

## Club Membership Planning Guide For Getting & Keeping Good Rotarians

*This planning guide is a tool to help your club establish the goals and procedures for both increasing and retaining the membership of your club.*

*The greatest resource of your club and of Rotary International are individual Rotarians. With them your club can do incredible things - without them there is no future for Rotary. Use this plan to create the sustainability of your club and Rotary. Review it monthly.*

### DEMOGRAPHIC INFORMATION

Number of Club members as of July 1/07: \_\_\_\_\_ Jan 07: \_\_\_\_\_ # July 1/06: \_\_\_\_\_ # Jan 06: \_\_\_\_\_

Number of Club members who are male: \_\_\_\_\_

Number of Club members who are female: \_\_\_\_\_

Number of Club members in each of the following age groups:

**Under 30:** \_\_\_\_\_      **30-40 yrs:** \_\_\_\_\_      **40-50 yrs:** \_\_\_\_\_  
50-61 yrs: \_\_\_\_\_      Over 61: \_\_\_\_\_

Club Past Presidents: (Are you successful keeping Past Presidents in your club?)

Still in Club: \_\_\_\_\_      Deceased or relocated: \_\_\_\_\_

Classifications in use (*Look at your community—what is the professional/biz mix?*):

Info Technol/Communic: \_\_\_\_\_      Real Estate: \_\_\_\_\_      Retail: \_\_\_\_\_

Building/Trades: \_\_\_\_\_      Manufacturing: \_\_\_\_\_      Home based?: \_\_\_\_\_

Financial/Banking/Insurance: \_\_\_\_\_      Legal: \_\_\_\_\_      Healthcare: \_\_\_\_\_

Wellness: \_\_\_\_\_      Other: \_\_\_\_\_      Number Retired: \_\_\_\_\_

Number of YEARS IN ROTARY of Club members:

**0-3 yrs:** \_\_\_\_\_      **3-5 yrs:** \_\_\_\_\_      **6-10 yrs:** \_\_\_\_\_      **11-15 yrs:** \_\_\_\_\_  
16-20: \_\_\_\_\_      21-25 yrs: \_\_\_\_\_      Over 25: \_\_\_\_\_



*This information will give you the "picture" of your club as it is now*

## GETTING & KEEPING GOOD ROTARIANS

*Using the information you sourced on page one of this planning guide now determine:*

### THE WHO & HOW of GETTING and KEEPING GOOD ROTARIANS

1. How many members would you like in your Club on July 1st of next year: \_\_\_\_\_  
 How many of your current members will you have to replace: \_\_\_\_\_

2. Who do you want those members to be?

Do you need more women or more men? Are local ethnic groups represented?

Do you need more Rotarians who are under 40 years of age? What about home-based businesses?

Why not Rotary Alumnae (GSE, Scholars?) Are there classifications you wish to fill within your Club?

*If you set a goal of who you want to attract and how many people you want to have join your club you will be more successful achieving your results. If you write it down and monitor it monthly "it will happen".*

Who: \_\_\_\_\_ How Many: \_\_\_\_\_  
 Ages: \_\_\_\_\_ Classifications: \_\_\_\_\_

3. How will you attract new members? What will your recruitment techniques be?

Club in a Club ([www.clubinaclub.com](http://www.clubinaclub.com))

Member bring member

Create a Public Relations campaign about being a Rotarian—build on service projects

Divide the Club into teams and set a goal for each team

\_\_\_\_\_

*Use as many recruitments techniques at one time as you want - monitor each separately so you know which is best*

| RECRUITMENT<br>TECHNIQUES | WHO IS IN<br>CHARGE | WHEN WILL<br>IT HAPPEN | WHO WILL<br>FOLLOW UP |
|---------------------------|---------------------|------------------------|-----------------------|
|                           |                     |                        |                       |
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*Set a GOAL to follow up monthly on the entire plan - Don't file it away*

*It is a "living" document for you to update regularly*

## **GETTING & KEEPING GOOD ROTARIANS**

Service clubs around the world are decreasing in size because they haven't planned for their future growth. There is truth in the old saying: "failing to plan is a plan for failure"

### **THE MENTORING PLAN for GETTING and KEEPING GOOD ROTARIANS**

*The largest loss of new members happens within the first three years of joining a Rotary Club. Surveys show they leave because Rotary didn't meet their expectations. They did not feel involved or necessary. If your Club is going to go to all the work of recruiting new members then an equal amount of time and energy has to go into "mentoring" them.*

**1. How will you mentor prospective members?**

- Hold information meetings where the commitments of Rotary are clearly outlined
- Invite prospects to attend meetings for several months prior to proposing them
- Hold one-on-one meetings with prospective members to clarify commitment

**2. How will you mentor New Rotarians after they join your Club?**

- Hold mentoring workshops to train all the members of the club on how to be a mentor both for one-on-one mentoring and group mentoring
- Assign a mentor to each New Rotarian
- Create a mentoring program to monitor the progress of a New Rotarian
- Create a membership package that includes a Club handbook and RI information
- Hold Rotarizing meetings with the Mentors and New Rotarians
- Create satisfaction survey for new members to determine what is working and what is not meeting their expectations within the club
- \_\_\_\_\_

| <b>MENTORING TECHNIQUES</b> | <b>WHO IS IN CHARGE</b> | <b>WHEN WILL IT HAPPEN</b> | <b>WHO WILL FOLLOW UP</b> |
|-----------------------------|-------------------------|----------------------------|---------------------------|
|                             |                         |                            |                           |
|                             |                         |                            |                           |
|                             |                         |                            |                           |



*Your District Membership committee is a resource for material---so contact them.*

## **GETTING & KEEPING GOOD ROTARIANS**

*Now comes the tricky part. You recruited new Rotarians, you mentored them, now how do you KEEP THEM? Knowledgeable ... Active ... Building a Better Community & World ...*

### **THE RETENTION PLAN for GETTING and KEEPING GOOD ROTARIANS**

#### **EDUCATION COMPONENT**

*The concept that knowledge is power can be helpful when determining what your Club members would appreciate knowing more about. Things change in Rotary. New programs are created that many Rotarians are not aware of. Existing programs get updated. Using the concept of 'life long learning' you can help your Club members grow.*

1. How will you create an interesting approach to educating your Club members?

- Survey your Club members to discover the areas of Rotary interests them
- Make the 9 action steps a reality (*club Leadership Plan*)
- Ask Past Presidents and members who have been in the club over ten years to put their Rotary knowledge to work to lead educational sessions
- Continually offer Rotary International material or website locations for your club
- Make club assemblies truly interactive and interesting
- \_\_\_\_\_

| <b>EVERY MEMBER<br/>NEEDS EDUCATION</b> | <b>WHO IS IN<br/>CHARGE</b> | <b>WHEN WILL<br/>IT HAPPEN</b> | <b>WHO WILL<br/>FOLLOW UP</b> |
|---|-----------------------------|--------------------------------|-------------------------------|
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|   |                             |                                |                               |



*There are many Rotarians who will help with the education process for your club. Contact your District Membership committee for help*

## GETTING & KEEPING GOOD ROTARIANS


### THE RETENTION PLAN for GETTING and KEEPING GOOD ROTARIANS

#### INVOLVEMENT

*To quote Carolyn Jones (first female Trustee of the Rotary Foundation) "They want to do something for their community. I never heard a Rotarian give personal hunger as the reason for joining Rotary. Realistically, if they want to make business contacts, they can join the Chamber of Commerce. If they want new friends, they can join a church or a social club. True Rotarians join or remain because the club is doing something that makes them feel proud to be a Rotarian."*

1. How will you help foster the reasons for a Rotarian to remain in your Club?

- Encourage current and new members to propose projects both in the community and internationally they would like to participate in or with
- Survey your members to rate the projects you have done and to consider which could be on going. Ask for new ideas for projects & DO THEM.
- Get them on an international hands-on project
- Involve them AND their families in projects
- Encourage involvement in Club committees and directorates**
- Track each member's participation in projects and committees as well as how often they attend club meetings. Discover how 'engaged' they are in the club.
- \_\_\_\_\_

| EVERY MEMBER NEEDS TO<br>MAKE A MEANINGFUL CONTRIBUTION  | WHO IS IN<br>CHARGE | WHEN WILL<br>IT HAPPEN | WHO WILL<br>FOLLOW UP |
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|  <span style="font-style: italic;">Attend the District Conference and District Training Assembly and use it as an opportunity to talk to other clubs to find out what they do to involve members</span> |                     |                        |                       |

**GETTING & KEEPING GOOD ROTARIANS**

**THE RETENTION PLAN for GETTING and KEEPING GOOD ROTARIANS**

**FELLOWSHIP AND RECOGNITION**

*Fellowship is the unexpected bonus of becoming a Rotarian. It was one of the key reasons Paul Harris started Rotary. He wanted to make friends when he moved to Chicago.*

1. How will you help foster the fellowship of your Club?

- Schedule regular social events for the Club
- Schedule regular projects where Club members work side-by-side getting to know one another while accomplishing something meaningful
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| EVERY MEMBER NEEDS<br>FELLOWSHIP | WHO IS IN<br>CHARGE | WHEN WILL<br>IT HAPPEN | WHO WILL<br>FOLLOW UP |
|----------------------------------|---------------------|------------------------|-----------------------|
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1. How will you recognize or acknowledge the members of your Club?

- Create a Club committee that researches District/ RI recognition programs
- Have a weekly Membership Minute where Club members are recognized
- Make the Induction a special ceremony - invite family & friends
- \_\_\_\_\_

| EVERY MEMBER NEEDS<br>TO BE RECOGNIZED | WHO IS IN<br>CHARGE | WHEN WILL<br>IT HAPPEN | WHO WILL<br>FOLLOW UP |
|--|---------------------|------------------------|-----------------------|
|  |                     |                        |                       |
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