



Rotary Leadership Institute

Sunshine Division Event Agenda

The Rotary Membership Graduate Class

7:00 am – 8:00 am	Registration Opens Check in, materials, Breakfast
8:00 am – 8:10 am	Welcome, Introductions
8:15 am – 9:15 am	What is Rotary?
9:20 am – 10:00 am	What is our Product?
10:00 am – 10:15 am	Break (flexible)
10:15 am – 11:05 pm	Showcase Club
11:10 am – 12:00 am	What Can You Change?
12:00 pm – 12:45 pm	Lunch (flexible)
12:50 pm – 1:40 pm	Who Is a Potential Member?
1:45 pm – 3:00 pm	Member Engagement
3:00 pm – 3:15 pm	Evaluation
3:20 pm – 3:30 pm	Closing Ceremonies



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>

Introductions

Name, Club and Years in Rotary
Size of Your Club (now, 3 years ago)
Size of Your District (now, 3 years ago)



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Welcome everyone and work through the questions above

Transition to what you plan to cover

GOAL – warm them up, have fun, make it fun, encourage participation

Today's Objectives

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

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The basic flow today is to review (briefly) the basics of membership from Basic RLI and the numbers. Then to discuss what an outstanding Rotary club might look like (creating a product to “sell”)

Finally, we work into finding and attracting new members and keeping the members we already have.

What is Rotary?

- Who decides what Rotary is?
Isn't?
- Why does it matter?

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GOAL - to reaffirm that the clubs and members decide WHAT Rotary is. They create the experience of belonging to a Rotary club. Get buy in to taking control of their club and making it into a powerful entity in their community and the world.

Once they realize they have control, refer back to the Objects of Rotary (next slide)

The Object of Rotary

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

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The First Object of Rotary

The development of acquaintance as an opportunity for service.

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Note that the First Object affirms that membership is a tool to offer more service



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Lead discussion on having them talk about their clubs – how big are they, how strong are they, what do they do well, how do they serve.

NOTE: Consider asking participants to bring in their completed self-evaluation form from Part 2



Source: Rotary.org July 1, 2023

Who are We?

Rotary Members?

1,400,000 in 46,000+ clubs in 200+ countries

Rotary Community Corps?

12,000 in 105 countries with 200,000+ volunteers

Rotaract Clubs?

10,698 with 203,300 members in 180 countries

Interact Clubs?

14,911 in 145 countries with 342,953 members

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Talk about the various ways to be affiliated with Rotary. Goal – we are not all the same and we don't all “Rotary” the same.

Remember – Rotaractors are now MEMBERS of Rotary and included in the 1.4 million

what is a Rotary Community Corp (RCC)?

Do any of your clubs have an RCC?

Why might an RCC bring value to your club? Your District?

What's an E-Club?

Does anyone know what happened at the 2016 Council on Legislation (COL) regarding E-Clubs? (they no longer exist – they are just Rotary clubs, no “E”)

Does your district have an online Club?

How many online Clubs can a district have? (as many as they want!! No difference)

What is a hybrid club?

What's a Satellite Club?

Do any of your clubs have a Satellite Club?

What do you think about Satellite Clubs?

What is a Passport Club?

Who has heard of a Cause Based club? Or a Corporate Club?

What is a Rotaract Club?

Who has one?

What is an Interact Club?

Who has one?

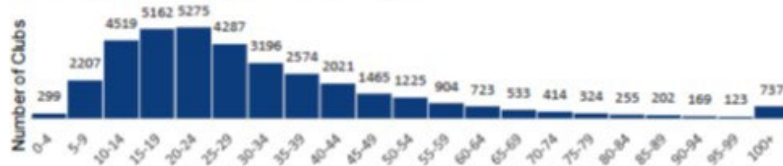


Club Sizes—where do you fit?

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

Rotary Clubs and Members

Distribution of Rotary Clubs and Members



Source: 2022 COL Fact Sheet

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QUESTIONS: Do any of you have clubs the sizes shown in your District?
 Do any of you belong to a club of the sizes shown?
 Do you think there is an advantage to being that size? Disadvantage?
 Challenges? Opportunities?

Note: The clubs with 1 or 2 members are generally in places that won't allow Rotary (like Afghanistan) This information will not be updated until the next COL

QUESTIONS BEFORE NEXT SLIDE: What would you guess our demographics breakdowns would be as a worldwide organization?

PROCESS: Have someone act as a scribe (erasable or flipchart) and put up the guesses for the following percentages for: age; gender; female governors.

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



Who are you?

Rotarian Age Distribution

- Globally 24% of Rotarians are women
- 33% in the US, Canada, & Caribbean
- 28% of club Presidents are women
- 25% of District Governors are women
- About 4850 couples are Rotarians

Unknown, 29%
80-89, 5%
70-79, 13%
60-69, 17%
50-59, 17%
40-49, 12%
30-39, 6%

Source: 2022 COL Fact Sheet

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NOTE: Discuss the attendees' thoughts now that they see the facts. What surprises them?
This information will not be updated until the next COL

QUESTIONS: How does your club compare to the information on the chart?
How about other clubs in your district?

What is the average age of a Rotarian in Australia? (estimated to be 71)
What is the average age of a Rotarian in England? (estimated to be 74)
What is the average age of a Rotarian in the USA? (estimated under 60)
Asia is growing but has very few women in Rotary, why would they still be growing?
Average age of a Rotarian in Croatia is very young, why? (possibly the result of the wars two decades ago and this is the new generation growing up)

What Is A Rotarian? Member? Or Customer?

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Lead a discussion on this topic. There is no absolutely right answer – but you do want them to think about the distinction and how to handle the differences based on the definition.

A member is part of a group and is assumed to stay (like family)

A customer is purchasing your product and may change their mind

Why does this matter?

How does it impact what we do?

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If Rotarians are customers, what is our product? What are they buying (expectations)?

How does Perception impact “sales” - old white guys having lunch...

After a short discussion, go to Name That Product – as you bring up each photo, ask what the product is. It isn’t “mail” or “film”, it is the perceived benefit....

NOTE: Discuss each of the companies as they come up

A:

Kodak: not film, memories

SEARS: not product, but the first of the shopping experiences

Blockbuster: not video tapes, but movie viewing

Polaroid: not cameras, but again memories

Borders: not books, but reading materials and the experience

Pan Am: they tried to go local and expanded too rapidly at a time travel was down

QUESTIONS BEFORE TRANSITIONING TO NEXT SLIDE:

What were these companies failing to recognize and do?



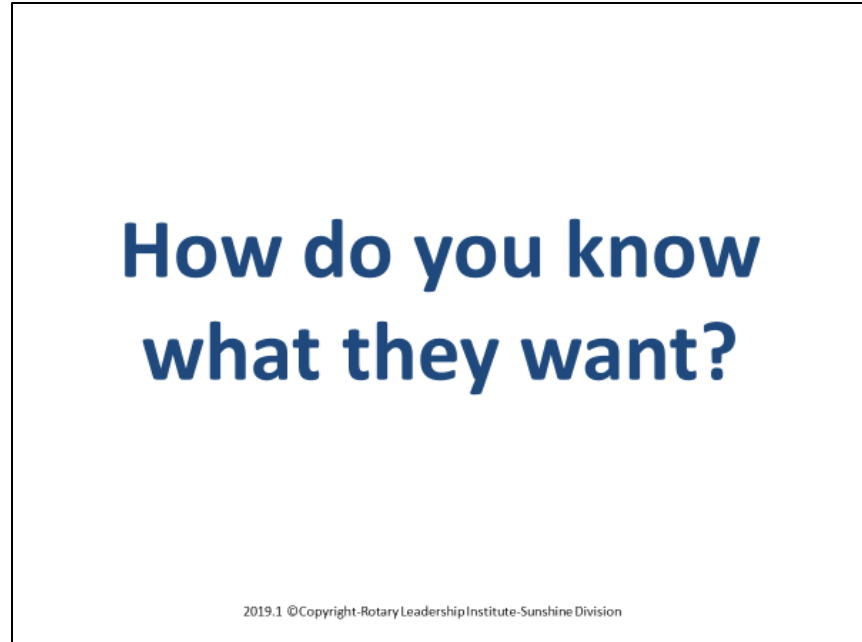
They failed to adapt and innovate!

Talk about each company as it comes up – how have they changed?

Amazon sells convenience – shop in your jammies

Walmart – convenience, everything in one stop

Apple sells innovation – cutting edge, easy to use technology



Discuss ways to determine what different groups want from Rotary. Important common denominator, ASK!

What do Rotarians want from their club?

What does the community want?

What do potential members want?

Record answers on a flip chart by category for reference later.

Grad Membership DL Guide



JW Marriott, founder of Marriott hotels



Susan Ward, Actress & Model



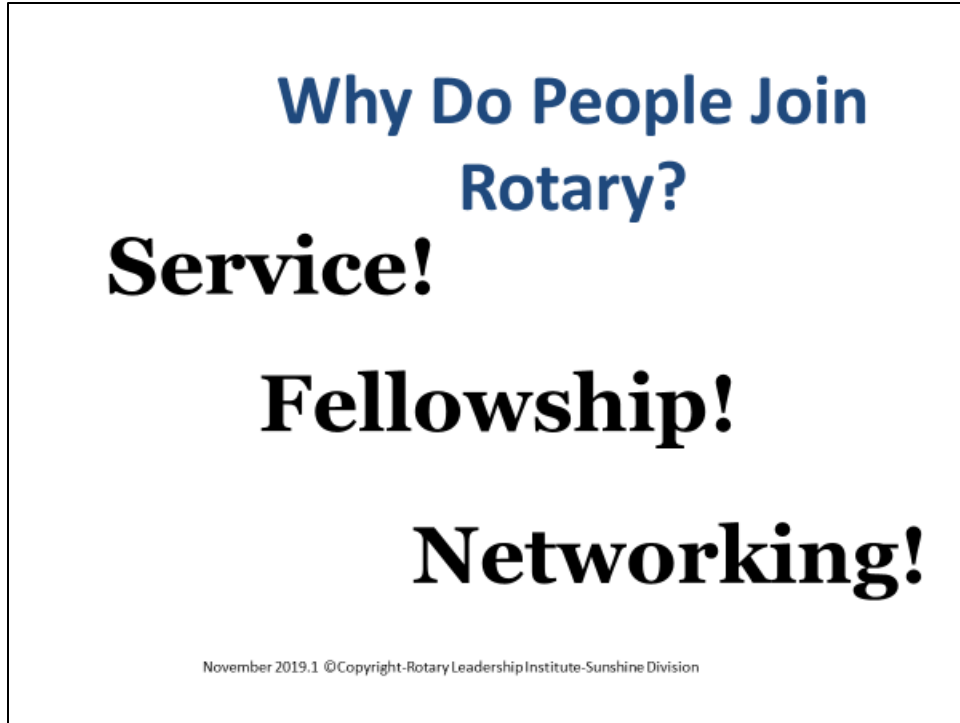
Sam Walton, founder of Wal*Mart



Lead discussion about delivery of our “product”. Are we doing what others *think* we are doing? How could this mis-match impact membership? Recruitment? Working a community project? Working with other Rotary clubs or civic organizations?

Who is using MAP to set goals and track their club’s progress? Note – this allows them to see their progress compared to other clubs, districts, and zones.

Goal – build awareness of what we do in our clubs from the standpoint of current members and potential members and project partners. Build buy in



A major study done by the Rotary Clubs in Buffalo NY surveyed well over 5000 Rotarians and found these three items to be the top reasons people joined Rotary

Ask audience why they joined

Lead discussion about these three topics – what do they each mean?

Service – community vs international? How many projects? What kind?

Fellowship – socials? Caring Hands?

Networking – getting business from other Rotarians? Mentoring? Learning?

QUESTIONS: Does every club, offer all three of the main reasons members join?

Do you ask someone why they are joining your club?

If your club does not do well in offering the one reason someone is joining your club, how should your club respond?

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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Lead discussion of what this Object means!

Rotary is more than a weekly lunch club – it is a way of life.

Is your club “showcase” ready?

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What does it mean to be “showcase” ready? Discuss....

Who decides if it is “showcase” ready? Answer: other people!

Why is it important to be showcase ready?

Goal – have them think of their club as a product to be marketed

<h2 style="text-align: center;">When Does the Prospective Customer Experience Begin?</h2> <p style="text-align: center;"><small>2019.1 © Copyright Rotary Leadership Institute - Sunshine Division</small></p>	<h2 style="text-align: center;">Anywhere, Anytime!</h2>  <p style="text-align: center;"><small>2019.1 © Copyright Rotary Leadership Institute - Sunshine Division</small></p>
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Discuss the point where a prospective customer (member, service partner) begins to experience what their Rotary club is like...

How do they become aware of your Rotary club?
How do they meet you?

Do they see your license plate or a decal on your car?
Do they see your Rotary pin?
Do they see a sign on your club project?
Do they see you on social media or in traditional media?

Most commonly, they come to a meeting.....

Could Be At A Meeting



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When Does the Prospective Member Experience Begin?

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

Does your club look like your community?

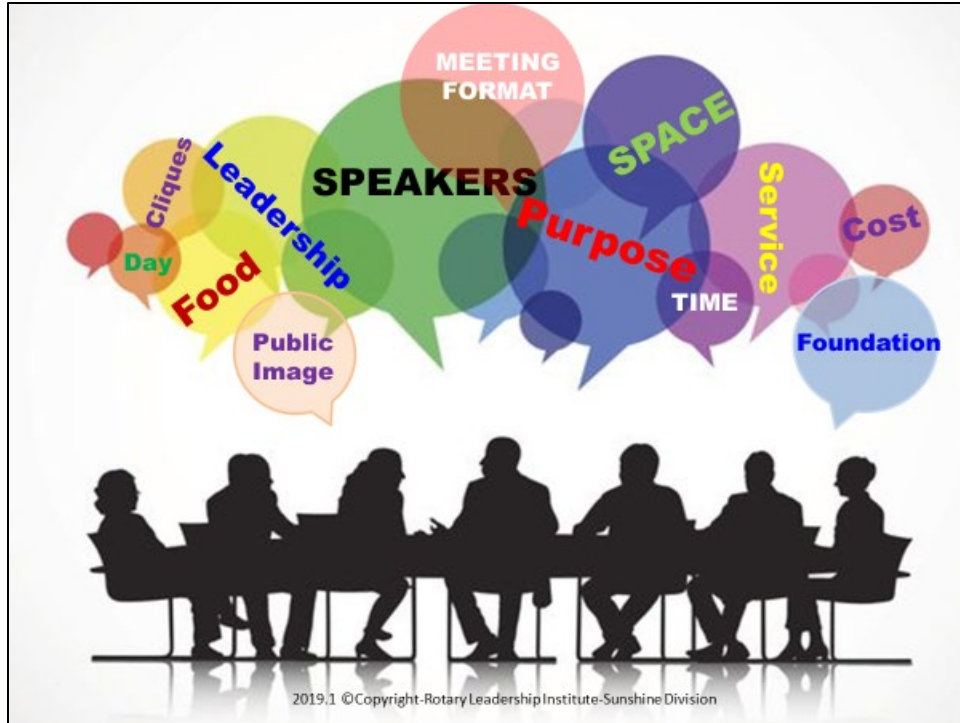
What is it the visitors experience when they visit your club?

Can differently abled people access your meeting space?

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?



Use this slide to see if anything got left out of your list

There are a lot of “moving parts” to a Rotary club, and no club is perfect...

QUESTIONS: Is the meeting organized?

Is the meeting ready to go?

Does the meeting start on time? End on time?

If you do a pledge, or raise a glass to the Queen, or anything in recognition of the government your club resides in, is there a flag ready to go? Glasses on the table for a toast? Etc?

Do you pray at your meeting? If yes, does the person doing it know they are doing it? Does that person realize Rotary is itself secular, although most of its members may in fact be of a particular faith?

How many of your club members are Christians? Jewish? Hindu? Buddhist? Muslim? Atheist?

Non-religious, other? How or why would you know? Why not be inclusive with the prayer?

Is the prayer non-denominational?

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

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NOTE: Discuss

QUESTIONS: Think about your club, does this slide apply to your club?
What can we do about this figure?

NOTE: Nearly half of new members leave within Five Years

Check MAP to see how your club is performing!

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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Club Health & Wellness



MEMBER SATISFACTION SURVEY

This survey focuses on your day-to-day experience in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers, we simply ask for your honest opinion. Thank you for taking the survey.





1. Overall, how satisfied are you with your membership in our Rotary club?

Dissatisfied

Somewhat satisfied


Neither satisfied nor dissatisfied

Somewhat dissatisfied


Dissatisfied

2. Considering our club's activities, members, and development, tell us your agreement with the following statements.

	Agree	Disagree	Neither agree nor disagree	Disagree	Disagree
Club meetings are a good use of my time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job of recruiting new members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club members are about the same	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club reflects the diversity in our area's business, professional, and community leaders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



EXCHANGE IDEAS: www.rotary.org/membership



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NOTE: Discuss whether any of the attendees are familiar with these types of evaluations.

QUESTIONS: The Club Health Check is new, have you seen it?
 When you did the 'analyzing your Club' exercise for RLI Part 2, did you take the information back to your club? Did you initiate or change anything uncovered with the exercise?
 What's a red/yellow/green survey? A: it's a simple, what do you like and want to do more of (green), what do you hate and want to discontinue (red), what needs to be changed or slowed if it is to be continued (yellow)

Of course, there is no point in asking questions unless you are willing to do something about the answers – that means change....

What Can You Change?

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Lead a discussion of what is in the club's power to change. The 2016 COL was notable for the way they redefined what a Rotary club could be!

Refer to the 2016 Council on Legislation which allowed:

- Abolished E clubs – we are all Rotary clubs now, no matter how we meet
- Abolished attendance from an RI standpoint
- Allows clubs to meet twice a month
- Allows clubs to have Satellites
- Allows clubs to create membership types
- Allows clubs to redefine meetings
- And more!

2019 Council on Legislation made it so Rotaractors could join Rotary and stay in their Rotaract club. It also removed the age cap for Rotaractors!

2022 COL allows Satellite clubs to belong to any “Mother” club and members can join any Rotary club regardless of where they live or work.

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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Discuss these various types of Rotary clubs / meeting types

Ask participants about their clubs – who has adapted one of these formats, or another?

Flexible – instead of a meeting with a speaker, you can do a project or a social

Meetings – the 2022 MOP stipulates a club must meet twice a month at least

Satellites – are chartered groups of 8 or more people, meet at a different time/location/day, are members of a sponsoring Rotary club, may have different dues depending on the sponsor club

Hybrid – Clubs may be traditional, online only, or a combination of live and online

Passport – meets about once a month, and then works with other Rotary clubs for the second meeting. Often online.

Cause Based – clubs that focus on one type of service, or cause

Corporate – clubs with members that mostly all work for the same employer but want to do good in the world.

Attendance

- ❖ **Is attendance important?**
- ❖ **What promotes Good Attendance?**
- ❖ **Who Determines the Club Attendance Requirements?**

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Lead discussion of these questions – special focus on the last 2 questions

The club is in charge. The club determines the attendance policy.

Why would you want an attendance policy?

What are your choices? (anything the club wants!)

Remember – RI does NOT require attendance! This is a club option only.

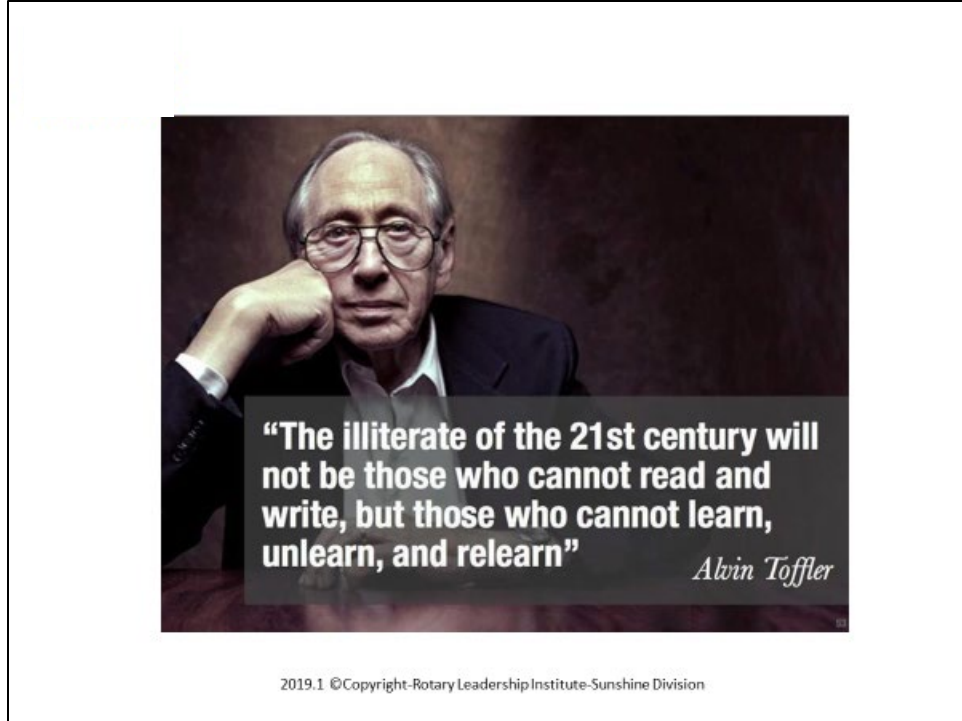
But we've always done it that way!

- **Dues**
- **Food**
- **Agenda**
- **Other stuff...**

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Lead discussion on these and other topics the participants bring up:

1. When was the last time you reviewed your dues structure?
2. How do you bill your members? Quarterly? Annually? Monthly?
3. What membership types do you have?
 - a. RI – has Active and Honorary only
 - b. Corporate
 - c. Family
 - d. Student / Military
 - e. Other
4. Do you use an agenda?
5. Do you have food? Is it in your dues or not?



“The only constant in life is change” - Heraclitus

Who Is A Potential Member?

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Lead brief discussion of who a potential member is...

What do you look for?

How do you find people different from yourself?

What are your “rules” for membership?

Do you have an induction fee?

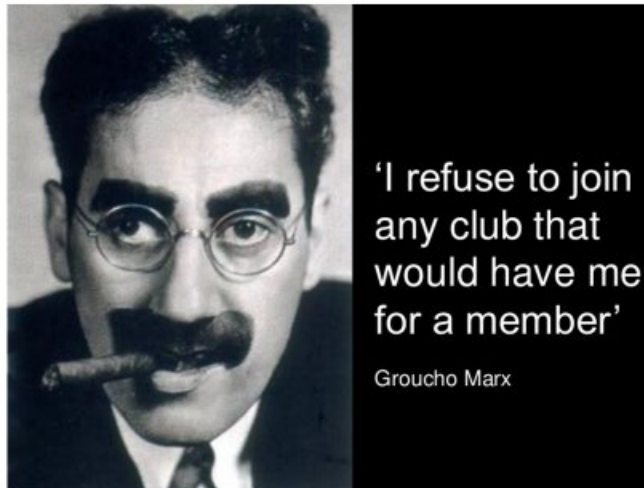
The Second Object of Rotary

High ethical standards in business and professions; the recognition of the worthiness of all useful occupations, and the dignifying of each Rotarian's occupation as an opportunity to serve society.

Question: Do we always induct new members, to the letter of this Object of Rotary?

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Lead discussion of admitting members – do we uphold the second Object of Rotary?



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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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The 2016 COL opened the doors for people who couldn't become Rotarians before. Originally, you had to be the owner or primary decision maker in a business in your community. Today, this guideline is used.

Is this good?

How does it change who / how you attract members?

Notice that it no longer includes classification restrictions. What does that mean for your club?

QUESTIONS: What do you think of this new definition? Does this definition perhaps more closely resemble what your club has been doing regardless? How would you describe these changes? Per the old definition, would a nurse be allowed into Rotary, or only the director of nursing? Would a teacher be allowed in, or only the principle of the school? The accountant at the firm, or only the owner?

QUESTIONS: What do you think was the origin of the classification system?

Why would there be a classification system?

Do you still find value in the classification system?

When considering a new member, how much thought goes into their classification, other than gathering information for their badge?

What are the limits to a given classification? Are they enforced?

When was the last time your club did a classification survey of the club?

Should you do a classification survey or your club?

Where do you look for potential members?

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With the new guideline in mind, where can we look for potential members?

Again, keep a flip chart of answers

FROGS

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



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Review these categories and discuss



Alumni

What are Alumni?



Vocational
Training
Teams



Rotary
Scholars

Group
Study
Exchange

rotary
youth
exchange

University
Teacher
Grants

Ambassadorial
Scholars



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QUESTIONS: How many of your Districts have Alumni Associations?
How many Alumni Associations are there in the Zone?
Answer: One as of June 2024, D6970

Note: Rotaract is now a membership type for Rotary!! It is not a Rotary program and they are no longer alumni

QUESTIONS BEFORE NEXT SLIDE: How many Rotary Alumni would you guess we have in the world?
How many of those alumni are Rotarians?

THEN GO TO NEXT SLIDE

Alumni

Now that we know what an Alumni is....How Many are there???

Over 600,000!

177,500+ considered TRF Alumni

450,000+ considered RI Alumni

How Many Alumni are Rotarians???

14,458

Source: June 4 2021 Rotary.org

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NOTE: Discuss the numbers, let them put percentages to the numbers
Any surprises with the numbers?

Today – 627,160 are Alumni!

QUESTIONS BEFORE NEXT SLIDE:

How many Rotarians Worldwide?

How many Rotarians 10 Years Ago?

How many have we inducted in the last 10 years?

Your district leaders can pull a list of alumni in your district from Rotary.org

THEN GO TO NEXT SLIDE

Alumni

How do you find Alumni?

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NOTE: Discuss

A: Alumni report from RI; lists from DaCDB, lists from Club Runner, club lists, club members memories, GSE team leads and members, name more.



NOTE: Discuss and have a scribe put any suggestions on the erasable or flip chart

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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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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NOTE: This slide depicts the ways to work with alumni, discuss each of the points and ask questions as to whether the clubs represented in the class, do any of those things

The PIN depicted is the official Rotary Alumni PIN

Get information at Rotex.org

QUESTIONS:

What is an Alumni Association?

Does your district have an alumni association? An alumni chair?

What would be the benefit of an alumni association?

QUESTIONS BEFORE TRANSITIONING TO NEXT SLIDE:

We have been discussing alumni, what about Young Professionals? What can you tell me about YPs and how is your club doing engaging them in your club? Should you be engaging them in your club?



Emerging Leaders



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What are these folks called in your district?

Young Professionals?

TRANSITION TO NEXT SLIDE



Young Professionals

What Are They Interested In?

77% of Millennials are involved with a charity or cause

61% of Millennials and 57% of GenX are interested in leadership

Gen X (1965 – 1980)

- Loyal to good leadership
- Use traditional media (such as TV), but are increasingly active on social media
- Prioritize spending on families (children, housing)
- Seek work-life balance
- Realistic and pragmatic

Millennials (1981 – 1998)

- Expect immediate access to product information and peer reviews
- Grew up with smartphones and internet
- Seek access to products without the burdens of ownership
- Dedicated to wellness, including exercise, eating smarter, and smoking less
- Optimistic and idealistic

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Only about 5% of Rotary membership is under 40 years old

What does your club look like?

Note: about 37% of Millennials have cancelled membership in an association due to cost!



What Do They Expect?

Use technology: It's part of their daily life. It connects them to the world.

Be transparent: Others market to them, but they don't always talk honestly with them.

Connect often: They are hyper-connected and want to know what their peers are doing and where, around the clock.

Feature compelling videos: They embrace a shared visual language that's engaging and easy to reach.

Create real, enduring change: They want to empower communities with sustainable solutions, not quick fixes.

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How can you do this in your club?

What changes might you need to enact?

QUESTION BEFORE TRANSITIONING TO NEXT SLIDE: What are the top three reasons that members join Rotary? Fellowship, Service, Networking

TRANSITION TO NEXT SLIDE

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

The Information Meeting!

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NOTE: Discuss the next steps thoroughly.

Discuss them as they apply to the various clubs represented in the room.

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

If the questions of a fireside chat comes up at this point, ask the following:

How many of you invite a perspective member to a social, fundraiser or project, prior to a fireside chat? Do you let a prospect get to know you, know the club before the next steps? Is there an advantage to club members knowing the prospect, before they are proposed for membership?

QUESTIONS BEFORE TRANSITIONING TO NEXT SLIDE:

Once you do proceed to some type of 'fireside chat' what should be covered?

Have a scribe put the points on the erasable or the flip chart.

ONCE THOROUGHLY DISCUSSED, TRANSITION TO NEXT SLIDE



Set Expectations, For Both Parties

- **What are the costs of being a Rotarian?**
- **What are the club attendance requirements:**
 - **at meetings; fundraisers; projects; events?**
- **How much time is required, in addition to meetings?**
- **What 'rules' should the prospective member be aware of?**
- **Mentoring program, Red Badge Program?**

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NOTE: Compare the points on this slide and the next slide, to the list your class made on the erasable or flip chart.

QUESTIONS: What did the class have that was not on these slides?

TRANSITION TO NEXT SLIDE



Set Expectations, For Both Parties

- **The prospect should be able to state what they are looking for: networking; local service opportunities, international service opportunities, fellowship; travel opportunities; leadership enhancement.**
- **May not want to be on a committee initially, may need to slowly move into Rotary.**
- **May need flexibility in their costs or attendance requirements**
- **WHAT ELSE?!**

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NOTE: Compare the points on this slide and the next slide, to the list your class made on the erasable or flip chart.

QUESTIONS: What did the class have that was not on these slides?

DISCUSS THOROUGHLY BEFORE TRANSITIONING TO NEXT SLIDE

The Induction

How Does Your Club Conduct a New Member Induction?



Is It A Big Deal?

Or, Like This?



Like This?

Or No Big Deal?

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NOTE: Discuss how each club inducts a new member. Role play some bad ones. Eventually get to a what if, and role play that one.

QUESTIONS: Do you invite the spouse?

Do you invite a district leader?

Do you bring the sponsor up?

Do you offer a brief bio of the new member?

What happens after the induction? Do they act as greeter? Do they shake hands with everyone in the club? What do you do that's special?

QUESTION BEFORE TRANSITIONING TO NEXT SLIDE:

What should happen next with the new member?

TRANSITION TO NEXT SLIDE



Member Engagement



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NOTE: Discuss membership engagement

QUESTIONS: How do we engage new members? Existing members?
Have we asked them, what they want to do? Or do we tell them, what we want them to do?

QUESTION BEFORE TRANSITIONING TO NEXT SLIDE:
Test question, Why Do Members Join Rotary?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

Why Do People Join Rotary?

The Opportunity for Service!

The Fellowship!

The Networking!

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QUESTIONS: Which of these has your new member joined for?
How are you going to insure they get what they want out of Rotary?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

**Why Do Members
Stay?**

The Service!

The Fellowship!

The Networking!

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The first two reasons are the primary reason members have stayed engaged in the past. As we gain younger members, the third reason is increasing in importance as they look for mentors and coaches.

The Fourth Object of Rotary

The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

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DISCUSS: Discuss the Fourth Object of Rotary

QUESTIONS: Since this is an object of Rotary, might service be one of the new members drivers? Does your club do service? Does your new member, want to do service projects?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

Importance of Engagement

- **What is engagement?**
- **Why is engagement important?**
- **Why Do Members Leave?**
- **What Can We Do About It?**

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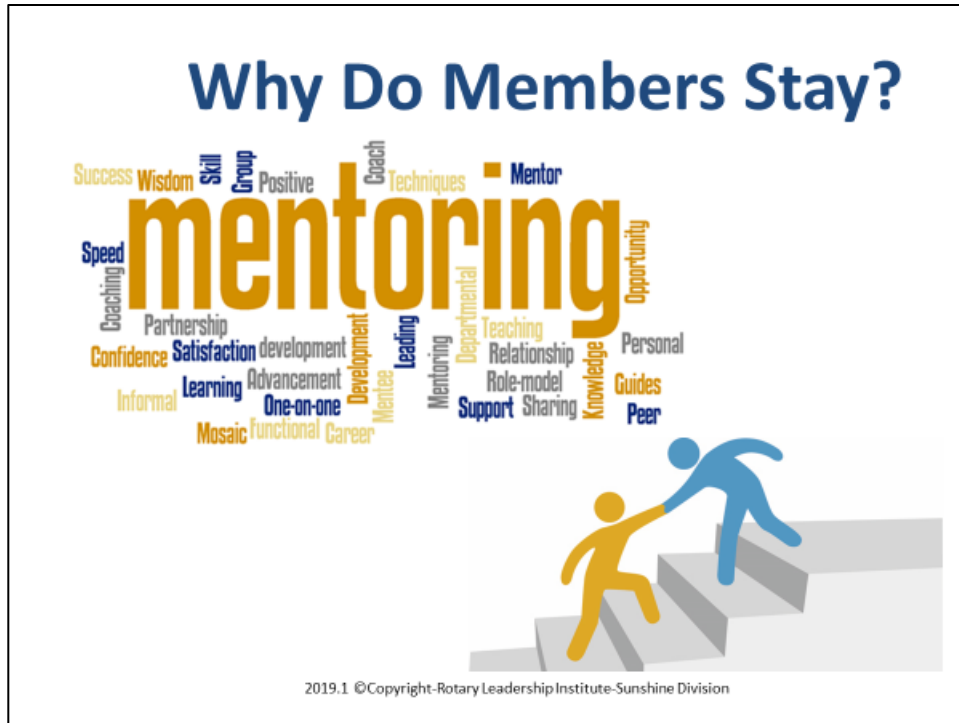
DISCUSS: Discuss the questions on the slide

QUESTIONS BEFORE NEXT SLIDE:

What about mentoring in your clubs, how do you mentor new members? Do you mentor new members? If yes, why? If no, why?

Do you do exit interviews?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE



DISCUSS: Continue the mentoring discussion and its value.

QUESTIONS: If you look at the responses to this word cloud, what other words on the slide stand out as a possible result of mentoring?

QUESTIONS BEFORE NEXT SLIDE:

- Who can tell us about Red Badge Programs?
- Whose club has a red bad badge program?
- Who does something similar to red badge?
- Why do a red badge program?

NOTE: Create a list of accomplishments that might be included by clubs, in order to gain a 'blue badge'. Have someone list the suggestions on the erasable or flipchart.

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

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
- Sit at a different table each week

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DISCUSS: The list and whether there were items on the class list not on the slide and whether there are items on the slide, not on the class list.

Further discuss the merits of the Red Badge program if needed.

What is on your Red Badge Graduation list?

How do you recognize Graduation? Ceremony?

QUESTIONS BEFORE NEXT SLIDE:

What about networking in Rotary?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

Why Do Members Stay?

*"If any one tells you that it is reprehensible to make a dollar or two for the wife and babies from club associates in straightforward business transactions, tell that person that some foreign substance has gotten into his carburetor."
(Paul P. Harris, January 1911)*

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DISCUSS: Rotary Means Business, is a Rotary Fellowship. It is a networking group. Does your district have an RMB?

RMB Fellowship Mission Statement:

Rotary Means Business encourages Rotarians to support the success of their fellow Rotarians by doing business with them, and by referring others to them.

Does your District have RMB? Or something similar?

How do Fellowships and Rotary Action Groups help retention?

QUESTIONS BEFORE NEXT SLIDE:

Does Rotary education have value? Learning more about Rotary?

What is available to learn more about Rotary? Have someone act as a scribe.

A: District: seminars, assemblies, conferences.

Rotary: website, convention webinars.

RLI

Others



Why Do Members Stay?



Ok, we say education works, what's the proof?



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DISCUSS: This slide simply enforces the various educational opportunities and offers a chance for more discussion if needed.

QUESTIONS BEFORE NEXT SLIDE: What do you think the impact of RLI has on our retention rates? Does it improve them?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

We're So Glad You Asked...

The numbers show that over the same period of time the Sunshine Division has been in existence, the retention rate of those having attended RLI is near 50% higher than those that have not!

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DISCUSS: Have someone read the slide.

QUESTIONS: Do you think other training/educational opportunities have an impact on retention as well?

QUESTIONS BEFORE NEXT SLIDE:

What is asked of members? What do they give?

Hint (think 3 Ts)

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

What Do Members Give?



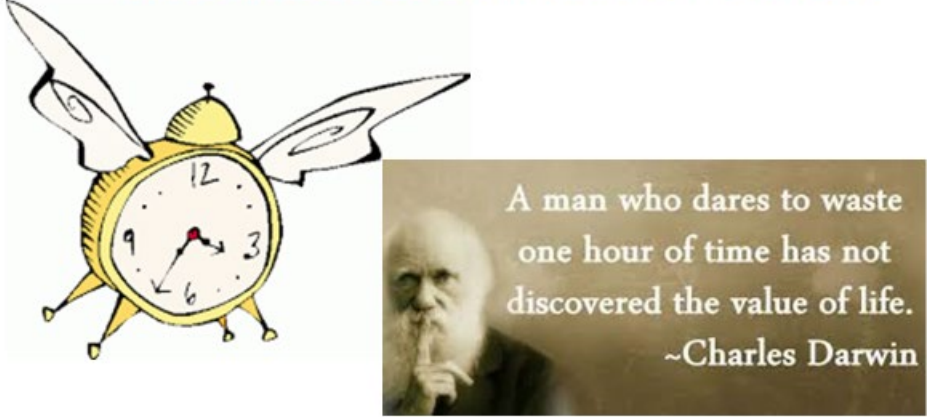
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DISCUSS: Discuss the generalities of the 3 Ts.

QUESTIONS BEFORE NEXT SLIDE: What's the most difficult of the 3 Ts to give?
What's the one T you can't get back?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

What's the One Thing Members Can't Get Back?



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DISCUSS:

QUESTIONS BEFORE NEXT SLIDE: We have to make sure our members, are not wasting their time. What is ROI?

ROI: (Return on Investment) A performance measure used to evaluate the [efficiency](#) of an investment or to compare the efficiency of a number of different investments. ROI measures the amount of [return](#) on an investment relative to the [investment's cost](#). To calculate ROI, the benefit (or return) of an investment is divided by the cost of the investment, and the result is expressed as a percentage or a ratio.

SROI: (Social Return on Investment) is a principles-based method for measuring extra-financial value (i.e., environmental and social value not currently reflected in conventional financial accounts) relative to resources invested.

What ROI do our members get from their Clubs? From Rotary?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE



DISCUSS:

QUESTIONS: What is Opportunity Cost?

OPPORTUNITY COST: the loss of potential gain from other alternatives when one alternative is chosen

ROI – Return on Investment

SROI – Social Return on Investment defined as a method for measuring values that are not traditionally reflected in financial statements, including social, economic and environmental factors. They can identify how effectively a company uses its capital and other resources to create value for the community.

What are some of the things we give up, in order to attend our Rotary meetings, events, fundraisers?

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE



DISCUSS:

NOTES: This is a general discussion, leading questions to cover the items discussed throughout the day, to strengthen the clubs. These are just some examples.

- | | |
|---|---|
| Club meeting time is good | Club communicates well |
| Club involves new members | Club listens to its members |
| Club continues to involve existing members | Club seeks input from its members |
| Club members care about each other | Club acts upon member ideas and input |
| Club members are some of my best friends | Club adapts to the needs of the members |
| I trust my club members with my business | |
| Club reflects the demographic of my community, the area businesses, is a good mix of community and professional leaders | |
| The amount of fundraising is appropriate | |
| Everyone gets a say in how our funds are spent | |
| Club involves all members in projects and events in manners that meet their interests | |
| Club socializes enough | |
| Club has the appropriate amount of interaction with the District | |
| Club encourages Rotary learning, RLI, Assemblies, etc. | |
| Our programs are good | Members feel welcome in our club |
| Our speakers are good | Guests feel welcome in our club |
| Our food is good | My family sees value in Rotary membership |
| Networking opportunities are appropriate and valuable | |
| Our projects are well organized | Because of my club, I make a difference |

ONCE DISCUSSED, TRANSITION TO NEXT SLIDE

Summary

- ❖ **The average Rotary Club loses 10%-15% of its membership each year**
- ❖ **Half of all new members leave within five years**
- ❖ **It is important to ensure your club meets the needs of it's members, why they joined, and if they leave...why they left.**
- ❖ **This is still the greatest organization on the planet. You know that or you wouldn't be here today. Invite someone to Rotary.**

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**I thank the person who got me into
Rotary virtually on a daily basis!**

WHO DO YOU THANK?

Give Someone a chance to thank you!

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GOAL: Make sure they fill out the evaluations and ask they include some comments as to how the class could be improved. Let them know about additional Grad Course options.



GOAL: Make sure they know there is a graduation recognition and a certificate coming!

Thanks for being a DL and taking a Saturday out of your life to strengthen Rotary!

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.

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 – **Rotaract becomes a membership type for Rotary**

Club Type Reference Sheet

Traditional – meets in person, usually has a speaker and a meal.

E Club – does not exist. It's designation as a separate club type was eliminated at the 2016 COL. Whether you meet in person or online, you are just a Rotary club. Clubs that chartered as E Clubs have been encouraged to change their charters to remove the "E" designation.

Hybrid – club meets in person and livestreams the meeting so people can attend virtually. Eliminating the E Club designation created the opportunity for hybrid clubs.

Satellite – A separately chartered subset of a traditional club. They meet at a different time and place. They have their own bylaws, officers, and dues structures. Members are listed on the roster of the "mother" club. They may not apply for Foundation global grants or district grants (they have to work with the mother club).

Passport – a new club structure focused on service and fellowship. Generally, they do not have a speaker or meal. Often, they meet online once a month. Members are encouraged / expected to visit other clubs and participate in their projects (accounting for the second required meeting of the month).

Cause Based – a Rotary club focused on service in a particular avenue of service. They might be focused on mental health projects or environmental issues. There is less focus on meetings, and much more focus on service to the cause they are united in.

Alumni - a Rotary club comprised on Rotary alumni. This is different than an Alumni Association! This is a full Rotary club (regardless of model) where most or all of the members are alumni.

Corporate – a Rotary club where most or all of the members work for the same employer. Generally focused on providing service within their community.

Interest Based – a Rotary club where the members share a common hobby or interest

Service Based – a Rotary club that meets regularly to do service projects. Often doesn't have traditional meetings.

International – a Rotary club comprised primarily of expatriots who wish to work together in their common language. Could also represent members that only want to do international service.