

# GETTING TO KNOW PROSPECTIVE AND NEW MEMBERS: MEMBER INTEREST SURVEY



Did you know that when members leave Rotary, one of the primary reasons they cite is that their expectations weren't met? Getting to know new and prospective members early on is helpful for everyone. If you understand someone's background, interests, and what they want to contribute, you can determine whether your club can offer what they want and how to involve them in ways they'll enjoy. You might even find opportunities for them to help your club grow. Surveying new and prospective members gives you feedback on any factors that might prevent them from joining or fully participating. You may also discover ways your club can be more flexible and accommodate more people.

## WHAT YOU'LL GAIN

If you consistently conduct this survey and act on its results, you can:

- Help prospective members and new members feel comfortable in your club
- Increase member engagement and satisfaction
- Improve your club's retention rate
- Help your club make the most of members' unique skills and expertise

## GETTING ORGANIZED

Identify a group of people who are committed to welcoming and involving new members and helping them understand the culture of your club.

This may be your membership committee or a newly organized member interest team. Next, decide how you'll use the survey. You can send it to guests who inquire about joining, include it in the membership application, make it part of new member orientation, or use it as the basis for an informal conversation. You'll also need to decide whether you'll print copies of the survey, email it to people, or use one of the survey platforms mentioned above.



Some clubs that use this survey in their membership application take an additional step. If it's clear that the club doesn't meet the person's interests, the club asks the assistant governor to find one that does.

## GETTING STARTED

### Step 1: Decide what questions to ask and who will ask them.

Review the sample questions below and use them to create your club's survey or guide your informal conversations. Not every question will apply, so you can edit them, add your own, or omit some. Save them with your club files so they're ready to use. Determine who'll be responsible for sending out the survey or having the conversations.

### Step 2: Determine when to use the questions and then do so.

Distribute the survey or schedule a time to talk based on the timing your committee decided upon. That might be after a guest's first visit or after a new member has joined. Let the person know the purpose of the survey or conversation and that their responses will help you offer them a better experience. Use the questions that your club had selected earlier.

### Step 3: Use the feedback to engage each member in ways that suit their interests.

This is the most important step. If people take the time to answer the questions thoughtfully but there's no response, they might feel frustrated, which would undermine your goal. Because you know your club and Rotary well, learning what members are interested in will enable you to connect them with activities they'll find fulfilling. Review the sample below to learn how to address a member's response.

NEW OR PROSPECTIVE MEMBER'S RESPONSE	WAYS TO ACT ON THEIR RESPONSE
<b>Example:</b> The person is interested in hands-on service, but also concerned about the attendance requirement.	Introduce the person to the service projects chair and ask if they want to join the committee.
	If your club doesn't have a strong service component, ask your assistant governor whether another club is a better fit or if there's a districtwide project the person could join.
	Ask if the person is interested in sharing their ideas for service projects your club could conduct.
	Explain that attendance is flexible (if it is in your club). If it's not, consider updating your bylaws to better accommodate people with this concern.

# MEMBER INTEREST SURVEY

## SAMPLE QUESTIONS

### Your background

1. What is your name and what do you like to be called?

What are your pronouns? (We ask because we always want to treat people with respect and ensure that people feel welcome.)

My pronouns are:   \_\_\_ he/him/his   \_\_\_ she/her/hers   \_\_\_ they/them/theirs

2. What title do you prefer? Please circle one:   Mr. / Mrs. / Ms. / Miss / Other: \_\_\_\_\_

3. Tell us about your areas of expertise.

4. What is your current or former profession?

5. What is your general field or industry? (For example, sales, publishing, etc.)

6. When is your birthday? (We ask so that we can honor you if you wish.)

7. Are there other significant dates we can help you or those close to you celebrate?

8. Tell us about where you grew up or the places you've lived.

9. What hobbies or interests would you like us to know about?

## Membership in Rotary

1. What motivated you to get involved with the club? How did you learn about us?
2. Have you engaged with Rotary in the past? If so, how?
3. What do you want most from your experience as a member?
4. What opportunities would keep you interested and improve your Rotary experience?
5. What strengths and skills do you have that could help your club?
6. Please rank these in order of what you want from your Rotary experience, using 1 for most important and 5 for least important:
  - \_\_\_ Friendship and fun
  - \_\_\_ Service activities
  - \_\_\_ Networking opportunities
  - \_\_\_ Leadership and personal development
  - \_\_\_ The club meeting experience

## Friendship and fun

1. What social activities are you excited to do with the club? This could include having coffee or tea and getting to know others better or attending sporting or cultural events.
2. What do you like about the club's social activities so far?

## Service activities

1. What needs in our community do you think are most vital for our club to address through service projects?
2. Are there any organizations that you'd like the club to work with to address needs locally or internationally?
3. What experience have you had in community activities? What are your main community interests?
4. Are you aware of any current club projects that you'd like to be involved in?

## Networking opportunities

1. What kinds of networking opportunities do you hope being a Rotary member will offer?
2. What do you like about the club's networking opportunities so far?

## Leadership and personal development

1. Our club has many roles that can help you develop your leadership skills. Mark any roles below that you want to learn more about or have questions about:

Club president

Club secretary

Club treasurer

Club administration committee member

Club membership committee member

Club public image committee member

Club service project committee member

Club Rotary Foundation committee member

Other (Please specify.) \_\_\_\_\_

2. Do you have experience in volunteer leadership?

3. Are you interested in serving in a club leadership role at some point?

## The club meeting experience

1. What are your expectations for club meetings or the topics you want addressed there?

2. Can you attend meetings on [day] and [time] (enter your meeting schedule)?

Circle one: Yes / No / Unsure

3. How do you feel about the meeting format? (Note whether your meetings are in person, virtual, or hybrid.)

4. How do you feel about how often the club meets? (Note your club meeting frequency.)
  
5. How do you feel about the club's expectations for attendance and participation? (Note what your club's expectations are.)
  
6. Are you aware of the membership dues and fees? (List the dues and fees.)  
Circle one: Yes / No / Unsure
  
7. How do you feel about the club's fees, dues, and other costs? (Note any other costs.)

### **Want to do other assessments?**

Diversity Assessment

Prospective Member Exercise

Retention Assessment and Analysis

Member Satisfaction Survey

Exit Survey

Use the Club Action Plan in appendix 1 to track your membership efforts.