MEMBERSHIP ASSESSMENT TOOLS

Rotary

TAKE ACTION: Rotary.org

ABOUT THIS GUIDE

Whether your club is large or small, strong or struggling, taking the time to evaluate what you're doing is worth the effort. The tools in this guide can help you connect better with your members, involve new and longtime members in ways they enjoy, find approaches to make your club experience more inclusive and flexible, and gather helpful feedback from members who leave your club. These tools are intended to help you find ways to make more people comfortable in your club and inspired to join. You'll find these membership assessment tools in the guide:

- **Member Interest Survey.** This helps you get to know new and prospective members so your club can meet their expectations and maximize the ways in which they can get involved.
- **Diversity Assessment.** This helps you identify groups in your community that may be underrepresented in your club.
- **Prospective Member Exercise.** This helps you think about specific people you want to invite to your club.
- **Retention Assessment and Analysis.** This helps you engage people at different stages of their membership.
- **Member Satisfaction Survey.** This helps you learn what your club's members want, find ways to get them involved, and think of new initiatives to keep your club relevant.
- **Exit Survey.** This reveals the expectations former members had that your club didn't meet and what you might do differently to avoid losing other members for similar reasons.

For the assessment tools that involve surveys, we recommend creating an online survey using a free platform that's popular in your region, using the questions in this guide as a starting point.

Recommended survey platforms include: Google Forms, Qualtrics, SurveyMonkey, Microsoft Forms, and Mailchimp.

Your club can use any or all of these assessments. We recommend asking a group of members who are committed to membership — ideally, the club membership committee — to conduct the assessments, analyze the results, and then recommend and help implement action based on the findings. While you may not have immediate changes in your membership, taking the time for in-depth assessments will strengthen your club and Rotary over time.

Use the **Club Action Plan template in appendix 1** to create a schedule and assign tasks for each membership assessment tool that you want to use.

GETTING TO KNOW PROSPECTIVE AND NEW MEMBERS: MEMBER INTEREST SURVEY

Did you know that when members leave Rotary, one of the primary reasons they cite is that their expectations weren't met? Getting to know new and prospective members early on is helpful for everyone. If you understand someone's background, interests, and what they want to contribute, you can determine whether your club can offer what they want and how to involve them in ways they'll enjoy. You might even find opportunities for them to help your club grow. Surveying new and prospective members gives you feedback on any factors that might prevent them from joining or fully participating. You may also discover ways your club can be more flexible and accommodate more people.

WHAT YOU'LL GAIN

If you consistently conduct this survey and act on its results, you can:

- Help prospective members and new members feel comfortable in your club
- Increase member engagement and satisfaction
- Improve your club's retention rate
- Help your club make the most of members' unique skills and expertise

GETTING ORGANIZED

Identify a group of people who are committed to welcoming and involving new members and helping them understand the culture of your club. This may be your membership committee or a newly organized member interest team. Next, decide how you'll use the survey. You can send it to guests who inquire about joining, include it in the membership application, make it part of new member orientation, or use it as the basis for an informal conversation. You'll also need to decide whether you'll print copies of the survey, email it to people, or use one of the survey platforms mentioned above.

Some clubs that use this survey in their membership application take an additional step. If it's clear that the club doesn't meet the person's interests, the club asks the assistant governor to find one that does.

GETTING STARTED

Step 1: Decide what questions to ask and who will ask them.

Review the sample questions below and use them to create your club's survey or guide your informal conversations. Not every question will apply, so you can edit them, add your own, or omit some. Save them with your club files so they're ready to use. Determine who'll be responsible for sending out the survey or having the conversations.

Step 2: Determine when to use the questions and then do so.

Distribute the survey or schedule a time to talk based on the timing your committee decided upon. That might be after a guest's first visit or after a new member has joined. Let the person know the purpose of the survey or conversation and that their responses will help you offer them a better experience. Use the questions that your club had selected earlier.

Step 3: Use the feedback to engage each member in ways that suit their interests.

This is the most important step. If people take the time to answer the questions thoughtfully but there's no response, they might feel frustrated, which would undermine your goal. Because you know your club and Rotary well, learning what members are interested in will enable you to connect them with activities they'll find fulfilling. Review the sample below to learn how to address a member's response.

NEW OR PROSPECTIVE MEMBER'S RESPONSE	WAYS TO ACT ON THEIR RESPONSE
Example: The person is interested in hands-on service, but also concerned about the attendance requirement.	Introduce the person to the service projects chair and ask if they want to join the committee.
	If your club doesn't have a strong service component, ask your assistant governor whether another club is a better fit or if there's a districtwide project the person could join.
	Ask if the person is interested in sharing their ideas for service projects your club could conduct.
	Explain that attendance is flexible (if it is in your club). If it's not, consider updating your bylaws to better accommodate people with this concern.

MEMBER INTEREST SURVEY SAMPLE QUESTIONS

Your background

1. What is your name and what do you like to be called?

What are your pronouns? (We ask because we always want to treat people with respect and ensure that people feel welcome.)

My pronouns are: ____ he/him/his ____ she/her/hers ____ they/them/theirs

2. What title do you prefer? Please circle one: Mr. / Mrs. / Ms. / Miss / Other: _____

3. Tell us about your areas of expertise.

4. What is your current or former profession?

5. What is your general field or industry? (For example, sales, publishing, etc.)

6. When is your birthday? (We ask so that we can honor you if you wish.)

7. Are there other significant dates we can help you or those close to you celebrate?

8. Tell us about where you grew up or the places you've lived.

9. What hobbies or interests would you like us to know about?

Membership in Rotary

1. What motivated you to get involved with the club? How did you learn about us?

2. Have you engaged with Rotary in the past? If so, how?

3. What do you want most from your experience as a member?

4. What opportunities would keep you interested and improve your Rotary experience?

5. What strengths and skills do you have that could help your club?

6. Please rank these in order of what you want from your Rotary experience, using 1 for most important and 5 for least important:

    ____ Friendship and fun

    ____ Service activities

    ____ Networking opportunities

    ____ Leadership and personal development

    ____ The club meeting experience

Friendship and fun

1. What social activities are you excited to do with the club? This could include having coffee or tea and getting to know others better or attending sporting or cultural events.

2. What do you like about the club's social activities so far?

Service activities

1. What needs in our community do you think are most vital for our club to address through service projects?

2. Are there any organizations that you'd like the club to work with to address needs locally or internationally?

3. What experience have you had in community activities? What are your main community interests?

4. Are you aware of any current club projects that you'd like to be involved in?

Networking opportunities

1. What kinds of networking opportunities do you hope being a Rotary member will offer?

2. What do you like about the club's networking opportunities so far?

Leadership and personal development

1. Our club has many roles that can help you develop your leadership skills. Mark any roles below that you want to learn more about or have questions about:

   ____ Club president

   ____ Club secretary

   ____ Club treasurer

   ____ Club administration committee member

   ____ Club membership committee member

   ____ Club public image committee member

   ____ Club service project committee member

   ____ Club Rotary Foundation committee member

   ____ Other (Please specify.) _____

2. Do you have experience in volunteer leadership?

3. Are you interested in serving in a club leadership role at some point?

The club meeting experience

1. What are your expectations for club meetings or the topics you want addressed there?

2. Can you attend meetings on [day] and [time] (enter your meeting schedule)?

   Circle one: Yes / No / Unsure

3. How do you feel about the meeting format? (Note whether your meetings are in person, virtual, or hybrid.)

4. How do you feel about how often the club meets? (Note your club meeting frequency.)

5. How do you feel about the club's expectations for attendance and participation? (Note what your club's expectations are.)

6. Are you aware of the membership dues and fees? (List the dues and fees.)

   Circle one: Yes / No / Unsure

7. How do you feel about the club's fees, dues, and other costs? (Note any other costs.)

Want to do other assessments?

Diversity Assessment

Prospective Member Exercise

Retention Assessment and Analysis

Member Satisfaction Survey

Exit Survey

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

UNDERSTANDING HOW YOUR CLUB REPRESENTS YOUR COMMUNITY: A DIVERSITY ASSESSMENT

Rotary is committed to diversity, equity, and inclusion (DEI). Thinking about whether your club is diverse means evaluating how well it reflects factors such as the different ethnicities, ages, and professions in your community and whether it has an appropriate gender balance. This assessment will help you identify people, skills, and experiences that are underrepresented in your club and develop a plan to address that. It's equally important to provide the support each person needs so they can have the same kind of experience, which is what we mean by equity. We always want to create a culture of inclusion, where people's differences are respected, supported, and valued.

WHAT YOU'LL GAIN

Conduct this diversity assessment and act on its results to:

- Raise your members' awareness of the diversity in your community
- Build member support for diversifying your club
- Make adjustments so that your club better represents the community

GETTING ORGANIZED

Learn more about diversity and Rotary's recommendations for your club by taking these courses in the Learning Center: Creating an Inclusive Club Culture, Microaggressions, and Diversifying Your Club. Then plan how you'll carry out the assessment, such as by dedicating time at a series of club meetings to each step of the process. Use the Club Action Plan in appendix 1 to track your progress.

Choose a facilitator (such as a DEI expert outside your club) who is comfortable talking about diversity and why it's important. This activity should involve all club members so that everyone has a stake in the process. Including your club members in this process now will increase awareness and support for more action in the future.

Diversifying your club isn't just about changing the mix of people. It also needs to involve making everyone feel valued and welcome, or they won't stay with Rotary.

GETTING STARTED

Step 1: Discuss the advantages of having diverse members.

Talk about the benefits of diversity and celebrate how it has helped you in the past. For example, highlight a project that was more successful because it involved members with diverse professional skills. Or acknowledge a member who identified a club bylaw that could exclude some people and talk about how your club changed it. Discuss how diverse perspectives aid your club's ability to address local needs. Reflect on your club's representation by profession, gender, age, ethnicity, and culture in your community.

Step 2: Collect information.

At the next meeting, summarize your previous discussion and briefly reiterate the positive effects of having diverse members. Explain that the next step is researching your community's demographics so that you can better understand your community's composition by age, gender, ethnicity, income levels, sexual orientation, and more. Distribute the Member Diversity Worksheet. Split club members into groups and ask each group to gather the specified information and complete what they can of the worksheet before the next meeting. You could organize the groups this way:

Remember as you try to assess the diversity in your club and community that there is a lot of nuance. People can belong to more than one ethnic group or have disabilities that aren't evident. Avoid making assumptions, such as about someone's sexual orientation or gender identity.

- **Group 1** gets data on the demographics of the community from a local business association, such as the chamber of commerce.
- **Group 2** gathers information about the community's cultural and demographic composition from the local tourism bureau.
- **Group 3** gets socioeconomic statistics from local economic development experts or the city government.
- **Group 4** gets the most recent census results, which may include information on the age, gender, profession, and ethnic identity of the area's residents.

Step 3: Discuss the findings within each group.

At the following meeting, ask each group to discuss what it found, share what it completed on the worksheet, and compile the findings. Then have each group choose a representative to present its data to the club later on. The goal is to have reliable data about the diversity in your community.

Step 4: Report the results and discuss their implications.

Give each group about five minutes at a club meeting to present its findings. Lead a discussion about the information and what it shows.

Talk about whether your club's members reflect:

- The ages of your area's population
- The gender composition of the community's working professionals
- The ethnic and cultural diversity of the community
- The varied socioeconomic levels of the community
- The various types of professions in the community
- The proportion of professionals who have disabilities

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

Step 5: Develop a member diversity action plan.

Now that you've determined who is underrepresented in your club, find ways to connect with these members of your community. You could invite someone to speak to the club about their perspective on the area and the issues you might work on together. Ask people about their experiences and if they are willing to share what they believe the community needs. Determine their interest in joining, how they could contribute to your club, what your club could offer them, and how your club could accommodate their needs. Document your plan and assign tasks to people on the membership committee or other club members. Set goals for how you want to diversify your club, monitor your progress, and keep club members updated.

Want to do other assessments?

Member Interest Survey
Prospective Member Exercise
Retention Assessment and Analysis
Member Satisfaction Survey
Exit Survey

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

MEMBER DIVERSITY WORKSHEET

1. What sources did you consult to find data about your community's demographic composition?

2. What data did you find about:

   Age:

   Gender:

   Nationalities (what countries are represented?):

   Ethnic background:

Professions:

Sexual orientation:

People with disabilities:

Socioeconomic status:

3. Does this data correspond to the current composition of your club? Explain your evidence.

4. What fact or statistic did you find most interesting?

5. What surprised you the most?

6. What surprised you the least?

7. Which demographic groups are underrepresented in your club?

8. What can your club do to better represent your community?

9. Do you think people from groups that are currently underrepresented would feel welcome in your club?

10. What do your club materials, website, and social media posts show about your club's diversity?

11. How can you integrate your findings into a plan of action?

FINDING PEOPLE TO INVITE: A PROSPECTIVE MEMBER EXERCISE

You can find new members by asking people you know, following up on your club's online membership leads, identifying who's missing from your club, cultivating new relationships, and leveraging social media.

Encourage members to invite prospective members to service activities, club meetings, and events so that they can learn how your club works with the community and provides opportunities for friendship and connection. Each club should review its list of membership leads regularly and contact those people. And keep making progress on making your club better reflect your community.

To reach an even broader group of people, work with your public image committee to promote your club's service and social activities on social media. Tagging contacts who may be interested in an event, adding a "join" link on public documents or webpages, and using hashtags strategically are all ways to broaden your reach.

WHAT YOU'LL GAIN

Identifying prospective members and actively engaging them will help your club:

- Develop a group of potential candidates for membership
- Determine how to introduce prospective members to your club
- Get to know people and what they're looking for so you can meet those needs

Clubs around the world approach member recruitment in very different ways. Customize this exercise to make it appropriate and relevant for your region.

GETTING ORGANIZED

Set aside time for members to complete the Identifying Prospective Members Worksheet at a club meeting. This exercise generally works best at the beginning of a Rotary year, when annual membership goals have just been set, or in March, when the incoming president is planning for the next year.

GETTING STARTED

Step 1: Ask all members to complete the Identifying Prospective Members Worksheet.

Explain the purpose of this exercise and ask club members to fill out the worksheet. Compile the information they provide, along with your club's membership lead candidates, and maintain a list of prospective members.

Step 2: Make an action plan.

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

Invite the prospective members to a club meeting, service activity, or social event. If you conducted the diversity assessment, refer to the list of groups you found to be underrepresented in your club and include people from those groups as well. Now you can develop a plan that specifies:

- Who you want to invite, and if you want to do so in small groups
- Who is responsible for inviting each person
- What event they'll be invited to
- How the person responsible will make the invitation
- How they'll follow up with the prospective member after the event

Step 3: Invite prospective members to a club event.

You can use the Manage Membership Leads page of My Rotary to store information about all your prospective members.

Invite the people from your list to attend an upcoming service activity or meeting. Or host a special event where they can meet club members and learn about the club in a casual atmosphere. Make them feel welcome by having the club president or another leader greet them personally.

Two of every three prospective members who are referred by a current member join Rotary. If a prospect is interested but can't join your club, you can still help Rotary grow by referring them to another club.

Step 4: Follow up with prospective members.

- Ask members who invited guests to contact them and then share their interest or feedback with the club.
- Keep the worksheets and your compiled list for future membership efforts.
- Regularly use the Club Administration area of My Rotary to track membership leads gathered through Rotary's website.
- If you find people who are interested in Rotary and would be good members, but they aren't a good fit for your club, refer them to another club.

Want to do other assessments?

Member Interest Survey

Diversity Assessment

Retention Assessment and Analysis

Member Satisfaction Survey

Exit Survey

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

You can also review the Rotary Research page for a broader understanding of membership trends.

IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

Think of your contacts, acquaintances, friends, and family members, as well as community residents who might be interested in your club. You don't have to know if they're ready to join Rotary.

After you've listed the names of people who might be interested, circle anyone you think would be a good fit for your club in particular.

Your name:_____ Date:_____

Professional contacts

Consider your current and former supervisors and colleagues, acquaintances from professional associations, and people you have done business with recently.

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Service contacts

Consider neighbors, community leaders, and acquaintances who have volunteered with you on Rotary or non-Rotary events or projects.

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Community contacts

Consider other people you know in your community, such as:

- Accountants
- Business consultants
- Civic leaders
- Construction workers
- Dentists
- Entrepreneurs
- Financial managers or planners
- First responders
- Food or beverage industry workers
- Health care workers
- Information technology professionals
- Lawyers
- Local innovators
- Nonprofit professionals
- Nurses or doctors
- Psychologists
- Public relations professionals
- Real estate agents
- Religious leaders
- Sales executives
- School administrators
- Social workers
- Stay-at-home parents
- Teachers or professors
- Veterinarians

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Rotary contacts

Consider past members or Rotary alumni that you know or that your club maintains contact with. Rotary alumni are people who have participated in:

- Ambassadorial Scholarships
- Interact
- Grants for University Teachers
- Group Study Exchange
- New Generations Service Exchange
- Rotaract (which is now a membership type)
- Rotary Peace Fellowships
- Rotary Scholarships
- Rotary Volunteers
- Rotary Youth Exchange
- Rotary Youth Leadership Awards (RYLA)
- Vocational training teams

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

Name: _____ Occupation or area of expertise: _____ Gender:_____ Age:_____

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 Connect for Good and the guide to Avenues of Service activities).	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.
Find videos 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 nominating 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.

GETTING STARTED

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.

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.

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

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.

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

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.	☐	☐	☐	☐	☐
My club does a good job involving new members.	☐	☐	☐	☐	☐
Members of my club care about each other.	☐	☐	☐	☐	☐
My club is as diverse as our community.	☐	☐	☐	☐	☐

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

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	☐	☐	☐	☐	☐	☐
Length	☐	☐	☐	☐	☐	☐
Frequency	☐	☐	☐	☐	☐	☐
Format (online, in person, or hybrid)	☐	☐	☐	☐	☐	☐
Time for socializing	☐	☐	☐	☐	☐	☐
Professional connections and networking	☐	☐	☐	☐	☐	☐
Content variety	☐	☐	☐	☐	☐	☐
Location	☐	☐	☐	☐	☐	☐
Meeting time and day	☐	☐	☐	☐	☐	☐
Meals or other food options	☐	☐	☐	☐	☐	☐
Opportunities to offer input and have discussions	☐	☐	☐	☐	☐	☐

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	☐	☐	☐
Number of local projects	☐	☐	☐
Number of international projects	☐	☐	☐

	Agree	Disagree	No opinion
Our projects are well-organized.	☐	☐	☐
Our projects make a difference in the community or the world.	☐	☐	☐
Our projects are meaningful to me.	☐	☐	☐

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.	☐	☐	☐	☐	☐
My club is good at listening to members.	☐	☐	☐	☐	☐
My club seeks input and ideas from members.	☐	☐	☐	☐	☐
My club regularly acts on input and ideas from members.	☐	☐	☐	☐	☐
My club updates our processes and rules to meet the needs of our members.	☐	☐	☐	☐	☐
I'm comfortable with the pace of change in my club.	☐	☐	☐	☐	☐

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.	☐	☐	☐	☐	☐
I can be myself around members of my club.	☐	☐	☐	☐	☐
My club members know me and value me.	☐	☐	☐	☐	☐
I make valuable connections through my club.	☐	☐	☐	☐	☐
My club provides opportunities to use my talents and skills.	☐	☐	☐	☐	☐
I have access to leadership opportunities in my club.	☐	☐	☐	☐	☐
My Rotary experience is worth the cost.	☐	☐	☐	☐	☐
My experience as a member is worth the time I commit to Rotary.	☐	☐	☐	☐	☐

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My family understands the value I place on my Rotary membership.	☐	☐	☐	☐	☐
My friends understand the value I place on my Rotary membership.	☐	☐	☐	☐	☐
Through Rotary, I make a difference in my community.	☐	☐	☐	☐	☐
Through Rotary, I make a difference in the world.	☐	☐	☐	☐	☐

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.	☐	☐	☐	☐	☐
I invite prospective members to join my club.	☐	☐	☐	☐	☐
I frequently participate in my club's activities, projects, and programs.	☐	☐	☐	☐	☐
I'm proud of my club.	☐	☐	☐	☐	☐

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	☐	☐	☐	☐
Food	☐	☐	☐	☐
Club fees	☐	☐	☐	☐
Requests for donations for service projects	☐	☐	☐	☐
Requests for contributions to The Rotary Foundation	☐	☐	☐	☐

Comments and suggestions:

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

UNDERSTANDING WHY MEMBERS LEAVE: EXIT SURVEY

The exit survey can help you understand why members leave and suggest changes your club can make to better accommodate people in the future so they stay. Your club membership committee can review and customize the survey to meet your needs. You can also choose to create an online form or conduct an in-person interview.

WHAT YOU'LL GAIN

Use exit surveys and act on their results to:

- Determine why members resign from your club
- Address any issues the survey reveals

GETTING ORGANIZED

Taking this survey may be the final contact that a person has with Rotary, and it's very important to listen to their feedback. If you conduct the survey online or use a paper survey, delegate someone to manage the process whenever a member leaves the club. If you have an in-person conversation, ask someone who is a good listener to talk with the member who's leaving. The interviewer will need to share the results with the membership committee and club board.

GETTING STARTED

Step 1: Ask permission.

Ask the person who is leaving if they're willing to take a confidential exit survey. Explain that the purpose is to understand any problems that need to be addressed in order to improve the club for others and prevent even more members from leaving.

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

Step 2: Provide the survey.

Give the person the survey and ask them to complete it as soon as they can reasonably do so. You can edit the survey included in this document and attach it to an email or use an online survey platform. If the person cannot complete the survey online, use a paper form and provide a stamped, addressed envelope for them to return it.

Step 3: Discuss the results.

After you receive the completed survey, discuss the results with your club's membership committee. If the person is leaving for a reason other than relocation or health issues, discuss what your club can change to prevent current or future members from leaving for similar reasons. Compare this person's responses to those on other recent exit surveys to identify any trends. Emphasize the importance of confidentiality and respect for all viewpoints.

Step 4: Take action.

This step is crucial. You invest time and resources into attracting and engaging members, so it's important to protect that investment by addressing any reasons that make people leave. Although not every exit survey will require action, they do all merit consideration. Create a plan to address any issues and delegate the tasks that it involves. Once a year, update your club's Member Satisfaction Survey based on the responses from resigning members over the previous year.

Want to do other assessments?

Member Interest Survey

Diversity Assessment

Prospective Member Exercise

Retention Assessment and Analysis

Member Satisfaction Survey

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

EXIT SURVEY SAMPLE QUESTIONS

We're sorry to lose you as a member of our club. To help us understand why you're leaving and what we can do to improve the club for others, please answer these questions about your Rotary experience. We appreciate your candid and honest responses.

1. What were your primary reasons for joining the club? (Choose all that apply.)

   ☐ Community service

   ☐ International service

   ☐ Personal development

   ☐ Leadership or professional development

   ☐ Family legacy or tradition

   ☐ Status and prestige

   ☐ Social opportunities

   ☐ Networking

   ☐ Opportunity to facilitate international exchange

   ☐ Tutoring and mentoring young people

   ☐ Reconnecting with Rotary as an alum

   ☐ Other: _____

2. How long have you been a member of this club?

   ☐ Less than a year

   ☐ 1-2 years

   ☐ 3-5 years

   ☐ 6-10 years

   ☐ More than 10 years

3. What did you like best about being a member of this club?

   What did you like least?

4. How many prospective member information sessions did you attend before you joined?

   ☐ 1

   ☐ 2

   ☐ 3 or more

   ☐ None, because the club didn't offer them

   ☐ None, because I wasn't interested

5. How many club meetings did you attend before you joined?

   ☐ 0

   ☐ 1-2

   ☐ 3-4

   ☐ 5 or more

6. How did you learn about club activities and your responsibilities before joining? (Choose all that apply.)

   ☐ I attended information sessions.

   ☐ I received information from a club officer.

   ☐ I received information from my sponsor.

   ☐ I found information on my own.

7. Did you learn more about Rotary in a structured way (such as through a new member orientation or continuing education) after you became a member? (Select one.)

1	2	3	4	5	6
☐	☐	☐	☐	☐	☐

Not at all Definitely

8. Do you believe you were adequately informed about the financial and time commitments of being a club member? (Select one.)

1	2	3	4	5	6
☐	☐	☐	☐	☐	☐

Not at all Definitely

9. Were club meetings a worthwhile use of your time? (Select one.)

1	2	3	4	5	6
☐	☐	☐	☐	☐	☐

Not at all Definitely

10. Did you feel welcome in the club? (Select one.)

1	2	3	4	5	6
☐	☐	☐	☐	☐	☐

Not at all Definitely

11. Did you feel comfortable expressing concerns to club leaders? (Select one.)

1	2	3	4	5	6
☐	☐	☐	☐	☐	☐

Not at all Definitely

12. If you didn't feel welcome or didn't feel comfortable expressing concerns, please explain why.

13. How would you describe the club's culture?

14. What can club leaders do to improve the experience for new members?

15. How do you rate these aspects of the club meetings?

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

16. Please evaluate these aspects of club meetings.

Meeting components	Excessive	Reasonable	Inadequate
Learning about Rotary (Rotary Youth Exchange, Rotary Foundation programs, etc.)	☐	☐	☐
Fundraising	☐	☐	☐
Content	☐	☐	☐
Structure	☐	☐	☐
Other	☐	☐	☐

17. Did you participate in service projects? ☐ Yes ☐ No

18. If no, why not?

- ☐ Type and quality of projects
- ☐ Number of projects
- ☐ Personality conflicts
- ☐ Cost
- ☐ Schedule conflicts
- ☐ Other: _____

19. How satisfying was your participation in service projects? (Select one.)

1	2	3	4	5	6
☐	☐	☐	☐	☐	☐
Not at all					Very

20. If your participation in service projects wasn't satisfying, why not? (Choose all that apply.)

- ☐ Lack of variety in projects
- ☐ Lack of quality of projects
- ☐ Not enough projects
- ☐ Personality conflicts
- ☐ Lack of support from other members
- ☐ Insufficient family involvement
- ☐ High costs
- ☐ Did not feel welcome
- ☐ Schedule conflicts
- ☐ Other: _____

21. Please evaluate how your Rotary experience aligned with your family commitments.

Family and Rotary	Agree	Disagree	Not applicable
Rotary interfered with my family responsibilities.	☐	☐	☐
My family was proud of my involvement in Rotary.	☐	☐	☐
My family wanted to be more involved in Rotary.	☐	☐	☐
I had opportunities to include my family in club activities and projects.	☐	☐	☐

22. How could club leaders provide more opportunities for families to be involved?

23. Please evaluate the costs associated with being a member.

Cost	Too high	Reasonable	Too low	Not applicable
Club dues (including RI and district dues)	☐	☐	☐	☐
Meal costs (if applicable)	☐	☐	☐	☐
Club operations	☐	☐	☐	☐
Club fines	☐	☐	☐	☐
Service project contributions (time or money)	☐	☐	☐	☐
Rotary Foundation contributions	☐	☐	☐	☐

24. How well does the club reflect the demographic profile of professionals in the community? (Select one.)

1	2	3	4	5	6
☐	☐	☐	☐	☐	☐
Not at all					Very well

25. Think about what you were told when you joined the club. Were your expectations met?

26. Why did you terminate your membership?

27. Would you consider joining another club?

- ☐ Yes
- ☐ No
- ☐ Not sure

28. What advice do you have for the club's leaders?

29. Do you have any other comments?

Thank you for completing this survey. If you ever want to rejoin or change clubs, you can start at rotary.org/join.

APPENDIX 1

CLUB ACTION PLAN

Complete the plan for your club, noting which assessment tools you'll use and who'll be involved. Use the sample response for your reference.

Assessment tool	Specific action	Implementation	Analysis	Distribution of the findings	Action steps to take in response
List the tool	List the action	List the date and who'll do it	List the date and who'll do it	List the date and who'll do it	List the date, who'll do it, and tasks
Member Interest Survey	*Distribute survey to members*	*August (Sue)*	*September (Jorge)*	*October (Lisa)*	*November (Sue, Jorge, and Lisa)* • *Relax attendance requirements* • *Add participation opportunities that don't involve standing for long periods*

ROTARY INTERNATIONAL

One Rotary Center
1560 Sherman Avenue
Evanston, Illinois
60201-3698 USA
Rotary.org

801-EN—(1022)