District 7630
Membership Summit
October 5, 2019

Name _____

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slide sets and handout pages available at:

tinyurl.com/7630membership

Membership Growth Plan
Rotary Club of _____

Save this template as an MSWord file where you can work on it until complete.

Clubs should complete a written Club Membership Growth Plan <u>no later than October 15</u> to ensure success in the most important Key Performance Indicator (KPI) of a healthy, vibrant Rotary club -- consistent, moderate membership growth. Clubs that already have comprehensive written membership plans may provide those instead.

Rotary is a Membership Organization and Our Product is Service. If you get Membership right, pretty much everything else takes care of itself. If you don't get membership right, everything else is a struggle for the whole year. Work on membership **first,** get your membership committee up and running **first, and** then attend to other priorities.

There is a huge difference between a membership slogan or concept and a membership plan. <u>An effective membership plan addresses all **4 essential success factors** of club membership growth</u>. To be successful, a club must plan and execute intentional, effective strategies for each of these areas:

1. **Prospect Identification (Lead Generation) -** A club must create and execute effective strategies for regularly prompting and inspiring members to bring a consistent stream of friends, neighbors and business associates to consider Rotary as part of their lives. This is the most common "missing link" in most club plans.

2. **Attracting Members -** Effectively presenting Rotary to qualified potential members. Many clubs experience a 50%+ success rate with potential members attending a **Rotary Information Hour**. We have a great product, and people will join if we present it well.

3. **Onboarding New Members -** The first step in long-term retention of members is an effective Rotary orientation and training program. Engaging members in the club's activities during their first year of membership is essential to retention success.

4. **Retaining Members -** It's much easier to retain a member than to find a replacement. Members stay because a club does meaningful, **Rotary-branded** service projects of its own (not writing checks to other non-profits). Hands-on, shoulder-to-shoulder service work is where members get to know and bond with each other. Clubs with attrition rates over 15% should prioritize these strategies. Start with the [Rotary Club Health Check](#).

The 1-Page Membership Plan Template that follows is a framework for you to identify intentional strategies for success in these 4 essential areas. Built in MS-Word format, you may edit or modify as it suits your club and your plan. Sections expand as you build your plan.

You may wish to take advantage of several excellent resources that have proven helpful for other clubs:

*   10 Intentional Membership Strategies that **work**: https://www.rizones33-34.org/?s=intentional
*   Recipe for a Successful Membership Event: https://www.rizones33-34.org/?s=recipe
*   Rotary Club Health Check: https://my.rotary.org/en/document/rotary-club-health-check

Your District Membership Team and AG will work directly with the president, membership chair and/or board of directors to provide ideas, suggestions and resources to help in the completion of your plan. Your District Membership team is also available to assist.

Membership Plans are due October 15. Please email your completed plan to your member Chair, Assistant Governor <u>and</u> District Governor by that date. We will focus on these plans at our October 5th Membership Seminar.

<div align="center">

Hope is not a strategy

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Membership Growth Plan
Rotary Club of _____

Current Membership: _____ members   **Average Annual Attrition:** _____ members
Actual Club Data at: http://RIZones33-34.org/Zone33MGI (page down to your District/Club)

Membership Goal -- Grow by _____ members (net), requiring _____ new members (growth + attrition)

Our Membership Challenges -- What are the membership challenges facing our club?

☐ High Attrition rate?   ☐ Low Attraction Rate?   ☐ Maintaining existing growth momentum?

Prospect Identification (Lead Generation) -- What is our plan for prompting members to think of candidates <u>AND</u> for inspiring members to contact them?
Intentional strategy(ies) we will use:

Who's responsible/accountable?	

Attracting Members -- How will we make our club attractive to prospects? How will we tell the Rotary story?
Intentional strategy(ies) we will use:

Who's responsible/accountable?	

Onboarding New Members -- How will we ensure that new members understand Rotary, our club, expectations and opportunities for service?
Intentional strategy(ies) we will use:

Who's responsible/accountable?	

Retaining Members -- How will we improve our club experience so members want to remain in Rotary? How will we make our service projects more compelling for our members?
Intentional strategy(ies) we will use:

Who's responsible/accountable?	

5 Things I Wish All Rotarians Knew (and Believed) about Membership

1. **Nothing Else Matters** -- **Rotary is a Membership Organization and Our Product is Service.** If you get Membership right, pretty much everything else takes care of itself. If you don't get membership right, everything else is a struggle for the whole year. Work on membership **first,** get your membership committee up and running **first, and** then attend to other priorities. Make sure your membership chair is 100% committed to membership growth, and to getting started in April or May (the April or May **before** the next Rotary year). And that the Membership Chair has a committee. *NOTE: A committee cannot be one member!*

2. **Attrition is Real** -- Membership organizations lose members, most at alarming rates. I know, you're thinking "Nobody would quit our great club". Wrong. The 5-year <u>average</u> attrition rate for Zone 33 clubs is **fouteen percent (14%) annually.** Half of those leave for reasons you can't control. A handful of clubs have long-term attrition rates below 10% and **none** lower than 8%. Build your membership plan around the assumption that 15% of your members will leave during this next Rotary year, and have a plan to replace them. Count your blessings (and your membership gain) if that doesn't happen.

3. **Retention is Important for the LONG Term** -- Retention rates can be changed over time, not quickly, and <u>you can't retain your way from 20 to 30 members</u>. Work on retention strategies, but don't count on moving the needle quickly. Find out why people leave through exit surveys, and fix those problems. | **Hint**: <mark>Most attrition casualties have been members less than 1, 2 or 3 years (<1 year = highest attrition)</mark>. Focus your retention strategies on those members.

4. **Clubs <u>need</u> membership growth every year** -- It doesn't have to be dramatic. 4% annual membership growth will double the size of your club in 18 years. What you want to develop is a **membership growth culture** -- the fundamental belief that the club grows a little every year and avoids huge declines along the way. It's not a series of "membership drives", but a consistent, sustained effort. We have examples of clubs doing just this, with <u>only **one** year of decline</u> (by 1 member) along the way. Set your goal at 10% net membership growth (plus an estimate of 15% attrition).

5. **It takes Intentional Strategies** -- Discard generalities like, "Ask members to bring guests to meetings". Change that to, "Ask "x" members to bring "y" guests to a meeting <u>about Rotary membership</u> on mm/dd/yyyy", and you might have something, if the rest of the plan for reminders, follow up, etc. is in place. Lather, rinse, repeat.
Likewise, financial and other incentives for membership recruiting are surprisingly <u>ineffective</u> -- you can't make the prize big enough to be "worth the effort" after a member thinks about it for awhile. It's a nice "thank you", but don't count on incentives alone.

   Remember the 10:3:1 Rule -- It takes about 10 names or referrals (suspects) to get 3 prospects to a Rotary Information Hour or Rotary club meeting, to get **one** new member proposal. Lack of sufficient "lead generation" is a root cause of low rates of new member flow.

   Zone 33 (thanks to Terry Weaver, PDG of D7750) has a list of **10 Intentional Strategies** that **are proven to work**.

If you **understand** and **believe** these truths, your year as President will be successful, rewarding and perhaps legendary in the life of your club.

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Recipe for a Successful
Rotary Membership Event

A successful Rotary Membership Event (Rotary Information Hour, Discover Rotary, etc.) starts with the right framework. This is a "business seminar", rather than a Rotary meeting, social hour, networking event, etc. Think about how you'd organize a new product introduction event for your company's prospects or customers.

Besides advance planning (enough lead time for members to get prospects lined up), a successful membership event has several essential ingredients, most of which occur before the event:

Pre-Planning

1. Enter the event on the DACdb club calendar. Better yet, set it up as Online Registration, where members can register themselves and their guests. This simplifies logistics

2. Make members <u>accountable</u> to bring prospects. This is not the same as "ask members to bring prospects". Accountability means that EACH member has committed to someone (or several someones) to show up with at least **one** prospect in tow.

3. Execute one or more intentional strategies to help members think of prospects
    a. Invitation Card at each member's place at the next meeting, with instructions to invite someone and report contact info to the Membership Committee
    b. "Who Do You Know" exercise at a Club Assembly. Every member knows someone to invite!
    c. A targeted list of business or community leaders, with someone responsible for contacting each (assigned at Club Assembly). Do a "Gao Analysis" of your club's classifications against those available in your community. Our clubs do need to represent our communities!

4. Members report their confirmed prospects **in advance** of the event - at least a week, to the Membership Committee. That lets you know which members have come through with a committed prospect and which haven't -- time for you to contact those and remind them they need to bring a prospect. Prospect information at a minimum:
    a. Name
    b. Email
    c. Mobile Phone #

    Important: All Prospects are entered in DACdb as "Potential Members" and included in Email distributions of the club's E-Bulletin or E-Newsletter, both before and after the event. Enter the member who invited them in the "Sponsor" field.

5. Membership Committee **emails** prospects with a **reminder** and all event info - time, place, dress code (probably business casual), etc. 2-3 days **before** the event (personalize with DACdb Pmail). One more message the day of the event. Member that invited the Prospect should also call them.

6. Membership Committee **texts** each prospect a short reminder the **morning of** the event

Event Day

The event itself should be practiced in advance and well executed. Essentials:

1. **Sign-in sheet** at the door -- Name, Email, Mobile Phone and Sponsor (who invited them). Make certain that someone is responsible for not only getting guests to sign in, but also to add walk-ins and contact data you collect to their Potential Member profiles in DACdb after the event.

2. **Refreshments** -- Perhaps served as prospects and members arrive.

3. **Agenda** -- VERY simple agendas work best
    a. **Introductions** -- Emphasize "30 seconds" each: (intent is 10 minutes, max. for all introductions)
        i. Name
        ii. Vocation (or past, if retired)
        iii. For prospects, "What sparked your interest in Rotary?"
        iv. For members, "What attracted you to Rotary, and what's kept you coming back?"

    Host or MC goes first, setting an example within the 30-second time budget. Practice this before-hand!

    b. **Rotary Overview** -- 20 minutes or less, with GOOD visuals, perhaps 2 or 3 presenters:
- i. Origin of Rotary, Object of Rotary, 4-way Test
- ii. Club overview - History, size, meeting day/time
- iii. Avenues of Service & Service Projects (Local and International)
- iv. The Rotary Foundation - highlights only -- This is what funds "Doing Good in the World"
- v. Membership is by Invitation. Include overview of financial commitment
- vi. "What happens if I join?" -- Onboarding/orientation process. Expectations of being a member
- vii. Hand out applications (use the info form from DACDB) -- "Please return to your sponsor (the member who invited you)"

    c. **Take Home Collateral --** Hand out a Rotary Brochure or Club Brochure for each prospect, along with a business card (President, Secretary, Membership Chair, etc.)

    d. **Wrap-up**, invitation to stay for refreshments, networking, etc. (20 minutes left to stay inside 1 hour)

Note: **NO** Invocation, **NO** pledge, **NO** song, **NO** "Rotary Meeting" preliminaries, **NO** Rotary business - this is a "business seminar" format. Stay focused on the purpose of this meeting. Think of what YOU would want to hear and learn at one of these sessions if you had attended one. Simple is best! Details can come after they have become a member.

The Fortune is in the Follow-Up

Sponsors are primarily responsible for phone follow-up, same day or next day, inviting them to join and asking, "what's your decision-making timetable?", and reporting same to Membership Committee. Additionally:

1. Follow-Up Email, thanking prospects for attending - same day or next day (create a template for all to use)

2. Phone call from President or Membership chair within 2 days, asking if any questions and inviting them to join. (create a standard script before making these calls)

3. Sponsor continues to follow up until we get a "Yes", "No" or "Not Now".
   a. **Yes** -- proceed with Membership Proposal process
   b. **Not Now** -- Keep as Potential Member and in "drip marketing", sending your E-Newsletter or E-Bulletin by PMail once or twice a month.
   c. **No** -- Terminate from DACdb to drop them out of your prospect list

Repeat

This is a playbook you can run two, three or four times a year. One club has a membership event every month, just before a regular meeting. Members will have prospects who can't make a given date. If you go ahead and schedule the next one out a few months, many times they can get a commitment for the alternate date.

REMEMBER:

We are in competition for everyone's time, talent and treasure. Therefore, we must put forth a "value-proposition" that meets the needs of our prospects, and meets the needs of our communities. For Rotary club to continue to grow and succeed, we must continually understand our communities, adapt to their needs, and attract new members that will assist us in achieving these goals. This requires ongoing assessments of our clubs and our communities. By doing so, your club should continue to grow. If you are not growing, you are dying. There is no such thing as "stable" when it comes to membership.

Discover Rotary Hour

Wed May 29, 2019
5:30pm - 6:30pm

4:30pm - set-up
- Make sure we have registration table
- Set up projector, screen, and connect laptop for slide show; make sure it is ready to go

5:30 - 5:45pm - registration & mingle
- Registration - have name tags (stickers) pre-printed?
- Socialize, network

5:45pm - presentation begins
- Membership chair (Paul Keely) welcomes everyone
- Asks all to introduce themselves;
    - Rotarians; name, occupation, why you joined Rotary, and your Rotary "ah ha" moment; 30 seconds each
    - Guests; name, occupation, why you're here; 60 second each
- Part 1 of 3; Rotary in the World
    - Slide 1a; photo of Paul Harris; year Rotary started; why we're called Rotary
    - Slide 2a; timeline (foundation starts, 1st international club, Polio Plus starts, etc.)
    - Slide 3a; stats; # members, # clubs, # countries. "Rotary is Bottom-Up; every starts at the club"
    - Slide 4a; The Four-Way Test
    - Slide 5a; People of Action
- Part 2 of 3; Newark Morning Rotary
    - Slide 1b; image of 1st Report cover?
    - Slide 2b; brief history
    - Slide 3b; stats; $ spent in 20 years, # service hours, recipients of $ and time
    - Slide 4b; who we are; list of professions, range of ages
    - Slide 5b; "The most fun you can have at 7:00am!"
- Part 3 of 3; Is this for me?
    - Slide 1c; meeting info (date, time, format)
    - Slide 2c; service activities; need photos of 4 - 5 projects
    - Slide 3c; recent district grant projects
    - Slide 4c; list of membership types

6:15pm - Q&A

6:30pm - presentation concludes; invite to social, and to club meeting tomorrow morning (or any Thursday)

6 Failed Membership Strategies Rotary Clubs Love

The Rotary Zone 33 Rotary Coordinator Team has been successfully training clubs on attracting, onboarding and retaining members, recommending **10 Intentional Membership Strategies** proven by clubs to work. Surprisingly, a set of legendary strategies that **don't work** continue to appeal to clubs. To save your club a lot of time and frustration, **here's a list of strategies to avoid**:

1. Club socials, "meet and greets" with prospective members invited as guests

2. Invite prospective members to regular club meetings

3. Incentives -- Offer members an incentive, such as "free dues for a quarter", gift cards or gift certificates, Foundation Recognition Points, etc. for proposing a new member

4. Free or reduced dues for new members

5. Podium announcements, newsletters, bulletins, emails, etc. asking members in mass to propose new members

6. Direct mail, print advertising, billboards, post cards or emails inviting prospects to events or meetings

WHY these strategies don't work to attract members

- **Club socials, "meet and greets" with prospective members invited as guests --** Clubs love this idea. Who wouldn't? Have a party and use membership as an excuse. Trouble is, a good social is a lousy venue for having a serious, informative conversation about what Rotary is and does. Members mostly talk with each other, guests feel a bit awkward and go home with, at best, a feeling that Rotary "may be OK".
  No call to action = no action.

- **Invite prospective members to regular club meetings** - Almost as ineffective as socials. In the average club meeting, 2 or 3 minutes focused on what Rotary is or does would be the exception. Prospects meet some nice people, perhaps hear a good program, have a great meal, and leave without knowing any more about Rotary than when they came in. They go home wondering, "What's that all about?" Conversion rates of 1 in 10 (1 new member for every 10 prospects at meetings) for this strategy are about the best you can expect, even with great member follow-up.
  Rather, a focused **Rotary Membership Event** can yield 1 new member for every 2 prospects.

- **Incentives** --- Offering members an incentive, such as "free dues for a quarter", gift cards or gift certificates, Foundation Recognition Points, etc, for proposing a new member -- For a full understanding of this one, read *Predictably Irrational: The Hidden Forces That Shape Our Decisions*. A weird thing happens when you attach money to something. Suddenly, instead of thinking, "That's even a better reason to do something I ought to do anyway" the member starts thinking, "There are probably easier ways for me to make $150." The problem is, you can't make it big enough to make the money matter in its own right. If you could offer, say, $2,000 it might work.   If your budget will support that, give it a try.
  This strategy also makes the prospect feel like they are being "sold" on Rotary. We do not want to recruit anyone – we would rather attract those who have a genuine interest. If you recruit a new member to Rotary, the recruiting doesn't end there, because you then need to recruit them to pay dues, recruit to meetings, recruit to club functions, etc. This new recruited member just became a lot of work. If anyone needs more work to do, then incentives will guarantee you that result.

- **Free or reduced dues for new members** -- In general, community service isn't free and community service including a meal several times per month surely isn't free. Rotary isn't for everyone, and particularly not for someone for whom the cost is a hardship. We don't do anyone any favors by asking them to give up something else to be part of Rotary. If the "sticker price" of Rotary is too much, reducing that by half or to zero for a while is just postponing the inevitable. When the full dues rate kicks in, it will still be too much and you just upped your attrition, or reduced your retention. .
  Note: The jury is out on the intentional strategy of bringing in Young Professionals who age out of subsidized dues by, say, age 35. It seems to work for country clubs and may work for Rotary, as well.

- **Podium announcements, newsletters, emails, etc. asking members in mass to propose new members** -- In even a group of 20 people, let alone 200, a general "ask" is anonymous - everyone at the table assumes the speaker is talking to the person on his left or right -- that someone else will take care of it. A real one-on-one conversation in person or by phone (a personal "ask") where you ask for and receive a commitment, is a whole different deal.

- **Direct mail, print advertising, billboards, post cards or emails inviting prospects to events or meetings** -- Clubs love this because it's easy. Doesn't work at all. If our own members won't pay attention to an anonymous "ask", why would prospects respond to an anonymous ask? The way to get prospects to a membership event (not a regular club meeting) is for a member who knows them to invite them personally, get their firm (not "Maybe" or "I'll try") commitment to come and offer to pick them up.
  If you really want to try this strategy, it would be a lot more entertaining to take the same money spent on these ideas, but instead convert it all to $1 bills and throw them down main street and watch the mayhem. Your results for attracting new members will be about the same.

If you really want your club to be successful in attracting, onboarding and retaining members, have a look at **10 Intentional Membership Strategies** proven by clubs to work. You need at least 1 strategy for each of the Membership Key Success Factors:

- Prospect Identification (Lead Generation)
- Attraction
- Onboarding
- Retention

Prospect Identification (Lead Generation)

1. Use the "**Who do You Know?**" handout at a Club Assembly. Actually allow time for people to fill it out (making it clear we're not leaving 'till everyone has some names written down) and <u>then</u> ask them to invite 10 of those people to a Rotary Information Hour (<u>remember the 10:3:1 rule</u>).

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2. **Classification/Profession Gap Analysis** -- Secure a list of local businesses and professions from the Chamber of Commerce and/or list sources like InfoUSA or ZoomInfo (available at your local Library). Identify businesses and professions that ought to have someone in Rotary. Present the list at a Club Assembly and ask which members know someone at each and who will invite them to an upcoming Rotary Information Hour (#4 below).

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3. **Club President personally asks** <u>each member</u> to bring a prospect to a Rotary Information Hour (#4 below) -- an eyeball-to-eyeball conversation over breakfast, lunch, coffee, adult beverage or a 2-way telephone conversation. Takes the anonymity out of the ask. "Can I count on you doing this not only for the **club** but also for **me**?"

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Attracting Members

 # 1 PROVEN ROI Strategy

4. A regularly-scheduled "**Rotary Information Hour**" once a quarter or once a month. The "intentional" part of this is that it's a standing event, on the club calendar, and members are reminded by email or phone to bring their prospective members. Not just to a meeting whenever you think of it, but to a regularly scheduled date, time and place. See: **Recipe for a Successful Membership Event**

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 # 1 PROVEN ROI Strategy

5. **"Drip Marketing**" -- Create a central prospect list, including email addresses, and use the "Potential Member" feature in DaCdb or another email distribution mechanism (Vertical Response, Constant Contact or MailChimp), to send your club's E-Bulletin once or twice a month to your entire prospect list. Regularly reminding prospects of your club's brand makes you "Top of Mind" when the time is right for the prospect to join a community service organization. Be sure and include "Response" information so they know how to raise their hands when they're ready. See: **Don't Squander Your Leads**

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6. **Take advantage of flexibilities from the 2016 Council on Legislation**, **(1)** such as a Corporate Membership category, allowing multiple people from a company to become Rotarians, with one being the "Corporate Active" member and the others "Corporate Associates". **(2)** Or create a "YP-35" membership category that follows the "Rule of 85" dues, meals and attendance structures. **(3)** Create Satellite club(s) for groups of members that have a different need or focus from the standard club. **(4)** Get creative. Put actions in place that are relevant for your club. **https://www.rotary.org/myrotary/en/club-flexibility**

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Onboarding New Members

7. Create a **New Member Orientation** program and process to engage members immediately in your club. Early engagement is the key success factor in retention. To follow up your New Member Orientation, use the **New Member Scavenger Hunt** for a fun way to get members engaged in learning more about Rotary and about your club. Consider a Red Badge/Blue Badge program.

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Retaining Members

8. **Upgrade the Club Experience** -- Clubs have proven that the club experience (including great programs) is what attracts and keeps members.   Programs need to be informative, educational or inspirational (or a combination thereof). Limit or avoid programs by other non-profits (members see those as fundraising requests) unless there is a value proposition for your club. Use the **Rotary Club Health Check**.

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9. **Mentorship --** Create a mentorship plan to assign an experienced member to work with a new member. Mentors help new members get acquainted and engaged with existing members.

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10. **Meaningful Service Projects** -- The bottom line of engaging and retaining members is for the club to do meaningful, **Rotary-branded** service projects of its own (not writing checks to other non-profits). Hands-on, shoulder-to-shoulder service work is where members get to know and bond with each other.

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HOPE is NOT a Strategy

"Who do You Know?"
Club Assembly Exercise

This very useful worksheet, properly deployed, can be a great "lead generation" exercise for your club.   Most clubs that fall short of their growth goals do so because of a lack of "lead flow", meaning they don't have enough people on their prospect lists.

The 10-3-1 Rule

People experienced at prospecting realize that not every prospect will come through, whether as a customer or as a new Rotary member.   In major league baseball, a 30% hit ratio is considered GOOD, even if it's a 30% hit ratio of only singles.

Generally speaking, it will take about **10** leads (referrals or acquaintances) to get into **3** substantive conversations about Rotary, to get **1** member.

How to Use This Worksheet

Most Important: This is not "homework".   Anyone who has let a member take this home, expecting to get it back has been disappointed. That doesn't work.

Second Most Important: This information is **not** for the Membership Committee. When this exercise is complete, **don't** ask members to pass the worksheets in.   What that does is imply that it's the Membership Committee's job to contact prospects and attract new members.   Keep that shoe appropriately on the member's foot. In a Rotary Club it's **everyone's** job to attract new members.

Quick Start Guide

- Announce a **Club Assembly** where members are asked to bring their contact information
- **Send reminders** a few days before and the day of the meeting emphasizing contact information
- **Print** the "Who do You Know" worksheet 2-sided and lay one at each member's seat
- At the meeting, explain **why** it's essential to build membership
- **Explain** the exercise -- 20 minutes, heads-down, listing everyone we know
- **Walk the room** to be sure members are engaged -- break up "chit-chat" sessions
- After 20 minutes, ask for show of hands -- how many have 50, 40, 30, etc.
- Ask them to **circle** 3 or 4 they would approach to invite to a future membership event or meeting
- Option -- Have them list those 3 or 4 on a 3"x5" card -- membership committee to follows up with them

See next page for detailed "How to use this worksheet"

Detailed "How-to"

1. At least a week in advance, **Announce to your members** that an upcoming meeting will be a Club Assembly, where they need to bring all their personal and business contact information. That may be on a smartphone, tablet, laptop, Rolodex, business cards in a rubber band, or handwritten on notebook paper. Email or phone all members, so you also reach those who weren't at the meeting.

2. **Remind your members** to bring their contact information to the meeting.   Use phone or email, a few days before the meeting **and** the morning of the meeting.   Make sure there's enough communication that "dog ate my business cards" isn't a plausible excuse.

3. Lay out the 2-sided "Who do You Know" Worksheet on each table - 1 per member.

4. As you open the exercise, explain **why** this is important -- It's essential to build our membership, and we need members bringing prospects to membership events and as guests at meetings to ensure a steady flow of new member candidates. **We need more prospects.**

5. Explain **what** we're going to do -- We're going to take 20 minutes, individually, to recall as many people as we can who we know - not necessarily prospects, just people we know. This is to be a "free flow" or "personal brainstorming" process.   We'll decide later who are the best prospects.

6. Go into "Proctor" mode.   Some members won't take you seriously. If you let that happen, the exercise will collapse. Walk the room.   When you find a couple of members chit-chatting instead of doing the assignment, say, "Guys, I really need your help with this. You may have a better idea for how to identify prospects, but I'm asking you to humor me for the next few minutes, and give this process a try."

7. When the time is up, ask how many people have 50 names (show of hands), 40 names, 30 names, etc.   Depending on your club culture, you might chide those with less than 10, saying, "You really need to get out more."

8. Ask each member to **circle** the 3 or 4 people they plan to contact in the next week to invite them to either a pre-determined prospective member event, or to a future meeting focused on membership.

9. **OPTION**:   You might also have 3"x5" cards on the table where they can report their 3 names to the membership committee so you can remind them of their commitment. They take the full prospect list with them, and the membership committee tracks only the 3 "best prospects"..

IMPORTANT: Please **don't** take up these sheets after the meeting.   That suggests to the members that it's somebody else's responsibility to approach and contact these prospects.   Keep that shoe on the member's foot -- it's everyone's job to regularly bring prospective members to Rotary.

Follow up -- At the next meeting or by email, ask members how they're doing on their 3 prospects.   If they're not making the contacts, ask "What's getting in the way?"   Then see what you can suggest to break down the excuses or roadblocks.

GOAL: If you can get each member to bring just **one** prospect to the table, you'll eclipse most any prior membership development effort in your club. Getting members to act on approaching and inviting members is not only your biggest challenge, but also your key success factor.

Please let us know how you used this worksheet and how it worked for you.
Email DG2015@Rotary7750.org with your experience.

25-Minute Membership Survey

Your Name _____ Date _____

Your Phone _____

Your E-mail _____

Consider professional colleagues, community leaders, and acquaintances who might qualify as potential Rotarians.

Your neighbor(s):

1. Male _____ Occupation _____

2. Female _____ Occupation _____

3. Male _____ Occupation _____

4. Female _____ Occupation _____

Your immediate manager (if applicable):

5. _____ Job Title _____

Another business professional within your company or organization:

6. _____ Job Title _____

Community leaders with a commitment to service:

7. _____ Occupation _____

8. _____ Occupation _____

RI or TRF program alumni your club maintains contact with:

9. _____ Occupation _____

Professional business association colleaques:

10. _____ Occupation _____

11. _____ Occupation _____

Consider your professional acquaintances:

12. Physician _____

13. Dentist _____

14. Financial Manager/Planner _____

15. Religious Leader _____

16. Attorney _____

17. Business Consultant _____

18. CPA _____

19. Veterinarian _____

20. Internet Technology Consultant _____

21. Public Relations Manager _____

22. Entrepreneur _____

23. Non-profit Executive Director _____

24. School Administrator _____

25. Other _____

Professional acquaintance (not named above) that you have done business with in the last week:

26. Name _____ Occupation _____

Professional acquaintances (not named above) that you have done business with in the last month:

27. Name _____ Occupation _____

28. Name _____ Occupation _____

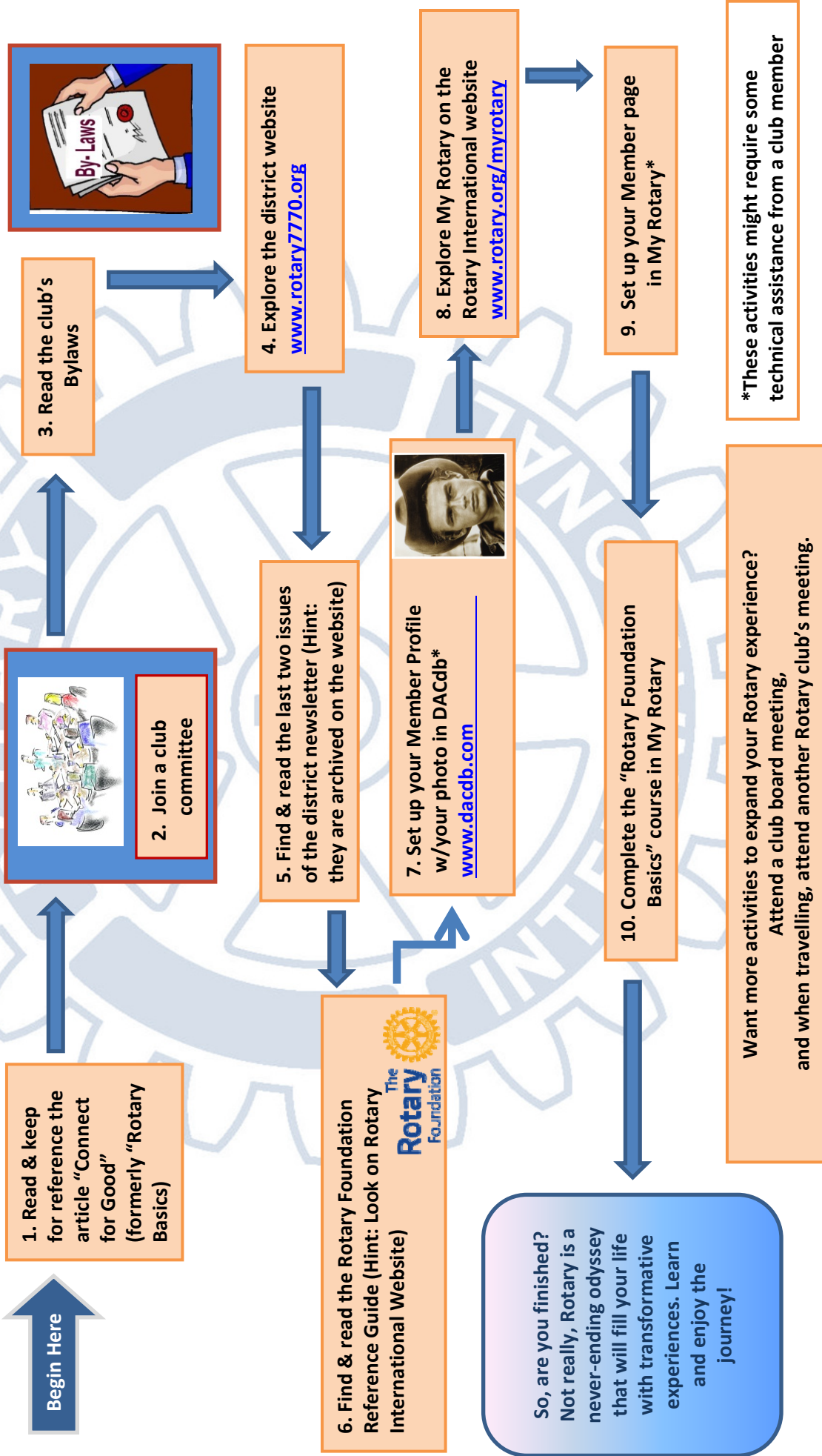Personal acquaintances who have volunteered with you (for a Rotary or a non-Rotary event/service project):

29. Name _____ Occupation _____

30. Name _____ Occupation _____

Rotary

Scavenger Hunt

Welcome to the Rotary new member scavenger hunt! Although not mandatory for your admittance to the club, we hope you will find this activity interesting and fun as you navigate Rotary to become more knowledgeable about Rotary and its service to mankind. Completion of the hunt will expand your knowledge about the opportunities of Rotary service and the organization of Rotary International, the district, and the club. The club membership chair will act as your guide throughout this process; however, any club member will be happy to help you as well.

Begin Here

1. Read & keep for reference the article "Connect for Good" (formerly "Rotary Basics)

2. Join a club committee

3. Read the club's Bylaws

4. Explore the district website
www.rotary7770.org

5. Find & read the last two issues of the district newsletter (Hint: they are archived on the website)

6. Find & read the Rotary Foundation Reference Guide (Hint: Look on Rotary International Website)

7. Set up your Member Profile w/your photo in DACdb*
www.dacdb.com _____

8. Explore My Rotary on the Rotary International website
www.rotary.org/myrotary

9. Set up your Member page in My Rotary*

10. Complete the "Rotary Foundation Basics" course in My Rotary

*These activities might require some technical assistance from a club member

Want more activities to expand your Rotary experience?
Attend a club board meeting,
and when travelling, attend another Rotary club's meeting.

So, are you finished? Not really, Rotary is a never-ending odyssey that will fill your life with transformative experiences. Learn and enjoy the journey!

ROTARY CLUB
HEALTH CHECK

tinyurl.com/rotaryhealthcheck

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.

MEMBERSHIP RECRUITMENT

Don't squander your leads

By PDG Terry Weaver
Rotary Club of Greenville
Zone 33 Assistant Membership Coordinator

The only thing worse than not having a pipeline of potential Rotarians is squandering those that you have. It's one of the most common failings of not only businesses but also Rotary clubs.

What do I mean by "squandering"? I mean not having a central, institutional place where we record at least the names, mobile phone numbers and email addresses of people who may have an interest in Rotary. People who may be Rotarians, but just haven't realized it yet. Absent an institutional prospect management platform (one that everyone in the organization uses) people cook up their own, using things ranging from Google sheets to personal spreadsheets to notebook paper, cocktail napkins and (the worst) human memory.

So how could you create your storage place? By using a tool you're already familiar with—the District and Club Database (DACdb). While originally intended to track active members, DACdb also has several non-member categories, such as Guest, Potential Member and Proposed Member.

Implementation is easy—just notify club leaders, the club Secretary and Membership Committee that your club is now getting serious about intentional membership growth strategies and that tracking and nurturing prospects is one of those intentional strategies. Then start using the **Guest** and **Potential Member** types immediately, including sweeping up and entering those that members have been tracking with schemes of their own.

One caution: Be **sure** to **first** change the Member Type (when Add a New Member) to one of these non-member types. It defaults to Active, which, if saved, will result in sending a New Member add to Rotary International. Using any of the non-member types, such as Guest, Potential or Proposed sends nothing to RI until you switch them to **Active.**

How to use the leads you track in DaCdb

1	Ask guests at your meetings to give you, at a minimum, their 　　Name 　　Email Address 　　Mobile Phone Number
2	Ask also (a check box on your sign-in sheet or guest registration card), "Would you have an interest in more information about Rotary?"
3	Enter those who don't in DACdb (add a member) using the Guest member type. You can later upgrade them to a Potential Member if they express more interest.
4	Enter those who do in DACdb (add a member) using the Potential Member type
5	Enter anyone who a member registers for an upcoming Membership Event as a Potential Member.
6	Send a reminder PMail from DACdb a couple of days before your Membership Event to those registered
7	Drip Marketing — This is a free way to put your club's "brand" in front of these prospects on a regular basis (once or twice a month). Pmail your club newsletter or bulletins to at least the Potential Members and Proposed Members (upgraded from Potential Members when a signed membership proposal is received).
8	Volunteer & Event Invitations — When your club has a project that needs either volunteer manpower or non-member attendance or participation, send that message (similar to the one you're sending your members) to all those member types.
9	Regular follow-up — Guests and Potential Members appear on the "Other Members" tab in the My Club view of DACdb. That gives potential sponsors, club leaders and the Membership Committee a quick and easy means of checking in with prospects by phone or email to see where they are in their decision-making timeline.

Please let us know how this works out for you. Email dg2015@Rotary7750.org with your stories.