

LA COMMISSION EFFECTIF DU CLUB MANUAL  
DEL COMITÉ DE DESARROLLO DEL CUADRO  
SOCIAL DEL CLUB 클럽 회원 위원회 매뉴얼  
CLUB MEMBERSHIP COMMITTEE MANUAL  
HANDBUCH FÜR DEN CLUBAUSSCHUSS FÜR  
MITGLIEDSCHAFT MANUALE DEL COMITÉ DE  
DESARROLLO DEL CUADRO SOCIAL DEL CLUB  
クラブ会員増強委員会の手引き MANUALE  
DELLA COMMISSIONE EFFETTIVA  
클럽 회원 위원회 매뉴얼 클럽会員増強  
委員会の手引き MANUAL DA COMISSÃO  
DE DESENVOLVIMENTO DO QUADRO SOCIAL  
HANDBOKEN FÖR KLUBBKOMMITTÉN FÖR  
MEDLEMSKAP HANDBUCH FÜR DEN  
CLUBAUSSCHUSS FÜR MITGLIEDSCHAFT

# Club Membership Committee Manual

**A PART OF THE CLUB OFFICERS' KIT**

ROTARY INTERNATIONAL®



# Contents

## Introduction

<b>1 Committee Role and Responsibilities</b> .....	<b>3</b>
Membership Development.....	4
Diversity.....	7
Club Image.....	7
Sponsoring New Clubs.....	8
<b>2 Club Membership Committee Chair</b> .....	<b>9</b>
Your Committee.....	10
Goal Setting.....	10
Budget.....	11
Communication.....	11
<b>3 Resources</b> .....	<b>13</b>
<b>District Assembly Discussion Questions</b> .....	<b>16</b>
<b>District Assembly Worksheets</b> .....	<b>17</b>

This is the 2012 edition of the *Club Membership Committee Manual*. It is intended for use by 2013-14, 2014-15, and 2015-16 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. Please refer to those resources for exact guidelines. Changes to these documents, by the Council on Legislation or the RI Board, override policy as stated in this publication.

*Photos: Alyce Henson and Monika Lozinska-Lee*

# Introduction

The *Club Membership Committee Manual* was developed to help Rotary club membership committees establish goals and understand their responsibilities related to increasing the club's membership. Because committee responsibilities vary according to area laws, cultural practices, and established club procedures, you should adapt the suggestions in this publication to fit your club's needs.

This publication includes three chapters. The first describes the major responsibilities of your committee. The second describes responsibilities specific to you as the chair of the committee. The third contains resources that may be useful for you and committee members. Following the third chapter are discussion questions to be completed before the district assembly and worksheets that will be used there, so be sure to bring this manual with you.

Each committee has a manual that provides an overview of the committee and its responsibilities (club administration, membership, public relations, service projects, and The Rotary Foundation). Additional copies of this manual can be downloaded at no charge at [www.rotary.org](http://www.rotary.org). This manual is part of the *Club Officers' Kit* (225). However, each manual can be purchased separately at [shop.rotary.org](http://shop.rotary.org).

As you prepare to help lead your club, remember that it is a member of Rotary International. Through this membership, it is linked to more than 34,000 Rotary clubs worldwide and granted access to the organization's services and resources, including publications in nine languages, information at [www.rotary.org](http://www.rotary.org), grants from The Rotary Foundation, and staff support at world headquarters and the international offices.

**Share chapter 1 with committee members so they are fully aware of the committee's responsibilities.**

## Comments?

Direct questions or comments about this manual or any of RI's training resources to:

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# 1

# Committee Role and Responsibilities



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

The role of the membership committee is to develop and implement an action plan for membership development. 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 size and strength of its membership base.

The responsibilities of the club membership committee, summarized below, are explained more fully in this chapter:

The club membership committee's work will address the Club, Vocational, and New Generations Avenues of Service.

- Develop committee goals to achieve club membership goals for the coming year.
- Educate and train club members about the importance of recruitment and retention of members.
- Conduct classification surveys to ensure that club members' occupations and businesses reflect current business and community needs.
- Develop a membership action plan to improve member satisfaction that involves surveying members and initiating changes in response to their feedback to ensure that the club remains relevant to its members.

Subcommittees can be created to manage the committee's various responsibilities, especially if you have a large club.

- Conduct club assessments to ensure that membership development and retention efforts are successful.
- Work with the public relations committee to create a positive club image that is attractive to prospective and current members.
- Sponsor newly organized clubs in your district, if applicable.

As you read more about these responsibilities, think about your committee goals, what your action plan will be, and what resources you will need for your year.

## Membership Development

Developing your club's membership requires identifying and attracting potential members and keeping current members. New members bring fresh ideas and new energy to a club. Current members are crucial to continuing your club's good works.

To recruit new members, the membership committee sets goals, develops a plan for achieving them, and communicates with club members in order to implement the plan. Although the committee leads the club's recruiting efforts, recruiting is a responsibility of each member. The membership committee should encourage all members to ask friends, family, business associates, and other community members to join.

Retention efforts should be a priority for the membership committee. Conduct club and member assessments regularly to determine your club's strengths and weaknesses. Ensuring that members are informed, involved, and recognized for their club contributions will increase member satisfaction. Monitoring trends in project participation and engagement, length of membership, fellowship activity, and contributions to The Rotary Foundation can reveal concerns that may need to be addressed.

The process for developing a Rotary club member often includes the following stages:

- Identify
- Introduce
- Invite
- Induct
- Inform and orient
- Involve
- Educate

**Identify.** Identify members of your community who are a good fit for your club. Careful selection of members will increase your club's retention rate and reinforce positive attitudes toward new-member induction.

Conduct the classification survey, membership diversity assessment, and 25-minute membership survey to identify potential members in the community. To find these tools, search for Club Assessment Tools at [www.rotary.org](http://www.rotary.org).

Use the classification survey and membership diversity assessment to determine how well your club represents the professional diversity of your community and to target recruiting efforts to help your club better represent the professional community.

**Introduce.** Introduce prospective members to Rotary by describing what your club does, your club's successful community and international service projects, and Rotary International programs. Develop a program that provides prospective members with an overview of:

- Your club and its history and a description of its primary or signature projects and activities
- Rotary International and The Rotary Foundation
- The benefits and value of membership in your club
- The various opportunities to get involved in club activities

A prospective member who has been introduced to Rotary by enthusiastic Rotarians, and who is well informed in these areas before joining, is more likely to become an involved and active member.

The committee should compile a club profile that can be presented to visitors. Consider also providing the *Prospective Member Information Kit* (423), which includes publications to introduce RI and its Foundation. Order the kit on [shop.rotary.org](http://shop.rotary.org).

**Invite.** Invite prospective members to join with a visit from both the proposer and a member of the membership committee. Rotarians extending the invitation should know the interests and expertise of the prospective member in order to point out activities and projects that would be of interest to them.

If the candidate meets qualifications for membership, your committee should submit the proposal to the club's board of directors, along with reasons for proposing the candidate.

**Induct.** Induct new members in a dignified and meaningful way. Invite family members to attend the induction ceremony. During the ceremony, ask new members to talk briefly about themselves, their work, and their families. Ensure that all club members personally introduce themselves to each new member. Your Rotary club should provide a new member with the following items:

- Rotary lapel pin
- Membership card
- Club information
- Club name badge
- District directory
- District governor's monthly communication
- *The Rotarian* or Rotary regional magazine
- List of local clubs and e-clubs for make-up meetings

Before inviting someone to become a Rotarian, make sure that the prospective member is fully aware of the opportunities to get involved in club service projects and activities and of the financial obligations of membership.

**Make sure that members are well-informed about RI programs such as Rotary Youth Exchange, Rotaract, and RYLA. Involvement in one of these programs often sparks a lifelong interest in Rotary.**

Communicate with the club administration committee to ensure that the new member and sponsor are recognized on your club's website and other communications.

**Inform and orient.** Inform new members about your club and RI by focusing on the following areas:

- Opportunities for service and involvement
- The benefits of being a member of the club
- The club's history and impact on the community
- Club administrative details

Consider scheduling a new-member orientation program that extends over several sessions. See [New Member Orientation: A How-to Guide for Clubs](#) (414).

**Involve.** Ensure that all club members are involved in club projects, committees, activities, fundraisers, board meetings, club meetings, and social activities. An involved member will feel part of the club and make Rotary a priority in his or her life. Consider these suggestions for involving new members:

- Assign new members to a committee or give them a role at club meetings.
- 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 member.
- Have a new member serve as a delegate to the district conference. Some clubs assist the new member by paying part or all of the registration fee and costs of the conference. After the conference, ask the new member to share with the club what he/she learned.
- Have all club members who join during 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 visiting Rotarians for a meal or other activity.
- Ask new members to find two or three potential members within their peer group. When new members promote Rotary to their friends, they become more enthusiastic themselves.

**Educate.** Members who feel informed and involved are more likely to remain actively engaged in club programs, projects, and initiatives. Clubs should also regularly communicate news from Rotary International and The Rotary Foundation to their members. Consider the following activities:

- Regular club assemblies to discuss which club activities members want to continue and which they want to change
- Participation of club members in multidistrict meetings that address continuing education
- Presentation by your Rotary coordinator, Rotary public image coordinator, regional Rotary Foundation coordinator, or Rotary Foundation alumni coordinator



- Participation in club-level webinars held by Rotary International
- Leadership training to develop potential leaders and for personal development. Use [Leadership Development: Your Guide to Starting a Program](#) (250).

Refer to the [Membership Development Resource Guide](#) (417) for more information on developing an action plan.

Use your club and district websites, social media sites, weekly meetings and emails, and club newsletters to share information from your district governor or Rotary International.

RI publications are also excellent continuing education tools. By reading publications like *The Rotarian* or Rotary regional magazines, club members can stay current on Rotary activities worldwide. Encourage members to visit [www.rotary.org](http://www.rotary.org) and to connect with Rotary's social media pages to stay current on events and resources.

## Diversity

Your club's membership should accurately reflect the community in terms of profession, age, gender, and ethnicity. One way to ensure diversity in your club is to conduct regular classification surveys and membership diversity assessments. Having a diverse membership will result in a wider range of experience and knowledge that will be useful for your club's service efforts. Membership diversity can also make it easier to attract prospective members in your community.

RI policy prohibits limitations on membership in Rotary clubs based on gender, race, color, creed, national origin, or sexual orientation. See [RI Bylaws](#), Article 4.070.

## Club Image

A club's image is directly related to its ability to attract new members. The club should highlight the specific values and benefits it provides its members, and communicate those values to prospective members. With consistent public image efforts, individuals will seek out local clubs and be more inclined to accept invitations to join. The membership committee should work with the public relations committee to coordinate public image efforts.

Develop a club website that contains current photos and contact information, depicts your club's projects and goals, and includes details about your club meetings and events. Graphics and Web banners that can be downloaded and embedded on your club website are available at [www.rotary.org/graphics](http://www.rotary.org/graphics). Your club should consider using social network sites, digital audio, streaming video, podcasts, and blogs in efforts to attract new members. To obtain help in developing these resources, consider targeting professionals in marketing, public relations, and Web technology in your membership recruitment efforts.

For the latest Rotary multimedia content, go to [www.rotary.org/mediacenter](http://www.rotary.org/mediacenter).

RI organizes webinars on topics such as a club's online presence and membership retention best practices. Webinar announcements, registration for sessions, and video recordings are available at [www.rotary.org/webinars](http://www.rotary.org/webinars).

## Sponsoring New Clubs

While your club membership committee is primarily working toward the growth of your club, it is important to recognize that your club may not be the best fit for every prospective Rotarian in your community. Prospective members have work and family commitments, and different areas of interest that often require different options for meeting schedules.

Alert your district governor and district extension committee if the demand is sufficient to support a new Rotary club in your community. Your club can mentor and work in partnership with new Rotary clubs in your area.

If your club sponsors a new Rotary club, your committee can

- Assist the special representative in planning and organizing the administrative processes of the new club
- Help organize the new club's programs and projects
- Report to the district governor as requested during the club's first year
- Mentor the new club for at least two years after its admission to membership in RI

Requirements for sponsoring new Rotary clubs include:

- Agreeing to mentor the new club for a minimum of one year
- Being in good financial standing with RI
- Having at least 25 active members
- Carrying out a well-rounded program of Rotary service

For more information on opportunities to sponsor a new Rotary club in your area, contact your district governor, district membership committee, or district extension committee.

# 2

# Club Membership Committee Chair



To prepare for your term as committee chair, learn what will be expected of you and your committee by the club's board of directors and members, your district, and Rotary International. There are several things you should do before you take office to prepare for your role. In addition to attending training sessions at the district assembly, you should

- Meet with the outgoing committee chair
- Review your club's bylaws to become familiar with your club's procedures and regulations
- Review your club's strategic plan and develop annual goals to support it
- Select and prepare your committee members with the president-elect
- Create subcommittees as needed (identifying new members, retention, new-member orientation, and mentoring)
- Develop a communication plan for the year
- Determine what additional responsibilities or duties your club has for your committee

Answer the discussion questions at the end of this manual to prepare for the district assembly.

All incoming committee members should attend the district membership seminar to learn the district's membership goals, discuss membership strategies, and learn what resources are available.

Good preparation will lead to a productive year. Once you take office, you will have the following major responsibilities:

- Manage your committee's budget.
- Work with other committees in your club and your district committee on multiclub activities or initiatives.
- Plan and conduct regular committee meetings and activities.
- Monitor progress toward your committee goals, and report committee activities and progress to the club president, board of directors, and the full club.

## Your Committee

Work with the president-elect to select committee members to fill vacancies and conduct planning meetings before the start of the year. For continuity, committee members should be appointed for three years. When selecting new members, consider the following characteristics:

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

Once your committee is formed, it is your responsibility to prepare members for the coming Rotary year. Determine how to use the skills and interests of your members and delegate tasks accordingly. You can prepare committee members by

- Informing them of the committee's ongoing activities and plans related to the club's strategic plan
- Pairing new committee members with more experienced ones
- Encouraging communication with counterparts in other clubs using the district directory
- Sharing the resources available to your committee
- Giving members a list of district activities and meetings

## Goal Setting

As the chair of your committee, you are responsible for ensuring that it sets and achieves its annual goals to support the club's strategic plan. You'll have an opportunity to work on goal setting with your president-elect and other incoming club leaders at the district assembly. RI is developing an online tool to help clubs submit their goals via Member Access.

**Effective goals.** Be sure that the annual goals reflect committee capabilities and club interests. Goals should be shared, measurable, challenging, achievable, and time specific.

Various planning tools are available to clubs, including *Be a Vibrant Club: Your Club Leadership Plan* and the *Strategic Planning Guide*.

**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:

- 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 available and needed from your club, district, and RI to support the goal.
- Decide how you will evaluate success in attaining your goals, and whether baseline data is needed.

Regularly assess your goals to ensure that steady progress is being made toward achieving them, and adjust if necessary.

**Motivation.** Part of your responsibility is keeping your committee members motivated. Common motivators include:

- Assurance that the goal will be beneficial
- Belief that the goal is achievable and will be successful
- Opportunities for fellowship and networking
- Assignments that use each member's expertise
- Recognition of efforts and time spent working toward committee goals

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

## Budget

Before 1 July, work with the outgoing committee chair and the club treasurer to determine what funds your committee will need and that these funds are included in the club's budget. Be sure to include any planned fundraising activities.

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 action if issues arise.

## Communication

Think about how you will communicate with the following club leaders.

- **Committee members.** Committees should meet regularly 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.** The work of one committee affects the work of another. Your committee should work with the following club committees:
  - Public relations committee (to elevate the image of your club in the community, making it more attractive to potential members and building pride among current members)
  - Service projects committee (to ensure that service projects are relevant to club members and the community)
  - Club administration committee (to plan programs that address members' personal needs and interests)
- **Your district.** If your committee needs guidance or information, contact your district counterpart or your assistant governor.
- **Your region.** Your Rotary coordinator is available to help your club with its membership questions. Find the Rotary coordinator in your region at [www.rotary.org](http://www.rotary.org).

# 3

## Resources



Many resources are available to help your committee fulfill its role. Download resources at [www.rotary.org](http://www.rotary.org), or order them at [shop.rotary.org](http://shop.rotary.org), by email at [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or from your international office.

- [\*Membership Development Resource Guide\*](#) (417) — Booklet outlining steps to help clubs develop a membership development action plan for recruiting and retaining members; Coordinates with online [Club Assessment Tools](#)
- [www.rotary.org](http://www.rotary.org) — RI website, aimed at helping club leaders gather information about effective club operations, providing links to club administration, membership, public relations, service projects, and Rotary Foundation information and to club-level resource pages
- [\*How to Propose a New Member\*](#) (254) — Brochure outlining the procedure for selecting and electing members; includes a Membership Proposal Form
- [\*New Member Orientation: A How-to Guide for Clubs\*](#) (414) — Resource for club's prospective and new-member information programs that includes sample program outlines, action steps, worksheets, and resource listings

- *Official Directory* (007) — Contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing of clubs within districts, including contact information (available in Member Access)
- [Recommended Rotary Club Bylaws](#) — Legal document that expands on club operations guidelines in the club constitution
- [Standard Rotary Club Constitution](#) — Framework for Rotary club operations that includes policy on membership
- [RI newsletters](#) — Electronic newsletters targeting specific Rotary-related topics, such as membership, polio, public relations, and The Rotary Foundation
- Awards — RI and Rotary Foundation awards and recognition programs, including the RI Membership Development and Extension Award, RI Recognition of Membership Development Initiatives, the RI Recognition of Smaller Club Membership Growth, and the Reach One, Keep One (recognition of new member sponsors and retention) [www.rotary.org/awards](http://www.rotary.org/awards)
- [Rotary E-Learning Center](#) — Brief modules designed for independent study by new members and club officers

### Order on [shop.rotary.org](http://shop.rotary.org)

- *Membership Video Set* (427) — Two DVDs (one for new members, one for prospective members), each featuring a compilation of Rotary videos
- *New Member Information Kit* (426) — Provides new members with essential information about Rotary International and The Rotary Foundation
- *Prospective Member Information Kit* (423) — Basic information on Rotary, The Rotary Foundation, and the responsibilities of club membership
- “Start with Rotary” postcards (614) and wallet cards (613) — Can be used as invitations for prospective members to attend a Rotary club meeting

### Human Resources

Find contact information in the *Official Directory*, at [www.rotary.org](http://www.rotary.org), or from your district governor.

- District governor — RI officer responsible for advising on strategies to make your club more effective
- 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 — Leaders who can serve as a resource to help support your club’s projects and initiatives



- Past club committee chairs and leaders — Knowledgeable Rotarians who can advise you as you plan your year and who can be assigned to lead committee activities
- Rotary coordinators — Rotarians appointed by the RI president to serve as a resource within a specific region
- Contact Center — A team available to answer questions; can be reached at [contact.center@rotary.org](mailto:contact.center@rotary.org) or toll-free (within U.S. and Canada) at 866-9-ROTARY (866-976-8279). Rotarians outside North America should continue to contact their international office.

## District Assembly Discussion Questions

When considering these questions, talk to outgoing and incoming club leaders to compare thoughts.

What are the responsibilities of the club membership committee, and what are your responsibilities as chair?

How will your committee support the club's strategic plan?

How can the club membership committee attract new members?

How can the club membership committee keep members engaged?

What controls are in place to ensure that new members are informed and included?

How can you help committee members do their job?



## Worksheet 2: Goals

Use this worksheet to draft a long-range goal and annual goals for three years to reach the long-range goal. Ensure that your goals are:

**Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.

**Measurable.** A goal should provide a tangible point to pursue.

**Challenging.** A goal should be ambitious enough to go beyond what your club has accomplished in the past.

**Achievable.** Rotarians should be able to accomplish the goal with the resources available.

**Time specific.** A goal should have a deadline or timeline.

**Long-range goal** (goal for your club three years from now)

**Year 1 annual goal**

**Year 2 annual goal**

**Year 3 annual goal**

# Worksheet 3: Action Plan

In the space below, write one annual goal from your goals worksheet. Then determine the action steps that need to be taken to meet this goal.

Annual goal
-------------

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

Resources needed
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# Worksheet 4: Club Membership Committee Case Studies

Read the case study below and answer the questions. Create a plan using the case study action plan on page 23.

## Case Study 1

After only three months of being a member of a Rotary club, John is asked to be the club's president-elect. When John becomes president, the club members are unhappy that he is changing things. John is overwhelmed and doesn't know whom to turn to for help.

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What should he do?

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If he sought your advice, what recommendations would you offer?

## Case Study 2

Greg, a lawyer, has been a Rotary club member for 10 years. He has had to let staff go at his law firm, and cases have piled up, making it difficult for him to leave the office for his lunchtime club meetings. He and a few other members have asked the club board if the meeting time can be changed to evenings. The board is reluctant to break with tradition.

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What can the club do to help ensure that Greg remains a Rotarian?

## Case Study 3

The Rotary Club of Mountain Point is in an area with a mix of indigenous groups and people from abroad. The club is made up primarily of expatriates who work in the industrial sector flourishing in the region. Young professionals have moved to the area, attracted by its strong economic growth. The club has 20 members, and did not add any last year.

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How can the club identify sources of new members within the community?

## Case Study 4

A devastating earthquake last year damaged an urban area that hosted a number of Rotary clubs. The 10 affected clubs quickly created a Facebook page and posted requests for assistance, and the area's Rotaract clubs used Twitter to post the requests to friends and family around the world. Rotarians raised more than double their fundraising goal for the earthquake victims.

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Why was their campaign so successful?

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How could this effort help them attract new members?



Case Study Action Plan

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

What did you learn that you can apply to your club?

Resources needed

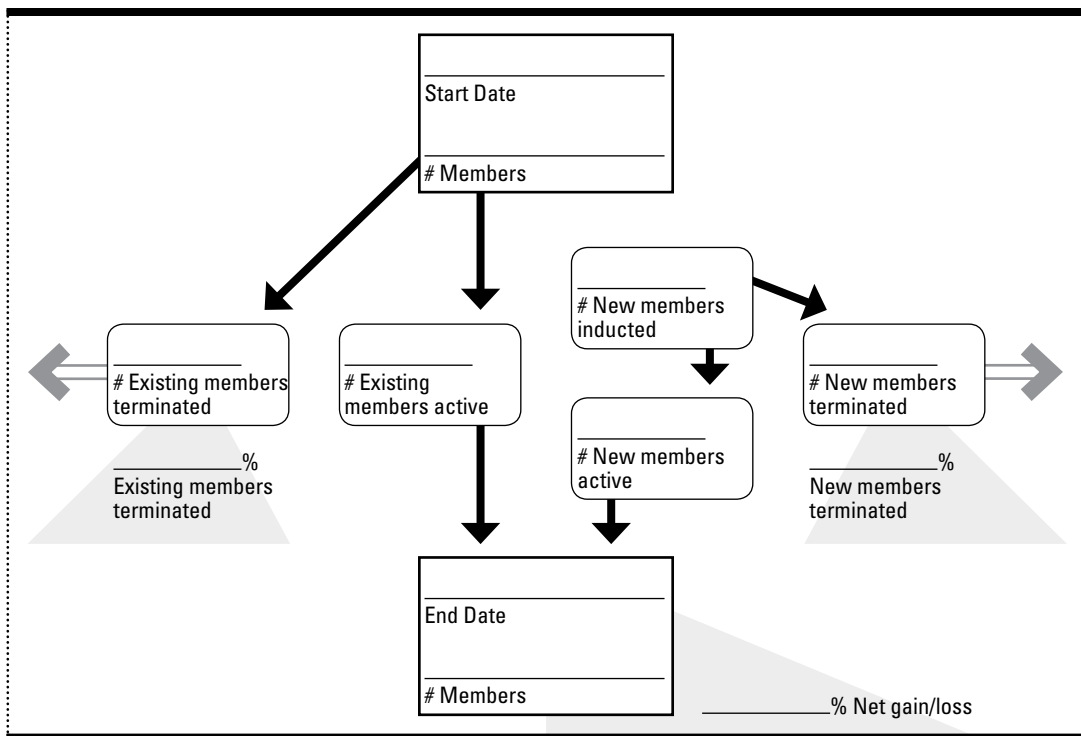
# Worksheet 5: Retention Model

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



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.)

In the **Start Date** box, enter the number of active members who were in the club on that date.

In the **End Date** box, enter the number of active members who were in the club on that date and calculate the **% Net gain/loss** by:

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

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

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

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

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

In the **New members inducted** box, enter the number of new members inducted between the **Start Date and End Date**.

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:

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

Calculate the **New members active** by:

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

---

\* 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 the gained and lost members are, 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 simply that the club has more members. It could mean that the club retained its active members and brought in new ones, or that the club inducted enough new members to offset the number of active members who left.

A net loss indicates that the club failed to retain a larger number of members than it inducted.

**Evaluating Termination Rate.** The strongest indication that a 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 the number of **New members terminated** (far right box) to determine the total number terminated. Is the total reasonable for a club of this size? Consider the reasons for these terminations and the steps the club can take to limit such losses.

**New Members.** To continue the termination analysis, consider the number of **New members terminated** (far right box) within the specified time frame. Every effort should be made to keep this number 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 orientation program, the number of new members terminated should be extremely low. The percentage listed under the **New members terminated** box (**% New members terminated**) identifies what percentage of new members have been terminated.

**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 is % **Existing members terminated**.) A low attrition percentage is an indication that the club is retaining its existing members.

**Other Resources.** Additional retention strategies and assessment tools can be found in the *Membership Development Resource Guide* and Club Assessment Tools, respectively. Contact your Rotary coordinator for guidance in your retention efforts. Detailed instructions on completing and analyzing the retention model are available by downloading Club Assessment Tools from [www.rotary.org](http://www.rotary.org).

# Worksheet 6: Problem-Solving Guide

Use the Planning Guide for Effective Rotary Clubs and the goals worksheet from session 2 to develop your problem-solving guide. Analyze your club’s goals, and think about potential challenges to achieving them. Then, offer solutions to these challenges.

	Goal	Potential Challenge	What resources are available?
<b>Administration</b>			
<b>Membership</b>			
<b>Public Relations</b>			
<b>Service Projects</b>			
<b>Rotary Foundation</b>			
<b>Other</b>			

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