

# Club Membership Committee Basics 2020-21





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# CLUB MEMBERSHIP COMMITTEE CHAIR JOB DESCRIPTION



As club membership committee chair, you create and follow an action plan to attract and engage members.

RESPONSIBILITIES	
GENERAL	MEMBERSHIP COMMITTEE
Attend your district training assembly.	Attend your district membership seminar.
Working with the president-elect, select and prepare your committee members.	Use <a href="#">membership assessment tools</a> to evaluate your club.
Create subcommittees as needed (e.g., new member recruitment, member engagement, new member orientation, mentoring).	Assemble a motivated and active committee of 5 to 15 members.
Meet regularly and plan activities.	Manage online membership leads on My Rotary.
Set committee goals to help achieve the club's goals, and monitor progress toward them.	Offer new member orientation.
Manage your committee's budget.	Emphasize the importance of attracting and engaging members as part of your club's strategic plan.
Work with your club's other committees and your district committee on multiclub activities or initiatives.	Use the <a href="#">diversity</a> and <a href="#">classification</a> assessments to analyze how well your club represents your community (including age, gender, and ethnicity).
Report committee activities and progress to the club president, board of directors, and the entire club.	Use the <a href="#">Club Membership Committee Checklist</a> to ensure your club is identifying, introducing, inviting, and engaging members effectively.
Determine your club's expectations for your committee.	Track your progress toward club membership goals in Rotary Club Central.
	Work with the club board if you sponsor new clubs in the community.

# USING ROTARY'S ONLINE TOOLS



## ROTARY'S ONLINE TOOLS

Work with your club president or secretary to ensure you are added as a club officer in Rotary's database as soon as possible to gain access to important functions in My Rotary. If you don't already have one, [create your My Rotary account](#).

You can use Rotary's online tools to:

- Customize and share your profile
- Join or start a discussion group
- Access important links, documents, and communities through your [dashboard](#)
- See [club trends and historical data](#) in Rotary Club Central
- Take courses in the [Learning Center](#)

These tools will help you conduct club business quickly and efficiently, and ensure that Rotary has accurate records for your club. To find them, sign in to [My Rotary](#), then go to the Club Administration page and look under the Manage tab.

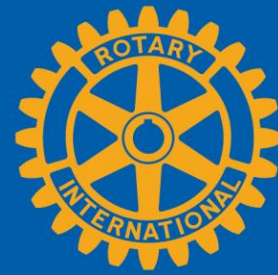
As membership chair, you can use My Rotary to:

- Update personal information
- Use [Rotary Club Central](#) to view your club's goals and its progress toward them
- Generate club officer reports
- [Update club data](#)
- View your daily club balance report
- See the most recent club invoice and members' dues payment status.
- Search the [Official Directory](#)

## DELEGATION

As a club leader, you can delegate your administrative tasks on My Rotary to another club member. This temporary permission, known as *delegation*, is not intended to relieve you of your duties as membership chair; it simply extends your access to My Rotary to another club leader with a My Rotary account. Your delegate can't view your personal information, such as your profile, contribution history, or discussion group activity. This person can, however, access the same tools and sensitive information that you can. Only delegate to someone you can trust. See [How to Delegate Your Online Access](#) for more information.

# WORKING WITH YOUR COMMITTEE



You're the club membership committee chair. What happens next? You'll not only create an action plan to attract new members and engage current ones — you'll also manage your committee members.

In many clubs, members serve on a committee for three years, so it's likely that some current committee members will continue into your term. If you need to fill any openings, work with the president-elect to find someone who:

- Has professional experience in recruiting, marketing, or sales
- Knows Rotary well
- Is outgoing and sociable

As chair, you'll delegate tasks, so you'll need to determine how best to use the skills and interests of your committee members. You can prepare members by:

- Informing them of the committee's activities and goals
- Pairing new committee members with more experienced ones
- Encouraging them to communicate with their counterparts in other clubs
- Notifying them of district activities and meetings
- Sharing resources

Find and share ideas for boosting membership with Rotarians around the world by joining the [Membership Best Practices Discussion Group](#). Collaborate with your club's other committees to maximize your impact as a group. Club board meetings are great opportunities for these ongoing conversations.

## SETTING GOALS

In your role, you'll make sure your committee sets and achieves annual goals that support the club's strategic plan. You'll set goals with your incoming president and other club leaders at the district training assembly. The president or secretary can enter the goals in [Rotary Club Central](#).

### Effective goals

Be sure your annual goals reflect committee capabilities and club interests. Goals should be shared, measurable, challenging, achievable, and time-specific (example: *Our club will have 10 percent more female members by the end of the year*).

## **Action plan**

Work with your committee to develop an action plan, or a series of smaller steps needed to achieve each annual goal. For every step:

- Determine who's responsible for implementing it.
- Set a due date.
- Decide how you'll measure progress and success.
- Identify the resources you already have, and get any that you need.
- Regularly assess your progress, and adjust your goals if necessary.

## **Motivation**

Part of your role as chair is keeping your committee members motivated. Remember, they are volunteers. Common motivators include:

- Assurance that the committee's goals are attainable and will benefit the club and community
- Opportunities for fellowship and networking
- Assignments that use each member's expertise
- Efforts to make the committee's work enjoyable

## **BUDGETING**

Before 1 July, work with the outgoing committee chair and club treasurer to discuss the funds your committee will need and ensure they are included in the club's budget. Be sure to consider any planned fundraising activities.

Oversee your committee's funds, transactions, and reports, and be aware of its budget status at all times. If you meet regularly with your club's treasurer, you'll be able to take action as soon as issues arise.



# CREATING AN ENGAGING CLUB EXPERIENCE



Create an engaging club experience to keep your members involved and connected. Start by assessing your club with tools such as the [Rotary Club Health Check](#) and [Member Satisfaction Survey](#). Then identify any changes your club wants to make, and work with your fellow leaders to implement them. Research shows that clubs can better attract new members and engage current ones if they have the freedom to be flexible.

Use the membership reports on Rotary Club Central to view your club's membership trends and determine where to focus your efforts.

Explore these options for flexibility:

- Reduce your meeting frequency. Just be sure to meet in some way twice a month.
- Check whether your current meeting day, time, and frequency work for most of your club members. If not, change them.
- Count service projects or social events as meetings.
- Choose whether to meet exclusively in person or online, to alternate between online and in-person meetings, or to use both formats at the same time (for instance, a member could join an in-person meeting through a video chat).
- Determine whether different types of membership could work for your club. Explore options such as family, junior, or corporate memberships. You can set policies on dues, attendance, and service expectations for each type, as long as you report these people as active members and collect RI membership dues from them.
- Invite Rotaractors to join your club while remaining members of their Rotaract clubs. If your club chooses to, it can make special accommodations for these members, such as relaxed attendance requirements or reduced fees, as long as those are reflected in the club bylaws.

Above all, get creative and have fun! Work with your club president and administration committee to develop flexible, engaging club meetings. See the [Club Flexibility page](#) on My Rotary to get started, and find more ideas in [Be a Vibrant Club: Your Club Leadership Plan](#).

The chart below gives sample meeting formats and examples of how clubs have used them.

<b>SAMPLE FORMATS FOR MEETINGS</b>	
<b>REGULAR MEETINGS</b>	<b>SOCIAL EVENTS</b>
<ul style="list-style-type: none"> <li>• Allow time for members to share ideas for making the community better.</li> <li>• Use meeting time to plan activities and projects.</li> <li>• Offer members the option to participate virtually if they can't make the meeting in person.</li> <li>• Have members speak about themselves rather than booking a guest speaker.</li> <li>• Give each meeting a different theme.</li> <li>• Rotate meeting locations.</li> <li>• Make meals optional.</li> <li>• Discuss Rotary business for the first half of the meeting and use the second half for fun activities.</li> <li>• Invite prospective members to speak as industry experts on topics related to your projects.</li> </ul>	<ul style="list-style-type: none"> <li>• Hold an annual retreat with your club to have fun and reflect on the work you've done in the past year.</li> <li>• Meet once a month at a restaurant or other venue to socialize.</li> <li>• Plan events and outings that include family members and Rotaractors year-round.</li> <li>• Celebrate personal milestones and other special occasions that are important in your members' lives.</li> </ul>
<b>NETWORKING AND TRAINING EVENTS</b>	<b>SERVICE PROJECTS</b>
<ul style="list-style-type: none"> <li>• Hold a networking meeting to build relationships and rapport with one another.</li> <li>• Conduct a joint networking event with Rotaractors and invite business professionals in the community to increase the visibility of your club, bring in new members, and form potential partnerships.</li> <li>• Plan a training event to enhance members' leadership skills or teach them a new skill that will help them carry out a project.</li> </ul>	<ul style="list-style-type: none"> <li>• Partner with other organizations to expand your outreach.</li> <li>• Make sure members are involved in activities that genuinely interest them.</li> <li>• Create regular opportunities to volunteer in the community together and discuss the experience in a subsequent meeting.</li> <li>• Involve Rotaractors to propose and lead service projects, with an experienced member to guide them.</li> </ul>

## ENGAGING YOUR MEMBERS

Keeping members is a top priority for any club, so member resignations can be difficult to face. But understanding why and at what point members leave can help you improve your engagement efforts and ensure that more people stay. You can start by reviewing the Member Viability and Growth report to see your club's current retention rates, and the Membership Termination Profile to determine why and when members leave. Find both under Club Reports in [My Rotary](#).

Research has shown that members leave for different reasons based on their length of membership. Be sure to engage your members at all stages:

### First year

- Make sure the club experience matches the expectations you've set.
- Offer a structured new member orientation program.

### 1-2 years

- Match members with a service project or activity that genuinely interests them.
- Involve them in a committee.

### 3-5 years

- Provide leadership opportunities.
- Ask them to be mentors.

### 6-10 years

- Encourage involvement in district activities.
- Use their expertise in projects, activities, and leadership.

### 10 years

- Ask for their ideas on energizing the club.

Learn more with the [Improving Your Member Retention](#) assessment tool.

Work with other club leaders to:

- Interview members who leave and use the [Understanding Why Members Resign: Exit Survey](#) to identify issues affecting retention
- Conduct the [Member Satisfaction Survey](#) to get input from your members
- Incorporate the results of your satisfaction survey into your club's strategic plan
- Recognize members for their efforts in the club
- Set and track membership goals in Rotary Club Central

# YOUR MEMBERSHIP PLAN



Your membership plan, which is part of your club's strategic plan, outlines the club's goals and strategies for attracting new members and engaging current ones. Work with your club leaders to develop a plan that includes these steps:

1. Identify your club's strengths and weaknesses using these tools:
  - [Rotary Club Health Check](#)
  - [Enhancing the Club Experience: Member Satisfaction Survey](#)
  - Membership reports in [My Rotary](#)
  - Membership trends in [Rotary Club Central](#)
2. Visualize where you want your club to be in three to five years. Involve all members in this process to give them a sense of responsibility in the club and motivation to achieve its goals.
3. List characteristics you want in your club. Think of five traits you'd like your club to have in three to five years.
4. Create a vision statement. Draft a one-sentence vision statement that will distinguish your club from other service clubs in your community. Refine your vision statement if you already have one.
5. Set goals. Review your top three membership goals in Rotary Club Central.
6. Align your goals to your vision. Determine whether they still support your club's vision or if you need new goals. Develop long-term and annual membership goals to support your vision.
7. Create an action plan for achieving your goals. Outline steps for recruiting and retaining members in [Strengthening Your Membership: Creating Your Membership Development Plan](#).

## DIVERSIFYING YOUR MEMBERSHIP

Your club's membership should reflect your community. Ensuring that different professions, ages, genders, and ethnicities are represented will foster an inclusive image that will help your club attract and retain new members.

With a diverse membership, your club will benefit from a wide range of experiences and knowledge, which will help you carry out more effective service efforts. Use these assessment tools to survey club members and compare their demographic information to that of your community.

### [Diversifying your membership](#)

Conduct this assessment to raise your members' awareness of the diversity in your community, build member support, and diversify your club to better represent working professional in your community.

### [Representing your community's professions](#)

Conduct this assessment to grow and diversify your club's membership and make the best use of your members' expertise and skills.

Rotary policy prohibits limitations on membership in Rotary clubs based on gender, race, color, creed, national origin, or sexual orientation. Rotary values diversity and celebrates the contributions of people of all backgrounds. See RI Bylaws section 4.070. and the Rotary Code of Policies section 26.130.

## **REFRESHING YOUR CLUB IMAGE**

Work with your club's public image committee to decide how to brand your club, keeping these considerations in mind:

- Make sure that club meetings live up to any expectations you've set in club communications. A vibrant club image won't boost membership if it doesn't reflect reality.
- Remind your members that they represent your club, and that everything they do contributes to the club's image. Their activities outside of Rotary are an opportunity to attract new members and promote your club's culture.
- Update your club's social media pages, website, and blog to be more appealing. Make sure your club's contact information is easy to find. Get ideas for organizing your website in the [Quick Start Guide for Club Websites](#), and download graphics and banners in Rotary's [Brand Center](#).

## **ATTRACTING NEW MEMBERS**

Getting involved in their communities and meeting new people are among the top reasons people join Rotary. How does your club reach out to prospective members?

New members offer fresh ideas and energy, additional support for your service efforts, and the potential to become future leaders, all of which can help ensure your club's long-term success.

Work with your club president and other committees to try new ideas for attracting members:

- Implement innovative projects that spark interest within the community or address a pressing need.
- Promote club activities using social media, direct marketing, and local news outlets.
- Target members of groups or professions that are not represented in your club.
- Connect with Rotary alumni.
- Invite prospective members to participate in events or projects.
- Update your club brochure to distribute to guests at club meetings.
- Hold prospective member events for your community, and use the [Discover Rotary](#) presentation.

- Promote incentives such as [Rotary Global Rewards](#), which provides discounts and special offers to members, along with opportunities to give back to Rotary.

As you develop your membership plan, use the [Club Membership Committee Checklist](#) to help you with:

- Identifying your club's strengths and finding prospective members
- Introducing prospective members to Rotary and your club
- Inviting prospective members to your events
- Engaging new members in your club

Use [Introducing New Members to Rotary](#) to create your club's prospective and new member orientation program.

## TAP INTO PERSONAL CONTACTS

Current club members are your biggest assets in finding potential members. Work with them to develop a pool of candidates and determine how to introduce them to your club. Use [Finding New Club Members: A Prospective Member Exercise](#) to organize your discussion.

## USE ONLINE LEADS

Each year Rotary International receives more than 18,000 online inquiries from people interested in joining local clubs. Rotary screens them and assigns them to a district. Districts are then asked to assign each person, or member lead, to a club in the area that is likely to be a good fit.

Along with your club president and secretary, you will receive an email alert when one of these potential members is assigned to your club. You can find information about these candidates in the [Club Administration](#) pages on [My Rotary](#).

Decide who will [manage your club's membership leads](#). Be sure this person follows up promptly by contacting prospective members or by asking the district to reassign them to another club if they would not be a good fit. It's important to make a good impression on all candidates, even if they don't join Rotary. Find tips in [Create a Positive Experience for Prospective Members](#).

## SPONSORING NEW CLUBS

New clubs often form when members of an existing club want to meet at a different time or focus on other kinds of activities. These added options can help attract prospective members, many of whom are balancing work and family commitments and have a variety of interests.

If you feel your community can support a new Rotary club or Rotaract club, contact your district governor, district Rotaract committee, and district membership committee about the next steps.

Sponsoring a Rotary Club:

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

- Help establish the new club
- Help the new club members to devise and adopt suitable Bylaws for their club
- Consult on the new club's programs and projects
- Serve as a liaison with the district governor during the club's first year
- Mentor the new club for at least one year after its charter date

Requirements for sponsoring new Rotary clubs include:

- Agreeing to mentor the new club for at least one year
- Being in good financial standing with Rotary International
- Having at least 20 active members
- Carrying out a well-rounded service program

For more information on [how to sponsor a new Rotary club](#) in your area, contact your district governor or district membership committee.

Sponsoring a Rotaract club:

If your club sponsors a new Rotaract club, your committee can:

- Find potential club members
- Organize a meeting for potential members to learn more about Rotaract
- Assign a Rotarian adviser to serve as the liaison for the Rotary and Rotaract clubs
- Plan to regularly attend the Rotaract club's meetings and events
- Invite the Rotaract club to collaborate with your Rotary club on your activities and events

Requirements for sponsoring new Rotaract clubs include:

- Submitting the [Rotaract Club Certification Form](#) along with a one-time \$50 certification fee to Rotary International
- Signing and presenting the certificate of organization

For more information on [how to sponsor a new Rotaract club](#) in your area, contact your district governor or district Rotaract committee. You can also refer to the [Rotaract Handbook](#) for a complete guide to sponsoring a Rotaract club.

Note: If the Rotaract club is university-based, work with the faculty adviser, who will serve as a liaison between the sponsor Rotary club and university administration.

## CLUB MEMBERSHIP COMMITTEE CHECKLIST

The role of the club membership committee is to write and follow an action plan to attract and engage members. An effective committee should be composed of five to 15 motivated members to guide the implementation of your membership plan. The committee's composition should allow for continuity from one year to the next and should represent the full diversity of your club's membership and your community.

### 1. Identify:

- Complete the [member diversity](#) and [classification assessments](#), found in [Membership Assessment Tools](#), yearly. Identify individuals in the community who fill gaps in the club's membership or exhibit interest in Rotary's ideals.
- Ask all members to complete the [Identifying Prospective Members Worksheet](#) at least yearly.
- Regularly go to the [Club Administration](#) area of My Rotary to manage the member leads assigned to your club.
- Meet at least monthly to review prospective members and their status in the membership process.
- Ask current members who are assigned to each prospective member to move them to the next step of the membership process.

### 2. Introduce:

- Select the most appropriate club members to engage prospective members. Keeping each prospective member's particular interests in mind, explain how your club can help them pursue their passions.
- Periodically hold events for prospective members to introduce them to Rotary, your club, and our core values.
- Invite the people you identified as prospective members to attend a service project or meeting.
- Tell qualified prospective members about your club, what to expect at meetings, and the networking, social, and service opportunities your club offers.

### 3. Invite:

- Designate the appropriate club member to invite each prospective member to join.
- Hold a meaningful ceremony to induct new members. Include their families and involve the entire club.
- Give new members a [welcome kit](#) that includes club and Rotary resources that they will find useful.
- Celebrate the addition of new members to your club. Announce it on your club's website, social media pages, and newsletter.

### 4. Engage:

- Welcome new members both through an [orientation program](#) and by involving them in the club.
- Assign a mentor to each new member to share professional expertise, community knowledge, and Rotary information.
- Engage each club member in a service project or club committee.
- Check in with all current members using the [Member Satisfaction Survey](#) at least yearly.



# DISTRICT TRAINING ASSEMBLY DISCUSSION QUESTIONS



The district training assembly is a great chance to exchange ideas with other incoming club leaders. These questions can help you prepare for your training.

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?

How can you ensure that new members are informed and included?

What tasks will you delegate to committee members, and how will you support them?





