members and the district governor and assistant governor can see their progress.

## Rotary Ideas

Crowdsourcing is a powerful digital strategy that supports Rotary's good work around the world. Rotary's own crowdsourcing platform, [Rotary Ideas](#), is designed to help Rotary and Rotaract clubs find the resources they need for projects. Clubs can post their projects or ideas and ask for partners, volunteers, funding, or other support.

## Rotary Showcase

[Rotary Showcase](#) is a platform where you can let people know what Rotary is doing in your community by spreading the word through social media. It allows members of the Rotary family to post information on their club or district service — 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](https://learn.rotary.org). There are many courses you can take or recommend to your club members, including role-based courses. 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.

# YOUR MEMBERSHIP PLAN WORKSHEET

Use this worksheet to make a membership plan for your club. After evaluating your club, focus on the particular steps that address your club’s toughest challenges. The steps will direct you to resources that can help. When you’ve completed the steps, you will have identified challenges and opportunities, developed a vision, and generated strategies for prospective, new, and established members.

During club meetings, talk to members about the steps you’re taking to strengthen membership, and encourage those members to get involved in the process.



## Step 1: Evaluating Your Club

- We identified areas for improvement after using the [Rotary Club Health Check](#), and we took the course [Is Your Club Healthy?](#) in the [Learning Center](#) to review the modules that address the areas of our club that need attention. Based on what we learned, we will try the following:

Area for improvement	Remedy we plan to try
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_____	_____
_____	_____
_____	_____

- We found ideas or best practices in [Be a Vibrant Club](#) that we will use to make our club innovative and flexible:

_____
_____
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- We completed the membership [diversity assessment](#), have taken the course [Building a Diverse Club](#) in the [Learning Center](#), and plan to do the following to increase and celebrate new ideas and perspectives:

_____
_____
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- Our club completed the [classification assessment](#) and plans to do the following to better represent our community's professional diversity:

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### Step 2: Creating a Vision for Your Club

- Our club completed the club visioning process and developed the following vision:

In 3-5 years, our club will:

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- Our club has a membership committee with a leader and at least five members to guide the implementation of our vision and membership plan.

- Long-term goals that will help us achieve our vision include:

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- We reviewed our club's strategic plan to ensure that our membership plan aligns with it.

### Step 3: Attracting New Members

- Our club completed the course [Strategies for Attracting New Members](#) in the [Learning Center](#) and plans to make itself more attractive to prospective members in the following ways:

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- Our club completed the [Finding New Club Members exercise](#) and will take these actions to find prospective members:

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- Our club selected the following membership benefits to highlight when speaking to prospective members:

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- Our club took the course **Practicing Flexibility and Innovation in the Learning Center** to understand the flexible options now available to clubs, and we plan to try the following to better accommodate members:

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- Our club took the **Online Membership Leads** course in the **Learning Center**, and we understand how membership leads can benefit our club.

- Our club leaders have determined who will manage membership leads assigned to our club.

- Our club has a process for following up with prospective members assigned to us through the membership leads program.

- Our club has read **Creating a Positive Experience for Prospective Members**, understands how that experience can influence prospective members' perceptions of Rotary, and has a plan to ensure we create a good experience for prospects whether or not they join.

#### **Step 4: Engaging Your Club's Members**

- Our club has asked members to complete the **member satisfaction survey** and decided to implement the following changes based on the results:

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- Our membership committee members have taken the course **Kick-start Your New Member Orientation** in the [Learning Center](#), have read [Introducing New Members to Rotary](#), and are developing an orientation process that educates new members and involves them in the club. Our orientation process will include the following:

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- Our club completed the [retention assessment and analysis](#), discussed the results, and will take these steps to improve our engagement and retention:

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- Our club has taken the course **Best Practices for Engaging Members** in the [Learning Center](#) and will take these actions to engage our members:

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- Our club has looked at the many ways members can get involved through Rotary, as outlined in [Connect for Good](#), and will encourage members to get involved in these new ways:

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- Our club asked members who've left recently to complete the [exit survey](#) to better understand why members leave the club. We've discussed the results and will take these steps to engage the member groups we've identified as the most vulnerable to termination:

Member groups

Strategy

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## Step 5: Improving Your Public Image

- We have selected a club member to manage our social media content.
- We have selected a member to manage and update our club website using materials from Rotary's [Brand Center](#).
- We have selected a member to update our customizable club brochure using the template on Rotary's [Brand Center](#).
- We visited the [Brand Center](#) on My Rotary and will use these additional tools to promote awareness in our community:

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- Our club hosted a focus group in our community. The group yielded these findings:

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## Step 6: Supporting New Clubs

- Our club membership committee chair has told our district governor that we're willing 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.
- Our club leaders are open to supporting a satellite club and consider it as an option for accommodating differing needs among members.

## Step 7: Supporting Your Club: Rotary Resources and Tools

- Our club membership committee communicates regularly with our district membership committee.
- Our club leaders regularly communicate with our district governor or assistant governor and ask for help when we need it.
- Our club membership committee members have visited [rotary.org/membership](https://rotary.org/membership) within the past month and know where to find Rotary materials to help our club.

# QUESTIONS?

If you have questions, comments,  
or suggestions about this  
publication, send them to  
[membershipdevelopment@rotary.org](mailto:membershipdevelopment@rotary.org).

## ROTARY INTERNATIONAL

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