



Be a gift to the world

District 5790 Membership Guide

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District 5790 Membership Guide

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 District Membership Team Members during the past three years.

A. The Club Membership Committee and Your District Membership Team

The role of your club membership committee is to develop and implement an action plan for membership growth. Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving Rotary at and beyond the club level is directly related to the size and strength of your club's membership base. It is good to start with a theme...perhaps "Bring a Guest...Make a Friend" or "Give the Gift of Rotary" or "Learn...Grow...Do" which I used as club President a few years ago.

The segmented table of contents allows you to focus on particular areas of interest and to better utilize training efforts where needed. It is an on-going membership growth development program so you don't have to develop a new membership training effort every year, and is offered to clubs who could use a fresh structured systems approach to growing your club. It is a common sense approach to; 1) invite prospects to your club, 2) demonstrate the fun and fellowship of your club membership 3) provide potential members an educational packet about Rotary and your club, and 4) send a formal letter of invitation to join your club to approved candidates, and 5) maximize retention.

Your club membership team should as a minimum include your President-Elect, the past club President, the club Membership Chair, and a club leader. For larger clubs, someone is assigned for orientation, classification duties, and reporting...and your District membership team is here to help you.

Although subject to change, it currently is:

Dave Hurt, Coordinator	Arlington	817-821-0326
Kay Huse, Chair	Weatherford	817-846-5866
Kayla Christenson	Abilene	-----
Max Morley	Denton	936-556-0905
Lori Williams	Mansfield	817-453-3645
Dub Hirst (Extension)	Arlington	817-480-4393
Jim Giffin (Extension)	Southlake	817-975-3308

You should also regularly involve your AG with your membership training and implementation efforts.

B. Member Responsibility in Recruitment Efforts

The organization efforts are developed by the Membership Committee...club members have a responsibility to contribute to membership development through continued outreach, which includes:

- Inviting potential members to the club...only 1 hour per month commitment is suggested
- Follow-up with second invitation (phone call) for those making the first visit
- Provide interested individuals with club brochure & your club prospective member package
- Refer qualified candidates to other clubs if your meeting time is inconvenient
- Provide membership committee chair with contact activity form (for follow-up letter)

C. Benefits of increasing membership:

- Greater credibility within the community
- Broader perspectives, ideas, talents, and skills
- Expanded volunteer resources
- Endless opportunity for leadership at the club, district, and zone levels
- Enhanced fundraising potential
- Less frequent program and club responsibilities

D. Recruiting across Classifications

The classification principle limits the number of individuals in a club to either five per classification or 10 percent of the total membership if the club has more than 50 members. This system helps the club, the district, and Rotary International develop a pool of expertise to implement successful service projects locally and internationally and to administer club operations effectively.

E. Identifying Qualified Prospective Members

The two types of Rotary club membership are active and honorary. For recruitment purposes, seek active members who fulfill the criteria listed below. Careful selection of active members will increase your club's retention rate and reinforce positive attitudes toward new member induction. Typical qualified potential members are either:

- Currently working in professional, proprietary, executive, or managerial positions or retired from such positions; or
- Community leaders who have demonstrated a commitment to service through personal involvement in community affairs; or
- Rotary Foundation alumni, as defined by the RI Board.
- Live or work within the club's area and are service oriented
- Fit into a classification that is not overrepresented in your club

F. Inviting More Women and Younger Professionals

Clubs are learning the value of women...and younger professional bring new energy and skills to a club. As a result, women now represent about 15% of Rotary. Multiply that percentage by 1,200,000 and you will learn that there are now almost 200,000 women Rotarians. Don't forget them in your planning process.

According to a 2006 demographic survey conducted by RI, 15 percent of all Rotarians worldwide are women. In many regions, this percentage is far lower than the actual rate of women's participation in business leadership positions and community service. Female professionals and community leaders represent an important demographic segment that should be targeted for membership.

Women are excellent communicators and offer beneficial leadership qualities to clubs. Part of your membership candidate base strategy should be focused on this large potential membership base. More women are joining Rotary every day. In many clubs women now outnumber the men...and add a

significant degree of organization and professionalism to the club! Welcome women into your club...you will be glad you did!

Younger members are another underrepresented group in Rotary. According to the 2006 survey, only 34 percent of members worldwide are under the age of 50. Younger members offer a host of benefits for your club. They bring fresh ideas for weekly programs, fellowship events, and service projects. They also provide a continuing source of energetic, enthusiastic members who can eventually serve as committee members, chairs, and club officers, ensuring your club's longevity and relevance.

G. Suggestions for Approaching Prospective Members

- Try to “connect” with your club prospective member...build on common bonds.
- Think about what kind of event would be most effective for introducing the prospective member to your club and to Rotary. Some people would be more interested in attending a weekly meeting or interesting club programs, whereas others might want to learn about Rotary and service projects, or play in your scholarship golf scramble or other fund raiser.
- Learn your club's program for the focus invitation week, and invite the prospective member to attend a meeting with interesting information of that particular person.
- Don't be discouraged if someone doesn't show an immediate interest. It's good to be persistent, but give prospective members some space to make a decision on their own time.
- Exchange business cards, and make a note to yourself about your conversations with prospective members on the back of their cards and keep a record of your conversations
- Give a copy of What's Rotary? to everyone you speak to about Rotary. Carry several of the cards in your wallet. For those who show interest in learning more, follow-up with a club brochure or letter about your club.
- One option is to follow up with interested candidates by mailing a personal note, or phone call, with an invitation to a club event...even offer to pick him/her up and drive them to our meeting.
- Include references to www.rotary.org and your club in correspondence.
- Every member should be sure and introduce themselves to each visitor who comes to your club...when possible, ask a member who has similar interest, or someone who is real good at “Rotary talk” to sit at the same table with the potential membership candidate.

H. Starting the Conversation: (Three workshop samples to “Talk Rotary”)

At a recent Zone seminar, one workshop topic was how to talk Rotary. I really liked the one sentence that sums it up: “Rotary JOINS LEADERS from all continents, cultures, and occupations to EXCHANGE IDEAS and to TAKE ACTION in and for communities around the world.”

It is important to remember that the initial discussion with a prospective member is not to get him/her to commit to becoming a member. It is simply to tell a story about Rotary that you feel would be interesting to that person. Enrich the Rotary story with your own story, including information that the prospective member would relate to. Then invite the individual to your club to meet other club members and to learn more about Rotary.

Below are three “Rotary Talk” sample ideas that may be applicable when talking with prospective members...become familiar with them, but do NOT read them to the prospective member. An impromptu discussion is always better than a script that is read; however, the wording may be useful in a follow-up letter or in a training workshop.

Sample 1: *Rotarians share a universal truth about happiness.*

That truth is that true happiness, the deepest of human longings, may be found most easily by helping others. During the last century, Rotary International has developed the reputation as a philanthropic, humanitarian organization. Rotarians invest their efforts to help others, and ask nothing in return. Rotary is the world’s oldest service organization, and one of the largest. We have over one million, two hundred thousand members, comprised of leaders in all walks of life, and now have a drive to increase our membership to do even more good.

Our “flagship” program during the last 20 plus years has been to eradicate polio in the world...with the collaboration and cooperation of the United Nations, the World Health Organization, and recently with support from organizations like the Bill and Melinda Gates Foundation we are very close to our goal. By being a key participant in immunizing approximately 1/3 of the worlds’ population... what once was 1,000 cases of Polio every day is now less than 200 per year... the world now has only 3 endemic countries. Our efforts have helped saved 13,000,000 children from polio.

Club members are involved in local community projects based on need, and through Rotary Foundation world-wide projects. Enormous goodwill has been, and will continue to be generated with projects from Rotary clubs that address local, community, and world needs. With Rotarians working shoulder to shoulder in over 200 countries, Rotary projects may become a stepping stone to help nations improve their peace-building process.

Sample 2: *Rotary does a lot to promote world peace. Let me explain how.*

To the psychologist, peace may be defined as a state of mind. Peace to a basketball player may be scoring 20 points a game...to the runner it may mean running a mile in six minutes...to the businessman it may mean making a seven figure income...to the down and out it may mean existing until tomorrow. In each situation, the inner stress created to reach the goal may prevent living in a peaceful state of mind.

In my opinion, inner peace is a mental state of contentment. Experts say that ultimate peace is living in a state of harmony with ones’ environment. Others say that condition cannot exist until basic needs are met and opportunities exist for a better future.

Peace makers and peace keepers, such as those in the United Nations, are involved with making peace through force and keeping the peace through monitoring actions. As a general definition, peace is defined as the absence of war, or the absence of conflict...but peace is so much more than that. At the peace building level, where Rotarians serve, there may be an individual “conflict” that prevents daily living without a struggle to meet basic needs. Rotary responds to these conditions with thousands of projects.

Rotarians are known as peace builders. Rotarians help individuals resolve individual conflict to make living less stressful, and thereby more peaceful. The conflict may be having too little water to drink, or having to walk 10 miles to fill a 5 gallon container, or providing filters to make the water safe to drink. It may be providing wheelchairs to those who cannot walk, or temporary living quarters for families in time of disaster. It may be building schools or helping schools do a better job...you get the idea.

Sample 3: *The story of Rotary is so dynamic and touches so many lives it almost reads like a fairy tale.*

It began over 100 years ago with four businessmen who became friends. They decided to work together to do a project in their local community. The project gave them so much personal satisfaction that they decided to expand their group to other cities and other countries.

The concept of fellowship and giving back is still the foundation for Rotarians and Rotary Clubs. Today there are over one million, two hundred thousand Rotarians in over thirty-four thousand clubs working in over two hundred countries across the globe doing similar projects. Going to an International convention that has thirty thousand members from all nations is an experience that one will never forget.

With our "Service Above Self" motto, perhaps Rotary is the most recognized humanitarian service organization in the world. For your information, an individual cannot join Rotary just because they would like to be a Rotarian, they must also be approved by the club! The club approval process is designed to add business and community leaders who want to give back to help others.

Once you have qualified someone as a potential member, how should you initiate a dialog on the benefits of Rotary club membership? One approach is to highlight an aspect of membership that matches his/her individual Interest and is of personal value to that particular candidate.

This involves a process of asking questions and listening to learn what is important to the prospective member. Keep it simple in the beginning. Don't try to tell prospective members everything there is to know about Rotary and by all means do not try to push Rotary before they've visited a club meeting or service project. The important first step is to get the person to attend a club meeting or event, and then educate the person on the value of being part of your club and Rotary with a visitor information packet.

I. Overview of "The Process of Gaining a Club Member"

It is very important that most of your members buy into your "doable" membership growth plan as they are the ones who make it happen. You should now that this approach has now been successful in the District for two years. It is a system that should instill confidence that, if followed, will achieve the desired results. Our club focuses on a single visitor meeting day each month to enhance the dynamics of having multiple visitors together at the same time. Don't forget, the plan has a much better chance of being successful if you make it fun.

Growing membership is a never ending process that should include a long-range plan with the following stages: 1) identify candidates, 2) introduction to Rotary and invitation to visit your club, 3) visiting a club meeting and receiving an educational "visitor packet", 4) a formal letter of invitation to join, 5) invitation acceptance, 6) membership induction, 7) mentor to inform and orient, 8) educate, and 9) involvement.

(Participation in with club projects and the development of friendships are paramount to member retention). A big heads up to not become complacent after one or two years of success!

To improve member retention, this plan is designed to have every member involved and working together with a **“Buddy”** and as a team of two or more Buddies. It is suggested that to improve friendships, each team meet every three or four months to have fun and also to discuss their progress in getting visitors to the club. Getting visitors in is their only responsibility as the club membership team should implement the remaining steps to membership acceptance.

It has been documented that placing charts with key messages on easels that are in the view of every Rotarian and every visitor will improve the visitor to member transition ratio. This basically serves as low cost advertising as to why one joined Rotary, and why one should stay a Rotarian.

As a basis for efficiency, every three properly screened visitors should produce a new member. This ratio for one club in our District was reduced to 2:1 (two visitors for each new member).....a goal worth shooting for. To keep this ratio low, your guests should receive the best fellowship your club has to offer, and there should be a program that would be of interest to members and guests alike.

If your club goal is 5 new members, it will take about 15 interested guests to visit your club. The interaction with the visitor never presents the necessity of asking the stressful “will you join” closing question...that is done with the follow-up invitation to join letter. Without this or a similar plan of action, closure is extremely awkward and it may take more visitors for each new member...sound familiar? Probably so, as membership “closure” is a major issue with all clubs.

The following is a brief overview of this three-year membership process:

- 1) A candidate list is developed from club members and business directories
- 2) Two “team members” visit the candidates...Teams should have at least 4 members.
- 3) Focus invitation day on third week (or other specific week of each month)
- 4) Documentation and contact information to membership chair during club meeting
- 5) Consider an annual prize or drawing for each of the winning team members
- 6) The club program on your focus “Visitor Day” needs to be good & announced in advance
- 7) A “Rotary Moment” to tell the story of a club member needs to be part of your “Visitor Day”
- 8) Give candidates a visitor packet with club and Rotary information before leaving the meeting
- 9) A follow-up invitation-to-join letter from club president within two weeks (timing important)
- 10) Public Relations chair will get new member induction pictures in the newspaper

An annual prize or lottery drawing may be funded from contributions of club members or it could be from the club. One prize or recognition plaque should be for the most visitors...another for the most new members...and one for the winning team given to the team leader. Whatever the award, it should be meaningful as success will mean a great deal to your club.

The suggested number of membership teams in the club is based on the club goal for new members. Each team is expected to bring in a minimum of one new member per year...a very reasonable goal. If the club goal is 5 new members, then there would be five teams. Within each team a member is selected as the team leader who will report visitor information (home addresses are very important to get for the invitation letter) to the club membership chair, and set up periodic team get-togethers. Your District Membership Team is very interested to hear of your success....please keep us informed.

J. The 5-Minute New Member Survey

It is recommended you have a membership club assembly to present your membership plan. During this time, club members need to write down the names of friends, neighbors, colleagues, and/or business acquaintances in the community who might be qualified prospective members, and don't forget women who are leaders in the church or community or executives in a business. This activity should generate a priority membership list that can serve as a starting point for each team in deciding who should be invited to club meetings. Other candidates may be developed by canvassing businesses in the area or using the Chamber of Commerce listing.

During this survey time, have members write down the name of their preferred prospecting Buddy" with second and third choice for their team members. The membership chair will select teams and team leaders...but it is important to keep member preferences in mind. Building friendships will improve member retention.

Our club has only one meeting per month to focus on visitors keeps the plan exciting, and enthusiasm is the catalyst that creates action. A goal of one well selected visitor per team every month is suggested. Your club effectiveness in converting guests to members may change this number. To encourage members to bring guests who are potential members, it is recommended your club pick up lunch costs for each qualified and documented new member candidate...this would not include member guests unless that guest is a qualified candidate for club membership. Keep your club secretary informed.

K. Membership Growth...Why Join Rotary?

Why do Rotarians seem to find a special kind of happiness and satisfaction in their lives? What's in it for us? Part of the Rotarian "return" is a personal satisfaction from being part of an organization that does so many great things. The essence of Rotary's Ideal of Service is to help others, in all parts of the world, willingly and without any thought of personal benefit.

Local and world-wide projects are the events that shape our lives and contribute to who we are. Social, political, and economic conditions affect the way people perceive volunteering and what they hope to gain from a volunteer experience. When developing recruitment strategies, consider these questions:

- What are volunteers looking for when they choose an organization?
- Is your club offering prospective members opportunities that match their expectations?
- How do the benefits of Rotary club membership compare with other organizations?
- What can be done to help prospective members choose Rotary over other organizations?

Use these questions and the following benefits as a springboard for discussion among your team members to determine the best way to position your club as the preferred option for service in the community. Focus on the benefits of Rotary club membership that extend beyond service opportunities...for example:

- Camaraderie, fellowship, and friendship with like-minded people locally & internationally
- Business networking, although networking alone is not a reason to join Rotary
- Opportunity to develop leadership skills within an internationally recognized service organization
- Increased awareness & participation in helping others in need throughout the world
- Pride in belonging to an effective organization that helps the local community

If you plan your visit to a prospective member at his/her office, you should be prepared to discuss the value of being a Rotarian, and position your club as an appealing course of action. Also realize that Rotary isn't for everybody. Some people may prefer to focus on short-term volunteer opportunities or want to work for a specific cause. Wish them well... stay in touch...they may later change their mind.

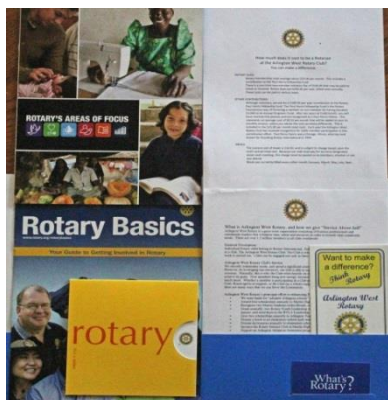
L. Potential Member Visitor Packet

There are numerous tools available to show others what Rotary is all about. When visiting a prospective member at their office, along with your business card or your Rotary invitation card, always leave a club brochure or similar publication that provides attractive information about your club or Rotary.

Your guest is the most important person at a club meeting and you should always introduce them to other members in your club, especially those who have similar interest. Before the guest departs, be sure to provide an educational "visitor packet," (previously referred to as the Blue Folder) that includes Rotary International information, your club policy, and the cost of being a Rotarian.

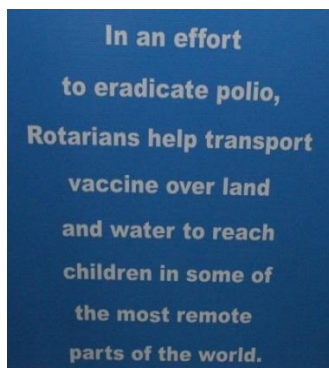
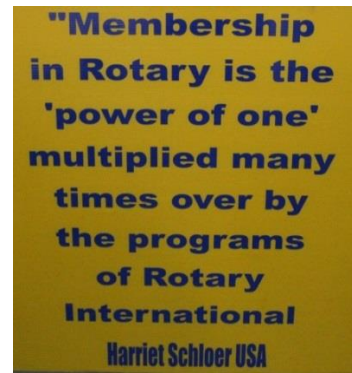
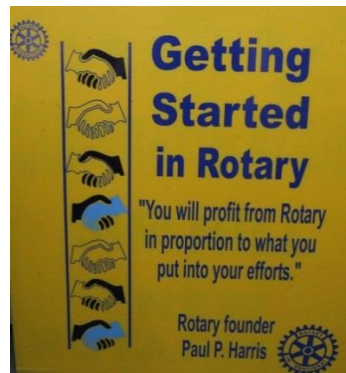
The visitor packet should not contain the same documents provided in the New Member packet. The packet illustrated below has three Rotary publications on the left side of the packet. They are: 1) "Rotary Basics" (R.I. form 595-EN-(611); 2) "Rotary's Areas of Focus" (R.I. form 965-EN-(411), and 3) "Rotary" (R.I. form 001-EN-(308).

The right side of the packet typically contains two club pages of information. The first is about your club and what your club does...this may be enhanced with a club brochure if one is available. The second document communicates the cost of being a Rotarian, including details about 1) Rotary dues (I personally say the dues average is only about \$25 per month, less than a dollar a day...plus meals), 2) this amount includes the Every Rotarian Every Year (EREY) volunteer \$100 contribution and eventually qualifying for the Paul Harris award, and 3) the cost of meals. Sample documents are found in the final implementation "tools" tab...see the electronic version in the Train-the-Trainer flash drive.



M. Use Charts to Increase Member Retention and Improve the Guest-to-Member Conversion Ratio

One past District Membership Chair has been gracious in sharing “chart ideas” that serve as growth and retention aids. Club charts are used to 1) remind members of the good we as Rotarians do, 2) reinforce reasons they joined Rotary and 3) why they should continue to stay a Rotarian. They are also used as advertising and education tools for visitors. We recommend positioning two charts on easels that are on either side of the speaker podium....periodically change the charts. Here are a few of my favorites:



After reviewing the use and non-use of charts over a three year period at one club, it was evident that the use of charts aids in the retention of members, and they also improved the conversion of guests to members from a 2:1 ratio when used, to a 3:1 ratio when not in us. These statistics speak strongly for the use of charts to educate members and to tell guests the good things that Rotary and your club do. Be creative and show off your club with charts....every week.

N. The Use of Publicity to Grow Clubs

We all know the importance of publicizing our club projects, new members, and community activities. Nothing attracts potential members more than reading about Rotary in the newspaper. Here is the good news...the charts shown above are an effective way to both publicize your club and retain membership!

There is no substitute for respecting an individuals' time and space...and understanding what their value system represents. Once you connect the value system (what's important) with how your club can positively impact those values...and with relative little time...you are on the way to gaining a new member.

O. Starting New Clubs

There are always opportunities to increase club activity. Currently, E-Clubs are gaining momentum.

During a recent interview, I asked an active businesswoman who was familiar with Rotary, but not a member, why she thought there were not more women in Rotary. Her answer surprised me, and made one think “outside the box” as to how our District could be more effective in adding women members.

Her thoughts were that people like to have fellowship with others who have similar interest and that interest be connected to projects to enhance the likelihood the person will remain in the club. Junior League community members may consider Rotary as a good transition once they become inactive in the league so make sure they know about Rotary.

There are also the situations when a club is very successful in adding new members and becomes very large. During the process of growing, there may be a few who may not adjust to the new club size, change of direction, new club culture, or who may want a different meeting time. Perhaps these few members may be interested in starting a new club that meets their particular needs.

P. Principles of Club Growth: The 5 C’s of Membership

With the assumption that one who has a good Rotary experience will remain a Rotarian, the following checklist is a good barometer of mentoring and club growth.

To maximize “The Rotary Experience,” use the following C’s as a checklist:

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. (Hint: Use the Buddy System)
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.

A Side Note:

It may not seem like much when there is a club membership loss of just one or two members. But with 66 clubs in the District, the impact is tragic...but not irreversible. It was not many years ago our District had about 3600 members, but the trend and cumulative District loss of even 50-75 members each year, has taken its' toll. This shows the importance of every club to become part of the solution...The future of Rotary is on the line.

Bottom line, as they say, the best answer to what ails most clubs, as well as Rotary International, is the development of new members and retention of existing members. I am very pleased to report that during the last two years many of our District 5790 clubs have used ideas presented in this membership guide. As a result, our District has made a significant reversal in the previous 13 year trend of negative growth. If your club is not growing consistently at a 5% growth rate, I encourage you to give this plan an honest effort.

My club: Not that many years ago my club was considering disbanding and joining another club. Members who love Rotary had all filled all Rotary Chairs (some several times) and had the "been there done that attitude" were tired and did not want to do it again. Now the good news...

About five years ago three energetic, enthusiastic, and committed new members came on board. Of course they were immediately given club responsibilities, starting with President Elect and President Nominee. During these few years, these three members made all District functions, we went to PETS even as President Nominees, and we attended Rotary ILT training together.

The training and commitment paid off! Our club is now a vital healthy vibrant club of 45 members, with over 10% growth in membership over the previous five years. I was fortunate to be among those three individuals, and whatever I may have given to the club has been returned in kind tenfold.

The important message that I hope you hear is that it only takes a few enthusiastic and committed membership oriented members to get, and keep, your club on a healthy membership growth track.

Now, I am hoping this guide will serve to re-energize you and a few members of your club to have a 10% growth, or more, this year and years to come. For all size clubs...new members will energize your club and enhance your Rotary experience...take a leadership role now in growing your club...you will be glad you did!

Speaking for your District AG's and your District Membership Team, we look forward to helping you grow your club and to hearing some great success stories.