



# **Rotary Leadership Institute**

## **Sunshine Division**

### **Event Agenda / Student Guide**

#### **The Rotary Membership Graduate Class**

Registration Opens

Check in, materials, Breakfast

Welcome, Introductions

What is Rotary?

What is our Product?

Break

Showcase Club

What Can You Change?

Lunch

Who Is a Potential Member?

Member Engagement

Evaluation

Closing Ceremonies



## Welcome to the Rotary Leadership Institute



## Membership: The of Rotary

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### Essential Membership Resources

- Strengthening Your Membership – <https://my-cms.rotary.org/en/document/strengthening-your-membership-creating-your-membership-plan>
- Membership Assessment Tools – <https://my.rotary.org/en/document/618>
- Club Health Check – <https://my-cms.rotary.org/en/document/rotary-club-health-check>
- Rotary Code of Policies Jan 2024  
[https://clubrunner.blob.core.windows.net/00000050043/en-ca/files/homepage/ri-code-of-policies---2024/code of policies rotary international en.pdf](https://clubrunner.blob.core.windows.net/00000050043/en-ca/files/homepage/ri-code-of-policies---2024/code%20of%20policies%20rotary%20international%20en.pdf)
- COL 2022 Report of Action  
<https://clubrunner.blob.core.windows.net/00000050156/en-au/files/page/council-on-legislation/2022-col-report-of-action/col22-report-of-action-en.pdf>
- Analyzing Your Rotary Club – RLI Sunshine Division Part II
- Rotary International – Alumni Association FAQ <https://rotex.org/rotary-alumni-associations/>
- <https://vimeo.com/133988115> (membership video with RIPE John Germ)
- Connect to Membership Leads – <https://my-cms.rotary.org/en/document/grow-your-club-using-membership-leads>
- Prospective Member Brochure: Impact Begins with You – <https://my-cms.rotary.org/en/document/prospective-member-flyer>
- Membership - <https://my.rotary.org/en/learning-reference/learn-topic/membership>

# Today's Objectives

- **Review of Membership basics**
- **Create a Showcase Club**
- **Attract New Members**
- **Member Retention**

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Who decides what Rotary is?

How?

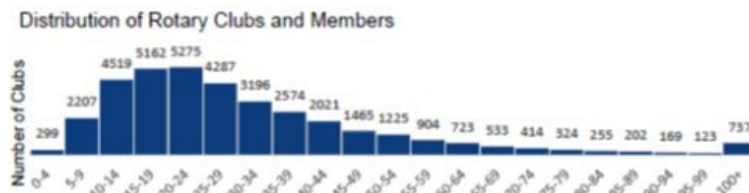
Why does it matter?



## Club Sizes— where do you fit?

- The average size of a Rotary club was 24 members
- 2506 clubs had 9 or fewer members.

### Rotary Clubs and Members



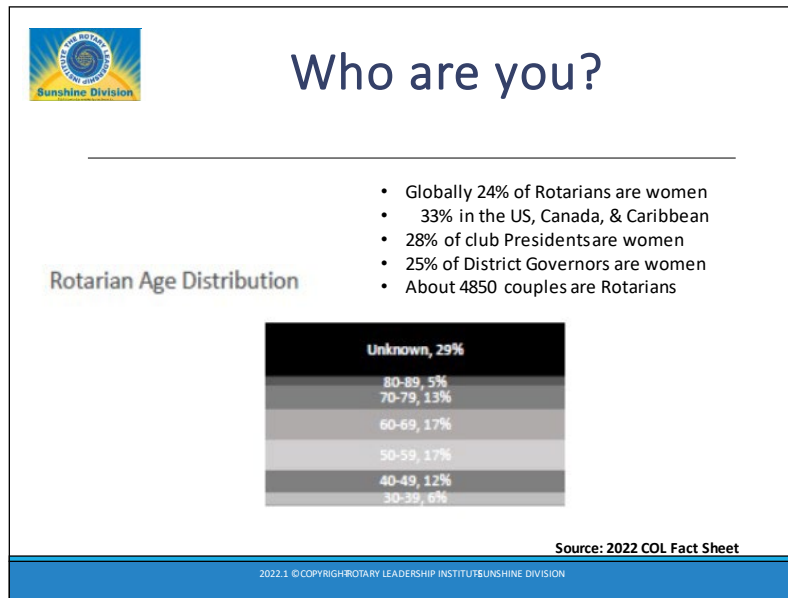
Source: 2022 COL Fact Sheet

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### NOTES:

What would you guess the percentages for the following: age breakdown; women in Rotary; female governors in the Rotary world?

- 70 and up
- 60- 69
- 50-59
- 40-49
- 30-39
- <29
- Women
- Women Governors



### NOTES:

How does your club compare to the information on the chart?

How about other clubs in your district?

What does this mean for the future of Rotary?

What is a Member?

What is a Customer?

Who is Rotary's Customer?

## **What is our Product?**

Why Rotary?



What did these companies sell?

How / Why did they miss the mark?

What can we learn from them?





How did these businesses adapt?

How did they change the business world?

What can we learn from them?

## How do you know what your customer wants?



What do Rotarians want?

What does the community want?

What do potential members want?

## **Do We Deliver the Anticipated Product?**

Do we deliver?

Does your club deliver?

Could we do better?

How?

## **The Third Object of Rotary**

**The application of the ideal of  
service in each Rotarian's personal,  
business, and community life.**

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Does this Object apply?

How could it apply to your club?

What does Showcase ready mean?

Why might it matter?

## **When Does the Prospective Member Experience Begin?**

What does a prospective member see when they visit your club?

What is the visitors experience when they visit your club?

How does your club handle visitors?

Are they going to want to come back to your club?

Do you personally always want to attend your club meeting?

What are the pieces that make up a Rotary meeting?

Who decides?

Does your club hold Club Assemblies?

If yes, how often?

If no, why not?

If yes, what do you talk about?

When's the last time your members were asked what they like about the club?

What they dislike?

**Did You Know:  
the Average Rotary Club  
Loses 10-15% of It's  
Membership, Every Year?**

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What about your club?

## **When Was Your Clubs Last Health Check?**

### **Types of Checkups**

- **Club Health Check – RI 2540EN16**
- **Analyzing Your Club, RLI Sunshine Division – RLI Part II**
- **Red, Yellow, Green Evaluation**
- **Simple Club Surveys**

### **What's The Best Time for a CheckUp?**

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What kinds of things are we “allowed” to change?

Where are the “rules”?

Is there anything we can't change?

How can we change the “rules”?



## Meeting Formats

- Innovative and flexible clubs:  
What you do during your meeting
- Meeting Regularity:  
Flexibility in time, place and frequency
- Satellite clubs:  
Clubs have up to 3 alternative club meetings
- Virtual and Hybrid Clubs:  
Clubs can meet online or live stream meetings

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Are you aware of any clubs meeting with any of these formats?

What has been their success?

Who determines how a club meets?

Is attendance important?

If yes, why? If no, why?

Does your club offer awards for attendance?

Does your district award clubs for their attendance?

Does RI award clubs or members for attendance?

When was the last time your club reviewed its dues structure?

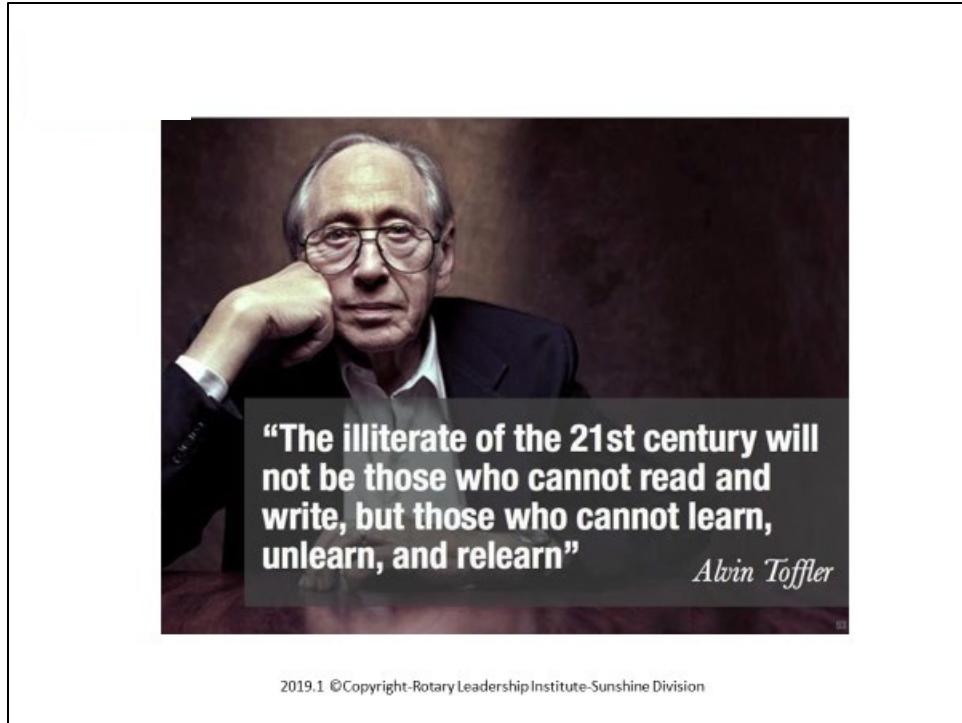
What dues options does your club offer?

What about food costs?

What choices do you have regarding food?

What does your meeting agenda look like?

What other items could you review?



What would happen if no clubs considered changing?

What if your club refused to change?

What is your club looking for in a member?

What are your rules for membership?



# A Member, per the 2022 MOP

## Article 8 Membership

**Section 1 — General Qualifications.** This club shall be composed of adult persons who demonstrate good character, integrity, and leadership; possess good reputation within their business, profession, and/or community; and are willing to serve in their community and/or around the world.

**Section 2 — Types.** This club shall have two types of membership, active and honorary. Clubs may create

## Article 9 Composition of Clubs

**Section 1 — General Provisions.** Each member shall be classified in accordance with the member's business, profession, occupation, or community service. The classification shall describe the principal and recognized activity of the member's firm, company, or institution, the member's principal and recognized business or professional activity, or the nature of the member's community service activity. The board may adjust a member's classification if the member changes positions, professions, or occupations.

**Section 2 — Diverse Club Membership.** This club's membership should represent a cross section of the businesses, professions, occupations, and civic organizations in its community, including age, gender, and ethnic diversity.

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What do you think of this definition?

Does this definition perhaps more closely resemble what your club has been doing regardless?

What about classifications?

## Where do you look for potential members?

# FROGS

- **Friends**
- **Relatives**
- **Occupation**
- **Geography**
- **Social**



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# Alumni

## What are Alumni?



Vocational  
Training  
Teams

Rotary  
Scholars

Group  
Study  
Exchange

Ambassadorial  
Scholars

rotary  
youth  
exchange



RYLA

University  
Teacher  
Grants

Interact  
Rotary Sponsored Club



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How many Alumni are there?

Total \_\_\_\_\_

Foundation Alumni \_\_\_\_\_

Rotary Alumni \_\_\_\_\_

How many Alumni have become Rotarians? \_\_\_\_\_

How do you find Alumni?



## How Can We Work with Alumni?

# Alumni

- Formally greet all Rotary Alumni upon their return home
- Ensure that Rotary Alumni complete required presentations primarily in the sponsoring district, as required by their program's guidelines
- Encourage Rotary Alumni to join a Rotary Alumni Association, or establish one if one does not already exist in their geographic area
- Encourage Rotary Alumni to participate in Rotary projects
- Arrange for articles on Rotary Alumni activities in appropriate publications
- Invite Rotary Alumni to the district conference
- Invite Rotary Alumni to annual dinners or other functions
- Organize regular reunions of Rotary Alumni
- Keep Rotary Alumni records current
- Consider Rotary Alumni as potential Rotary members
- Invite Rotary Alumni to contribute to the Foundation as appropriate
- Invite Rotary Alumni to participate in the recruitment and selection processes for outbound program participants
- Ask Rotary Alumni to participate in orientation programs for outbound program participants in the district
- Encourage invitations to Rotary Alumni to attend or participate as speakers at special district and club functions.

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NOTES:

# Alumni Associations

**A Rotary Alumni Association is a group united to pursue service and fellowship. The primary purpose of an alumni association shall be to further friendship, fellowship, and service for those who share a common tie to Rotary International and The Rotary Foundation. Rotary Alumni associations must be self-sustaining financially, administratively, and otherwise.**

**The Goal of the Association is:**

- To establish and maintain a common bond among Rotary alumni
- To enable alumni to network with one another and with Rotarians
- To provide alumni opportunities for involvement in Rotary service
- To facilitate alumni membership in Rotary and Rotaract clubs, including e clubs



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## NOTES:

What is an Alumni Association?

Does your district have an alumni association?

An alumni chair?

What would be the benefit of an alumni association?

How could this work with your Interact or Rotaract club?

## **Emerging Leaders – Who are They?**

What differences do you see in these points, from any age?

Do you recognize any of this in your club?

What could be changed in your club?

# **Our Prospective Member/New Customer Says Yes! Now What?**

## **The Information Meeting!**

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Once you have a person interested in membership, what do you do next?

Do you go straight to a 'fireside chat' or do you do something else?

## Set Expectations for Both Parties

What should be discussed at an Information Meeting?

1.

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2.

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3.

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4.

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5.

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6.

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7.

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8.

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9.

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10.

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Is a new member induction a big deal in your club?

What about the awarding of Foundation recognition, do you treat that as a big deal?



# Member Engagement



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## NOTES:

How does your club engage new members?

Do you ask them what they want to do in the club?

Do you ask them why they joined Rotary?

## **Why do People Join Rotary?**

## **Why do People Stay in Rotary?**



Does your club do service?

Does your new member want to be involved in service?

What is engagement?

Is engagement important?

Why do members leave?

What can we do about it?

**Why do members stay?**

Does your club have a Red Badge Program?

Do you do something similar to red badge?

Why do a red badge program?

## Why Do Members Stay?

Some Sample Red Badge Graduation Requirements:



- Host a fellowship event
- Invite a speaker
- Upload your photo and bio to the club website
- Attend a Rotaract meeting
- Attend an Interact meeting

- Be the greeter 'X' Times
- Visit a different Rotary Club
- Participate in a Social
- Participate in a fundraiser
- Participate in a project
- Invite a non-Rotarian to a meeting
- Attend a Board Meeting
- Give a craft or classification talk
- Join a committee
- Attend the District Assembly
- Attend the District Conference
- Attend other District meetings
- Attend an RLI session
- Register on My Rotary, [www.rotary.org](http://www.rotary.org)
- Sit at a different table each week

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What is on your Red Badge graduation list?

How do you recognize Red Badge “graduation”?

Does your District have a Rotary Means Business?

Does your District have something comparable?

**What do members provide?**

What are the 3 Ts?

Which one is the most difficult for our members?



**Can you answer the next three questions as they apply to Rotary membership?**

What is ROI?

What is SROI?

What is Opportunity Cost?

## Rotary Acronyms and Abbreviations

3H	Health, Hunger and Humanity Program (no longer used, but you still hear it!)		
AFIRAL	A Friend in Rotary and Life		
AG	Assistant Governor	RIP	Rotary International President
CLP	Club Leadership Plan	RIPE	Rotary International President Elect
COL	Council on Legislation	RIPN	Rotary International President Nominee
D	District	RLI	Rotary Leadership Institute
DaCDb	District and Club Database	RLI-SD	Rotary Leadership Institute – Sunshine Division
DDF	District Designated Fund		
DG	District Governor	RYLA	Rotary Youth Leadership Award
DGE	District Governor Elect	RYE	Rotary Youth Exchange
DGN	District Governor Nominee	SAR	Semi Annual Report
DGND	District Governor Nominee Designate	SHARE	not an acronym! It doesn't stand for anything
DGNE	District Governor Nominee Elect		
DLP	District Leadership Plan	TRF	The Rotary Foundation
DSG	District Simplified Grant (no longer used)	VTT	Vocational Training Team
DTA	District Training Assembly	YEP	Youth Exchange Program
EN	English	YIR	Yours in Rotary
EREY	Every Rotarian Every Year	YIRS	Yours in Rotary Service
GETS	Governor Elect Training Seminar	YIRAL	Yours in Rotary and Life
GRSP	Georgia Rotary Student Program		
GSE	Group Study Exchange	FR	French
IA	International Assembly	SP	Spanish
IPDG	Immediate Past District Governor		
MOP	Manual of Procedure		
PAG	Past Assistant Governor		
PDG	Past District Governor		
PE	President Elect		
PEN	President Elect Nominee		
PETS	President Elect Training Seminar		
PHF	Paul Harris Fellow		
PN	President Nominee		
PP	Past President		
PRID	Past Rotary International Director		
PRIP	Past Rotary International President		
RAG	Rotary Action Group		
RC	Rotary Club		
RCC	Rotary Community Corps		
RFFA	Rotarians for Fighting Aids		
RI	Rotary International		
RIBI	Rotary International in Great Britain and Ireland		
RID	Rotary International Director		
RIDE	Rotary International Director Elect		

## History of Membership

**1905**-First gathering, on [Thursday evening](#), 23 February 1905 in Chicago, Illinois, U.S.A. by attorney [Paul P. Harris](#). Young Harris, fresh from a wild five years as a reporter, actor, cowboy, seaman, granite salesman, fruit picker and hotel clerk, five years building a successful law practice, then had an idea. It was regarding observations of success and respect which could come from organizing professional acquaintances. More years past. He had given this much thought by the time he and Silvester Schiele walked over to Gus Loehr's office, in [Room 711](#) that cold winter night in 1905, almost 9 years from his arrival in Chicago. Several weeks later, Schiele was elected the first president of Rotary when the meeting was held in his office. Harris [suggested several names](#), one of them being "**Rotary**."

**1908**-Second club formed in [San Francisco](#) California, U.S.A. by businessman Homer Wood. Paul Harris had asked Chicago Rotarian, Manuel Munoz, who was being sent to San Francisco by his employer, to "spread the word" about Rotary. The timing was perfect. San Francisco businessmen needed a boost. It has been just two years since the devastating earthquake of 1906 which nearly destroyed the city.

**1909**-[Homer Wood](#) then organized [Oakland, California, USA #3](#), [Seattle, Washington, USA #4](#) and [Los Angeles, California, USA #5](#) by the end of 1909. Two days after Christmas, Seattle #4 organized [Tacoma](#), Washington, USA #8.

**1910**-Rotary becomes "international" on 3 November 1910 with the "organization" of Rotary Club of [Winnipeg](#), Canada. Winnipeg then was chartered as Club #35 on 13 April 1912 prior to the [Duluth](#), Minnesota USA convention when Rotary become the [International Association of Rotary Clubs](#).

**1911**-Convention in [Portland](#). 15 new clubs had joined the ranks of NARC. Many others were organized and "doing" business as those in the [United Kingdom](#) were. Among the 15 clubs, Jacksonville, FL, Club #41

**1914**- 123 Clubs, **15,000** Rotarians

**1916** - [El Club Rotario de la Habana](#), capital of Cuba. First club in a non-English speaking country. 1 June 1916

**1918** - Club #400 [Fort Scott, Kans.](#), U.S.A. **40,000** members world-wide.

**1987**- US Supreme Court rules women can be members of Rotary

**2001** - **30,000th** Rotary Club is Chartered

**2019**- Rotaractors become a membership type of Rotary

## Evaluation – Rotary Leadership Institute – Graduate

*Please rate the following statements using 0 as being in need of substantial improvement and 9 as being excellent.*

**Discussion Leader** \_\_\_\_\_ **Date** \_\_\_\_\_

**Location** \_\_\_\_\_

### **The Membership Class**

Discussion Leader established immediate rapport and was able to hold the group's attention \_\_\_\_\_

Discussion Leader adequately oriented the group to the specific learning objectives \_\_\_\_\_

Discussion Leader was knowledgeable with this subject, and we met the session's objectives \_\_\_\_\_

This session helped improve my knowledge of Membership \_\_\_\_\_

This session is applicable to leadership in Rotary \_\_\_\_\_

***What was the best part?***

***What part did you like least?***

### **Logistics**

The advance registration process was easy to understand \_\_\_\_\_

The directions to the venue were clear and easy to understand \_\_\_\_\_

The on-site registration /check-in was orderly, organized and relatively quick \_\_\_\_\_

The food and beverages were satisfactory \_\_\_\_\_

The classroom atmosphere was appropriate for this type learning experience \_\_\_\_\_

Would you recommend this Graduate class to other Rotarians as an avenue to enhance their leadership skills in Rotary? YES NO

### **Comments**