



## HOW WILL YOU GET INVOLVED?

When you get involved, it's not just your club and community that benefit. You benefit, too. As an active Rotarian, you'll make connections and develop skills while Doing Good in the World. You'll meet community leaders and tackle local and global issues that are important to you and your fellow club members. You'll feel the shared sense of purpose that comes from working together to better your community. When it comes to being an active Rotarian, the opportunities are endless.





There are countless ways to engage with Rotary and your Rotary club. You choose how — and how much — to get involved.

# ENGAGING AND KEEPING MEMBERS: A RETENTION ASSESSMENT AND ANALYSIS



When members stay, it's a sign that your club's doing well. But just keeping your overall member count steady doesn't mean you don't need to be concerned about retention. If clubs are consistently losing members and inducting new ones, that indicates that they may need to change how they manage their growth or retention.

This assessment provides ways to understand your club's trends and engage people more meaningfully at different stages of membership. This increases the likelihood that they'll remain in Rotary.

## WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

- Determine when and why members leave your club
- Develop strategies to keep people engaged and involved so they stay

## GETTING ORGANIZED

Part of this process requires access to club membership reports in Rotary Club Central. The club president, secretary, treasurer, membership chair, and Foundation chair have this access and can delegate it to anyone at the same organizational level. It may be helpful to involve a member who has experience in data analysis.

## GETTING STARTED


### Step 1: Gather information.

Think about the members who have resigned from your club during the past year or two. Consider whether they were newer members or longtime members, and whether they had any reasons in common. If your club surveys exiting members, you can gain insight from that feedback. When

you terminate a member in My Rotary, it's important to list the reason they left. This information will be used in the Rotary reports that are a good source for analyzing trends.


To access these reports:

- Sign in to My Rotary
- From the MEMBER CENTER menu, choose Online tools and then Rotary Club Central
- From the options on the left, choose **Reports**
- Under **Club Reports**, choose the report you'd like to access

You can use the Member Viability and Growth report to find the retention rates for existing members. You can also search for trends in when members leave your club and their reasons by using the Membership Termination Profile report. To export reports, select the "Export" icon  and choose a program or format. You can now save or print the report.

Knowing why people left and when in their Rotary membership they did so can help you recognize your club's retention strengths and weaknesses to focus your efforts.



To export reports, click or tap the "Export" icon  and choose a program or format. You can now save or print the report.

## Step 2: Understand when and why members leave your club.

Once you've reviewed the Member Viability and Growth and the Membership Termination Profile reports, discuss the results with the membership committee. Think about:

- Who is leaving your club? Are they longtime members, new members, or both?
- Why are members leaving?
- Are any common themes emerging from the data?

## Step 3: Develop an action plan to better engage members.

Present the membership committee's findings to the club. Ask your club to consider:

- What is our club good at?
- What could our club do better?
- What keeps our active members involved?
- How can we better engage those who aren't as involved?

Lead a discussion about how to build on what you're doing well and address any challenges. Encourage members to share their ideas about how to involve people at different stages of membership.

# WHY MEMBERS LEAVE AND TIPS TO RETAIN THEM

Understanding why members leave is crucial to strengthening your club. The Exit Survey we discuss elsewhere in this guide helps you gather this information on a club level. Rotary has also conducted extensive research worldwide on why people leave at various points in their membership. Here's what we've found along with tips to address various situations.

## MEMBERS WHO STAY LESS THAN A YEAR

Although about three-fourths of new members who leave say they were told about the responsibilities of being a member before they joined, 40% cite the cost or time commitment as their reasons. Others lose interest, don't feel included, or find that their experience didn't meet their expectations. Some say they weren't able to engage with the club or found the club unwilling to change its traditions.

### What you can do

If your club is losing members within their first year, try these strategies:

With prospective members	With new members	With your club practices
Communicate better about the personal and professional benefits that your club offers as well as the expectations that the club has for members.	Plan meaningful induction ceremonies that celebrate the occasion and include their families.	Make sure current members make new members feel welcome (such as by engaging them in conversation or inviting them to sit with you at meetings).
Ask for their impressions of the club and be willing to act on their suggestions.	Offer orientation programs that help them learn more about Rotary and how to get involved in the areas they're especially interested in.	Pair new members with mentors who can explain the club's practices and traditions, answer questions, introduce them to other people, and talk regularly with them about how they're enjoying their experience.
Tell them about the professional development opportunities available through Rotary, such as the leadership and communication courses in the Learning Center.	Involve them in ways that match their specific interests and expertise rather than in ways that fill the club's needs.	Keep club meetings fun, energetic, and entertaining without forgetting that most people join Rotary for the opportunity to engage in meaningful service.



## MEMBERS WHO LEAVE AFTER 1-2 YEARS

Many members who leave after a year or two say they didn't feel involved in club events and activities, didn't get along with people in the club, or had difficulty fitting Rotary into their lives because of other commitments.

### What you can do

If your club is losing members after one to two years, try these strategies:

Get them involved	Connect with them	Emphasize learning
Talk to members who are reaching this point about opportunities to join a committee or get involved in a project.	Ask these members for feedback about what they like and what they want to change. They may have ideas that can revitalize the club's social activities or service projects.	Remind them about the professional development opportunities available through Rotary, such as the leadership and communication courses in the Learning Center. New courses are added regularly, so they may have more options than when they first joined.
Ask how they want to get involved (find ideas in <a href="#">Connect for Good</a> and the <a href="#">guide to Avenues of Service activities</a> ).	Pair members who don't have mentors with one, or suggest that they change mentors if they want a different perspective or have become interested in different aspects of Rotary.	

## MEMBERS WHO LEAVE AFTER 3-5 YEARS

Members who leave after three to five years may do so because their social expectations weren't being met, they were frustrated with the club's leaders, or they had difficulty meeting the expectations for members because of other commitments.

### What you can do

If your club is losing members after three to five years, try these strategies:

Innovate	Listen	Provide opportunities
Implement new activities so that people remain excited about attending meetings and other club functions.	Ask these members for feedback about what they like and what they want to change. They may have ideas that can revitalize the club's social activities or service projects.	Offer these members leadership opportunities and ensure that those who want these kinds of roles are considered for them. By taking on leadership roles, they'll feel useful, valued, and more connected with the club.
<a href="#">Find videos</a> from recent Rotary events to supplement your club meetings. After you watch, ask people to discuss the topic's relevance in their club or community.	Ask them to give a presentation to the club about something that's important to them.  Encourage those who are in club leadership roles to mentor newer members or participate in district activities, which puts them and others in a position to take on more challenging roles.	
Organize social activities that are different from the ones your club has held before.	Ask them what's preventing them from participating more fully, then accommodate them as much as you can.	Ask them to advise on or lead a project or activity in their specific area of expertise, and recognize them for their efforts.

## MEMBERS WHO LEAVE AFTER 6-10 YEARS

Some members who leave after six to 10 years say that their social expectations weren't being met and they were frustrated with the club's leaders. Others left when they retired or needed to relocate.

### What you can do

If your club is losing members after six to 10 years, try these strategies:

Understand their needs	Recognize their value	Connect them with a new club
Talk with these members about what they're looking for and how their interests have changed since they joined.	Let them know what you value about their perspective and what you look forward to doing alongside them in the future.	Forward a relocating member's contact information to clubs in their new area, refer them through My Rotary, or encourage them to let Rotary know they want to change clubs.
Ask if they're interested in mentoring newer members or getting involved in district activities, such as planning the district conference or serving on a district committee.	Thank them for their contributions, big and small.	
Ask them what they need or if you can make something easier for them that will keep the club experience relevant and accessible for them and others.	Give them an opportunity to lead in some capacity.	If several members have different interests, suggest that they start a satellite club.

## MEMBERS WHO LEAVE AFTER 10 YEARS

Many members who leave after more than 10 years say they weren't interested in the club's meetings and activities. Others left because of retirement, family obligations, financial constraints, or health problems.

### What you can do

If your club is losing members after more than 10 years, try these strategies:

Show them they matter	Offer new ways to get involved	Accommodate them if you can
Talk with these members to learn what they're experiencing and feeling.	Ask for their opinions on how to energize or reinvent your club meetings.	Consider easing the financial or participation obligations on these members if it's a factor that pressures them to leave.
Recognize them for their efforts over the years by <u>nominating</u> them for an award.	Ask if they're still interested in the club's activities or what might interest them instead.	Be aware that these members may have health concerns that they may or may not want to disclose. Ask them what they need or if you can make something easier for them that will keep the club experience relevant and accessible for them and others.
Tell them what you value about them and how much your club benefits from their perspective and expertise.	Gauge their interest in taking on a district leadership position such as assistant governor, district governor, or district committee chair.	



Use the Member Satisfaction Survey to ask everyone for feedback about the club and the Member Interest Survey to learn more about people so you can better engage with them.

## Want to do other assessments?

Member Interest Survey

Diversity Assessment

A Prospective Member Exercise

Member Satisfaction Survey

Exit Survey

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



# ENHANCING THE CLUB EXPERIENCE: MEMBER SATISFACTION SURVEY



The experience your club offers people affects how they feel about the club. By asking members for feedback regularly and then responding to it, you're showing your openness to change and empowering them to help create their ideal club experience. The Member Satisfaction Survey can help you gather feedback so you can use it to ensure that members are enjoying their experience.

## WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

- Identify what your members like and dislike about their club experience
- Develop an action plan that builds on what people enjoy and that ends or changes what they don't

## GETTING ORGANIZED

You'll need a dedicated group of people to conduct the Member Satisfaction Survey. It can be your club's membership committee or a few interested volunteers. You can devote time during a club meeting to discuss how satisfied people are and have them take the survey. You could also hand out the survey or email it to members so they can have more time to complete it. Or you could hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.



Emphasize to those administering the survey the importance of keeping the responses confidential when they discuss and analyze them. Be sure to tell members this will happen.



Consider using an online survey platform. They're convenient, often free or inexpensive, and helpful in managing the response data.



Be sure to allow enough time when you're planning the schedule. Each step can take a week or longer.

## GETTING STARTED

### Step 1: Customize the survey.

Use the sample questions below to develop your club's Member Satisfaction Survey.

### Step 2: Distribute the survey.

Distribute the survey to people or use an online survey platform. Explain that their responses are confidential and will be used to enhance the club experience for both current and prospective members.

### Step 3: Analyze the data.

Have the group you organized to administer the survey review the results. Remind people about the importance of confidentiality and respecting all viewpoints.

### Step 4: Share the results and make an action plan.

Present the survey results to the club and discuss them. Allow time for members to ask questions and offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for making changes.

### Step 5: Take action.

The final step is to implement the action plan. Talk to members and involve as many of them as you can in the process so that they're invested in making the club experience better for everyone.

### Want to do other assessments?

[Member Interest Survey](#)

[Diversity Assessment](#)

[Prospective Member Exercise](#)

[Retention Assessment and Analysis](#)

[Exit survey](#)

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

# MEMBER SATISFACTION SURVEY

## SAMPLE QUESTIONS

This survey focuses on your typical experiences in our club. Your input is valuable and will be used to make the club even better for everyone. There are no right or wrong answers, so simply offer your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with being a member of our club?

- Satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Dissatisfied

2. Thinking about our club’s **culture, members, and meetings**, indicate how much you agree with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I enjoy our club meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job involving new members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Members of my club care about each other.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club is as diverse as our community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Members are involved in ways that match their interests and skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The number of fundraising activities is appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our club has a welcoming environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I can freely express myself among our club members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm proud to belong to this club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

3. How do you rate the following aspects of club meetings?

	Excellent	Good	Fair	Poor	Very poor	Not applicable
Rotary International updates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format (online, in person, or hybrid)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for socializing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional connections and networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content variety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting time and day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals or other food options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities to offer input and have discussions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

4. What do you think about these aspects of our club's **service projects**?

	Just right	Too many	Too few
Total number of projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of local projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of international projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Disagree	No opinion
Our projects are well-organized.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our projects make a difference in the community or the world.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our projects are meaningful to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**



5. Thinking about **communication** and **responsiveness** in our club, indicate how much you agree with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club is good at communicating with members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club is good at listening to members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club seeks input and ideas from members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club regularly acts on input and ideas from members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club updates our processes and rules to meet the needs of our members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm comfortable with the pace of change in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

6. Indicate how much you agree with the following statements about being a member.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I am welcome in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I can be myself around members of my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club members know me and value me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I make valuable connections through my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club provides opportunities to use my talents and skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have access to leadership opportunities in my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My Rotary experience is worth the cost.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the time I commit to Rotary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My family understands the value I place on my Rotary membership.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My friends understand the value I place on my Rotary membership.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in my community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in the world.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**



7. Indicate how much you agree with the following statements about club engagement.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I invite my friends, family, and colleagues to club events.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I invite prospective members to join my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I frequently participate in my club's activities, projects, and programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm proud of my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

8. Think about the costs associated with being a club member and rate these factors.

	Too low	Just right	Too high	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for donations for service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments and suggestions:**

9. What didn't we ask about that you'd like to start, stop, or continue in your club?