



**District 7730
Membership Summit
September 17, 2022**

Name _____

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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 annual termination rate for Zone 33 clubs is **fourteen percent (14%) annually**. Half of those leave for reasons you can't control. A handful of clubs have long-term termination rates below 10%. 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, year after year. 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 **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.



Rotary

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.



6 Failed Membership Strategies Rotary Clubs Love

- **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



Intentional Membership Strategies

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 then ask them to invite 10 of those people to a Rotary Information Hour (remember the 10:3:1 rule).

<p>10:3:1 Rule</p> <ul style="list-style-type: none"> • 10 targets (conversations) • 3 Prospects (to a meeting) • 1 Member
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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 each member** 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

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](#)

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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1 PROVEN ROI Strategy

1 PROVEN ROI Strategy

6. **Innovative Clubs and Member Types - Create a product for today's market**, such as (1) 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. RIZones33-34.org/zone-33-innovative-club-advocates
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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

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 "Rotary Membership - Who Do You Know?"** 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 -- 15 minutes, heads-down, listing everyone we know on the back page
- **List the "Top 5"** potential Rotary prospects on the front page, with contact information
- **Walk the room** to be sure members are engaged -- break up "chit-chat" sessions
- **Contact the Prospects** – Members get in touch with a week to invite them to a Rotary event
- Option -- Have them list the Top 5 on a 3"x5" card so the membership committee can enter them as Prospects
- Option 2 - Have them take a photo of their page and email to the Membership chair so the membership committee can enter them as Prospects

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 "**Rotary Membership - 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 15 minutes, individually, to recall as many people as we can who we know - not necessarily prospects, just people we know, jotting those names on the "thought-starter page" (reverse side).
6. Then, enter the Top 5 on the front page, along with contact information.
7. 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 exercise a try."
8. Ask each member to contact their prospects 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 names and contact information to the membership committee. They take the full prospect list with them, and the membership committee enters them in DACdb as Potential Members
10. **OPTION 2:** Ask them to take a picture of their prospect page with their phone, and email it to the Membership Chair, who will enter them in DACdb as Potential Members, along with their contact and Sponsor information.

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.



Rotary Membership - Who Do You Know?

Your Name _____

Date _____

Your E-Mail _____

Phone _____

Considering our Rotary Club's passion and purpose - Service above Self and networking opportunities, do you know professional colleagues, community leaders, friends or acquaintances who might qualify as potential Rotarians? Please list at least five individuals you believe should be in Rotary.

Name	Occupation	Email	Phone

Acquaintances to Consider:

Architect	Home Health Service
Attorney	Hospitality Owner/Manager
Banker	Internet Technology Consultant
Business Consultant	Manufacturer
Chiropractor	Non-profit Executive Director
Contractor	Other Leader(s) in your Company
C-Suite Executives or Management	Physician
CPA	Public Relations Manager
Customer(s)	Public Relations/Marketing Agency
Dentist	Religious Leader
Distributor	Reseller/Manufacturer's Rep
Engineer	Retail Owner/Manager
Entrepreneur	School Administrator
Estate Planner	Software Developer
Financial Manager/Planner	Supplier(s)
Friend/Neighbor	Veterinarian
Funeral Service	Other



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 "Gap 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 proposal forms (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.

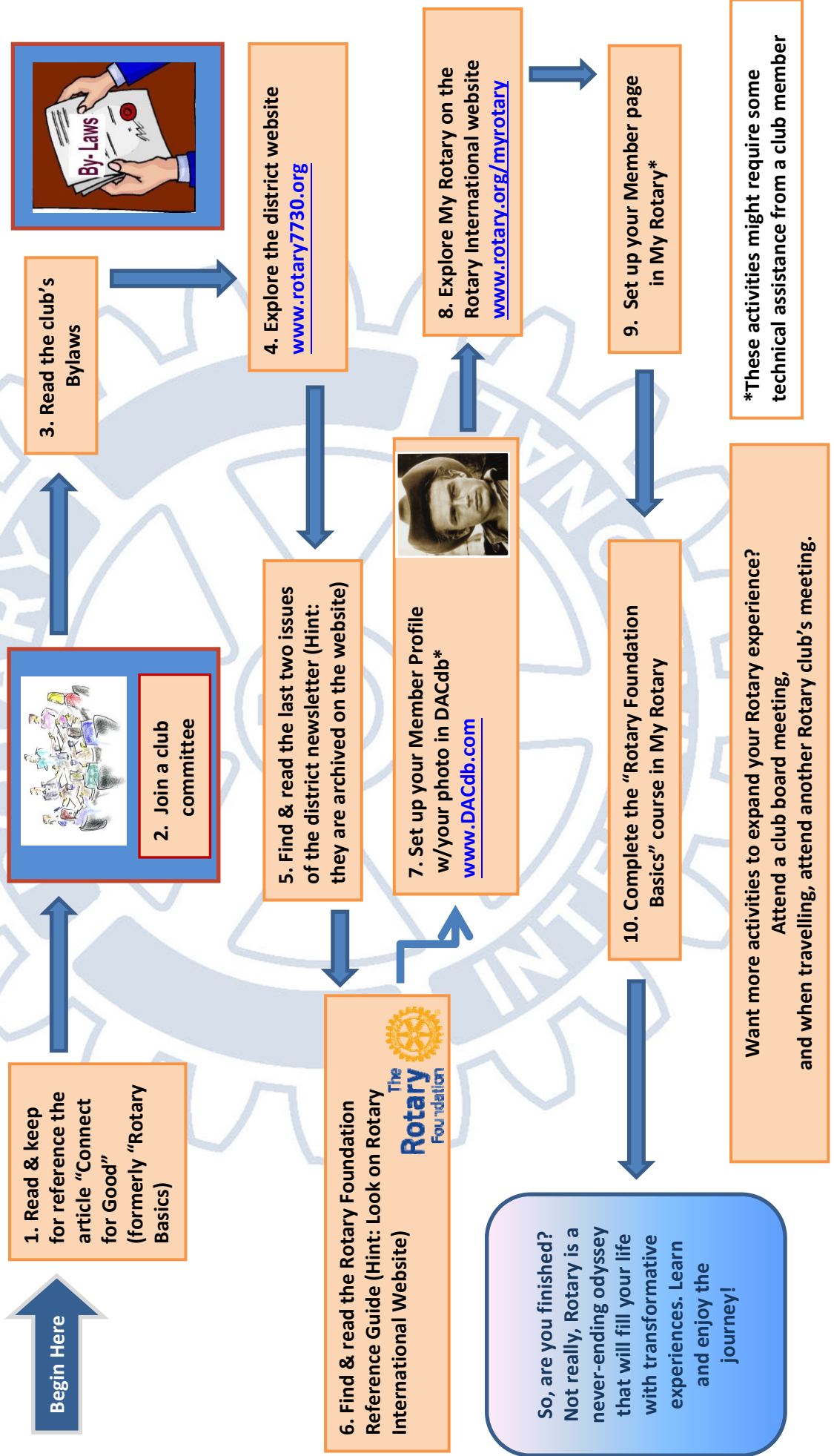
REMEMBER:

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.

Scavenger Hunt



Welcome to the Rotary Club of Greenville 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.





New Member Induction

Fellow Rotarians, it is the duty of our Rotary club to add new members from time to time, so that we not only increase the impact of our club, but also extend the reach of Rotary throughout the community. Today, I welcome to our ranks and admit to membership _____ .

You have been chosen for membership in this club because your fellow members believe you to be a worthy representative of your calling and also because you possess qualities that exemplify the true spirit of Rotary in your public, business, social and private life.

I wish to impress upon you that you have been admitted not only to the Rotary Club of _____, but to a worldwide association, which includes 36,000 clubs, 1.2 million members, in 200 countries; and by virtue of your membership in this club, you will be welcomed into the fellowship of any Rotary club in the world.

You will be joining other Rotarians who contribute their time, energy and passion to sustainable, long-term projects in local communities across the globe. Projects focusing on important issues like peace and conflict resolution, disease prevention and treatment, water and sanitation, maternal and child health, basic education and literacy, economic and community development and protecting the environment. You are joining an organization that has used its resources to help eradicate Polio around the globe.

Membership in the Rotary Club of _____ is an honor and privilege, and every privilege has its corresponding obligations.

One of the special obligations of membership is regular attendance at club meetings; it is the basic method of fulfilling the principle of fellowship and also a way by which you represent your vocation.

Another important obligation is to support the worldwide work of Rotary through regular giving to The Rotary Foundation

In addition, every Rotarian is expected to perform his or her share of club and community service, and the committees of our club will afford you opportunities to give service. For the rest of this Rotary year, I would be pleased if you would work with your mentor to find a position on a club committee

Lastly, but by no means least, is our ideal of friendship. As you expect to receive, so give. May you be stimulated by the friendship you find here, and may we in return know you to be an added source of strength to our club, whose presence will help us live out the Rotary theme this year of "Rotary Connects the World" [*insert current theme*]

I ask all members to rise.

In the name of the Rotary Club of _____, I now formally admit you to membership in this club. Sponsor, will you now affix to _____'s lapel the Rotary emblem?

It is my pleasure to present your Certificate of Membership and The Four Way Test for you to display in your business.

Welcome to the grand adventure in Friendship and Service that we call Rotary!

Fellow Rotarians, I commend to you our newest member(s); _____ .



Rotary Club of Wilmington West

Red Badge Requirements

Welcome to the Rotary Club of Wilmington West. Your “Red Badge” identifies you as a new Rotarian and recent inductee to the club. We are honored to have you become part of the world-wide Rotary family.

Working with your mentor, please complete these opportunities as soon as you can and obtain initials of the appropriate Rotarian for each item as it’s completed.

The goal is to attain the coveted “Blue Badge” status by completing 12 of the 15 tasks within 6 months of your membership induction.

Please submit the completed list to membership.

Date(s)	Opportunity	Initial
_____	Serve as a solo Greeter four times at a weekly meeting (see Sgt. At Arms)	_____
_____	Lead the Pledge of Alliance at a luncheon meeting (see President)	_____
_____	‘Shadow’ a chair for an event or service project	_____
_____	Become a member of one or more committee	_____
_____	Lead the “Four Way Test” at a luncheon meeting (see President)	_____
_____	Upload your photo and verify that your Bio is current on the District website	_____
_____	Attend a club or area social function	_____
_____	Attend at least 8 club meetings after receiving your Red Badge (see Secretary)	_____
_____	Attend new member indoctrination (see Membership Chair)	_____
_____	Be current in all club dues and fees (see Treasurer)	_____
_____	Attend another Rotary club meeting	_____
_____	Attend a Board of Directors meeting	_____
_____	Participate in the Dictionary project by delivering with another Rotarian	_____
_____	Give a classification briefing at a meeting	_____
_____	Attend at least one Rotary Leadership Institute session	_____



New Member Orientation Outline

- I. Welcome to the Rotary Club of _____
 - a) Rotary Club Profile
 - i. List officers and board members
 - ii. For a complete list of members and to update your personal page go to our Club membership website <https://www.dacdb.com> use email address and last name as UserID/Password
 - b) List of club projects and supported organization
 - c) Calendar of events
Monthly calendar showing club events (tentative where necessary).
 - d) Copy of club charter
- II. About Rotary
 - a. Becoming a Rotarian
 - b. Object of Rotary
 - c. Benefits of Rotary
 - d. Declaration of Rotarians in Business and Professions
- III. What it means to be a member
 - a. Attendance –
 - i. Where to go for makeups – local club locations and times
 - ii. Other ways to receive make up credits
 - iii. How to get credit for makeups
 - iv. The Rotary App/Club Locator
 - b. Dues – describe how our dues work including contribution to TRF
 - c. The Rotary Foundation/PHF – what it means and why it's important
 - d. Recruiting new members
- IV. Rotary History
 - a. Website information
 - b. Administration
 - c. The Early Years
 - d. Rotary milestones
 - e. Rotary goes global
 - f. Four Way Test
 - g. Other Rotary supported youth-related organizations
- V. Rotary International, Priorities, History and Structure
 - a. Paul Harris
 - b. Strategic Plan
 - c. Guiding Principles
 - d. Causes (Areas of Focus)
 - e. Rotary Partners
 - f. Other RI organizations – give a top-level view of RI – Rotaract, Interact and RYLA

- VI. The Rotary Foundation
 - a. Evolution of TRF
 - b. Programs – Polio Plus, Ambassadorial Scholarships,
 - c. Grant process – as much detail as you think is necessary
 - d. Ways to Contribute

- VII. Rotary Calendar
 - a. The general worldwide calendar of events for RI

- VIII. How to get involved
 - a. Volunteer
 - b. Recruit new members
 - c. Guest speakers
 - d. More discussion.....

- IX. Important websites
 - District – www.rotary7730.org
 - Zone – www.rizones33-34.org
 - Rotary International – www.rotary.org

Example Calendar of Events for a Rotary Club

January	Local Food Bank/Salvation Army
February	Roadside Cleanup
March	Rotary Wheel – Plant daffodils
April	Azalea Festival booth District Conference
May	Celebration of Club Charter Roadside Cleanup
June	Fund raiser President induction dinner
July	Food drive
August	Social evening event
September	Literacy Council Spelling Bee
October	Dictionary Project Roadside Cleanup
November	5K Race Fundraiser RYLA
December	Salvation Army bell ringing Holiday party
Monthly event	Club assembly – 1 st Thursday every odd numbered month Board meeting – 3 rd Thursday each month at 11:05 am



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.

CLUB TYPES, FORMATS, AND MODELS

All Rotary and Rotaract clubs share similar values and a passion for service, but each offers a unique experience. When you start a club, you'll need to choose a club type, a meeting format, and a club model. Look at the needs of your community and the club's prospective members to decide which kind of club would be best.

CLUB TYPE: First, determine whether your new club will be a Rotary club, a Rotaract club, or a satellite Rotary or Rotaract club.

Club type	Description	Appeals to	Charter member minimum
Rotary club	Professionals and other leaders who meet regularly for service, connection, and personal growth Read about a successful Rotary club.	People who are looking for friendship and service opportunities Learn more in the Starting a Club online course.	20 required
Rotaract club	Adults who take action through community and international service, learn leadership skills, and develop professionally Read about a successful Rotaract club.	People, especially younger professionals and university students who want to develop leadership skills, find innovative solutions to pressing issues, and have fun through service Learn more in the Rotaract Handbook .	12 recommended
Satellite club	A section of a Rotary or Rotaract club that has its own meetings, projects, bylaws, and board, run in collaboration with its sponsor club Read about a successful satellite club.	Those who want a club experience or a meeting format or time other than what's offered by other clubs in the area but also appreciate the support and partnership of another club Learn more in the Guide to Satellite Clubs .	8 for a satellite Rotary club; no minimum for a satellite Rotaract club

MEETING FORMAT: Next, determine whether your club will meet in person, online, or both.

Meeting format	Description	Appeals to
In person	A club that meets in person	Those who consider face-to-face interactions an important part of the meeting experience or who aren't comfortable with or don't enjoy online meetings
Online	A club that meets primarily online Read about a successful club that meets online.	People who travel frequently, have circumstances that make it difficult to meet in person, or prefer an online experience Learn more about online club meetings .
In person and online	A club that holds some meetings in person and others online, or one that holds in-person meetings that some members attend virtually Read about a successful club that meets in person and online.	Those who have various needs or who want a mix of experiences

CLUB TYPES, FORMATS, AND MODELS

CLUB MODEL: Finally, determine the approach or elements your club will offer. You can choose a model below or design your own.

Club model	Description	Appeals to
Traditional	<p>The traditional club experience includes having a meal, hosting a speaker, and practicing traditions that members value; traditional clubs often have higher dues because of venue and meal costs</p> <p>Read about a successful traditional club.</p>	<p>People who want to socialize over a meal while learning about a new topic or an opportunity to serve the community</p>
Passport	<p>A club that allows members to attend other club meetings frequently as long as they attend a specified number of its own meetings each year</p> <p>Read about a successful passport club.</p>	<p>People who travel frequently or who enjoy trying a variety of club experiences and meeting lots of people</p> <p>Learn more in the Guide to Passport Clubs.</p>
Corporate	<p>A club whose members (or most of them) work for the same employer</p> <p>Read about a successful corporate club.</p>	<p>Employees of one organization who want to do good in their community</p>
Cause-based	<p>A club whose members are passionate about a particular cause and focus their service efforts in that area</p> <p>Read about a successful cause-based club.</p>	<p>People who want to connect with others while addressing a particular set of problems</p>
Alumni-based	<p>A club in which a majority of members (or a majority of charter members) are former Rotary program participants, or former Rotaractors or Rotarians</p> <p>Read about a successful alumni-based club.</p>	<p>People who have participated in Rotary</p>
Interest-based	<p>A club that focuses on a particular interest or hobby</p> <p>Read about a successful interest-based club.</p>	<p>People who want to enjoy Rotary in a specific way or focus on a shared interest or activity, such as professional development for members</p>
International	<p>A club whose members are expatriates or who speak a common language other than the primary language of their district, or an online club whose members are from different countries</p> <p>Read about a successful international club.</p>	<p>Expatriates who want to connect with each other using a common language, or those who want to connect with people from all over the world or want other international experiences from their club meetings</p>

Zones 33-34 Innovative Clubs Info: rizoness33-34.org/?s=innovative



Recipe for Changing Club Culture

Rotary clubs are as resistant to change as any organization - perhaps more than most. That's because the club inherits a culture over time and that culture is propagated by the self-selection of members. Those who like it stay, and those who don't leave. Leaders come out of that same culture and reinforce it.

Yes, your club has a culture, whether it's one you like or not. Long term, that culture embraces the status quo and becomes greatly resistant to change, which is natural. It's a "status quo" mentality.

With respect, for example, to membership, a club's culture can be oriented toward growth and vitality, which is the case with 25%-30% of Rotary clubs. The remainder of clubs are content with rocking along at about the same size, with some dropping an average of 2 members per year. That seems to be within the threshold of pain for most clubs. It's also how your 40 member club gets to 30 over 5 years, and to 20 over the next 5.

What if you're in a failing club and want to turn that trend around? You'll be bucking a culture of mediocrity or decline that's probably taken decades to mature. That change won't happen by itself. You'll need an intentional strategy to change that culture - otherwise it will push back **hard** against the change you're trying to make, in this case putting the club on a consistent, moderate growth path.

The Situation

Most of your members are completely happy with the way things are.

The Problem

Here's what you're probably facing:

- Everyone's happy with the status quo –
 - Expectations are low
 - Everyone's OK with a net decline of a couple of members a year
 - Nobody sees a problem
- **I'm all by myself** -- nobody else "gets it". You now understand that chronic membership decline spells an eventual collapse of the club.
- **They'll be pushing back**, defending the status quo, making excuses -- It's the nature of humans to want to keep things as they are - comfortable. The members don't understand that if a change is not made the club is doomed to failure.

You have to decide whether you're going to become a "Change Agent". If so, you recognize that "Doing more of what we're doing will get us more of what we've got". The status quo will continue unless you act.

Club culture cannot be taken "head-on". Culture can't be changed directly. You have to:

- First: **Change Strategies** to those likely to get the results we want. Decide upon intentional strategies that are known to work and promote those.
- Second: **Change Behaviors** to support the new Strategies and accomplish some **short-term "wins"**. This is the "secret sauce" of your change management strategy. You need to get people doing different things than the ones that haven't worked before.
- Third: **Reinforce** the new Strategies and Behaviors and **Culture will follow**. Short-term "wins", along with recognition of those members who are doing what you want will get others onboard.

The Implication

If your club has embraced a culture of decline, it's only a matter of time until someone has to decide on who's turning out the lights. Chronic membership decline is a cultural disease that will kill your club long term.

Checklist for Changing Club Culture

Effecting change in an organization is not accidental. It requires a very intentional, "checklist" approach. Here's a "can't fail" checklist borrowed from John Kotter, a Harvard Business School professor and arguably the world's thought leader in organizational change management. Like any recipe if you skip steps you can expect that the result may not be what you wanted:

What situation in your club could benefit from a change in culture or mindset?

Intentional steps to make that change (make notes on your plan):

- Reset the bar - **Redefine what "good" is** - consistent, moderate membership growth. If necessary, create a crisis -- "If we keep doing what we're doing...." Make it an **urgent** priority.

- Assessment** – Use the **Club Health Check** to spot areas that need to be fixed for improvements in both attraction and retention. Members vote with their checkbooks to join and with their feet to leave when their expectations are not met. Take a "Man from Mars" look - from an external perspective.

- Create a Coalition** - Enlist people who see things the way you do. **Include** them in developing your strategy. List candidates:

- Create a Vision** -- a future different from the past. Give your members something to believe in. Include your Coalition.

I see our club as...

- Build a Script -- SPIN**

Situation -- Here are the facts...._____

Problem -- The **problem** with that is.._____

Implication -- If we keep doing what we're doing..._____

Need -- What we need to do is.._____

- Teach** your members how to do what you visualize. They don't know HOW to grow a Rotary club. You do (now). Work on the **club experience** (see Assessment above). In parallel, work on strategies to **attract** more members to your club.

- o **Different Strategies** (intentional, to get the different results you want)
- o **Different Behaviors** that support the new strategies
- o **Reinforce** the new Behaviors and Culture will follow

- Communicate, Communicate, Communicate** -- Keep membership top-of-mind (step up your initial instinct by a factor of **10**)

- o Face to Face
- o Phone (live conversation vs. voicemail)
- o Email
- o Print - bulletins, handouts
- o Meetings (use your **SPIN** Script)

- Confront** those in the way -- win them over or neutralize them.

- Set up some **short-term “wins”** -- Prove that what you're promoting works. **Recognize and praise** the members who are doing what you want. Possible short-term wins:

Keep your **Long-Term Goal** in mind – to **create a growth culture** in your club. We're not running membership drives or campaigns.

Vision Examples:

Works best starting with "I see". What does success look like? What does "good" look like? Inspiring, compelling, and a purpose that's worth the time and energy of those you'd like to have follow you.

- I see our club growing steadily - by 10% or more per year. Those new members will bring energy, service hours and financial contributions that will help us more effectively serve our community. They will also be a steady supply of leaders of the future, so we can have future presidents identified 3 or 4 years in advance.
- I see our club meaningfully contributing to The Rotary Foundation, helping our members understand that there's more to Rotary than our own club. We need to be averaging at least \$100/year per member, which would qualify us for District Grants from the Foundation for projects in our own community. More awareness of Rotary beyond our club's boundaries will help attract new members and retain existing members who want to make a bigger impact than our local club can do on its own.
- I see our club becoming far more visible in our community, attracting new members who hear about us and want to become Rotarians. We would have at least one "signature" project a year, highly publicized, and prominently displaying the Rotary brand. Press releases would keep us visible in our local media, and an active social media campaign would keep us visible on the web. We will become **the most-recognized** community service club in our area.
- I see our club reinventing itself, finding ways to attract members and getting back to a sustainable critical mass of at least 25 members. With more members, we can create and fund some new projects that will not only attract new members but also re-energize our long-time members, reminding them of what Rotary is really about. Our meeting will exude energy and include speakers that our members find interesting, informational and inspirational.