

## District Assembly Discussion Questions

When considering these questions, talk to outgoing and incoming club leaders to compare thoughts.

What are the responsibilities of the club membership committee, and what are your responsibilities as chair?

How will your committee support the club's strategic plan?

How can the club membership committee attract new members?

How can the club membership committee keep members engaged?

What controls are in place to ensure that new members are informed and included?

How can you help committee members do their job?

[illegible]

## Worksheet 2: Goals

Use this worksheet to draft a long-range goal and annual goals for three years to reach the long-range goal. Ensure that your goals are:

**Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.

**Measurable.** A goal should provide a tangible point to pursue.

**Challenging.** A goal should be ambitious enough to go beyond what your club has accomplished in the past.

**Achievable.** Rotarians should be able to accomplish the goal with the resources available.

**Time specific.** A goal should have a deadline or timeline.

**Long-range goal** (goal for your club three years from now)

**Year 1 annual goal**

**Year 2 annual goal**

**Year 3 annual goal**

## Worksheet 3: Action Plan

In the space below, write one annual goal from your goals worksheet. Then determine the action steps that need to be taken to meet this goal.

Annual goal
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Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

Resources needed
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## Worksheet 4: Club Membership Committee Case Studies

Read the case study below and answer the questions. Create a plan using the case study action plan on page 23.

### Case Study 1

After only three months of being a member of a Rotary club, John is asked to be the club's president-elect. When John becomes president, the club members are unhappy that he is changing things. John is overwhelmed and doesn't know whom to turn to for help.

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What should he do?

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If he sought your advice, what recommendations would you offer?

### Case Study 2

Greg, a lawyer, has been a Rotary club member for 10 years. He has had to let staff go at his law firm, and cases have piled up, making it difficult for him to leave the office for his lunchtime club meetings. He and a few other members have asked the club board if the meeting time can be changed to evenings. The board is reluctant to break with tradition.

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What can the club do to help ensure that Greg remains a Rotarian?

### Case Study 3

The Rotary Club of Mountain Point is in an area with a mix of indigenous groups and people from abroad. The club is made up primarily of expatriates who work in the industrial sector flourishing in the region. Young professionals have moved to the area, attracted by its strong economic growth. The club has 20 members, and did not add any last year.

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How can the club identify sources of new members within the community?

### Case Study 4

A devastating earthquake last year damaged an urban area that hosted a number of Rotary clubs. The 10 affected clubs quickly created a Facebook page and posted requests for assistance, and the area's Rotaract clubs used Twitter to post the requests to friends and family around the world. Rotarians raised more than double their fundraising goal for the earthquake victims.

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Why was their campaign so successful?

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How could this effort help them attract new members?

## Case Study Action Plan

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

What did you learn that you can apply to your club?

Resources needed



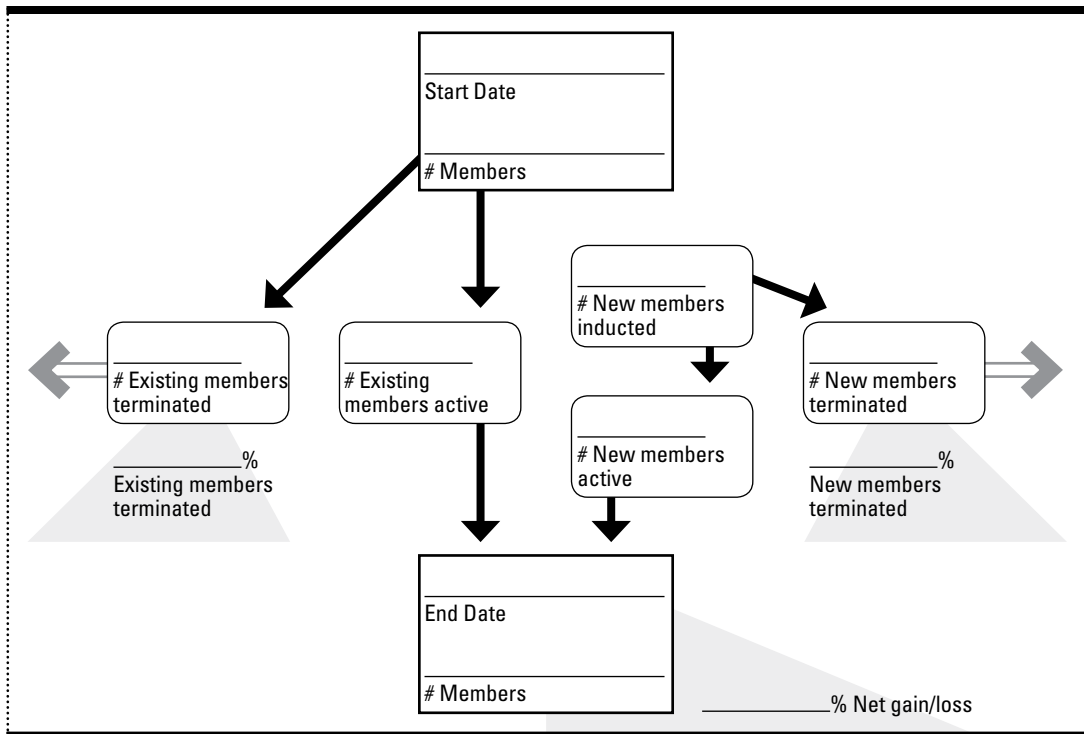
## Worksheet 5: Retention Model

To remain viable, a Rotary club must retain its current members and induct qualified new members. The retention model is a tool to help clubs calculate their net membership gain or loss over a specified period and determine its source: existing or new members.

Use your club membership records and the following diagram and instructions to create a retention model for your club. You'll need induction and termination dates for all members in the three- to five-year period. (If your club doesn't have complete records, your president or secretary can download them from Member Access at [www.rotary.org](http://www.rotary.org).)

Once you've completed your model, use the instructions to interpret it.

### Creating Your Retention Model



Establish the time frame you wish to study by entering a **Start Date** in the top box of the retention model and an **End Date** in the bottom box. (We recommend a time frame between three and five years.)

In the **Start Date** box, enter the number of active members who were in the club on that date.

In the **End Date** box, enter the number of active members who were in the club on that date and calculate the **% Net gain/loss** by:

$$\frac{(\text{End Date number of members} - \text{Start Date number of members}) * 100}{\text{Start Date number of members}} = \text{ \% Net gain/loss}$$

In the **Existing members terminated** box, enter the number of members who were active on the start date but terminated before the end date. Calculate the **% Existing members terminated** by:

$$\frac{\text{Existing members terminated} * 100}{\text{Start Date number of members}} = \text{--- \% Existing members terminated}$$

Calculate the number of **Existing members active** by:

$$\text{Start date number of members} - \text{Existing members terminated} = \text{Existing members active}$$

In the **New members inducted** box, enter the number of new members inducted between the **Start Date and End Date**.

In the **New members terminated** box, enter the number of new members who were terminated before the end date and calculate the **% New members terminated** by:

$$\frac{\text{New members terminated} * 100}{\text{New members inducted}} = \text{--- \% New members terminated}$$

Calculate the **New members active** by:

$$\text{New members inducted} - \text{New members terminated} = \text{New members active}$$

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\* The number of members at the **End Date** should equal the number of **Existing members active** plus the number of **New members active**.

### Interpreting Your Retention Model

Once you know who the gained and lost members are, you can begin to identify the club's retention strengths and weaknesses.

**Net Gain or Loss.** A net gain or net loss of members is the first indication of a club's retention status. A net gain indicates simply that the club has more members. It could mean that the club retained its active members and brought in new ones, or that the club inducted enough new members to offset the number of active members who left.

A net loss indicates that the club failed to retain a larger number of members than it inducted.

**Evaluating Termination Rate.** The strongest indication that a club might have a retention problem is if it has terminated a large number of members. Add the number of **Existing members terminated** (far left box) and the number of **New members terminated** (far right box) to determine the total number terminated. Is the total reasonable for a club of this size? Consider the reasons for these terminations and the steps the club can take to limit such losses.

**New Members.** To continue the termination analysis, consider the number of **New members terminated** (far right box) within the specified time frame. Every effort should be made to keep this number as low as possible. It is understood that occasionally a new member may leave unexpectedly; however, if the club fully informs prospective members about the responsibilities of membership and maintains an effective orientation program, the number of new members terminated should be extremely low. The percentage listed under the **New members terminated** box (**% New members terminated**) identifies what percentage of new members have been terminated.

**Existing Members.** The number of **Existing members terminated** (far left box) identifies how many of the members that were active on the start date have been terminated. (The club's attrition percentage is % **Existing members terminated**.) A low attrition percentage is an indication that the club is retaining its existing members.

**Other Resources.** Additional retention strategies and assessment tools can be found in the *Membership Development Resource Guide* and Club Assessment Tools, respectively. Contact your Rotary coordinator for guidance in your retention efforts. Detailed instructions on completing and analyzing the retention model are available by downloading Club Assessment Tools from [www.rotary.org](http://www.rotary.org).

## Worksheet 6: Problem-Solving Guide

Use the Planning Guide for Effective Rotary Clubs and the goals worksheet from session 2 to develop your problem-solving guide. Analyze your club's goals, and think about potential challenges to achieving them. Then, offer solutions to these challenges.

	Goal	Potential Challenge	What resources are available?
<b>Administration</b>			
<b>Membership</b>			
<b>Public Relations</b>			
<b>Service Projects</b>			
<b>Rotary Foundation</b>			
<b>Other</b>			