

# CLUB MEMBERSHIP COMMITTEE MANUAL



ROTARY INTERNATIONAL®

This is the 2006 edition of the *Club Membership Committee Manual*. It is intended for use by 2007-08, 2008-09, and 2009-10 club committees. The information in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, and the Rotary Code of Policies. Changes to these documents, by the 2007 Council on Legislation or the RI Board, override policy as stated in this publication.

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# Introduction

The *Club Membership Committee Manual* was developed to help you establish goals and understand your responsibilities related to increasing club effectiveness. An effective Rotary club is able to:

- Sustain or increase its membership base
- Implement successful projects that address the needs of their community and communities in other countries
- Support The Rotary Foundation through both program participation and financial contributions
- Develop leaders capable of serving in Rotary beyond the club level

Under the Club Leadership Plan, the recommended administrative structure of Rotary Clubs has the following five standing committees:

- Club administration
- Membership
- Public relations
- Service projects
- Rotary Foundation

Each committee has a manual which provides an overview of the committee and its responsibilities as well as available resources, specific committee duties, and other relevant materials to support you and your committee members. Copy related sections of the *Club Membership Committee Manual* and distribute to committee members. Additional copies of this manual can be downloaded for free at [www.rotary.org](http://www.rotary.org). The *Club Officers' Kit* (225-EN), including this manual, can be purchased through the *RI Catalog*.

## **Club Membership Committee Chair**

Before the district assembly, review this manual in order to understand your role and responsibilities. Bring it to your district assembly to use as a reference.

At the district assembly, club leaders, including the club president-elect and the incoming secretary, treasurer, and committee chairs, will discuss their role and responsibilities, work on annual goals, and develop their working relationship for the coming year.

Complete the following discussion questions in advance to fully participate in the discussions at the district assembly:

What is the role of the membership committee?

What are your responsibilities in this role?

How can you identify and recruit new members?

How can you involve new members in club projects, committees, and activities?

What are some strategies for increasing retention of members?

How can you help committee members serve effectively?

What are your long-range and annual goals?

**Comments?**

If you have questions or comments about this manual or any of RI's training resources, please direct them to:

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# Role and Responsibilities

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

## Role

The membership committee develops and implements an action plan for recruiting, retaining, and educating club members.

## Responsibilities

The membership committee has the following responsibilities, which are explained in this manual:

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

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Plan weekly meetings and activities in observance of Membership and Extension Month (August) and New Generations Month (September).

## Working with Club Committees

The membership committee should work with the following club committees to meet membership goals:

- Public relations committee (to elevate the image of your club in the community, making it more attractive to potential members and building pride in current members)
- Service projects committee (to ensure that service projects are relevant to club members and to involve non-Rotarians in service projects to better understand the opportunities for service that Rotary membership provides)
- Club administration committee (to plan weekly programs that educate members about Rotary and address their personal needs and interests)

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

### **Subcommittees**

Depending on the goals of your committee, it may have the following subcommittees:

- Recruitment
- Classifications
- Retention
- Prospective member education
- New member orientation and education
- Continuing member education
- Family of Rotary

### **Contents**

Copy and distribute these materials to committee members as needed.

Membership Resources 5-6

Club Membership Committee Chair 7-10

Membership Section of the  
*Planning Guide for Effective Rotary Clubs* 11-12

Recruitment 13-16

Classifications 17

Retention 18-22

Education 23-24

Organizing New Clubs 24

## Membership Resources

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### Informational Resources

Order publications through the *RI Catalog* (019-EN), or download them at [www.rotary.org](http://www.rotary.org).



***Membership Development Resource Guide* (417-EN)** — Outlines basic procedures for building club membership and lists suggestions for recruiting and retaining members.

- Classification survey — Tool to help clubs identify potential new members.
- Club bulletin — Club's main communication tool, which should include membership development information such as recruitment strategies and continuing education opportunities.
- Club member interest assessment — Tool to help clubs identify the needs and interests of their members.
- Club profile — Club information for new and prospective members.
- Governor's monthly letter — Membership development resource for clubs that includes retention and recruitment strategies as well as continuing education opportunities.
- *How to Propose a New Member* (254-EN) — Brochure outlining the procedure for selecting and electing members.
- *New Member Orientation* (414-EN) — Resource for Rotarians responsible for creating or updating their club's new member education program.
- *Official Directory* (007-EN) — Contact information for RI and Foundation officers, committees, task forces, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing of clubs within districts, including contact information.
- *Planning Guide for Effective Rotary Clubs* — Club assessment and goal-setting tool used to plan membership goals (see pages 11-12).
- *Rotary Basics* (595-EN) — Member education publication containing the information that every Rotarian should know.
- *The ABCs of Rotary* (363-EN) — Compilation of short articles about Rotary history and programs.
- *This Is Rotary* (001-EN) — Brochure providing brief overview of Rotary for prospective Rotarians and the public.
- *The Rotarian* (or Rotary regional magazine) — RI's official monthly magazine, which reports club and district projects, RI Board decisions, and RI meetings. In addition, 30 Rotary regional magazines in 23 languages serve Rotarians around the world.
- *What's Rotary?* (419-EN) — Wallet-size card answering frequently asked questions about the organization and scope of Rotary. Popular as a handout to non-Rotarians.

### **[www.rotary.org](http://www.rotary.org)**

The RI Web site provides online resources and up-to-date information on all aspects of Rotary. You can download free publications, shop the online catalog, and locate the meeting time and place of any Rotary club.

Click on:

- Membership ([www.rotary.org/membership](http://www.rotary.org/membership)) — Comprehensive, current source of Rotary membership information, including resources for recruitment and retention. Many publications are available for free download.

Keyword searches:

- Recognition programs — RI and Rotary Foundation awards and recognition programs, including the RI Membership Development and Extension Award and RI Recognition of Membership Development Initiatives.
- Membership Development Best Practices Exchange — Contains successful membership ideas submitted by Rotary clubs and districts around the world.
- Rotary E-Learning Center ([www.rotary.org/training/elearning](http://www.rotary.org/training/elearning)) — Brief modules designed for independent study by new members and club officers.
- Termination profile — Online tool to help clubs identify why members were terminated.

### **Human Resources**

- District membership development committee — Rotarians appointed to support clubs in their membership development efforts. (Request contact information from your district.)
- District public relations committee — Rotarians appointed to provide resources to clubs for developing a positive image within the community. (Request contact information from your district.)
- Regional RI membership coordinator (RRIMC) and RI membership zone coordinator (RIMZC) — Rotarians appointed by the RI president to serve as a primary membership development resource within a specific region. (Find contact information in the *Official Directory* or at [www.rotary.org](http://www.rotary.org).)
- RI Club and District Support representative — Staff member at RI World Headquarters or international offices available to answer administrative questions and direct other inquiries to appropriate RI and Foundation staff. (Find contact information at [www.rotary.org](http://www.rotary.org).)
- RI Membership Development staff — Staff members at RI World Headquarters dedicated to assisting clubs and districts in their membership development efforts. (Find contact information at [www.rotary.org](http://www.rotary.org).)

## Club Membership Committee Chair

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As the chair of your committee, you're responsible for ensuring your committee achieves committee and club goals.

### Responsibilities

Before taking office, you have the following responsibilities:

- Reviewing your committee's manual
- Attending the district assembly
- Reviewing your club's bylaws, which should contain information on your committee's purpose
- Working with the president-elect to recruit committee members based on their professional abilities and personal interests, and preparing them for the year
- Reviewing and establishing club long-range and annual goals with the president-elect using the *Planning Guide for Effective Rotary Clubs*
- Developing an action plan for your committee to achieve annual goals

During your year as committee chair, you have the following responsibilities:

- Planning and conducting regular committee meetings and activities
- Holding members accountable for the responsibilities they've accepted
- Reporting committee activities and progress to the club president and board of directors and the full club
- Cooperating with the appropriate district committee on multiclub activities or initiatives
- Recognizing committee members' work and efforts

### Committee Members

Work with the president-elect to select committee members to fill vacancies and conduct planning meetings before the start of the year. When feasible, committee members should be appointed to the same committee for three years for continuity. Committee members should have connections to a cross-section of the community. Other important characteristics to consider include:

- Professional experience in recruiting, hiring, or sales
- Thorough knowledge of Rotary
- Outgoing and sociable personality

All incoming committee members should attend the district membership seminar to learn the district's membership goals, discuss membership strategies and cooperation with their counterparts in other Rotary clubs, and know what resources are available.

The club president serves as an ex officio member of all club committees.

To prepare committee members:

- Supply newer members with information on the committee and its activities.
- Pair new committee members with more experienced ones.
- Encourage networking with counterparts in other clubs (use the district directory).
- Know the resources available to your committee.
- Give members a list of district activities and meetings.

## Goal Setting

The *Planning Guide for Effective Rotary Clubs* is a goal-setting tool that helps the club president-elect work with club committees to assess the current state of the club and establish annual goals that support the club's long-range goals for the year. The planning guide also provides strategies that committees can use to achieve their goals. Each recommended club committee has a section in the planning guide. You'll have an opportunity to work on the planning guide with your club president-elect and other incoming club leaders during the district assembly. The *Planning Guide for Effective Rotary Clubs* can be used throughout the year to help measure progress toward established goals. It should be reviewed periodically and updated as needed.

**Establishing effective goals.** To ensure that the goals established accurately reflect committee capabilities and club interests, committee goals should be

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it. Consult with club leaders, club members, and district leaders in setting a goal.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available. Compare goals to previous goals achieved by the committee and the club.
- **Time specific.** A goal should have a deadline or timeline.

**Developing an action plan.** Work with club leaders and committee members to develop an action plan that outlines the steps needed to achieve each goal. The following steps can help you develop an action plan:

- Establish a time frame for each step.
- Determine who is responsible for implementing each step.
- Establish the criteria for measuring progress and success for each step.
- Consider the resources and tools available from your club, district, and RI to support the goal.
- Secure human, informational, and financial resources before taking action.
- Evaluate the success of previous goals and your current plan, making modifications as necessary.

Ensure steady progress is being made toward achievement of goals as envisioned.

**Motivating committee members to follow the action plan.** Because Rotarians are volunteers, what motivates them in their profession may not motivate them in Rotary. Consider the motivational needs of each committee member. Common motivators include:

- Belief that the goal will benefit the community and their club, district, and Rotary
- Opportunities for fellowship
- Opportunities for networking
- Belief that the goal is achievable and the project or activity will be successful
- Assignments that are challenging or use their expertise
- Recognition of efforts and time spent working toward committee goals

Using these motivating factors can help maintain member commitment to Rotary and encourages continued participation in club activities.

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Review your club's membership assessment tools and five-year membership profile available at [www.rotary.org/membership](http://www.rotary.org/membership).

## Budget

Before 1 July, work with your committee and the incoming club treasurer to determine what funds your committee will need to achieve its goals. Also include any planned fundraising activities. Ensure your committee's financial needs are included in the club budget.

Provide oversight of committee funds, transactions, and reports, and be aware of the financial condition of your committee's budget at all times. By meeting regularly with your club's treasurer, you can take early corrective measures if issues arise.

## Communication

Before the start of the year, develop a communication plan with other club leaders that outlines with whom, when, and how you'll communicate, including communications with:

- **Committee members.** Committees should meet regularly to review and identify available resources, discuss ongoing projects and new initiatives, and develop strategies to achieve committee and club goals.
- **Your club.** Report your committee's activities, including action plans and progress toward goals, to your club's president, board, and all club members.
- **Other committees.** Often, the work of one committee affects the work of another. For example, the public relations committee's work to raise community awareness of Rotary may influence the membership committee's recruitment efforts. Effective communication will help committees work together to coordinate projects and initiatives.
- **Your district.** If your committee needs guidance or information, contact your district counterpart or your assistant governor.

## Additional Resources

In addition to your committee's resources, the following resources can help you fulfill your responsibilities and answer committee members' questions:

### *Informational Resources*

Order publications from the *RI Catalog* (019-EN), or download them at [www.rotary.org](http://www.rotary.org).

- District directory — Listing of district leaders and activities (if your district produces a directory).
- *Manual of Procedure* (035-EN) — RI and Rotary Foundation policies and procedures established by legislative action, the RI Board of Directors, and the Trustees of The Rotary Foundation, issued every three years following the Council on Legislation. Contains the RI constitutional documents.
- Recommended Rotary Club Bylaws — A legal document that expands on club operations guidelines in the club constitution.
- Rotary Code of Policies and Rotary Foundation Code of Policies — Policies and procedures established by the RI Board of Directors and the Trustees of The Rotary Foundation in support of the RI Constitution and Bylaws, revised following each Board or Trustees meeting.
- Standard Rotary Club Constitution — A constitutional document that is a framework for Rotary club operations.

*www.rotary.org*

The RI Web site provides online resources and up-to-date information on all aspects of Rotary. You can download free publications, shop the online catalog, and locate the meeting time and place of any Rotary club.

Click on:

- Club-District Support ([www.rotary.org/support](http://www.rotary.org/support)) — Resources for club and district officers, including the most up-to-date versions of the Recommended Rotary Club Bylaws and Standard Rotary Club Constitution.

#### *Financial Resources*

- Funds from individual donors or local businesses
- Grants from other foundations
- Rotary Foundation grants for club and district humanitarian projects

#### *Human Resources*

Unless otherwise noted, contact information is available from your district.

- Assistant governor — Rotarian appointed to assist the governor with the administration of designated clubs. Your assistant governor will visit your club quarterly (or more often) and is available to answer questions or provide advice.
- Other club committee chairs in your district — Club leaders who can serve as a resource to help support your club's projects and initiatives.
- District governor — RI officer responsible for advising your club on strategies to make your club more effective. (Find contact information in the *Official Directory*.)
- Past club committee chairs and leaders — Knowledgeable Rotarians who can advise you as you plan your year and can be assigned to lead committee activities.
- RI and Rotary Foundation resource groups/task forces — Groups of Rotarians appointed by the RI president to assist Rotary clubs and districts with the presidential emphases. (Find contact information in the *Official Directory*.)

# PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in this section are common ways clubs might choose to pursue membership goals. Clubs are encouraged to develop alternative strategies to achieve their membership goals when appropriate.  
Download a Microsoft Word version at [www.rotary.org](http://www.rotary.org).

## MEMBERSHIP

### Current State

Current number of members: \_\_\_\_\_

Number of members as of 30 June last year: \_\_\_\_\_ 30 June five years ago: \_\_\_\_\_

Number of male members: \_\_\_\_\_ Number of female members: \_\_\_\_\_

Average age of members: \_\_\_\_\_

Number of Rotarians who have been members for 1-3 years: \_\_\_\_\_ 3-5 years: \_\_\_\_\_ 5-10 years: \_\_\_\_\_

Number of members who have proposed a new member in the previous two years: \_\_\_\_\_

Check the aspects of your community's diversity that your club membership reflects:

Profession  Age  Gender  Ethnicity

Our classification survey was updated on \_\_\_\_\_ and contains \_\_\_\_\_ classifications, of which \_\_\_\_\_ are unfilled.  
(number) (date) (number)

Describe club's current new member orientation program:

Describe club's continuing education programs for both new and established members:

Our club has sponsored a new club within the last 24 months.  Yes  No

Number of Rotary Fellowships and Rotarian Action Groups members participate in:

What makes this club attractive to new members?

What aspects of this club could pose a barrier to attracting new members?

### Future State

Membership goal for the upcoming Rotary year: \_\_\_\_\_ members by 30 June \_\_\_\_\_  
(number) (year)

Our club has identified the following sources of potential members within the community:

**How does the club plan to achieve its membership goals? (check all that apply)**

- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Ensure that the membership committee is aware of effective recruitment techniques
- Develop a recruitment plan to have the club reflect the diversity of the community
- Explain the expectations of membership to potential Rotarians
- Implement an orientation program for new members
- Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- Assign an experienced Rotarian mentor for every new club member
- Recognize those Rotarians who sponsor new members
- Encourage members to join a Rotary Fellowship or Rotarian Action Group
- Participate in the RI membership development award programs
- Sponsor a new club
- Other (please describe):

**Action steps:**

## Recruitment

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The membership committee recruits prospective candidates for club membership and informs all club members of the importance of identifying and inviting prospective members to join the club. Because membership in Rotary is by invitation only, club members must reach out to friends, family, business associates, and other community members by asking them to join.

New members bring important benefits to the club, including:

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

Your club's ability to recruit new members is dependant on effective and relevant projects, public relations, interesting meetings, diverse membership, and overall club effectiveness. Anticipate the challenges of recruiting new members and work with other club leaders to implement strategies for addressing them.

### Responsibilities

The membership committee has the following responsibilities for recruiting new members:

- Understanding club guidelines for recruiting new members
- Helping members identify potential Rotarians
- Ensuring the club's members are a diverse representation of the community's professional and business population
- Welcoming and inducting new members
- Proposing new members to the club
- Understanding the classification system

### Action Steps

To recruit high-quality Rotary club members, your membership development action plan should include the following action steps:

- Identify
- Introduce
- Invite
- Induct

For each of these steps, develop a timeline, determine which committee member is responsible for implementing it, establish criteria for measuring progress, and consider the resources and tools available to support you. Recruitment strategies for these action steps are explained below.

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For more information on recruitment, consult the *Membership Development Resource Guide*.

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Browse the Membership Development Best Practices Exchange at [www.rotary.org](http://www.rotary.org) for recruitment strategies.

### *Identify*

Identify professional members of your community who are qualified to join your club. Each year the club membership committee should conduct a classification survey as early as possible, in order to develop a list of classifications not held by members of the club. Use this list to determine the classifications to target in recruitment efforts. Share this information with all club members and consult with the board on all classification issues. See Classifications (page 17) for more information.

In order to encourage recruitment, personally recruit a new member during the first month of the Rotary year and encourage club members to do the same. Work with the entire club to seek out new club members among the following groups:

- Local businesses
- Professional and trade associations
- Chamber of commerce
- Local and regional government offices
- Rotary Foundation alumni
- Current and past Rotaractors
- Spouses, partners, and family members of Rotarians

### *Introduce*

Ensure that prospective members are introduced to Rotary International's programs, your club's service efforts, and the benefits and responsibilities of membership. A prospective member who has been introduced to Rotary by enthusiastic Rotarians and is informed about the club's projects before joining is more likely to become involved and remain active.

Encourage club members to discuss Rotary and its goals with friends, family, and colleagues. Also use your community service projects to identify and involve potential members. See Education (pages 23-24) for more information on informing prospective members about Rotary.

### *Invite*

Invite a prospective member to become a club member with a personal visit from both the proposer and a member of the membership committee. This two-person visit provides the prospective member with a second contact in the club, one who brings additional Rotary knowledge and experience. Rotarians extending the invitation should know the personal interests and abilities of the prospective member in order to point out relevant club activities and projects. The membership committee should ensure that club members who sponsor new members are recognized for their efforts.

Assist the board in investigating the character, business or profession, community standing, and general eligibility of all people proposed for membership. Membership retention will be improved by identifying quality prospective members.

In assessing a candidate's qualifications for membership, consider the following questions:

- Is the individual above reproach?
- Is the reputation of the individual's firm exemplary?
- Is the person service-minded?

- Can the candidate meet the financial obligations of membership and attend weekly meetings?
- Is the candidate committed to getting involved in the club's projects, programs, and committees?

The committee should act promptly on all membership proposals. Your report to the board of directors should explain the extent of the committee's investigation and the reasons for its conclusions.

### *Induct*

New members should be welcomed in a dignified and meaningful manner. Use an induction ceremony as an opportunity to explain the benefits and responsibilities of being a Rotarian. If possible, invite family members to attend. During the ceremony, offer new members the opportunity to give a five-minute talk about themselves, their businesses, and their families. Your Rotary club should provide a new member with the following items:

- Rotary lapel pin
- Membership identification card
- Club bulletin
- District directory
- District governor's monthly letter
- *The Rotarian* or Rotary regional magazine
- List of local clubs for make-up meetings
- Club name badge
- Club banner

Recognize the new member and sponsor in your club's bulletin or at the weekly meeting.

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See the *Membership Development Resource Guide and New Member Orientation* for ideas on inducting new members.

## **Recommended Rotary Club Bylaws**

### **Article 13 Method of Electing Members**

**Section 1** – The name of a prospective member, proposed by an active member of the club, shall be submitted to the board in writing, through the club secretary. A transferring or former member of another club may be proposed to active membership by the former club. The proposal shall be kept confidential except as otherwise provided in this procedure.

**Section 2** – The board shall ensure that the proposal meets all the classification and membership requirements of the standard Rotary club constitution.

**Section 3** – The board shall approve or disapprove the proposal within 30 days of its submission, and shall notify the proposer, through the club secretary, of its decision.

**Section 4** – If the decision of the board is favorable, the prospective member shall be informed of the purposes of Rotary and of the privileges and responsibilities of membership, following which the prospective member shall be requested to sign the membership proposal form and to permit his or her name and proposed classification to be published to the club.

**Section 5** – If no written objection to the proposal, stating reasons, is received by the board from any member (other than honorary) of the club within seven (7) days following publication of information about the prospective member, that person, upon payment of the admission fee (if not honorary membership), as prescribed in these bylaws, shall be considered to be elected to membership.

If any such objection has been filed with the board, it shall vote on this matter at its next meeting. If approved despite the objection, the proposed member, upon payment of the admission fee (if not honorary membership), shall be considered to be elected to membership.

**Section 6** – Following the election, the president shall arrange for the new member's induction, membership card, and new member Rotary literature. In addition, the president or secretary will report the new member information to RI and the president will assign a member to assist with the new member's assimilation to the club as well as assign the new member to a club project or function.

**Section 7** – The club may elect, in accordance with the standard Rotary club constitution, honorary members proposed by the board.

## Classifications

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Rotary clubs use the classification system to help ensure they represent the diversity of the local business and professional community. A classification describes either the principal activity of a firm or a person's business or professional activity, not a profession or office: "architecture" or "banking" (not "architect" or "bank president"). There is no definitive list of classifications, because business activities and terminology vary greatly throughout the Rotary world. Use your local business directory or phone book to develop a classification survey.

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If your club cannot induct a qualified prospective member due to the classification principle, recommend him or her to another Rotary club in the area.

### Applying the Classification Principle

Clubs are limited to five members for each classification, or 10 percent of their total membership if the club has more than 50 members. Members who are retired should not be included in the total number of members from a classification.

If a member changes classification, the club may continue the member's membership under the new classification. Rotarians who transfer from another club or who are former members should still be admitted even if they exceed the membership limit for a classification. Rotary clubs should consider these exceptions as temporary.

### Conducting a Classification Survey

In order to know what professions and businesses are in the community, conduct a classification survey. This survey is a list of all business and professional establishments in your community, focusing on qualified executives found within the locality of the club and bordering communities or the corporate city limits. It should also include classifications of residents in the locality whose places of business are outside the club's locality. Once you have a survey, prepare a roster of filled and unfilled classifications. The roster should list the names of current club members beside their classification. Use the roster to target classifications that are not represented in the club for membership recruitment.

Classification is just one of the criteria for Rotary club membership. See the Standard Rotary Club Constitution for a complete list of membership qualifications.

## Retention

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

Determine what retention challenges your club faces and then implement strategies for addressing them. Successful club retention strategies include member education and keeping club members involved and informed.

### Responsibilities

The club membership committee has the following responsibilities for retaining members:

- Identifying current retention strengths and weaknesses using the Retention Model (pages 20-22)
- Monitoring trends about attendance, length of membership, service projects participation, and contributions to The Rotary Foundation. Such trends can point out concerns that may need to be addressed.
- Informing and orienting new and continuing members about the importance of Rotary and membership
- Implementing strategies to involve new and current members in club activities
- Recognizing existing members for their contributions to club projects and activities

### Action Steps

To retain club members, your membership development action plan should include the following action steps:

- Inform and Orient
- Involve

For each of these steps, develop a timeline, determine which committee member is responsible for implementing it, establish criteria for measuring progress, and consider the resources and tools available to support you. Retention strategies for these action steps are explained below.

#### *Inform and Orient*

The club membership committee should make continuing education for members a regular club activity, and inform and orient new club members about the club and RI. Training and education provide knowledge and skills to Rotarians and is fundamental to membership retention. Some members resign from their clubs because they feel uninformed. See Education (pages 23-24) for more information on new and continuing member education.

#### *Involve*

Ensure that all club members are involved in club committees, activities, fundraisers, board meetings, weekly club meetings, and social activities. An involved member will feel a part of the club and will make Rotary a priority in his or her life. Encourage clubwide participation in community service and Rotary Foundation programs.

Also consider the following methods of getting new members involved in the activities of the club:

- Assign new members to a committee or give them a weekly meeting assignment.
- Create special name badges for new members to wear for one year. Encourage other members to look for the badges and make a special effort to talk with the new members.
- Have a new member serve as a delegate to the district conference to learn about the world of Rotary and the projects being done outside of his or her own club. Some clubs assist the new member by paying part or all of the costs of the conference. After the conference, ask the new member to give a report to the club.
- Introduce a commencement program, where all club members who join in the same Rotary year work together on a project.
- Encourage new members to experience the internationality of Rotary by attending the RI Convention or hosting a Group Study Exchange team member for a meal or other activity.
- Ask new members to find two or three other new members from among their peer group. When new members promote Rotary to their friends, they become stronger and more enthused about Rotary.

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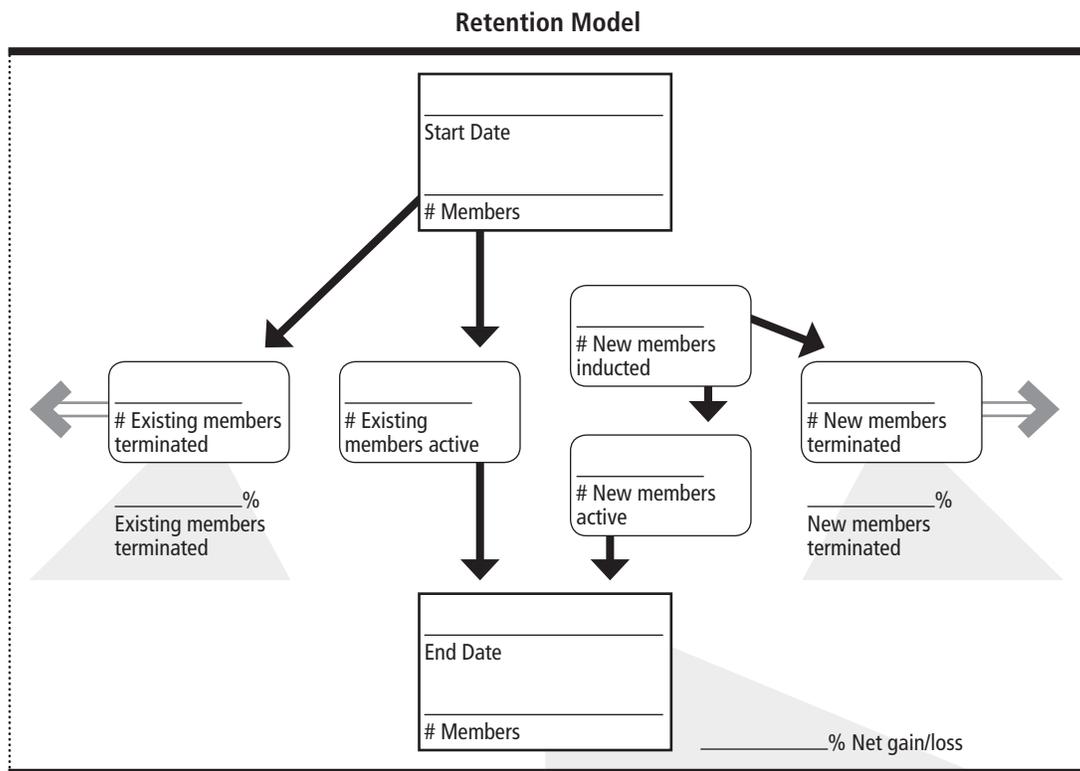
Find membership retention strategies that have worked for other clubs at [www.rotary.org/membership](http://www.rotary.org/membership).

## Retention Model

To remain viable, a Rotary club must retain its current members and induct and retain new, qualified members. The retention model is a tool to help clubs calculate their net membership gain (or loss) over a specified time period and determine its source: existing or new members.

Use your club membership records and the following diagram and instructions to create a retention model for your club. You'll need induction and termination dates for all members in the three-to-five-year period. (If your club doesn't have complete records, your club president or secretary can download them from Member Access at [www.rotary.org](http://www.rotary.org).)

Once you've completed your model, use the instructions to interpret it.



## Creating Your Retention Model

1. Establish the time frame you wish to study by entering a **Start Date** in the top box of the retention model and an **End Date** in the bottom box. (We recommend a time frame between three and five years.)
2. In the **Start Date** box, enter the number of active members who were in the club on that date.
3. In the **End Date** box, enter the number of active members who were in the club on the end date and calculate the \_\_\_\_% **Net gain/loss** by:

$$\frac{(\text{End Date number of members} - \text{Start Date number of members}) * 100}{\text{Start Date number of members}} = \text{____\% Net gain/loss}$$

4. In the **Existing members terminated** box, enter the number of members who were active on the start date but terminated before the end date and calculate the \_\_\_\_% **Existing members terminated** by:

$$\frac{\text{Existing members terminated} * 100}{\text{Start Date number of members}} = \text{____\% Existing members terminated}$$

5. Calculate the number of **Existing members active** by:

$$\text{Start Date number of members} - \text{Existing members terminated} = \text{Existing members active}$$

6. In the **New members inducted** box, enter the number of new members inducted between the start date and end date.
7. In the **New members terminated** box, enter the number of new members who were terminated before the end date and calculate the \_\_\_\_% **New members terminated** by:

$$\frac{\text{New members terminated} * 100}{\text{New members inducted}} = \text{____\% New members terminated}$$

8. Calculate the **New members active** by:

$$\text{New members inducted} - \text{New members terminated} = \text{New members active}$$

*Note:* The number of members at the **End Date** should equal the number of **Existing members active** plus the number of **New members active**.

## Interpreting Your Retention Model

Once you know who constitutes your club's net membership gain or loss, you can begin to identify the club's retention strengths and weaknesses.

### *Net Gain or Loss*

A net gain or net loss of members is the first indication of a club's retention status. A net gain indicates that the club has more members. This could mean that the club retained its active members and brought in new members or it could indicate that the club is inducting enough new members to compensate for the active members who are leaving.

A net loss indicates that the club has failed to retain more members than it inducts.

### *Evaluating Termination Rate*

The primary evidence that the club might have a retention problem is if it has terminated a large number of members. Add the number of **Existing members terminated** (far left box) and number of **New members terminated** (far right box) to determine the total number of members the club has terminated. Is the total number of terminations reasonable for the size of the club? Consider the reasons for these terminations and the steps the club can take to limit these losses.

### New Members

To continue the termination analysis, consider the number of **New members terminated** (far right box). This indicates how many new members the club inducted and subsequently terminated within the time frame. Keep this number as close to zero as possible. The percentage listed under the **New members terminated** box (\_\_\_\_% **New members terminated**) identifies what percentage of new members have been terminated. Keep this percentage as low as possible. It is understood that occasionally a new member may leave unexpectedly; however, if the club fully informs prospective members about the responsibilities of membership and maintains an effective new member orientation program, the number of new members terminated should be extremely low.

### Existing Members

The number of **Existing members terminated** (far left box) identifies how many of the members that were active on the start date have been terminated, the club's attrition percentage (\_\_\_\_% **Existing members terminated**). A low attrition percentage is an indication that the club is retaining its existing members.

## Other Resources

Additional retention strategies can be found in the *Membership Development Resource Guide*. Contact your regional RI membership coordinator (RRIMC) and their zone coordinators (RIMZCs) for guidance on your retention efforts.

Detailed instructions on completing and analyzing the retention model are available at [www.rotary.org](http://www.rotary.org).

## Education

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

### Responsibilities

The membership committee has the following responsibilities for membership education:

- Explaining the benefits and responsibilities of membership to potential members
- Working with the president to provide continuing Rotary education and training to all club members
- Promoting the district membership seminar and membership seminars sponsored by regional RI membership coordinators and RI membership zone coordinators
- Implementing new member orientation and education strategies

### Prospective Member Education

Inform prospective members about Rotary, including its history, ideals, and information about the club and its activities. Work with the president and the public relations committee to provide prospective members with introductory Rotary information.

The committee should compile this information in a club profile that can be presented to visitors along with the *This Is Rotary* brochure and a current copy of *Rotary Basics*. A recent issue of *The Rotarian* or a Rotary regional magazine is also a good introduction to Rotary.

### New Member Orientation and Education

The process of new member orientation should build on the information provided to prospective members and should begin immediately after induction.

Every member of your club should play an active role in introducing new members to the club. Assign a mentor to each new member to advise him or her on how to be an effective club member.

During the first six months, new members can expand their understanding of Rotary in these ways:

- Attending new member orientation meetings
- Visiting the Rotary E-Learning Center at [www.rotary.org](http://www.rotary.org)
- Attending club assemblies, board meetings, or committee meetings
- Giving a classification talk at a club meeting
- Making up a meeting at another club
- Inviting a guest to a club meeting or proposing a new member
- Choosing a club committee on which to serve

### **Continuing Member Education**

Continuing member education ensures that members remain challenged, motivated, and enthusiastic. The membership committee should have a continuing Rotary education plan in place to keep existing members up-to-date on Rotary and the club. Such a program could include the following:

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

Use your club and district Web sites, weekly meetings and e-mails, and club bulletins to share information from your district governor or Rotary International. Make sure everyone knows about such RI and Foundation programs as Youth Exchange, Ambassadorial Scholars, and World Community Service. Becoming involved in one of these programs can spark a lifelong commitment to Rotary.

RI publications are also excellent continuing education tools. By reading publications such as *The Rotarian* or Rotary regional magazines, club members can stay up-to date on Rotary activities worldwide. Encourage members to visit [www.rotary.org](http://www.rotary.org) often to keep up-to-date on events and resources.

### **Organizing New Clubs**

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

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

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





**Maximize your club's potential.**

**Use the *Planning Guide*  
for *Effective Rotary Clubs*  
to take control of its future.**

Find it in the *Club Membership Committee Manual* or at [www.rotary.org](http://www.rotary.org).



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