



## 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 average attrition rate for Zone 33 clubs is **fifteen percent (15%) 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 you can't retain your way from 20 to 30 members. 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: Most attrition casualties have been members less than 1, 2 or 3 years (<1 year = highest attrition)**. Focus your retention strategies on those members.
4. **Clubs need 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 only one year of decline (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 about Rotary membership 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 ineffective -- 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 **24 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.

Chris Jones  
Rotary Coordinator, Zone 33  
[chris.jones.rotary@gmail.com](mailto:chris.jones.rotary@gmail.com)  
+1-980-288-4007





## "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 "25-Minute Membership Survey" worksheet 2-sided and put 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 follow 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 "25-Minute Membership Survey" 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](mailto: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 colleagues:

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 \_\_\_\_\_



# Membership Event Invitation Cards

## The Strategy

The critical success factor in a Membership Event is prompting members to invite qualified prospects to the event. It's also important to hold members accountable for doing so. Thus, you need to know which members have committed prospects for an upcoming event and sufficient contact information on those prospects, including:

- Name
- Email Address
- Mobile Phone

## Invitation Cards

One proven strategy is to create an **Invitation Card**, given to each member at a meeting, asking them to give the card to one prospective Rotarian and invite him/her to an upcoming Membership Event. The card includes space for the minimum needed contact information, the date the and instructions for the Rotarian to advise the club (Secretary, Membership Chair, etc.) who's coming and to which upcoming event.

### IMPORTANT:


The Invitation Card is **not** an outbound mailer -- those don't work, besides being very expensive. What we're looking for is confirmation that members are making invitations and getting **commitments** from potential member guests. The card is used by the **members** to report their confirmed guests.

Set the event up as an online registration event in DACdb, as a place for the **members** to respond, identifying their prospects and providing contact information. Enter the prospects in DACdb as Potential Members, and PMail them a reminder 2-3 days before the event. Likewise, Pmail the members to remind them they have a guest coming.

## Examples

Front

Back


**Discover Rotary**  
 Come Join Us!  
 For a no-obligation Rotary Information Hour  
 Westin Poinsett  
 11 am - 12 pm -- Select date below

Tuesday, Feb. 27, 2018       Tuesday, Apr. 24, 2018  
 Tuesday, Mar., 2018         Tuesday, Jun. 26, 2018  
 Tuesday, May 22, 2018

Name: \_\_\_\_\_ Phone (mobile): \_\_\_\_\_  
 Email: \_\_\_\_\_

**Rotarian Sponsor Name:** \_\_\_\_\_

Please complete the reverse with contact information and **Discover Rotary date selection**

**Then**  
 Please do **1 of 4 things** with this card:

1. Stamp it and mail it
2. Email the contact information and date to the Rotary Office:  
**ClubAdmin@GreenvilleRotary.org**
3. Call the Rotary Office  
**864 235-2293**
4. Register yourself and your prospect online  
**www.greenvillerotaryorg/join**  
(member database login required)

Rotary Club of Greenville  
 728 N. Pleasantburg Drive  
 Greenville, SC 29607



## 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 accountable 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.



## 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.

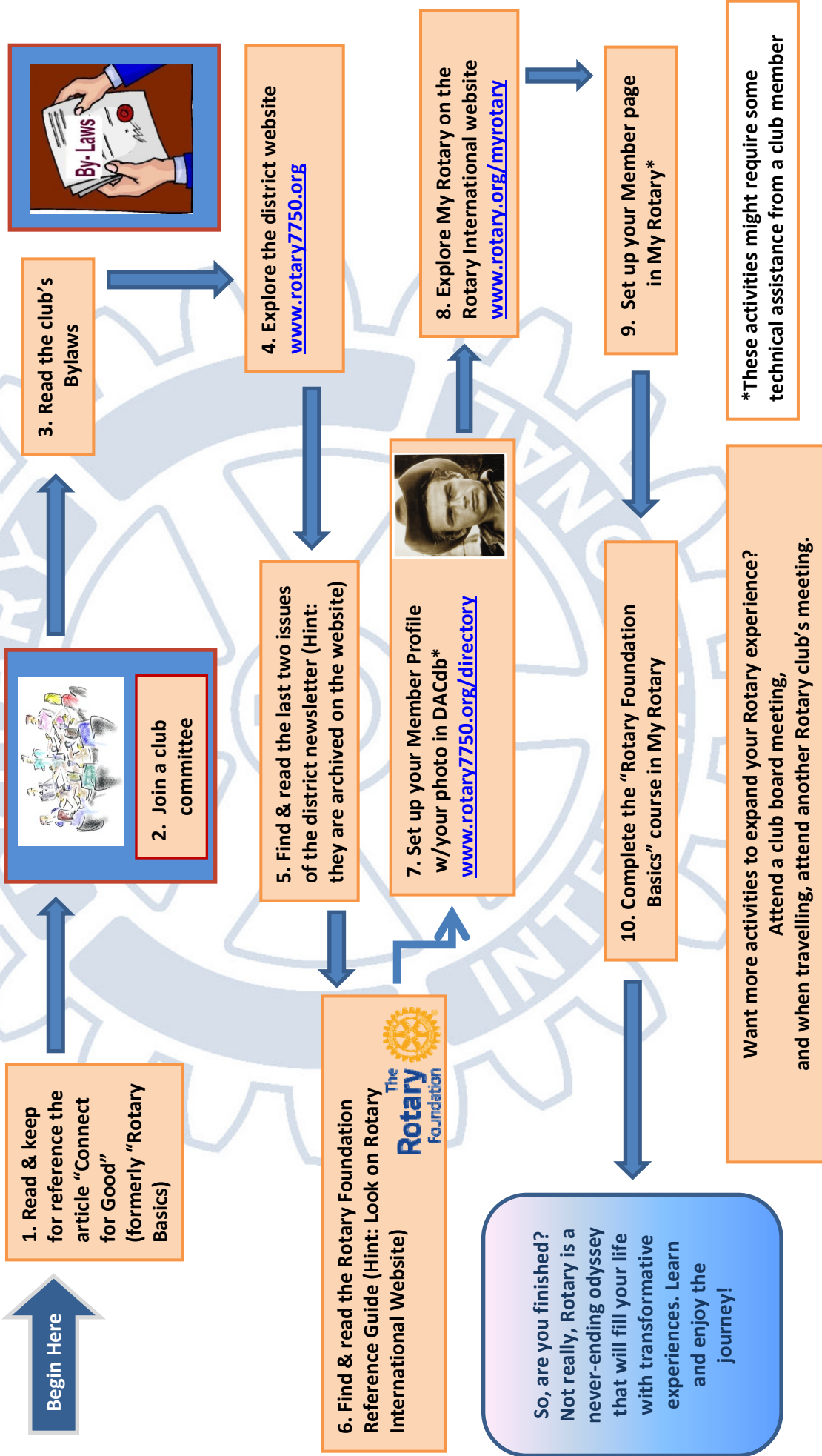
9

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.

# 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.





## Rotary Club of \_\_\_\_\_ Expectations of \_\_\_\_\_ Committee Chair

1. Attendance at all club events -- Visible leadership and engagement in club activities is part of the role of all officers, board members and committee chairs
2. Vision -- The \_\_\_\_\_ Committee is expected to:
  - [What is the Committee expected to accomplish?]
  - [What will success look like?]
3. Strategies/Activities -- The Committee is expected to:
  - [What is the Committee expected to do?]
  - [How is the Committee expected to do that?]
  - [What, if any, constraints?]
4. Metrics -- We will measure success by:
  - [Numerical results]
  - ["soft" results/observations]
  - [Interim progress milestones]
5. Support -- What resources (people, money, etc.) are available to help?
6. Sustainability -- Bringing along a vice-chair as a future replacement

### Interview questions:

- How does this role sound to you?
- Is this something you can get passionate about?
- Can you see yourself leading this for me?
- Can I count on you to lead this part of my team?



# My Action Plan Next Steps and Takeaways

Name: \_\_\_\_\_

Roles/Responsibilities/Expectations

5 Things/Club Membership Profiles

Leadership Workshop/Leading Change

Membership Growth Index - Attrition/Attraction Workshop

Intentional Membership Strategies

Delegation/Accountability & Coaching Volunteers



# My Action Plan Next Steps and Takeaways

Name: \_\_\_\_\_

## Action Plans

Activity	By When	Prerequisites/Needs

Other ideas for consideration

Obstacles I'll need to overcome

Help I need (from whom?)