



District 7750 Membership Summit
Piedmont Tech, Newberry
August 6, 2022

Agenda

Networking – Graffiti

Welcome	DGE Joyce Morin Rotary Club of Lancaster
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Membership Chair	PDG Carol Burdette Rotary Club of Anderson
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The Perfect Invitation	Chunsta Miller Rotary Club of Anderson
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PART 1 – Retaining Members - Creating a Club People Want to Join

Helping the new members get Involved	Cara Hamilton Rotary Club of Anderson
Orientation	
Scavenger Hunt	
Red Badge Program	
Engaging Club Meetings	

Internal Club Communication	Rachel Strayer Rotary Club of Greenwood
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Club Value Proposition	DGE Renee Stubbs Rotary Club of Newberry
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Rotary Leadership Institute	Renee Stubbs RLI District Chair
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Break

Engaging Members in Service

Engaging Members in Fundraising

Activity

Lunch

PART 2 – Attracting Members

Attrition and Attraction
Setting Membership Goals

Terry Weaver
Rotary Coordinator, Zone 33
Rotary Club of Greenville

Innovative Clubs
Membership Types

Butch Hughes
Rotary Club of Anderson

Membership Strategies

DGN Rysheeka Bush
Rotary Club of Aiken Sunrise

Break

Using Public Relations and Public
Image to get the Word Out

Maddie McMahon
Rotary Club of Spartan West

Work on Club Plans

Carol Burdette

Membership Inspiration

Carol Burdette

Summarizing the Day Activity

Carol Burdette

Closing Remarks

DGE Joyce Morin

Summit Evaluation

DGE Renee Stubbs



7 Habits of Effective Rotarians

The idea for this article comes from Steven Covey's popular book entitled, "The Seven Habits of Highly Effective People." Mr. Covey's research found that highly effective and thus successful people who made an impact in their various fields shared a specific set of character traits and habits. Over the past 10 years, leaders have written on the habits of effective Rotarians. This version is driven and adapted by some great work.

District Governor Joyce Morin calls on us to fulfill RI's theme *Imagine Rotary* by keeping and attracting members who share the vision of Rotary and can imagine the possibilities in the change they can make to change the world.

Vibrant Rotary clubs are driven by effective people. Let's look at the key habits.

1. **PARTICIPATION:** Effective Rotarians are engaged with a priority to attend club meetings and complete timely make ups. They are active on committees, fundraising and service projects. They are keen to attend all club events and district functions and even the Rotary International Convention.
2. **FELLOWSHIP:** Effective Rotarians enjoy and value their relationships and know that fellowship is a key to the value of Rotary. They go out of their way to talk to those whom they do not know and believe a stranger is just a friend they have not met yet.
3. **VOCATION:** Effective Rotarians respect every vocation. They firmly believe that each vocation provides a cog in the wheel and is important. They advocate living Rotary values and the Four Way Test in the work place as part of excellence in each vocation.
4. **DISCIPLINE:** Effective Rotarians understand the value of self-discipline and know that productive accomplishments are hard to achieve without it.
5. **WORK, WEALTH AND WISDOM:** Effective Rotarians are purpose-driven in Rotary and contribute to success and impact with their resources. They are effective with the proper balance between their family, vocation and community.
6. **EMPATHY/SERVICE:** Effective Rotarians care deeply about helping others and seek to make a difference.
7. **IMAGE OF ROTARY:** Effective Rotarians know they are an important part of the great Rotary brand. They maintain a positive attitude and portray a good image of Rotary, both inside and outside the organization. They proudly wear their Rotary pin and clothing.

Effective Rotarians share their passion and pride with others. They tell their personal Rotary story. In so doing, they invite others to meetings and service projects to help grow Rotary, enhance impact and share the rewards of Service Above Self.

By: John Kimbell is a member of E Rotary of the Carolinas having relocated from Florida in 2015. He is a member of the District GRAT and Rotary Leadership Institute Committee. His email is jkimbell46@gmail.com.

HOW TO SHARE ROTARY WITH OTHERS



RECOGNIZE THE OPPORTUNITY

DON'T BE SHY AND LOOK FOR SIGNALS THAT SOMEONE IS SERVICE ORIENTED.

AVOID THE JARGON

KEEP IT SIMPLE. FOCUS ON THE WHY WE DO INSTEAD OF ROTARY'S STRUCTURE OR LINGO.



FIND THE "PASSION" CONNECTION

LISTEN AND IDENTIFY WHAT PASSIONS YOU SHARE. HOW DOES THAT CONNECT TO ROTARY?



KEEP IT REAL & LOCAL

ANSWER QUESTIONS WITH YOUR PERSONAL EXPERIENCES & LOCAL PROJECTS. TALK ABOUT FRIENDSHIPS, NETWORKING, AND ROTARY'S VISION.



SHARE YOUR STORY

SHARE YOUR LOVE FOR ROTARY AND WHY YOU ARE HOOKED ON SERVICE.

FOLLOW UP

YOU CAN'T SHARE EVERYTHING IN ONE SITTING. IF YOU FEEL THERE WAS INTEREST, DON'T FORGET TO FOLLOW UP.



MEMBERSHIP

ROTARY'S MEMBERSHIP EXPERIENCE

Why do people join Rotary? What makes them stay in their clubs, and what makes them leave? Rotary conducts the Membership Experience Feedback Survey every year to better understand the needs, interests, and engagement of our members. The most recent survey offers insights on prospective, current, and former members.

PROSPECTIVE MEMBERS

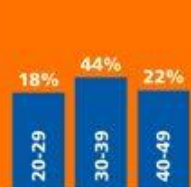
••••• WHY THEY JOIN •••••

- Participate in local service projects 40%
- Participate in international service projects 31%
- Gain personal development and training opportunities 27%

GENDER



AGE



••••• WHAT YOU CAN DO •••••

- Contact them when they express interest
- Give them a positive orientation experience
- Engage them in local and international service projects

CURRENT MEMBERS

••••• WHY THEY STAY •••••

- Participate in local service projects 46%
- Enjoy friendship and fellowship 41%
- Connect with people outside their work and social circles 29%

GENDER



AGE



••••• WHAT YOU CAN DO ••~••

- Display leadership in action
- Be a vibrant club
- Engage people at all stages of membership

FORMER MEMBERS

••••• WHY THEY LEAVE •••••

- Cost or time constraints 34%
- Club environment and culture 32%
- Unmet expectations 17%

GENDER



AGE



••••• WHAT YOU CAN DO •••••

- Assess your club
- Work on building a diverse club
- Practice flexibility and innovation

Read more about the survey results in the **Global Executive Summary**.

Gender breakdown reflects participants who did not specify a gender.
Age breakdown includes only the top three responding categories.
Respondents were asked to rank in order of preference and could respond to more than one.

5 Things I Wish All Rotarians Knew (and Believed) about Membership

1. **Nothing Else Matters -- Rotary is a Membership Organization And Our Product is Service.** If you get Membership right, pretty much everything else takes care of itself. If you don't get membership right, everything else is a struggle for the whole year. Work on membership **first**, get your membership committee up and running **first, and** then attend to other priorities. Make sure your membership chair is 100% committed to membership growth, and to getting started in April or May (the April or May **before** the next Rotary year). And that the Membership Chair has a committee. *NOTE: A committee cannot be one member!*
2. **Attrition is Real** -- Membership organizations lose members, most at alarming rates. I know, you're thinking "Nobody would quit our great club". Wrong. The 5-year average attrition rate for Zone 33 clubs is **fifteen percent (15%) annually**. Half of those leave for reasons you can't control. A handful of clubs have long-term attrition rates below 10% and **none** lower than 8%. Build your membership plan around the assumption that 15% of your members will leave During this next Rotary year, and have a plan to replace them. Count your blessings (and your membership gain) if that doesn't happen.
3. **Retention is Important for the LONG Term** -- Retention rates can be changed over time, not quickly, and you can't retain your way from 20 to 30 members. Work on retention strategies, but don't count on moving the needle quickly. Find out why people leave through exit surveys, and fix those problems. | **Hint: Most attrition casualties have been members less than 1, 2 or 3 years (<1 year = highest attrition)**. Focus your retention strategies on those members.
4. **Clubs need membership growth every year** -- It doesn't have to be dramatic. 4% annual membership growth will double the size of your club in 18 years. What you want to develop is a **membership growth culture** -- the fundamental belief that the club grows a little every year and avoids huge declines along the way. It's not a series of "membership drives", but a consistent, sustained effort. We have examples of clubs doing just this, with only one year of decline (by 1 member) along the way. Set your goal at 10% net membership growth (plus an estimate of 15% attrition).
5. **It takes Intentional Strategies** -- Discard generalities like, "Ask members to bring guests to meetings". Change that to, "Ask "x" members to bring "y" guests to a meeting about Rotary membership on mm/dd/yyyy", and you might have something, if the rest of the plan for reminders, follow up, etc. is in place. Lather, rinse, repeat. Likewise, financial and other incentives for membership recruiting are surprisingly ineffective -- you can't make the prize big enough to be "worth the effort" after a member thinks about it for awhile. It's a nice "thank you", but don't count on incentives alone.

Remember the 10:3:1 Rule -- It takes about 10 names or referrals (suspects) to get 3 prospects to a Rotary Information Hour or Rotary club meeting, to get **one** new member proposal. Lack of sufficient "lead generation" is a root cause of low rates of new member flow. Zone 33 (thanks to Terry Weaver, PDG of D7750) has a list of **24 Intentional Strategies** that **are proven to work**.

If you **understand** and **believe** these truths, your year as President will be successful, rewarding and perhaps legendary in the life of your club.

ORIENTATION

Welcome to
Rotary
Rotary Club of Newberry

WHAT IS ROTARY?

BBQ Fundraisers Helping the community

What you see before joining
What you see once you join

Teamwork and communication skills

New friendships and connections

Speaking and professional development opportunities

Opportunities for collaboration and networking

International aid, travel and worldwide friendships

Rotary

1

What is Rotary International?

- We are neighbors, community leaders, and global citizens uniting for the common good.
- With you, we can accomplish even more.
- Rotary is an organization of business and professional people pledged to uphold the highest professional standards.
- Rotarians believe that worldwide fellowship and international peace can be achieved when businesspeople unite under the banner of service.

2

Rotary

Most Financially Sound
Largest
Most Powerful
Networking Service
Organization

Whose flag is recognized in more
Countries than any other flag in the world

Every minute of every day Rotary:

- * Feeds someone
- * Houses someone
- * Vaccinates someone
- * Performs surgery on someone
- * Comforts someone
- * Provides clean water to someone

THIS IS ROTARY!

Rotary International is
the world's oldest
service club
organization

Over 1.2 million
members in 35,000
clubs in over 200
countries

Mottos:
"Service Above Self"
and
"People of Action"

3

The first four Rotarians (left to right):
Gustavus Loehr, Silvester Schiele, Hiram Shorey, Paul Harris

Mining Engineer Coal Dealer Merchant Tailor Attorney

The first Rotary Club was
organized in 1905, by Chicago
Attorney Paul P. Harris

The original four-member club met for
fellowship, in rotation at member's
offices -- thus, the name **Rotary**

- Rotary soon became a service organization.
- Rotary's first community service project was providing a public toilet outside the Chicago City Hall

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Rotary Club of Newberry
Founded in April 1920

Part of District 7750

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**The Guiding
Principals of a
Rotarian are
expressed in the
4-Way Test**

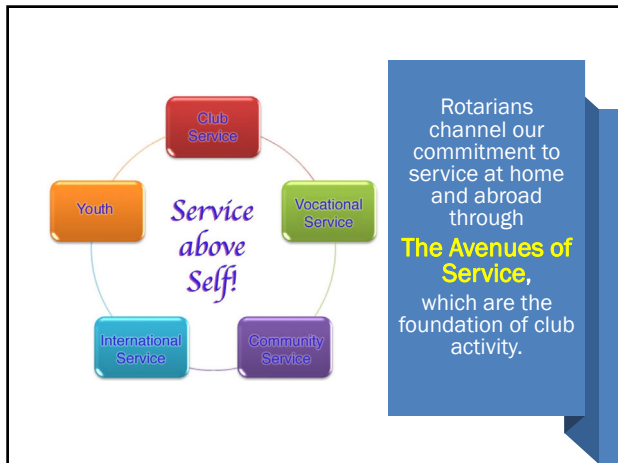
Rotarians apply these
ideals at work and
everyday life

**The Four
Way Test**

of the things we think, say and do

1. Is it the **TRUTH**?
2. Is it **FAIR** to all concerned?
3. Will it build **GOODWILL** and **BETTER FRIENDSHIPS**?
4. Will it be **BENEFICIAL** to all concerned?

6

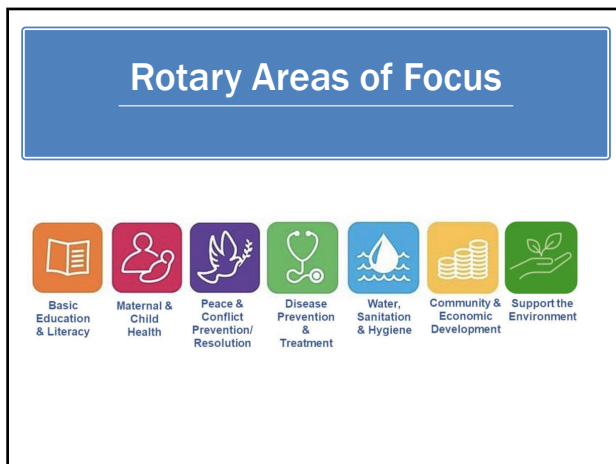


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The Rotary Club of Newberry been serving the Newberry community for over 100 years including:

- Sponsor Boy Scout Troop #1
- Renovations to Lynches Woods in the 1970's
- Community Prayer Breakfast
- Christmas Party for Boy's Farm and Thornwell Children's Home
- Instrumental in bringing the YMCA to Newberry
- Formed the Newberry Historical Society
- Student and Teacher of the Month Recognition
- Literacy Projects for the community through Third Grade Dictionary Project, Little Free Libraries, and book donations to The Boy's Farm and Newberry Literacy
- Picnic Shelter Renovations at the Newberry Disabilities Board
- Computer Information Stations at the Newberry Museum
- Meals on Wheels
- AND Many More

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The Rotary Foundation

The charitable arm of Rotary

Rotary's non-profit foundation supports Rotary in the fulfillment of the Object of Rotary and the achievement of world understanding and peace through humanitarian, educational and cultural programs.

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The Rotary Foundation Supports the Areas of Focus Through PolioPlus

- Rotary's efforts have achieved a 99.99% reduction in the number of Polio cases worldwide
- Now working on the final countries; Pakistan, Afghanistan

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The Rotary Foundation Helps


- Through Humanitarian grants
- Through Educational programs
- Nutrition programs & clean water systems
- Literacy Projects around the world
- **Through Local and Global grants** – The Newberry Rotary Club has provided over \$90000 in grants to give back to the Newberry Community

In 2020 The Rotary Foundation received its 10th consecutive 4-Star Rating by Charity Navigator

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What's in it for me?

- Expand your world view
- Meet and work with leaders in our community and the world
- Make the world a better place
- Be a part of something greater than yourself.
- Be with people who share the same core values
- Rotary Core Values



"TOGETHER, WE SEE A WORLD WHERE PEOPLE UNITE AND TAKE ACTION TO CREATE LASTING CHANGE — ACROSS THE GLOBE, IN OUR COMMUNITIES, AND IN OURSELVES."

13




Rotary Fees and expectations

- **Dues:**
\$100 per quarter – this amount includes meals
Club dues and District and International dues.
- **Prayer Breakfast tickets**
- **Rotary Radio Day**
contribution or sell adds
- **Service:**
Participate in Service Projects and contribute to the Rotary Foundation
- **Attendance**
Attend Club meetings every other Friday at 1:00 at the Community Hall. Strive for 100%

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What happens when I join?


- Attend New Member Orientation
- Attend as many of the lunch meetings as possible striving for 100% attendance
- Quickly identify the service-related activity - something that excites you or that you're passionate about.
- Take advantage of the many learning opportunities offered through Rotary



YOU ARE THE MISSING PIECE.

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Start with Rotary
and good things happen.



Rotary. Humanity in motion. rotary.org

Thank you for choosing
Rotary International and
the Rotary Club of Newberry!

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Rotary



**JOIN LEADERS
EXCHANGE IDEAS
TAKE ACTION**

In our community and throughout the world

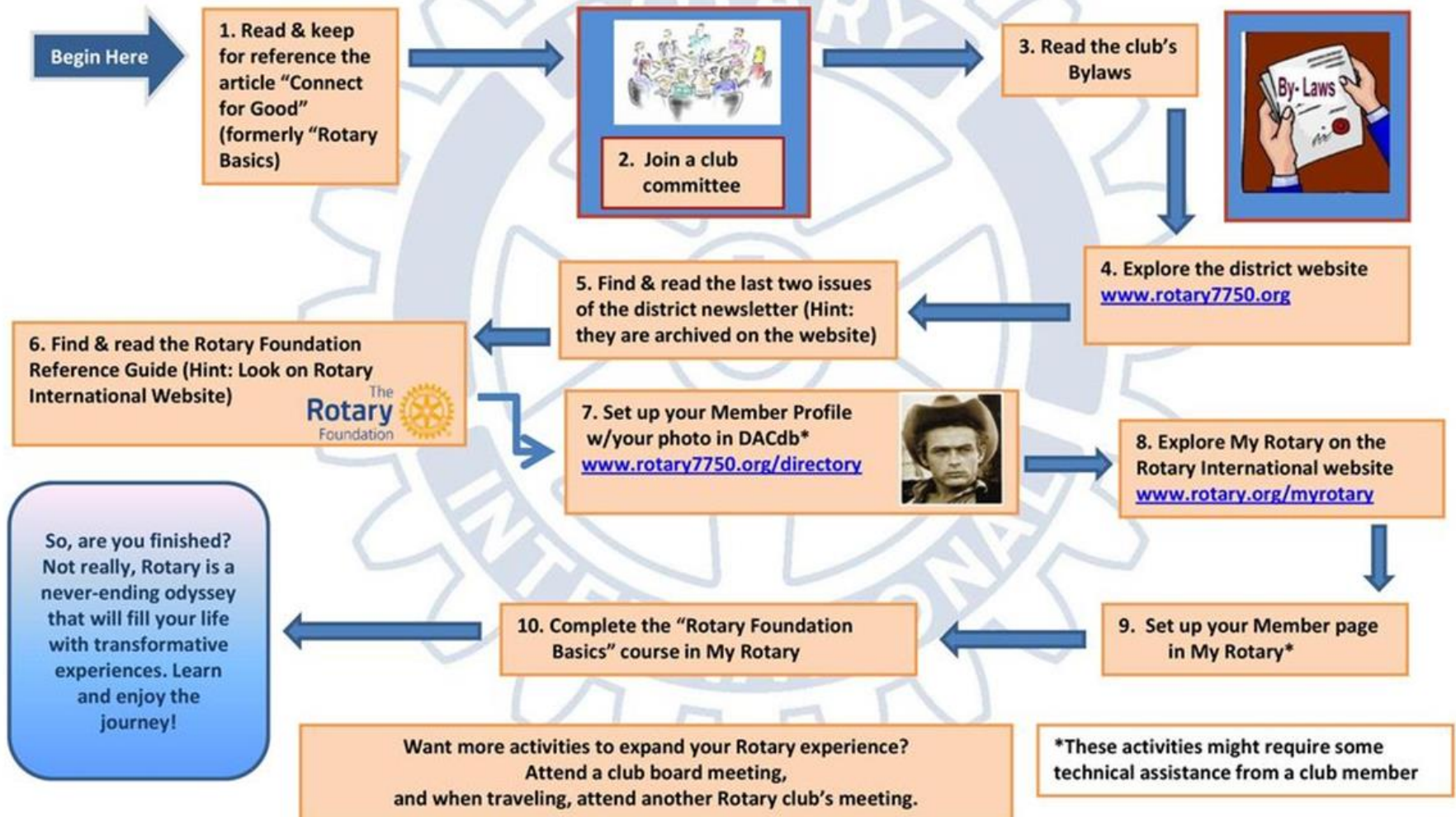



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Scavenger Hunt



Welcome to the Rotary new member scavenger hunt! Although not mandatory for your admittance to the club, we hope you will find this activity interesting and fun as you navigate Rotary to become more knowledgeable about Rotary and its service to mankind. Completion of the hunt will expand your knowledge about the opportunities of Rotary service and the organization of Rotary International, the district, and the club. The club membership chair will act as your guide throughout this process; however, any club member will be happy to help you as well.





Google search Rotary Red Badge programs and you will find many more ideas for this



The Membership Committee would like to propose a Red Badge Program for our club. This is a successful mentoring and retention program for many Rotary Clubs. Please Google "Rotary Red Badge". As our club and community grows it is not always obvious at meetings who our newest members are. Also, our newest members are statistically the ones at most risk of leaving. We hope that the Red Badge will encourage the new member to quickly become engaged and help our veteran members recognize, welcome and assist our newest members on their Rotary journey.

Thank you for your consideration,
Membership Committee

Red Badge Program or Red Ribbon

Purpose:

The Red Badge Program will encourage newly inducted members to become engaged in the many aspects of the Rotary Club of _____. Members who quickly become involved in club activities, become more connected to the club and Rotary International.

Also, current members can easily recognize a newer member and ensure that they are welcomed and involved.

Process:

All incoming members will be given a Red Rotary Badge. They will receive their Blue Badge through completing several easy and enjoyable activities that will involve the member in various club activities.

The sponsor will also receive the sheet given to the new member so that they can assist as needed.

Red Badge (Ribbon) to Blue Badge Activity:

- Attend New Member Orientation
- Serve as a greeter at least one time
- Log into DACdb and upload photo and current information
- Assist at a club project or fundraiser
- Attend a club After Hours Social Event
- Attend club meetings regularly



Rotary Club of _____



Dear _____,

Welcome to the Rotary Club of _____!

We are honored to have you become part of the world-wide Rotary family.

Your 'Red Badge' identifies you as a new Rotarian and recent inductee to the club.

Working with your sponsor, please complete these opportunities as soon as you can and obtain initials of the appropriate Rotarian for each item as it is completed.

We hope that you find the activities easy, enjoyable, and helpful in beginning your Rotary Journey.

The goal is to attain the "Blue Badge" status within 3 months of your membership induction. We will have a special recognition for you at that time!

Red Badge to Blue Badge Activities:

Activity (see back of this sheet for explanations)	Date	Signature of Rotarian verifying the activity
• Attend New Member Orientation(required)		
• Serve as a greeter at least one time. (Schedule with the club secretary)		
• Log into DACdb and upload photo and current information. www.Rotary7750.org then click LOG IN Tab. (we will do this at orientation)		
• Assist at a club project or fundraiser		
• Attend a club After Hours Social Event		
• Attend club meetings regularly (try not to miss more than 2 per quarter)		

Name: _____ Sponsor: _____

Return to the Membership Development Chair upon completion

Activity: *The following activities are designed to assist you in building relationships among our members and learning about Rotary.*

New Member Orientation

At orientation you will meet with the orientation committee to extend your learning from Discover Rotary to better understand the details of our club's community service, details about the Rotary Foundation, how dues are assessed and paid, attendance, and opportunities to become engaged in Rotary service and activities beyond our club.

Setting up a DACdb Club and District Database account

At Orientation we will assist you with setting up their DACdb log in and mobile access. DACdb account will allow you to have online access to the list of members of our club and their contact information as well as photos of club members. Having a DACdb account will assist you with easy access to district newsletters and helpful information about Rotary. Access will also provide you with the district calendar so you may register for district events.

Serving as a greeter at a club meeting

Assisted by a veteran member, serving as a greeter will help current members get to know you and vice-versa.

Assist at a club project or fundraiser – Rotarians are “People of Action”

Participating in a club project or fundraiser is a great way to build relationships with other members while working together to serve our community.

Attend a club After Hours Social Event

An After Hours Social Event is planned every quarter. These events bring members together for networking and conversation. They are also an opportunity to bring a friend to meet our members.

Attend club meetings regularly

The 4-F's of Rotary are Food, Fellowship, Fun and the Foundation! Attending meetings is important to making these happen for members. Our meetings allow for time to network and share some “Health and Happiness”. The programs are selected to be educational about our community and Rotary. Our meetings bring members together for our common cause - to better serve our community. Members should strive for “regular” attendance.

Step right up

In Rotary's membership game, everyone's a winner

By **Geoffrey Johnson**

When it comes to finding new members for his Minnesota Rotary club, Tom Gump doesn't just walk the walk, he trots the trot: the turkey trot. Gump is a former president of the Rotary Club of Edina/Morningside, which makes boosting membership a priority. In fact, that's the fourth item on a list of 10 tips to attract and retain members which has been prepared – and practiced – by the club. It's tip No. 10 that finds Gump clad in a turkey suit. More on that shortly.

The tips work: During Gump's 2016-17 stint as club president, Edina/Morningside added 31 members. Eleven of them were women; 10 were under 40 years old. With 94 members, the club "went from being classified as a medium-size club to being one of District 5950's large clubs," says Gump, who will be the 2020-21 district governor. "There were 13 clubs larger than our club in our district, and now there are only four."

The tips have proven so effective that Gump has taken the Edina/Morningside show on the road, using a PowerPoint presentation to coach other clubs on specific ways they can expand their membership. "I have been called a good salesman," says Gump (who, for the record, is a real estate lawyer and a developer). "But to me, recruiting new Rotary members is not really selling. It's matching up potential members with what he or she wants in a club."

So if you're looking to add members to your club, consider taking a page from the Edina/Morningside playbook. Read on for the club's top 10 tips.

Create a list of all the great things about your club

List your star members, the advantages of your meeting location, how many members you have, the kinds of projects and events you host, and so on. The list can serve as a template when sending an email or letter to a potential member. Make sure to tailor any correspondence so it addresses the specific interests and wants of any potential member. For instance, if someone is interested in international work, your email or letter should focus on that.

Keep a list of potential members

It doesn't matter if it's a paper list or if it's kept on the desktop of your computer. Either way, it makes you think about those people who might be a fit for your club. Discuss the list at board meetings – not just the concept of bringing in new members, but the specific names and who's going to contact them and when. And don't overlook some obvious suspects, such as members' spouses, Youth Exchange host parents – “they already have a taste of what Rotary is about” – and even former members. “We had two founding members rejoin recently,” Gump says. “Sometimes people need to leave for a reason and then later they have more time and just have to be asked to come back.”

Know your club's strengths

Most things are strengths if you target the right audience. If you meet in the morning, you're probably a good fit for someone working 9 to 5. Meet at noon and you're more likely to appeal to retirees or parents of schoolchildren. “Not every club is right for every potential member,” Gump says. “If someone doesn't fit your format, recommend them to another club.” Keep in mind that the point is not just growing your club, but boosting Rotary's capacity to make a difference in communities around the world. And with any luck, that other club will send you a potential member one day. Gump points to one member who joined his club last year after a recommendation from the Rotary Club of Edina, which typically meets middays. “Morning meetings worked better for him than noon meetings,” Gump says. “He has already become a Paul Harris Society member, leads our beer tasting committee, and led our 100th anniversary celebration for The Rotary Foundation.”

Make membership growth your club's top priority -

and make sure every member understands that. “I always tell presidents and presidents-elect that the best way to make their year as president easier is to bring in more members,” says Gump. New members bring new energy to a club, he explains, and mean more people to serve on

committees, work on projects and events, and raise money for the Foundation.

Talk about Rotary wherever you go –

at work, family gatherings, neighborhood get-togethers, parties. You will be amazed how easy it is after you practice awhile. “Getting a lot of ‘nos’ helped build my confidence, because it didn’t hurt as bad as I thought it would,” Gump says. “And most people were happy I asked, even if they did have to decline.” And remember: It’s never not a good time to invite a potential member to a meeting. “People say it’s a bad time, for example, because it’s the holiday season,” says Gump. “Our club recruited and inducted three new members during the holiday season.” Nor is there a bad place to talk about Rotary: Gump landed one new member he met at Chipotle. “You never know where you will meet your next member,” he says. “And if you want younger members, hang out where they hang out.”

Make a list of club members’ responsibilities

It’s important to engage with potential members beforehand. They will want to know how they can fit in with your club and what opportunities there are for serving. The list should also include information about dues, attendance guidelines, and other club expectations – and it should emphasize the many benefits that come with being a Rotary member.

Realize there is no finish line

Even if your club is the optimum size, it’s no reason to stop recruiting. There are always reasons people leave. Of the 31 members who joined Edina/Morningside in 2016-17, eight eventually left the club: Three had a job transfer, one had a family issue, and two had conflicts with work. Only two people simply stopped participating. Among those who remained, 10 are now very active in leadership roles, and two are “on the presidential track.” What’s more, the club added 11 more members between July 2017 and April 2018. “You’re either growing or you’re dying as a club,” Gump says.

Celebrate when you get a new member

“You have to make potential members feel wanted,” Gump says. “Our club makes a poster of the individuals after they’ve been voted in, and we put it in the front of the room at our next meeting. They love it. Some ask if they can take the poster home. One wanted to mail it to his mother.” While celebrating new members, don’t forget that clubs also stay strong by retaining current members. If you ensure that they are having a good experience and realizing the full value of their membership, the club’s current members will be proud to invite a guest to a meeting – and those guests will want to join an attractive and welcoming club.

Be persistent

At times, it will take more than one or two requests to get someone to attend a meeting. Keep asking. “It took my workout partner two years to convince me to come to a meeting,” says Gump, who joined the club in 2013 after attending just one meeting.

Be vibrant

If Gump’s fowl finery is any indication, this is a tip he takes to heart, dignity be damned. “The week before Thanksgiving, I contacted people on my recruitment list and told them I would be wearing a turkey suit to the next meeting and that they should come and see it,” he says. “A few took me up on the offer – and some of them joined. It’s all about making club meetings and events fun and vibrant. Other simple things we’ve done is make outrageous centerpieces for our meeting tables. It gets people talking. For example, at Easter we put baskets in the middle of the tables with plastic eggs, and inside the eggs were blue and gold M&Ms with the Rotary logo on them. At St. Patrick’s Day, we had shamrocks with members’ pictures on them; same thing at Christmas, but on foil trees. My club is so welcoming, sometimes it just takes getting a potential member to the first meeting and then they join. Balloons, posters, streamers – it all helps. It really does work.”

CLUB MODELS

Rotary is a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change across the globe, in our communities, and in ourselves. The criteria for membership are simple. For Rotary clubs, a member needs to be an adult; for a community-based Rotaract club - age 18 and over, who demonstrates good character, integrity, and leadership; has a good reputation within their business, profession or community; and willing to serve in the community or have an impact elsewhere in the world. All clubs share similar values and a passion for service, but no two clubs are the same because each community has its own unique needs.

Club Model	Description	Appeals to	Minimum number of charter members
<u>Traditional Rotary Club</u>	Professionals and aspiring leaders who meet regularly for service, connections, and personal growth	People looking for connections, service opportunities, and traditions	20
<u>Satellite Club</u>	A Rotary club sponsored by a traditional club but with its own meetings, projects, bylaws, and board	Those who want a club experience or meeting format or time other than what's offered by the traditional clubs in the area Learn more in the <i>Rotary Guide to Satellite Clubs</i>	8
<u>E-Club</u>	A Rotary club that meets primarily online	People who travel frequently, whose schedules make it difficult to meet in person, or who prefer an online experience	20
<u>Passport Club</u>	A Rotary club that allows members to attend other Rotary club meetings as long as they attend a specified number of meetings in their own club each year	People who travel frequently, or those who enjoy trying a variety of club experiences and meeting lots of new people Learn more in the <i>Rotary Guide to Passport Clubs</i>	20
<u>Corporate Club</u>	A club whose members (or most of them) work for the same employer	Employees of an organization who want to come together to do good in their community	20
<u>Cause-Based Club</u>	A club whose members are passionate about a particular cause and focus their service efforts in that area	People who want to connect with others while addressing a particular set of problems.	20
<u>Alumni-based Club</u>	A club whose members (or most of them) are former Rotary or Rotary Foundation program participants	People who have participated in Rotary outside of a club	20
<u>Rotaract Club</u>	A club that is sponsored by a Rotary club and often works with that club on projects	People who want to serve their communities and have fun through service. Learn more in the <i>Rotaract Handbook</i>	12

All club models meet at least twice each month.



This can be called associate membership, family membership, etc

SHARED MEMBER PROGRAM

Feedback from numerous Rotary surveys and focus groups has repeatedly shown that prospective members and current younger Rotarians require flexibility in their Rotary club membership.

In 2016 the Rotary Council of Legislation included in the suggested club constitution and bylaws that clubs consider more options for membership types.

The Shared Membership Program will allow a business, school system, or family in the club's area to become a member of the Rotary Club of Newberry through an established membership approval process, and to appoint up to 2 designees as the individuals attending club meetings, serving on projects, voting on club matters, and serving as club officers and on club committees, and so on.

PREMISE

A shared membership category will increase the club's ability to attract and retain a qualified and diverse professional base within the community.

DEMONSTRATED RESULTS AND MEASURES from other Rotary Clubs

Increase

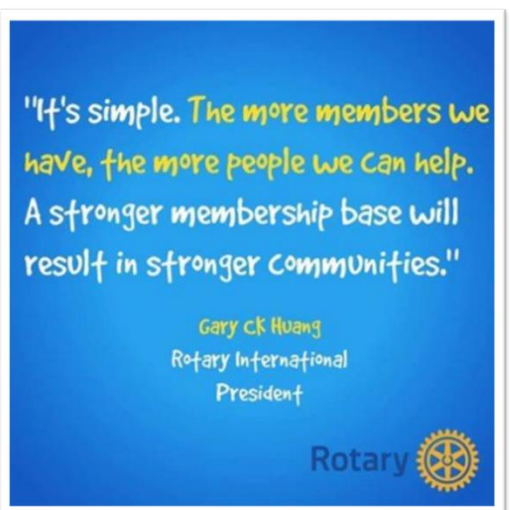
- Club membership recruitment and retention
- Support to The Rotary Foundation (program participation and fundraising)
- Successful service projects (community and international)

Improvement

- Leadership and engagement opportunities for members
- Participation in club activities
- Gender balance in the clubs' membership
- Overall diversity within the club's membership

Decrease

The average age of club membership



Rotary



Rotary Club of _____

Shared Membership Application

We apply for shared membership in the Rotary Club of Newberry and authorize our consideration by the Board of Directors. If approved, we authorize publication of our organization's name and representing officers and classification in the _____ Rotary club's newsletter for consideration by the club membership. We agree to abide by the requirements of membership and to pay the initiation fee and annual dues promptly.

If Applicable;

Company or Firm Name: _____

Business Address: _____

City/State/Zip: _____ Website Address: _____

Primary Member

Name: _____ Title: _____

Business Phone: _____ E-mail: _____

Home Address: _____

Home City/State/Zip: _____ Home/mobile Phone: _____

Birth date including year: _____

Additional Shared Membership

Name: _____ Title: _____

Business Phone: _____ E-mail: _____

Home Address: _____

Home City/State/Zip: _____ Home/mobile Phone: _____

Birth date including year: _____

Additional Shared Membership

Name: _____ Title: _____

Business Phone: _____ E-mail: _____

Home Address: _____

Home City/State/Zip: _____ Home/mobile Phone: _____

Birth date including year: _____

Signature of Primary Member: _____

Date: _____



Rotary Club of _____ Shared Membership Guidelines

The Shared Membership Program will allow a business, school system, or family in the club's area to become a member of the Rotary Club of Newberry through an established membership approval process, and to appoint up to 2 designees as the individuals attending club meetings, serving on projects, voting on club matters, and serving as club officers and on club committees, and so on.

1. Approval. Members joining through a shared membership may become members of the Rotary Club of _____ through the same approval process established by the club in the club bylaws.

2. Inductions. All persons joining through a shared membership are formally inducted into the club as established by the club.

3. Attendance. All members joining through a shared membership are encouraged to be as active and engaged as possible. Participation in club projects is expected.

4. RI registration. Each member will be listed as an official active member of the Rotary Club.

5. Badges. Badge references will be the same as an individual member.

6. Votes and quorum. For the purpose of general meetings and club matters, shared membership members voting will be the same as an individual member. As official members of the Rotary Club of Newberry members would apply toward RI election voting.

7. Holding office. Each member as an individual, can hold any office in the Rotary Club of _____ to which a member is elected in the normal way.

8. Financial obligations. The financial obligations of a shared membership may be as follows:

(a) Initiation fee. Each member will pay the initial fee.

(b) RI dues: Payable for each member as stipulated in RI Bylaws 17.030. Each member

(c) Annual club dues: An amount determined by the club. Each member.

(d) Meal/beverage costs: The primary member will be charged for meals. In the case that others named in the shared membership attend the club meeting they will be charged per meal. If the primary member does not attend, one of the other designated member(s) may attend and not be charged for a meal.

(e) Optional contribution to The Rotary Foundation.

(f) Tickets for the annual Community Prayer Breakfast.

- Each individual will have a \$35 one-time initial fee if he/she has never been a Rotary member in any club.
- Each membership (regardless of the number of individual members) will have a \$45 annual assessment to support two of our club service projects.
- 1 member is \$100 a quarter (\$400 annually)
- 2 members is \$150 a quarter (\$600 annually) Plus extra meal if both attend
- 3 members is \$200 a quarter (\$800 annually) Plus extra meals if more than one attends

9. Bulletin and communication. Each member will receive the club's bi-weekly bulletin/newsletter and regular club communications.

10. Receipt of Rotary. The Rotary magazine will be sent to each member at the prevailing cost.

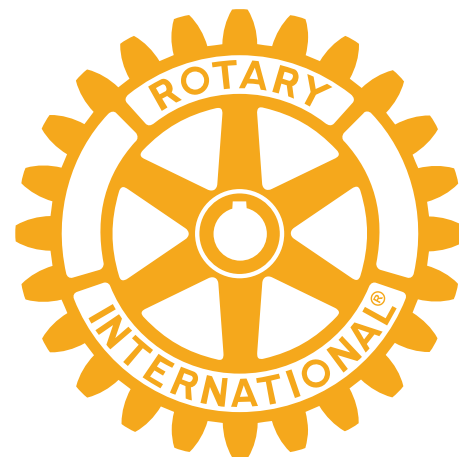
11. Liability coverage. All members will be included under the respective club liability insurance while participating in any approved club activities or projects.

12. Participation in youth activities. All members are expected to abide by all restrictions, policies, and procedures with respect to club activities involving youth.

13. Termination. The process for terminating the membership will be the same as an individual member as stated in the club bylaws article twelve.

14. Primary Member Termination. In the event the Primary Member is terminated, one of the shared members may assume the financial responsibilities of the Primary Member or another Primary Member may apply for membership in the Primary role within 90 days. Or the shared members may each assume regular individual membership. If the shared members do not wish to participate financially as an individual member or Primary member then they will be terminated.

PROPOSING NEW MEMBERS



New members bring fresh perspectives and ideas to your club, expand your presence in the community, and help ensure your club is strong and vibrant. You've got some great potential members in your area — it's just a matter of finding them. Here are some suggestions to get the conversation started.



SHARE WHAT ROTARY MEANS TO YOU

- + Share why you value your Rotary membership:
 - We share common interests and have fun.
 - We make a positive impact in our community through service projects.
 - We're part of a global network of friends.
- + Emphasize professional benefits with colleagues:
 - We share business connections and expand our professional networks.
 - We have opportunities to develop professional skills.
- + Share Rotary videos and photos of meaningful initiatives with your social media network.
- + Wear your Rotary pin to initiate conversations about your involvement with Rotary.



SHARE INFORMATION ABOUT YOUR CLUB AND ROTARY

- + Encourage interested prospects to learn more about Rotary clubs and Rotary on your club website and Rotary.org.
- + Offer a club brochure that highlights recent service projects and social events.
- + Bring them along to a club meeting or your club's information session for prospective members.
- + Invite friends, family, co-workers, and colleagues to a club activity or project.

If a prospective member expresses interest in joining your club, make sure they understand expectations of membership, including club fees.



PROPOSE A NEW MEMBER

Once you've found a great candidate, follow your club's process for proposing a new member.

WEB RESOURCES

Need a procedure for proposing new members? Consult the **Manual of Procedure**.

Don't have a club brochure? Create one with a template in **Rotary's Brand Center**.

Find materials and tools to help you bring in members at www.rotary.org/membership.

Onboarding New Members

19. Create a **New Member Orientation** program and process to engage members immediately in your club. Early engagement is the key success factor in retention.

20. Use the **New Member Scavenger Hunt** for a fun way to get members engaged in learning more about Rotary and about your club

21. Create a **"Red Badge" or "Quick Start"** program for new members -- a prescribed set of activities and accomplishments intended to get them engaged and acquainted with the club. .

Retaining Members

22. Club President attends **all** District events, including RLI, and brings members (particularly **new** members) along -- help members understand that Rotary is a lot more than just the local club. Lead by example.

23. **Upgrade Programs** -- Clubs have proven that great programs attract and keep members. Programs need to be informative, educational or inspirational (or a combination thereof). Limit or avoid programs by other non-profits (members see those as fundraising requests).

24. **Mentorship** -- Create a mentorship plan to assign an experienced member to work with a new member. Mentors help new members get acquainted and engaged with existing members.



Intentional Membership Strategies

Prospect Identification (Lead Generation)

1. Use the ["Who do You Know"](#) handout at a Club Assembly. Actually allow time for people to fill it out (making it clear we're not leaving 'till everyone has some names written down) and then ask them to approach 10 of those people about Rotary (remember the 10:3:1 rule).

2. Targeted "industrial recruiting" strategy -- make a list (or get one from Info USA) of companies in your club territory, then make calls or visits to each, explaining Rotary and asking them for a member.

3. Secure a list of non-Rotarians participating in any co-op club project (something you're partnering with another organization). Approach each directly (phone, etc.) with an invitation to visit Rotary. **Always** have a plan to collect email addresses of non-Rotarians helping with Rotary projects.

4. Secure a list (with email addresses) of Board members and volunteers of any organization your club provides funding to. Approach each directly (phone, etc.) with an invitation to visit Rotary.

5. Club Social Hour -- An event other than a club meeting where members bring prospects --- peer pressure works Maybe a "5th Tuesday" activity.

6. Treat the **parents** of your Rotaractors and Interactors as part of your prospect list. It will be decades before the Rotaractors and Interactors themselves will be prospects, but their parents are right in our "sweet spot" demographically.

Attracting Members

7. Invite local business leaders as speakers, then recruit them as members.

8. Club President **personally** asks each member to bring a new member into the club -- an eyeball-to-eyeball conversation over breakfast, lunch, coffee, adult beverage or a 2-way telephone conversation. Takes the anonymity out of the ask. "Can I count on you doing this not only for the **club** but also for **me**?"

9. Club President makes it the responsibility of every officer and board member to bring someone into the club -- direct ask per #3, but ties into "We were chosen as leaders of this club -- we need to lead, particularly in membership growth."

10. A regularly-scheduled "**Rotary Information Hour**" once a quarter or once a month. The "intentional" part of this is that it's a standing event, on the club calendar, and members are reminded by email or phone to bring their prospective members. Not just whenever you think of it, but to a regularly scheduled date, time and place.

One club calls this "Discover Rotary" and schedules it the first Wednesday of every month (for 12 years running) at 7:30 am, promising to be finished by 8:30. After work is another good option. Give a 2-minute overview of Rotary International and the local club, club projects, expectations and costs (visuals and handouts are important). (PowerPoint template available on request)

11. One meeting a month is "**Bring a Friend Day**" -- One club calls it "**Rush Hour**"

12. Club President follows up **personally** with a phone conversation (not just email or voicemail) with guests and prospects, inviting them to another meeting. This **matters**.

13. Create a "**Vocational Service Award**" for local businesses -- recognizing the service they do to the community through their businesses. Invite them to receive the award and then recruit them as members. (Also a public image/public awareness strategy)

14. "**Drip Marketing**" -- Create a central prospect list, including email addresses, and use the "Potential Member" feature in DaCdb or another email distribution mechanism (Vertical Response, Constant Contact or MailChimp), to send your club's E-Bulletin once or twice a month to your entire prospect list. Regularly reminding prospects of your club's brand makes you "Top of Mind" when the time is right for the prospect to join a community service organization. Be sure and include "Response" information so they know how to raise their hands when they're ready.

15. Create a **Club Brochure** and keep copies on hand at every meeting as a "takeaway" for visitors and guests. Consider a QR code on any print material so they can easily find your website or an email address of a membership committee member. Club Brochure templates are downloadable from MyRotary (login required).

16. Create a **Public Image/PR campaign & a Social Media strategy**. Provide local media with press releases on club meetings, service projects and events. Recognize members for actively posting on the club's Facebook page.

17. Actively promote the **Governor's Pin of Excellence**. Encourage members to work on all 3 criteria -- Bringing in a member, contributing to The Rotary Foundation and participating in a service project.

18. Take advantage of flexibilities from the 2016 Council on Legislation, such as a **Corporate Membership** category, allowing multiple people from a company to become Rotarians, with one being the "Corporate Active" member and the others "Corporate Associates".

<https://www.rotary.org/myrotary/en/club-flexibility>

This is an effective intentional membership strategy for clubs under 25 members, where it's a practical amount of time investment by the President. Or for a larger club carried out over several weeks.

The club President **personally** asks each member to bring a new member into the club -- an eyeball-to-eyeball conversation over breakfast, lunch, coffee, adult beverage or 2-way telephone conversation. Takes the anonymity out of the ask. "Can I count on you doing this not only for the **club** but also for **me**?"

The **intentional** part is the **personal** part. It's not an "anonymous" request like a podium announcement or an email broadcast. In those cases, members many times think, "Someone else will do that -- I don't really need to."

So, what's a quick, practical way to get this done? First, decide whether you're going to do this by phone or in person (or some of both). If you decide on phone, use the **Email-Call-Email-Call strategy we learned at Pre-PETS**:

- Email 10 members on Monday: **Subject:** Can we catch up Tuesday? **Body:** Hello, Jim, I need to talk with you about our Rotary Club. I'll call you Tuesday to discuss. Please let me know if there's a better time for my call. Thanks
- Call on Tuesday. If you get voicemail, leave this message: "Hi, Jim. Sorry I missed you today. I need to talk with you about a Rotary matter. I'll call you tomorrow, Wednesday. Please let me know if there's a better time to talk"
- Open the first email from your Sent Mail folder and **forward it** to Jim: **Subject:** Can we catch up Wednesday? **Body:** Hello, Jim, Sorry I missed you by phone today. I'll call you Wednesday to fill you in on this. Please let me know if there's a better time for my call. Thanks
- Call on Wednesday. If you get voicemail, leave this message: "Hi, Jim. Sorry I missed you today. I need to talk with you about a Rotary matter. I'll call you tomorrow, Thursday. Please let me know if there's a better time to talk"
- Open the second email from your Sent Mail folder and **forward it** to Jim: **Subject:** Can we catch up Thursday? **Body:** Hello, Jim, Sorry I missed you by phone today. I'll call you Thursday to fill you in on this. Please let me know if there's a better time for my call. Thanks
- Most times you'll find that the member will email you back, giving a time that's convenient for him -- then you have an appointment. If a member won't take a phone call from you, the club President, it's probably a good idea to add one more to your new member goal. It's likely that member won't be part of the club for much longer.
- It's easy to make 10 of these phone calls in a single hour -- even faster, if several of them go to voice mail. Do the next 10 the next day or the next week until you've made your way through all the members. Break this task down into bite-sized parts you can accomplish in short bursts of effort.

When you get Jim on the phone, have your script ready:

- "Is this an OK time, or are you tied up with something?"
- "We have a great Rotary club
- "At its current size its long term sustainability is in jeopardy
- "We could do a whole lot more for our community with 10 more members
- "I need your help to get there -- I need you to bring in **one -- only one** -- member into our club in the next three months. "Can I count on you doing this not only for the **club** but also for **me**?"
- "How can I help you get a list together of people you can invite to one of our meetings?"

This will work. First, your **personal ask** will cause members to act, rather than assuming someone else is going to do it. Secondly, this politely persistent Email-Call strategy reinforces the idea that it's important to talk with them, and that **you** are willing to do most of the work to make that happen.

Let us know how this works out for you.

"Who do You Know?" Club Assembly Exercise

This very useful worksheet, properly deployed, can be a great "lead generation" exercise for your club. Most clubs that fall short of their growth goals do so because of a lack of "lead flow", meaning they don't have enough people on their prospect lists.

The 10-3-1 Rule

People experienced at prospecting realize that not every prospect will come through, whether as a customer or as a new Rotary member. In major league baseball, a 30% hit ratio is considered GOOD, even if it's a 30% hit ratio of only singles.

Generally speaking, it will take about **10** leads (referrals or acquaintances) to get into **3** substantive conversations about Rotary, to get **1** member.

How to Use This Worksheet

Most Important: This is not "homework". Anyone who has let a member take this home, expecting to get it back has been disappointed. That doesn't work.

Second Most Important: This information is **not** for the Membership Committee. When this exercise is complete, **don't** ask members to pass the worksheets in. What that does is imply that it's the Membership Committee's job to contact prospects and attract new members. Keep that shoe appropriately on the member's foot. In a Rotary Club it's **everyone's** job to attract new members.

Quick Start Guide

- Announce a **Club Assembly** where members are asked to bring their contact information
- **Send reminders** a few days before and the day of the meeting emphasizing contact information
- **Print** the "Who do You Know" worksheet 2-sided and lay one at each member's seat
- At the meeting, explain **why** it's essential to build membership
- **Explain** the exercise -- 20 minutes, heads-down, listing everyone we know
- **Walk the room** to be sure members are engaged -- break up "chit-chat" sessions
- After 20 minutes, ask for show of hands -- how many have 50, 40, 30, etc.
- Ask them to **circle** 3 or 4 they would approach to invite to a future membership event or meeting
- Option -- Have them list those 3 or 4 on a 3"x5" card -- membership committee to follow up with them

See next page for detailed "How to use this worksheet"

Detailed "How-to"

1. At least a week in advance, **Announce to your members** that an upcoming meeting will be a Club Assembly, where they need to bring all their personal and business contact information. That may be on a smartphone, tablet, laptop, Rolodex, business cards in a rubber band, or handwritten on notebook paper. Email or phone all members, so you also reach those who weren't at the meeting.
2. **Remind your members** to bring their contact information to the meeting. Use phone or email, a few days before the meeting **and** the morning of the meeting. Make sure there's enough communication that "dog ate my business cards" isn't a plausible excuse.
3. Lay out the 2-sided "Who do You Know" Worksheet on each table - 1 per member.
4. As you open the exercise, explain **why** this is important -- It's essential to build our membership, and we need members bringing prospects to membership events and as guests at meetings to ensure a steady flow of new member candidates. **We need more prospects.**
5. Explain **what** we're going to do -- We're going to take 20 minutes, individually, to recall as many people as we can who we know - not necessarily prospects, just people we know. This is to be a "free flow" or "personal brainstorming" process. We'll decide later who are the best prospects.
6. Go into "Proctor" mode. Some members won't take you seriously. If you let that happen, the exercise will collapse. Walk the room. When you find a couple of members chit-chatting instead of doing the assignment, say, "Guys, I really need your help with this. You may have a better idea for how to identify prospects, but I'm asking you to humor me for the next few minutes, and give this process a try."
7. When the time is up, ask how many people have 50 names (show of hands), 40 names, 30 names, etc. Depending on your club culture, you might chide those with less than 10, saying, "You really need to get out more."
8. Ask each member to **circle** the 3 or 4 people they plan to contact in the next week to invite them to either a pre-determined prospective member event, or to a future meeting focused on membership.
9. **OPTION:** You might also have 3"x5" cards on the table where they can report their 3 names to the membership committee so you can remind them of their commitment. They take the full prospect list with them, and the membership committee tracks only the 3 "best prospects"..

IMPORTANT: Please **don't** take up these sheets after the meeting. That suggests to the members that it's somebody else's responsibility to approach and contact these prospects. Keep that shoe on the member's foot -- it's everyone's job to regularly bring prospective members to Rotary.

Follow up -- At the next meeting or by email, ask members how they're doing on their 3 prospects. If they're not making the contacts, ask "What's getting in the way?" Then see what you can suggest to break down the excuses or roadblocks.

GOAL: If you can get each member to bring just **one** prospect to the table, you'll eclipse most any prior membership development effort in your club. Getting members to act on approaching and inviting members is not only your biggest challenge, but also your key success factor.

Please let us know how you used this worksheet and how it worked for you.
Email DG2015@Rotary7750.org with your experience.

25-Minute Membership Survey

Your Name _____ Date _____

Your Phone _____

Your E-mail _____

Consider professional colleagues, community leaders, and acquaintances who might qualify as potential Rotarians.

Your neighbor(s):

1. Male _____ Occupation _____

2. Female _____ Occupation _____

3. Male _____ Occupation _____

4. Female _____ Occupation _____

Your immediate manager (if applicable):

5. _____ Job Title _____

Another business professional within your company or organization:

6. _____ Job Title _____

Community leaders with a commitment to service:

7. _____ Occupation _____

8. _____ Occupation _____

RI or TRF program alumni your club maintains contact with:

9. _____ Occupation _____

Professional business association colleagues:

10. _____ Occupation _____

11. _____ Occupation _____

Consider your professional acquaintances:

- 12. Physician _____
- 13. Dentist _____
- 14. Financial Manager/Planner _____
- 15. Religious Leader _____
- 16. Attorney _____
- 17. Business Consultant _____
- 18. CPA _____
- 19. Veterinarian _____
- 20. Internet Technology Consultant _____
- 21. Public Relations Manager _____
- 22. Entrepreneur _____
- 23. Non-profit Executive Director _____
- 24. School Administrator _____
- 25. Other _____

Professional acquaintance (not named above) that you have done business with in the last week:

26. Name _____ Occupation _____

Professional acquaintances (not named above) that you have done business with in the last month:

27. Name _____ Occupation _____

28. Name _____ Occupation _____

Personal acquaintances who have volunteered with you (for a Rotary or a non-Rotary event/service project):

29. Name _____ Occupation _____

30. Name _____ Occupation _____

Recipe for a Successful Rotary Membership Event

A successful Rotary Membership Event (Rotary Information Hour, Discover Rotary, etc.) starts with the right framework. This is a "business seminar", rather than a Rotary meeting, social hour, networking event, etc. Think about how you'd organize a new product introduction event for your company's prospects or customers.

Besides advance planning (enough lead time for members to get prospects lined up), a successful membership event has several essential ingredients, most of which occur before the event:

Pre-Planning

1. Enter the event on the DACdb club calendar. Better yet, set it up as Online Registration, where members can register themselves and their guests to simplify logistics
2. Make members accountable to bring prospects. This is not the same as "ask members to bring prospects". Accountability means that each member has committed to someone (or several someones) to show up with at least **one** prospect in tow.
3. Execute one or more intentional strategies to help members think of prospects
 - a. Invitation Card at each member's place at the next meeting, with instructions to invite someone and report contact info to the Membership Committee
 - b. "Who Do You Know" exercise at a Club Assembly
 - c. A targeted list of business or community leaders, with someone responsible for contacting each (assigned at Club Assembly)
4. Members report their confirmed prospects **in advance** of the event - at least a week, to the Membership Committee. That lets you know which members have come through with a committed prospect and which haven't -- time for you to contact those and remind them they need to bring a prospect. At a minimum:
 - a. Name
 - b. Email
 - c. Mobile Phone #

Important: All Prospects are entered in DACdb as "Potential Members" and included in Email distributions of the club's E-Bulletin or E-Newsletter, both before and after the event. Enter the member who invited them in the "Sponsor" field.

5. Membership Committee **emails** prospects with a **reminder** and all event info - time, place, dress code (probably business casual), etc. 2-3 days **before** the event (personalize with DACdb Pmail)
6. Membership Committee **texts** each prospect a short reminder the **morning of** the event

Event Day

The event itself should be practiced in advance and well executed. Essentials:

1. **Sign-in sheet** at the door -- Name, Email, Mobile Phone and Sponsor (who invited them). Make certain that someone is responsible for not only getting guests to sign in, but also to add walk-ins and contact data you collect to their Potential Member profiles in DACdb after the event.
2. **Refreshments** -- Perhaps served as prospects and members arrive
3. **Agenda** -- VERY simple agendas work best
 - a. **Introductions** -- Emphasize "30 seconds" each: (intent is 10 minutes, max.)
 - i. Name
 - ii. Vocation (or past, if retired)
 - iii. For prospects, "What sparked your interest in Rotary?"
 - iv. For members, "What attracted you to Rotary, and what's kept you coming back?"

Host or MC goes first, setting an example within the 30-second time budget

- b. **Rotary Overview** -- 20 minutes or less, with GOOD visuals, perhaps 2 or 3 presenters:
 - i. Origin of Rotary, Object of Rotary, 4-way Test
 - ii. Club overview - History, size, meeting day/time
 - iii. Avenues of Service & Service Projects (Local and International)
 - iv. The Rotary Foundation - highlights only -- This is what funds "Doing Good in the World"
 - v. Membership is by Invitation. Include overview of financial commitment
 - vi. "What happens if I join?" -- Onboarding/orientation process
 - vii. Hand out applications -- "Please return to your sponsor (the member who invited you)"
- c. **Take Home Collateral** -- Hand out a Rotary Brochure or Club Brochure for each prospect, along with a business card (President, Secretary, Membership Chair, etc.)
- d. **Wrap-up**, invitation to stay for refreshments, networking, etc. (20 minutes left to stay inside 1 hour)

Note: **NO** Invocation, **NO** pledge, **NO** song, **NO** "Rotary Meeting" preliminaries - this is a "business seminar" format.

Follow-Up

Sponsors are primarily responsible for phone follow-up, same day or next day, inviting them to join and asking "what's your decision-making timetable?", and reporting same to Membership Committee. Additionally:

- 1. Follow-Up Email, thanking prospects for attending - same day or next day
- 2. Phone call from President or Membership chair within 2 days, asking if any questions and inviting them to join
- 3. Sponsor continues to follow up until we get a "Yes", "No" or "Not Now".
 - a. **Yes** -- proceed with Membership Proposal process
 - b. **Not Now** -- Keep as Potential Member and in "drip marketing", sending your E-Newsletter or E-Bulletin by PMail once or twice a month.
 - c. **No** -- Terminate from DACdb to drop them out of your prospect list

Repeat

This is a playbook you can run two, three or four times a year. One club has a membership event every month, just before a regular meeting. Members will have prospects who can't make a given date. If you go ahead and schedule the next one out a few months, many times they can get a commitment for the alternate date.

Save this template as an MSWord file where you can work on it until complete.

Clubs should complete a written Club Membership Growth Plan to ensure success in the most important Key Performance Indicator (KPI) of a healthy, vibrant Rotary club -- consistent, moderate membership growth. Clubs that already have comprehensive written membership plans may use those instead.

Rotary is a Membership Organization and Our Product is Service. If you get Membership right, pretty much everything else takes care of itself. If you don't get membership right, everything else is a struggle for the whole year. Work on membership **first**, get your membership committee up and running **first, and** then attend to other priorities.

There is a huge difference between a membership slogan or concept and a membership plan. An effective membership plan addresses all 4 essential success factors of club membership growth. To be successful, a club must plan and execute intentional, effective strategies for each of these areas:

1. **Prospect Identification (Lead Generation)** - A club must create and execute effective strategies for regularly prompting and inspiring members to bring a consistent stream of friends, neighbors and business associates to consider Rotary as part of their lives. This is the most common "missing link" in most club plans.
2. **Attracting Members** - Effectively presenting Rotary to qualified potential members. Many clubs experience a 50%+ success rate with potential members attending a **Rotary Information Hour**. We have a great product, and people will join if we present it well.
3. **Onboarding New Members** - The first step in long-term retention of members is an effective Rotary orientation and training program. Engaging members in the club's activities during their first year of membership is essential to retention success.
4. **Retaining Members** - It's much easier to retain a member than to find a replacement. Members stay because a club does meaningful, **Rotary-branded** service projects of its own (not writing checks to other non-profits). Hands-on, shoulder-to-shoulder service work is where members get to know and bond with each other. Clubs with attrition rates over 15% should prioritize these strategies. Start with the [Rotary Club Health Check](#).

The 1-Page Membership Plan Template that follows is a framework for you to identify intentional strategies for success in these 4 essential areas. Built in MS-Word format, you may edit or modify as it suits your club and your plan. Sections expand as you build your plan.

You may wish to take advantage of several excellent resources that have proven helpful for other clubs:

- 10 Intentional Membership Strategies that **work**: <https://www.rizones33-34.org/?s=intentional>
- Recipe for a Successful Membership Event: <https://www.rizones33-34.org/?s=recipe>
- Rotary Club Health Check: <https://tinyurl.com/rotaryhealthcheck>

Your Assistant Governor will work directly with the president, membership chair and/or board of directors to provide ideas, suggestions and resources to help in the completion of your plan. Your District Membership team is also available to assist.

Hope is not a strategy

Current Membership: _____ members **Average Annual Attrition:** _____ members
Membership Goal -- Grow by _____ members (net), requiring _____ new members (growth + attrition)
 Actual data at: tinyurl.com/7750Summit2021 **Membership Goal Worksheets – your club**

Our Membership Challenges -- What are the membership challenges facing our club?

☐ High Attrition rate? ☐ Low Attraction Rate? ☐ Maintaining existing growth momentum?

Prospect Identification (Lead Generation) -- What is our plan for prompting members to think of candidates AND for inspiring members to contact them? Intentional strategy(ies) we will use:

Who's responsible/accountable?	
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Attracting Members -- How will we make our club attractive to prospects? How will we tell the Rotary story? Intentional strategy(ies) we will use:

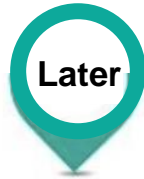
Who's responsible/accountable?	
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Onboarding New Members -- How will we ensure that new members understand Rotary, our club, expectations and opportunities for service? Intentional strategy(ies) we will use:

Who's responsible/accountable?	
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Retaining Members -- How will we improve our club experience so members want to remain in Rotary? How will we make our service projects more compelling for our members? Intentional strategy(ies) we will use:

Who's responsible/accountable?	
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A General Road Map for new Club Members' Responsibilities

In your 4th year as a Club Member, you may be asked to:

- Serve as President-Elect or President Nominee
- Oversee a Service Project that you have a passion for
- Continue to attract new Members & develop the club

In your 3rd year as a Club Member, you may be asked to:

- Serve as a Board Member (attend monthly 1 hour Board meetings).
- Serve as Treasurer, Secretary, or President-Elect
- Organize and lead a Service Project that you have a passion for.

In your 2nd year as a Club Member, you may be asked to:

- Serve on a Committee (Membership, Projects)
- Asked to lead a project that you have a passion for
- Be a Rotary buddy for a new member

Regarding Service Projects, you will be asked to participate as your competing priorities & schedule allows with the following projects:

- Beautiful America – trash pick up 1 hour/qtr.
- Organize a project – your passion – 1 hour/qtr.
- Offer up any service project that touches your heart/ignites your passion & is connected to one of our seven causes: Water & Sanitation, Basic Education & Literacy, Disease Prevention & Treatment, Maternal & Child Health, Peace & Conflict Prevention/Resolution, Economic & Community Development and Protecting the Environment

In your 4th year as a Club Member, in addition to 1st year duties, you may be asked to:

- Mentor other Rotary members
- Provide new ways of energizing/“livening up” the meeting.

In your 3rd year as a Club Member, in addition to 1st year duties, you may be asked to:

- On occasion, fill in for the President during his/her absence
- Help to provide admin support/fill in the gaps as needed

In your 2nd year as a Club Member, in addition to 1st year duties, you may be asked to:

- Take a more active role in the meetings
- Be a Rotary buddy for a new member
- Invite prospective members to a meeting, Discover Rotary event or social

In your 1st year as a Rotary Club Member, you may be asked to contribute to your Club Meeting by:

- Saying an Invocation or Rotary moment
- Leading a short song to open the meeting
- Gather up “Happy Bucks”
- Conduct the 50/50 raffle
- Provide a speaker (once or twice in a year)
- Lead in the Four Way Test of the things we think, say, or do

NOTE: This is only a general guideline. As Rotarians we have busy lives & cannot always follow this path. Your voluntary, engaged membership is what we desire most.

Rotary Fellowships and Action Groups



<https://www.rotary.org/fellowships>

Retention/Engagement Strategy

Encourage members of your club to get involved in Rotary activities beyond the club experience.

Rotary Fellowships are international groups that share a common passion. Being part of a fellowship is a fun way to:

- make friends around the world,
- explore a hobby or profession,
- and enhance your Rotary experience.

Below is a list of a few of the Rotary Fellowships. More are added each year.

<ul style="list-style-type: none"> • Amateur Radio • Antique Automobiles • Argentine Culture • Badminton • Bathhouse • Beard and Moustache • Bee • Beer • Bird Watching • Bowling • Camping • Caravanning • Chess • Comedy • Computer Users • Corporate Social Responsibility • Cricket • Cruising • Cultural Heritage • Curling • Cycling • Doll Lovers • Draughts (Checkers) • E-Clubs • Editors and Publishers • Educators • Empowering Women • Entrepreneurs • Home Exchange • Honorary Consuls • Horseback Riding • Hunting • Healthcare Professionals 	<ul style="list-style-type: none"> • Internet • Italian Culture • Jazz • Kites • Latin Culture • Lawyers • Leadership • LGBT+ • Magicians • Magna Graecia • Marathon Running • Metalhead • Military Veterans • Motorcycling • Music • Old and Rare Books • Palmwine • Past District Governors • Peace Fellows • Photographers • Pickleball • Public Health • Quilters and Fiber Artists • Railroads • Recreational Vehicles • Rotary Global History • Rotary Heritage and History • Rotary Means Business • Rotary on Pins • Rotary on Stamps • Rowing • Rum • Scouting 	<ul style="list-style-type: none"> • Scuba • Shooting Sport • Singles • Skiing • Social Networks • Strategic Planning • Surfing • Table Tennis • Tennis • Total Quality Management • Travel and Hosting • Triathlon • Urban Gardening • Vintage collectibles • Wellness and Fitness • Whisk(e)y • Wildlife Conservation • Wine • Yachting • Yoga • Environment • Esperanto • Ethics • European Philosophy • Executive Managers • Fishing • Flying • Genealogists • Gin • Global Development • Go • Golf • Gourmet Cooking
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Membership Action Plan Webinars
2nd Mondays
5-6 pm ET August/September
6-7 pm Thereafter

[August 8, 2022 – Create a Membership Pipeline](#)

[September 12, 2022 – Connect with Prospects](#)

[October 10, 2022 – Meaningful Onboarding](#)

Since 2015 Rotary International has officially recognized **membership growth** as our top internal priority. We are a **membership organization** that delivers amazing service however Membership decline remains the biggest problem we have to solve.

Our clubs deserve a multi-year approach to create a membership culture that will result in consistent, moderate membership growth. And that's what Zones 33 & 34's Membership Action Plan (MAP) intends to help you do.

Imagine... having more members to share the load in your club, to bring fresh ideas and generate energy, to give you the resources to do more good in your communities... Imagine the increased impact...the difference we all know Rotary can make. By providing clubs an easy-to-follow path toward membership growth, we'll go beyond imagining and make it reality.

<https://www.rizones33-34.org/membership-action-plan/?fbclid=IwAR2Bkoyl48g1LxsbyxpcuapmW7RYXvEWrAnoAbsC78vk4IlijkVWzmmKUqFg>