



Be a gift to the world

District 5790 Membership Training - TOOLS

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District 5790 Membership Training
(Third Year 2015-2016) Dave Hurt, Membership Coordinator

Disclaimer: Those in business may be familiar with a performance study made some time ago. The conclusion of the study was that practically any business, even with a bad business plan, performed better than good businesses with no plan. When you think about it, even on the football sandlot the pickup team rarely wins against the team who has plays and a game plan.

This plan has been developed by your District Membership Coordinator for clubs in need of a membership plan and member training. Fully realizing no one document meets all needs and there may be some information that may not have consensus, please do not hold the District Membership Team responsible for errors or content. By no means is this plan the end-all solution to membership growth, but it hopefully will provide some clubs with new training ideas on how members can work together, with the goal of improving member retention as well as the goal of developing new members....and having some fun along the way.

The document is intended as a guide for membership teams of small, medium, and large clubs who could use a long-term specific process that has strategic goals and how-to tactics to meet those goals. It uses tips and ideas presented by District Membership Chairs before me and from club and membership team members.



ROTARY



The 5 C's for Growing Rotary

- 1. CLARITY – Members understand and connect with the purpose of Rotary.**
- 2. CONNECTION – Members have fun, make friends, and connect with other Rotarians.**
- 3. COMPASSION – Members look out for the needs of other members. There is care and concern for each other and support through life's milestones.**
- 4. COMMUNITY- Members actively serve beyond the club in ways that make a difference in the greater community and in the world.**
- 5. CHALLENGE – Members are continually assessing their own personal growth and challenging themselves to grow as Rotarians and as leaders.**

Plan of Action for Membership and PR Committees

GOAL:

Committee is responsible for membership development and retention

Committee Members:

Committee Chair:

Plan of Action / Task	Responsible Member	Start	End	Status/Update/Measure	Budget/Cost Resource
Find 4 members to serve on committee					

GOAL:

Committee will be responsible for promoting everything Rotary in all media venues and will work closely to support recruiting efforts of Membership Committee

Committee Members:

Committee Chair:

Plan of Action / Task	Responsible Member	Start	End	Status/Update /Measure	Budget/Cost Resource
FIND ONE PERSON TO SERVE ON COMMITTEE					

SAMPLE MEMBERSHIP POA

1. Avenues of Service –
 - a. Service Involvement - Everyone is linked to an avenue of service – Divide and Conquer!
 - b. New members will be brought in and assigned to a committee under one of the five Avenues – immediate involvement!
 - c. Directors need a plan to hold their committees to task. Bottom up.
2. Classification Assessment – Identify our club needs/gaps/opportunities

Assign every member to a committee under one of the Avenues of Service

Committees and members can be added in ClubRunner for management
3. Target Prospects by NAME
 - a. By classification – By Avenue of Service
 - b. Local companies – who in the club knows who
 - c. Leadership Development Alumni
 - d. Community Events – we need to have more of a presence (Rotary Awareness)
 - e. Divide the list between the Membership Committee working in two's
 - f. Initial contact – Formal Invitation for a one-on-one

Stressing Invitation Only and we've hand selected you!

Where are their interests, do we have a match

Then invite to a meeting – intro of Director and Team Captain
4. Marketing Strategy
 - a. Information geared towards the prospect – monthly touch all prospects with information regarding the Five Avenues of Service

Use different types of media

Attention grabbers – why do people join rotary – benefits - InfoGraphics
 - b. Goal is to find those who want to contribute and work in one of the Avenues of Service
 - c. Qualify for the “right fit”
 - d. **People will only commit if it's important to them – what's important to them?**
5. Younger Generation
 - a. From a Global Generational Study: 2016 – 80% will be millennials in the workplace
 - b. According to a 2014 study by Deloitte, 43% actively volunteer or are a member of a

- c. community organization
- d. It's all about convenience. Easy to interact. Fun. Technology is a must. Flexibility in schedule.
- e. They want to work in teams - Social needs are more important
- f. Almost 70% say that giving back and being civically engaged are their highest priorities
- g. Video Content
- h. Webinar meetings, maybe once a month instead of Spring Creek – held in the evening
- i. Finding projects that attract the younger crowd – we need to touch base with Common Ground Network (Susan Luttrell) to assess community needs and where we might be able to assist

Success depends on Directors and Team Members keeping the communication and the enthusiasm going in between projects and club meetings. I would even suggest a Director/Committee Chair Leadership Training (I will offer to do at no charge). Get them

RECRUIT

- Identify
- Introduce
- Invite

NEW MEMBER

- Induct
- Inform and orient

RETAIN

- Involvement

MEMBERSHIP COMMITTEE

The role of the membership committee is to develop and implement an action plan for membership development. To be effective, a Rotary club needs members. Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving Rotary beyond the club level is directly related to the size and strength of its membership base.

The responsibilities of the club membership committee, summarized below:

- Develop committee goals to achieve club membership goals for the coming year.
- Educate and train club members about the importance of recruitment and retention of members.
- Conduct classification surveys to ensure that club members' occupations and businesses reflect current business and community needs.
- Develop a membership action plan to improve member satisfaction that involves surveying members and initiating changes in response to their feedback to ensure that the club remains relevant to its members. Conduct club assessments to ensure that membership development and retention efforts are successful.
- Work with the public relations committee to create a positive club image that is attractive to prospective and current members.
- Sponsor newly organized clubs in your district, if applicable.

District 5790 Club Membership Team Leader Instructions

Congratulations for being selected Team Leader to impact the future growth of your club. Most of us joined Rotary to be part of something that mattered....to give back....and to enjoy the journey. Human beings can't help it: we need to belong, and one of the most powerful survival mechanisms is to be part of, and contribute to, a group of like-minded people....Rotarians.

To grow your club and provide a community of business and volunteer leaders, Rotary needs a continual influx of new energy, new ideas, and additional members to share our journey. Now our District is embarking on an organized long-term approach of doing just that. Needless to say, your leadership and team communication is very important to your club's success!

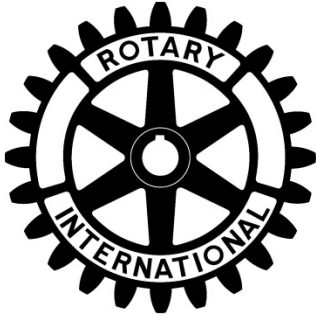
The District Membership Team has developed a three year membership plan for your consideration. If a copy is needed, [this plan is available on the District Newsletter, or by sending an e-mail to davidwhurt@sbcglobal.net.](#) Please discuss the plan with each of your team members. Remember, the sole role of the club member is to qualify candidates for Rotary membership, and to invite only community and business leaders and other qualified candidates to a club meeting.

The plan consists of five key elements: 1) developing a buddy/team system to call on candidates for membership and to keep an eye out for each other, 2) inviting guests to a target visitation day, 3) providing interested candidates an educational packet while at the club meeting (Membership chair), 4) sending an invitation letter (from our club president) to join (within two weeks of the club visit), 5) members following up with a phone call to answer any questions.

The success of our clubs' growth is dependent on keeping current members and adding new ones...an obvious and well known strategy. However, the "Buddy System" is an important new retention tactic and your role in keeping the buddy teams informed and energized is very important.

The better job you and your team do in connecting with and qualifying an applicant, the fewer visitors that will be needed for a new member. If everything is done well, it is quite possible to have a new member for every two guests. If an average of more than three visitors are needed for each member, we may need to review the process and refresh the personal moment and Rotary story-telling skills to better match the interests of the applicant with projects within the club and equally important, Rotary international humanitarian projects that indirectly include every Rotarian.

It really should not take that much time...and most everyone wants to give back when given the opportunity.... only an hour per month is suggested and that includes team meetings. The typical team goal is ONLY one guest per team per month....that includes all members of your team! This should provide adequate guests to meet our club membership goal. And be sure to have your team members call you when they have a confirmed visitor so you can pass the word to your club membership chair, secretary, and other team members.



Rotary Club Visitor Sign In

Date: _____

- Guest: _____
 - Address: _____

 - Email: _____
 - Preferred
Phone: _____
 - Visiting Rotarian? Yes/No Home
Club: _____
 - Classification: _____

- Guest: _____
 - Address: _____

 - Email: _____
 - Preferred
Phone: _____
 - Visiting Rotarian? Yes/No Home
Club: _____
 - Classification: _____

Special Candidate Invitation



Special Invitation

You have been hand selected by our Membership Committee for potential membership in the Rotary Club of Mansfield.

This invitation is for an initial meeting for us to get to know you and for you to get to know us.

We'd like to set up a time that is convenient for all to meet.

Please respond and let us know your availability.



NEW MEMBER ORIENTATION HANDOUT

Membership Committee Members:

My Avenues of Service – _____

- o The Director is - _____
- o Website sign in www.mansfieldrotary.org (member area) you will be prompted to create a password. Next step is to create your profile information in the system.
- o The next upcoming service opportunity –

Your Rotary International ID#: _____

All 3 web addresses- Local, District and International

www.mansfieldrotary.org

www.rotary5790.org

www.rotary.org

Rotary Club physical address:

Current Contact Info for all Directors is on the website bottom right hand side.

To make up a meeting “online” you can go to this website: <http://rotaryclubone.org/>

Burleson Rotary Club (#1773) President: Manuel Trevino Meetings: Fridays at 7:00 AM Hill College & Texas Wesleyan U. Campus 130 E Renfro Burleson, TX 76028	Kennedale Rotary Club (#81766) President: Jack Dalrymple Meetings: Tuesdays at 12:00 PM No Frills Grill - Little Road 4914 Little Road Arlington, TX 76017	Arlington South Rotary Club (#1765) President: Dave Davis Meetings: Fridays at 12:00 PM Spring Creek BBQ 3608 South Cooper Street Arlington, TX 76015
Arlington Sunset Rotary Club (#59104) President: Larka Tetens Meetings: Tuesdays at 6:00 PM J Gilligan's 400 E. Abram St. Arlington, TX 76010	Arlington West Rotary Club (#1766) President: Jamey Hodge Meetings: Tuesdays at 12:00 PM Shady Valley Country Club 4001 W Park Row Drive Arlington, TX 76013	For more options visit: http://www.rotary5790.org/ under District Information on the left side.

Red Badge Requirements

The purpose of the Red Badge Program is to assist new members in becoming quickly involved and committed to club activities and to foster leadership and service above self. It will also help you meet other members in our Rotary family and build new friendships. The goal is to complete the checklist below in the first six months of membership.

New Member's Name

Date of Induction

Throughout the First Six Months

- Maintain 80% Attendance
- Meet all your club fellow Rotarians individually

First Month

- Attend Orientation
- Complete paperwork
- Complete online orientation/learn website
- Placement/Involvement on a Committee

Second Month

- Serve as Greeter/set up and take down meeting room
- Participation in a service opportunity

Third Month

- Give a classification talk
- Lead pledge/4-Way test

Fourth Month

- Identify a new member prospect (discuss with Membership Committee)
- Makeup/visit another Rotary Club

Fifth Month

- Attend a Board Meeting

Sixth Month

- Presented permanent Blue Badge

Optional Red Badge “New Member CHECKLIST”

NAME: _____

Welcome to the Arlington West Rotary Club. As a new member with no prior service in a Rotary Club, you will be assigned certain tasks designed to orient you on Rotary. The goal is for you to complete these items within six months or less.

When you have completed the checklist, present it to the Club’s Membership chairman. When this checklist and the Orientation quiz are complete, remove your “New Member” sticker from your Rotary Badge.

REMOVE YOUR “NEW MEMBER” NAME TAG STICKER WHEN ALL COMPLETED! Date Completed

1. View the Arlington West Rotary Club Membership Orientation CD _____
 2. Read the Pamphlet “Rotary Basics” and the booklet “ABC’s of Rotary” _____
 3. Display the *Object of Rotary* and the *4-Way Test* at your place of business. _____
 4. Attend one or more of the following club functions. (Circle function Selected) _____
 - A. Board Meeting
 - B. A meeting of one of the clubs standing committees
 - C. A Club Fellowship activity
 5. Complete one or more of the following tasks: (Circle the completed task) _____
 - A. Serve as a greeter at a club meeting and greet the members as they arrive.
 - B. Give a Vocational/Classification talk at a club meeting.
 - C. Participate in a Club service activity.
 6. Make up a meeting at another club _____
 7. Extend the opportunity for Rotary to non-members by: _____
 - A. Inviting a guest to our Rotary Club Meeting.
 - B. Propose a new member (The club Secretary has the proposal cards)
A Visitor who has attended a Club meeting may be offered membership, unless you have been advised that a member has expressed objections to a Board Member after the prospective Member’s Club visit.
-
1. It is not required but recommended that you attend one of the following District Functions: District Assembly, District Conference, Foundation Seminar, or Membership Seminar.

The Planning Checklist

Don Ferrell, previous District 5790 Membership Chair knows a great deal about growing a club. Here is his checklist. It is easy to overlook a component needed to design a comprehensive club membership plan.

HERE ARE SOME ITEMS YOU DON'T WANT TO OVERLOOK:

- GOAL
- THEME
- YOUR STORY...i.e. MEMBERSHIP MINUTE
- BE MY GUEST CARDS
- ROTARY COINS
- REWARDS-----PINS "I SHARED ROTARY"
- VISITOR PACKET (Previous Blue Folder Information)
- TRACKING VISITOR & NEW MEMBER SYSTEM
- FORMAL INVITATION LETTER TO JOIN ROTARY
- CHART: CONGRATULATIONS NEW ROTARIAN
- ROTARY SPONSOR PINS (Request from R.I.)
- MENTORING
- RED BADGE PROGRAM
- NEW MEMBER ORIENTATION
- MEMBERSHIP CLUB ASSEMBLY

Remember...Membership is a TEAM effort...Clubs need a membership committee...not just a membership chair....Membership teams enhance the process.

Sample for your club visitor packet

How much does it cost to be a Rotarian at the (Arlington West) Rotary Club?

You can make a difference!

SAMPLE

ROTARY DUES:

Rotary membership costs average about \$25.00 per month. This includes a contribution to the Paul Harris Fellowship Fund.

There is a one-time new member initiation fee of \$100.00 that may be paid by check or invoiced. Rotary dues are \$200.00 per year, billed semi-annually. These costs can be paid in various ways.

OTHER CONTRIBUTIONS:

Although voluntary, we ask for a \$100.00 per year contribution to the Rotary Paul Harris Fellowship fund. The Paul Harris Fellowship Fund is the Rotary Foundations way of honoring a member or non-member for having donated \$1,000 to its Annual Programs Fund. After ten years at \$100/month, you will have reached this plateau and are recognized as a Paul Harris Fellow. This represents an average cost of \$8.33 per month that will be added to your bi-monthly invoice, unless you advise the club secretary differently. This is included in the \$25.00 per month total costs. Each year the Arlington West Rotary Club has received recognition for 100% member participation in this contribution effort. Paul Percy Harris was a Chicago, Illinois, attorney best known for founding Rotary International in 1905.

MEALS:

The current cost of meals is \$ _____, and is subject to change based upon the club's actual meal cost. Because our club must pay for so many designated meals each meeting, this charge must be passed on to members, whether or not you attend.

Meals are currently billed every other month.

SAMPLE: Rotary Prospect Invitation to Visit Your Club

Hi _____! I have an opportunity I want to talk to you about. I know you love (*Abilene*) and want to see it grow and thrive. I also know you're busy and you want to feel like your volunteer efforts are truly making a difference. And I think you're like me—when you volunteer, you want to connect with people who have the same level of commitment as you. And you want to have fun and fellowship that often develops into friendships.

I'm a member of the (*Abilene Wednesday Rotary Club*)—we are a group of community-minded professionals who enjoy each other's company. We have a great time together; we laugh and we learn about issues in our community and in the world, and Rotary provides the opportunity for us to take the next step to actually address issues and solve problems. I get a lot of satisfaction and I've made great friends through Rotary.

Are you familiar with Rotary and what it does? *Did you know that Rotary is responsible for the near eradication of polio in the world? Rotary's fingerprints are all over communities and the world... Rotary is the oldest and largest service club in the world, and its impact in the world is unmatched.*

The *Abilene Wednesday Club* is committed to action, to laughing and learning together, and I'm convinced you would be a great fit for Rotary and our club specifically. I want to personally invite you to be my guest at our next meeting. We meet on (*Wednesdays at noon at the Abilene Country Club*). I can pick you up or meet you at the door.

_____, you are an asset to our community, and I know your experience, skills, and passion would be an asset to our Club. At the same time, I guarantee that you, as a person, will benefit tremendously from being a member. Every week we have a community program with excellent speakers which keeps us informed of events and community activities.

Just so happens I will have an empty chair next to me at next week's meetingI'd love to pick you up or meet you at.....(pause for response).

On Rotary Letterhead: Sample invitation letter to join your club

Send ASAP to Member "Approved" Visitors who have received the Visitor Package

Date ()

Address

City, Texas Zip Code

Hi **(first name)**,

It was a pleasure having you as our Rotary guest recently. Our club meets weekly, socializing with good friends, good food, and interesting programs from local organizations, members, and our community. At this time, our club would like to extend to you an invitation to join Rotary as we feel you have the heart and interest in helping others. We also feel you would enjoy being a member of our club and part of the world's oldest and largest service organization of community, business, and professional leaders.

Every day, in every part of the world, the 1.2 million men and women of Rotary are helping to improve health, alleviate poverty, eradicate polio, promote literacy, and bring hope to millions of people in need. During the last century, Rotary International has developed the reputation as a philanthropic, peace-building humanitarian organization throughout the globe.

Rotary invests in helping others, and asks nothing in return. Included are projects like water filters for entire villages, wheelchairs for those who cannot walk, crisis emergency response, youth programs, and, ongoing since 1985, global leadership and field immunization for about one-third of the world's population against Polio. With Rotarians working shoulder to shoulder in over 200 countries, our international projects may become a stepping stone to help nations with their peace-building process.

Rotarians share an indescribable inner feeling that money cannot buy...coming from the personal reward of being a service to others, and knowing you are part of an International organization that helps thousands in the world every day. With an individual monthly \$8.34 voluntary contribution to our "Every Rotarian Every Year" (\$100 EREY) Foundation Fund, you become an important part of a significant collective contribution of Rotarians that use every penny donated to provide funding for humanitarian needs locally and across the globe.

Beyond the actual meal cost, the total cost of being a Rotarian is about \$300 per year, less than a dollar a day, making Rotary a "should do" on your list of non-profit contributions. With very little time commitment, it is fun to be a Rotarian and it feels good being part of a humanitarian organization that has world class members and sponsorships like the Bill and Melinda Gates Foundation.

We hope you will join us and if you would like to become a member of our club, please complete the application found in the visitor packet, or simply come to another meeting as our guest.

Look forward to hearing from you!

Sample: Specific Rotary Club Initiative Plan

Many clubs need a jump-start initiating their club membership plan. While it is critical to have a “want-to” attitude, it is just as important to set up an on-going process that will get visitors to your club and convert them to members.....while keeping existing members on board. Here is how the Rotary Club of Arlington structures their club growth program.

Membership Tips from the Trenches

Clete McAlister, Membership Director, Rotary Club of Arlington

How do we attain goals? The most important principle of attaining a goal is to have our attention on it constantly. In Rotary, where everything done is voluntary, it is critical to have the club president constantly advocate for a goal.

The president’s support for increasing membership was evident in virtually every meeting and in multiple ways. As a Board of Directors, we initiated a 3-pronged strategy. First, we worked to attract new members. Second, we focused on retaining our existing members. Third, we initiated a mentor program.

To attract new members, we implemented 6 key initiatives:

1. “Membership Minute” talks given by various established members.
2. Ping pong ball drawings for gift card prizes. The balls with sponsor names written on them were drawn from a fish bowl.
3. Frequent reminders and encouragement from the podium about attaining our goal.
4. A specific incentive was offered for members who sponsored three or more new members.
5. Our “Development Team” met monthly to review creative and proactive steps to achieve our membership growth plan.
6. Each board member specifically challenged to bring in at least one additional member per year.

We also focused on the most difficult part of membership which is retaining existing members.

Our club president took action and did the following:

1. Examine the monthly report of individual attendance.
2. Send a “we missed you” message to individuals missing three or more consecutive meetings.
3. Established a “Rotary Cares” Coordinator who sends greeting cards to the members on various life concerns such as illnesses, awards, births, family deaths, etc
4. Sends a personal birthday card and wedding anniversary card to every Rotarian; providing a personal touch is critical in letting members know they’re important.

We utilized mentoring to get new members involved.

Getting new members engaged is so important, so we took these steps:

1. New members are assigned an experienced Rotarian who helps mentor them and identify new opportunities to get members engaged in our club. We believe long term retention of members will be greatly enhanced by the mentorship program.
2. A former club president took on the tasks of writing a job description for mentors and of assigning mentors to new members.
3. We liked the result so well we even went back to members inducted in the previous year that had not completed the requirements for their Blue Badge and assigned a mentor to them. An annual club assembly to review the history of Rotary and our club activities also serves as a reminder to all members of our club why they should be proud of their decision to become...and remain...a Rotarian.

Why Join Rotary?

1. **Friendship.** In an increasingly complex world, Rotary provides one of the most basic human needs: the need for friends, fellowship, and “giving back.” These are three of the reasons why Rotary began in 1905.
2. **Business Development.** The second original reason for Rotary’s beginning. Everyone needs to network. Rotary consists of a cross section of every business community. Its members come from all walks of life. Rotarians help one another, and collectively help others.
3. **Personal Growth and Development.** Membership in Rotary continues one’s growth and education in human relations and personal development.
4. **Leadership Development.** Rotary is an organization of leaders and successful people. Serving in Rotary positions is like a college education in Leadership: learning how to motivate, influence and lead leaders.
5. **Citizenship in the Community.** Membership in a Rotary club makes one a better community citizen. The average Rotary club consists of the most active citizens of any community.
6. **Continuing Education.** Each week at Rotary there is a program designed to keep one informed as to what is going on in the community, nation and world. Different speakers, different topics.
7. **Fun.** Rotary is fun. A lot of fun. Each meeting is fun. The club projects are fun. Social activities are fun. And the service is fun.
8. **Public Speaking Skills.** Many an individual who joined Rotary was afraid to speak in public. Rotary develops confidence and skill in public communication. And opportunity.
9. **Citizenship in the World.** Every Rotarian wears a pin that says: “Rotary International.” And every Rotarian is welcome – even encouraged to attend – at 29,000 clubs in 195 nations and geographical regions. There are few places on the globe which do not have a Rotary club. Instant friends in both one’s own community and in the world community.
10. **Assistance when Traveling.** Because there are Rotary clubs everywhere, many a Rotarian who has needed a doctor, lawyer, hotel, dentist, advice, etc., while traveling has found same quickly through Rotary.
11. **Entertainment.** Every Rotary club and district has parties and activities which provide diversion in one’s business life. Rotary has conference, conventions, assemblies and institutes which provide entertainment in addition to Rotary information, education and service.
12. **Family Programs.** Rotary provides one of the world’s largest youth exchange programs; high school and college clubs for future Rotarians; spouse clubs and programs, and a host of activities designed to assist family members in growth and the development of family values.
13. **The Development of Ethics.** Rotarians practice a 4-Way Test which governs one’s ethical standards. Rotarians are expected to be ethical in business and personal relationships.
14. **Cultural Awareness.** Around the world, practically every religion, country, culture, race, creed, political persuasion, language, color and ethnic identity is found in Rotary. It is a cross section of the world’s most prominent citizens from every background. Rotarians become aware of other cultures and learn to love and work with people everywhere. They become better citizens of their countries in the process.

15. **Prestige.** Rotary members are prominent people: leaders of business, the professions, art, government, sports, military, religion and all disciplines. Rotary is the oldest and most prestigious service club in the world. Its ranks include executives, managers, and professionals: leaders who make decisions and give back.
16. **The Opportunity to Serve.** Rotarians provide community service – at both the local and international communities. This is the best reason perhaps for becoming a Rotarian: the chance to do something for somebody else and sense the self-fulfillment which will follow.

Who Are Rotarians?

By Grant Wilkins

Rotarians are people who dig wells from which they will never drink.

Rotarians are people who vaccinate children they will never meet.

Rotarians are people who restore eyesight for those they will never see.

Rotarians are people who build housing that they will never live in.

Rotarians are people who educate children they will never know.

Rotarians are people who plants trees they will never see or sit under.

Rotarians are people who feed hungry people, regardless of race, color, or politics.

Rotarians are people who make crawlers into walkers, halfway around the world.

Rotarians are people who know real happiness which can only be found by serving others.

District 5790 A Retention Strategy...“The Buddy System”

Rotary was founded on the basis of friendship and fellowship. Later, good works for the community were undertaken to help meet the needs of other people. Books have been written about the immeasurable good Rotarians do locally and around the world, generally under the structure and guiding principles of the R.I. Foundation.

So what’s the problem...the issue is that RI membership has not significantly grown in almost a decade. Ten years represents a statistical trend that cannot be taken lightly. Just imagine the statistical impact in another 30 years if this trend is not reversed...fewer community and international projects...and reduced contribution to the R.I. Foundation for project funding.

To address this problem, it is important that every club re-strategize their club growth activities, with planning and action steps that will address the loss of members.

Why is The Buddy System Important? Perhaps the answer lies in the reason Rotary was founded...to develop friendships and promote fellowship. Growing clubs are dynamic, fun loving clubs that not only have significant projects, but also share a special relationship among its members. This system may be easier to implement in small clubs than in large clubs, but it may be even more important in large clubs where not everyone can participate in a club project.

The Buddy System impacts all Rotarians in a club, and attempts to structure pairs of friends or members with similar hobbies or outside interests! And putting this member retention strategy in place requires no organizational cost. In the May 2014 issue of the Rotarian (p 67), the Buddy System was summarized as follows: “Groups of four members stay in touch and support one another. Members are surveyed and paired with one close buddy, and the membership chair assigns a minimum of four or more buddies to make a team. One person is the team leader and with the club social chair, coordinates occasional get-togethers and activities.”

This organizational “system” engages members outside club projects and creates an environment for all members to enhance their own personal experience of Rotary fellowship.

Inclusive in the club organization, and independent of team structuring, is a Social Chair who organizes a quarterly activity that members could enjoy sharing. The more members do together as a group, the greater the Rotary inter-personal dynamics...some would just call it having fun...a great way to retain existing members, and possibly a great way to attract new members.

This system develops the engagement of members outside club projects and creates an opportunity for all members to enhance their own personal experience of Rotary fellowship and Rotary friendship.

Are You an Inspiring Leader?

Principles

1. Reframe & Rethink

Transforms the club so that it is not simply an extension of the present but is more meaningful, innovative, sustainable, and successful than before.

Selected key performance indicators:

- * Confronts the brutal truths of the organization
- * Is not satisfied with the good when great can be achieved
- * Has the courage to think differently
- * Looks for disruptive innovation

2. Pursue Significance

Ensures that the club provides meaning, value and purpose for all members and the community.

Selected key performance indicators:

- * Identifies outcomes beyond short term financial results
- * Defines both operational and social outcomes
- * Provides a line-of-sight from projects to purpose

3. Live, Share, & Scale the Right Values

Positions the club to stand for sustainable values and ethical principles and not simply operational short term goals.

Selected key performance indicators:

- * Focuses on sustainable, not situational values
- * Makes decisions based on "should," not "can"
- * Is a role-model for sustainable values

4. Lead Through Culture

Recognizes that culture is a powerful governing force that, when properly shaped, leads to a self-regulating and sustainable club.

Selected key performance indicators:

- * Shapes culture intentionally
- * Aligns culture with significant purpose and sustainable values
- * Reinforces principled culture actions everyday
- * Moves toward a self-sustaining and self-regulating culture

5. Earn & Extend Trust

Believes that trust is the centerpiece for all meaningful relationships and it must be in place for leaders to inspire.

Selected key performance indicators:

- * Keeps the best interest of others in mind
- * Respects the contributions of everyone
- * Keeps commitments and delivers on promises

6. Embrace Transparency

Is committed to conducting business openly, honestly, directly and that it should involve members and interested communities.

Selected key performance indicators:

- * Is direct and truthful
- * Conducts business openly
- * Admits mistakes when made
- * Shares information with interested parties

7. Connect with Others

Believes in the power of connecting with people to listen , learn, develop and solve problems

Selected key performance indicators:

- * Is approachable and interested in connecting with others
- * Seeks out individuals with distinctive skills and experiences
- * Builds strong professional relationships

8. Collaborate Across Boundaries

Believes that working together with skilled, capable people will lead to superior results.

Selected key performance indicators:

- * Makes cross-functional teams more effective
- * Breaks down barriers to working across boundaries
- * Shares work products
- * Uses collaboration tools

Managing Change

- At the heart of understanding how people react to change is the issue of control. Humans have evolved to being the most control-oriented animals on the planet.
- People are most comfortable when they can influence what happens to them. The ability to influence is largely dependent on being prepared for what will happen. People, therefore, feel in control of their lives when their expectations match what they think to be actually occurring.
- There are two types of control we all seek:
 - Direct Ability to dictate outcomes
 - Indirect Ability to at least anticipate outcomes

Think of your club/person whom you want to convince/change. Can you think of a way to allow them to dictate some of the outcomes or help them to prepare for, or be involved in, the planning?

Person/Club	Change Required	Benefit of Change	Plan

Leadership Team Assessment and Development Tool

Team Members/ Name				
Heart	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Vision	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Emotional IQ	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Key Strengths	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Obvious Gaps	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Blind Spots	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Communication	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Planning	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:

Follow-up	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Cultural Fit	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Self Development	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Life Balance	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Greatest Value to the Club	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Greatest Risk to the Club	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Their Life Goals or Dreams	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Time Efficiencies	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
Organization	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:

Self-Assuredness	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:	1 2 3 4 5 Comments:
My Actions to Recognize Their Contributions				
My Key Areas to Focus on for Their Development				
What I see for Their Future				



Our Founder, Paul Harris In 1905....37 year old attorney **Paul Harris** changed the world.

"This is a changing world; we must be prepared to change with it."¹

From the years 1891-1896, Paul Harris was raised by his New England Grandparents with values of tolerance toward all. He gained his law degree in 1891 and had a wide variety of jobs before settling down in Chicago to practice law.

1896-1905 In 1896, he did go to Chicago to practice law. One evening, in 1900, Paul went with a professional friend to his suburban home. After dinner, as they strolled through the neighborhood, Paul's friend introduced him to tradesmen in their stores. This reminded Paul of his Grandparents home in New England. "Why not have a fellowship composed of businessmen from different occupations, without restrictions of politics or religion?" he thought.

1905-1908 On February 23, 1905, Paul Harris had dinner with his closest friend, Chicago coal dealer **Sylvester Schiele**. Afterwards they walked over the river to **Room 711** of the Unity Building where they met their host, Gustavus Loehr, a mining engineer; and another friend, Hiram Shorey, a merchant tailor. Harris proposed that they form a club. No name was chosen for the group. The second meeting was March 9th.

Paul was very interested in starting Rotary in other cities. The second Rotary club was founded by **Homer Wood** in **San Francisco** in 1908. **Harry Ruggles** was a printer, and created the "name badge" version of the Rotary "wheel" and also started singing in Rotary.

Paul Harris had a vision of "Around the World Rotary" which was opposed by many of his fellow Rotarians. It was not until he won the loyalty of the man who was to be Rotary secretary from 1910-1942 that Rotary became organized and international. That man was **Chesley Perry**, whom Paul called the "Builder of Rotary."

1910-1911 By August 1910 there were *sixteen clubs* and the *National Association of Rotary Clubs* was organized and held its **first convention that year**, in Chicago. At the 1911 Portland Convention, "**Service, Not Self**" was introduced by **Frank Collins** of Minneapolis. It later became "**Service Above Self.**" The slogan "**He profits most who serves best,**" was also read there.

In 1917, Arch C. Klumph, Rotary's sixth president, proposed to the R.I. Convention in **Atlanta, Georgia, USA**, the creation of an "**endowment fund for Rotary** . . . for the purpose of doing good in the world in charitable, educational, and other avenues of service. A few months later, the endowment received its first contribution of \$26.50 from the Rotary Club of Kansas City, Missouri.

1912-23 When clubs were formed in Canada and Great Britain in 1912, the name was changed to the International Association of Rotary Clubs. Paul Harris served two terms, was named President Emeritus, and served until his death January 27, 1947.

1989-2005 Rotary came close to removing polio from the face of the earth and, in 2005, returned again to Chicago to celebrate the first 100 years.

Rotary: Orientation and Retention Introduction:

Orientation and Retention sound like two separate issues, but they are linked together in keeping Rotary a viable and active Worldwide Organization.

How can Rotary hope to grow as envisioned by RI President Gary (Wang) if we don't Orient New Rotarians on how Rotary works and retain those and current members? As Past RI President Frank Devlyn, 2000-2001, said "have you considered that if persons coming into Rotary stayed in Rotary, we would solve all of our membership problems."

Learning The Object of Rotary will provide the roadmap for a successful Rotary career, and is the "key" to successfully orienting new members. As each club independently operates its 'own way, within the framework of Rotary, this overview is designed to broadly outline the Object of Rotary and to support the learning process within each club.

The birthday of Rotary, February 23rd, is celebrated throughout the length and breadth of the movement.

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

1. The development of acquaintance as an opportunity for service.
2. High ethical standards in business and professions, the recognition of the worthiness of all useful occupations, and the dignifying of each Rotarians occupation as an opportunity to serve society.
3. The application of the ideal of service in each Rotarians personal, business and community life.
4. The advancement of international understanding, goodwill and peace through a world fellowship of business and professional persons united in the ideal of service.

Let's look at each of these 4 Objectives

1. The development of acquaintance as an opportunity for service.

Paul Harris, the Founder of Rotary, and his 3 friends didn't get together to talk only business. They met as friends to establish a relationship for to discuss service opportunities to the community in Chicago.



The first service project was in

Chicago. It consisted of initiating and promulgating the establishment of public comfort stations in Chicago.

The greater significance however, was the fact that it was the precursor of thousands of similar services rendered by Rotarians throughout the world.



Paul Harris



Chicago Home...Recently Refurbished



Gustavus Lorhr, Silvester Schiele, Hiram Shorey & Paul Harris...."Friends Forever"



- 2. High ethical standards in business and professions, the recognition of the worthiness of all useful occupations, and the dignifying of each Rotarians occupation as an opportunity to serve society.**

When a person inducted into Rotary, they are assigned a Classification based on their work being performed. Ethical standards for every job are critical. There is a Standard that Rotarians live by each day.... not only in our business lives but also in our private lives. This "Standard" is known as The Four Way Test and it is repeated during every club meeting.

The Four Way Test

1. Is it the Truth.....
2. Is it FAIR to all concerned.....
3. Will it build Goodwill and better Friendships.....
- 4 Will it be Beneficial to all concerned.....

This standard sets the bar high for Rotarians and it validates the worthiness of each and every job of Rotarians. With high ethical standards, the services Rotarians perform in our communities are recognized quickly.

3. The application of the ideal of service in each Rotarians personal, business and community life.

“If Rotary says we’ll do it, it will get done.”



Sharing fellowship while doing community service projects builds the bond of friendship. The ideal of service to the community in our personal, business and Community life is the heart of Rotary.

“Giving back” is what makes Rotary one of the most significant organizations in the world. Rotary Clubs do an enormous amount of good locally and around the world. Rotary projects have been prioritized within six areas that receive additional focus.

Areas of Focus

The six areas of focus reflect critical humanitarian issues that Rotarians have been addressing for many years.



Peace and conflict prevention/resolution



Maternal and child health



Disease prevention and treatment



Basic education and literacy



Water and sanitation



Economic and community development

ROTARY INTERNATIONAL



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

Worldwide service through fellowship in all clubs is the key to advancing international understanding, goodwill and peace. Rotary demonstrates Fellowship not only at club meetings but through Fellowship Groups worldwide.



governance of the association.

The Council on Legislation is an important part of Rotary's governance process. The Council comprises more than 500 representatives from every part of the Rotary world. Voting members include one elected representative of the clubs of each Rotary district. While the Board of Directors sets policies for Rotary International, the Council is where Rotary clubs have their say in the

Every three years, each district sends a representative to the Council, which reviews proposed legislation. The introduction of women into Rotary and the flagship program Of Rotary, Polio Plus occurred with approval from the Council on Legislation.

A Rotarian doesn't necessarily have to get into a Worldwide Group to join in the activity, do it at your club level. I had a Rotarian friend from the San Antonio Downtown Club who was a member of a group who bowled every Thursday morning. The number of fellowships is numerous. By becoming active in a Fellowship Group, one can develop friendships from all over the world. Fellowship is the key to enhance retention.

Rotary's program of promoting better understanding between different racial groups and between devotees to different religious faiths, so simply and yet so auspiciously begun in the year 1905. It has been the way of Rotary that has met with greater success thus far than the negotiations of diplomats....focus thought upon matters in which members are in agreement, rather than upon matters in which they are in disagreement.

Members may make selection of their activities according to their special tastes and aptitudes. An all-round Rotarian is interested in Club Service, Vocational Service, Community Service, and International Service. Get to know the activities within your club and volunteer to help out. There are few Rotarians who do all of the recognized activities initially, but grow into greater responsibilities as their Rotary experiences develop.

Rotary funds local and international projects through its Foundation. Although a voluntary contribution, the Foundation suggests that every Rotarian donate \$100 to the EREY program. It is also suggested that you share the concept of Rotary with friends, family, business and church leaders. Remember, each Rotary Club must approve every application for membership so the best approach is simply to invite your friend to a club meal/meeting to meet your club members and so they may have an opportunity to get to know your friend.

Note: With gratitude and acknowledgement, much of the material content of this article was provided in the Rotary Global History Fellowship (RGHF). Go to www.rghf.org and also to www.rotary.org to expand your knowledge about Rotary.