

# MEMBERSHIP SUPPORT & RESOURCES

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Emily Tucker  
Regional Membership Officer  
Zones 29 and 25B



# EMILY TUCKER

## Regional Membership Officer

Zones 29 and 25B

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## HOW CAN I HELP YOU?

Support and guide districts and zones:

- Membership resources
- Reports and data
- Attraction and engagement strategies
- Club assessments & member satisfaction surveys
- Enhance the member experience
- New club development
- Club & membership flexibility
- Membership Leads program

# HOW WE COMMUNICATE

- Monthly RMO emails
- Phone and conference calls
  - Rotary Coordinators
  - District Membership Chairs
- Webinars
- Trainings

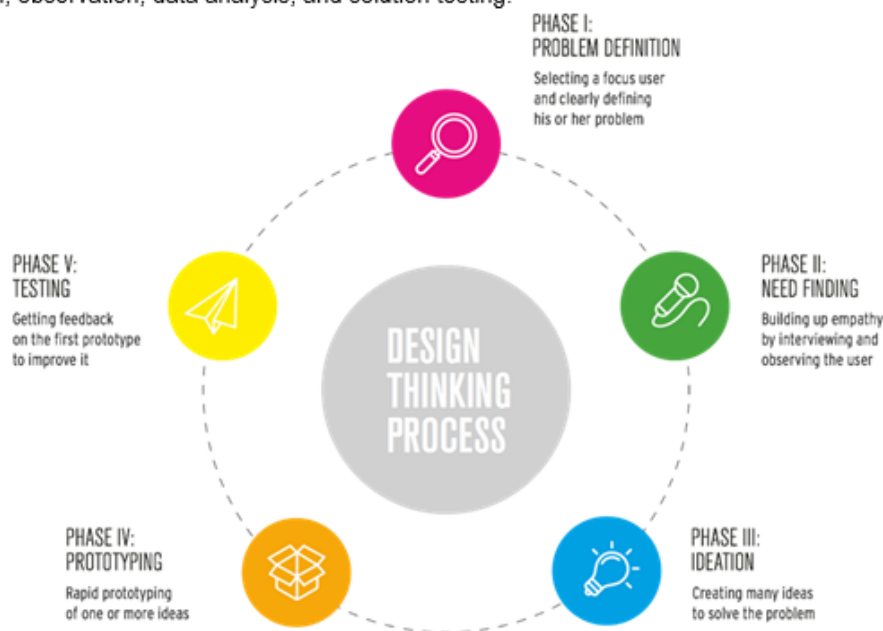


# MONTHLY RMO EMAILS

## **Regional Story – Improving Membership through Strategy**

What if we could examine the Rotary experience from the perspective of a member by using information to improve a club's culture in relation to membership engagement and community engagement, service projects, and grants? Could that enable a club to increase member satisfaction and retention? That's exactly what district 5180 is seeking to do by using [Design Thinking](#).

Design Thinking (also known as Human Centered Service Design) is a creative problem-solving process used to discover new solutions by focusing on the user's perspective through problem definition, observation, data analysis, and solution testing.



Using his own business experience, knowledge, and expertise, AG Brian Gladden is working with district leadership this year to introduce and implement this training in their district by:

- Training District leaders on Design Thinking and how it could be applied to Rotary membership
- Training presidents & presidents-elect on Design Thinking and how it can be applied to the member and club experience
- Following up with clubs on how the training is being utilized to evolve and enhance at least one club process that needs further development or improvement

If you would like to know more about this training and how it might be used in your district, please reply and I can put you in touch with Brian. To find out more about Design Thinking in general, click [here](#) to learn more.

# RESOURCES – ROTARY.ORG/MEMBERSHIP



## ROTARY CLUB HEALTH CHECK

## CLUB FLEXIBILITY PAGE

[Rotary.org/Flexibility](https://Rotary.org/Flexibility)



## MEMBERSHIP ASSESSMENT TOOLS



TAKE ACTION: [www.rotary.org](https://www.rotary.org)



## STRENGTHENING YOUR MEMBERSHIP

Creating Your Membership Plan



### MEMBER SATISFACTION SURVEY

This survey focuses on your day-to-day experiences in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers; we simply ask for your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with your membership in our Rotary club?

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

2. Considering our club's **culture, members, and meetings**, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Club meetings are a good use of my time	<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"/>
My club's members care about one another	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club reflects the demographic profile of our area's business, professional, and community leaders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>





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### Learn by Role

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### Learn by Topic

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### About Rotary

[Our Priorities](#)

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[www.rotary.org/learn](http://www.rotary.org/learn)



**Getting Started With the Learning Center**

English ★★★★★

[ENROLL](#)

#### Rotary Courses - English >



**All About the Rotary Peace Fellowship**

English ★★★★★

[ENROLL](#)



**Best Practices for Engaging Members**

English ★★★★★

[ENROLLED](#)



**Building a Diverse Club**

English ★★★★★

[ENROLLED](#)



**Club Administration Committee Basics**

[ENROLL](#)



**Club Membership Committee Basics**

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**Club President Basics**

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**Club Com**

[ENRC](#)

# ONLINE MEMBERSHIP COURSES

- Is Your Club Healthy?
- Diversify Your Club
- Online Membership Leads
- Strategies for Attracting New Members
- Best Practices for Engaging Current Members
- Kick-start Your New Member Orientation
- Practicing Flexibility and Innovation
- Your Membership Plan





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## Club & District Administration

[Club Administration](#)

[District Administration](#)

[Contributions](#)

[Reports](#)

[Rotary Club Central](#)

## Community Marketplace

[Official Rotary Apps](#)

[Club Management Systems & Website Providers](#)

[Marketplace Resources](#)

## Brand Center

[Our Story](#)

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## Products & Services

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## Travel & Expenses

## Profile Picture



[Individual Contribution Form](#)

[Rotary Workgroups](#)

[Recommendations](#)

[My Invitations](#)

[Credit card opt-out \(U.S. & Canada\)](#)

[Donor History Report](#)

## Connections

Set your privacy settings for who can see your connections.

## Club Finances

### ★ Club Invoice

View the most recent invoices for each of your clubs.

[View invoices](#) | [View club balance report](#) | [About the club invoice](#)

## Club & Member Data

### ★ Manage Membership Leads

Review your online membership leads for prospective, referred, and relocating or returning members. Then assign and track your candidates through the membership process – from inquiry to induction.

[View or manage leads](#) | [About the membership leads program](#)

## District Conference

### ★ District Conference

Submit district conference details by 1 February. Submit or view feedback after the conference.

[President's representative feedback](#)

## District Giving

### ★ Online

Make a contribution as an individual, on behalf of a group, or to a grant-funded project.

[Give](#) | [Multiple donor form](#) | [Individual contribution form](#)

### ★ Printable Forms

Send printed forms to The Rotary Foundation with your credit card number or check, or as soon as a wire transfer is initiated.

[Multiple donor form](#) | [Individual contribution form](#)

## Was möchten Sie tun?



## My Quick Links

**You have no Quick Links.** To add links, click on the ★ icon and choose "Add to My Quick Links." To remove links, click on the ★ icon and choose "Remove from My Quick Links." [Learn more.](#)

## FAQ & Help

Learn how to create a MyRotary account, pay your invoice, update club officers, and more.

### Frequently Asked Questions

[Club & District Administration](#)

[Club Invoice](#)

[Paul Harris Society \(PDF\)](#)

[RI Payment Guidelines \(PDF\)](#)

[Rotary.org](#)

[Rotary Grants Travel Insurance \(PDF\)](#)

[Satellite Club \(PDF\)](#)

### Help

[How to create a My Rotary account](#)

[How to pay your club invoice](#)

[How to add a member](#)

[How to remove a member](#)

[How to edit member information](#)

[How to add a club officer](#)

# Manage Membership Leads

View and manage your membership leads, including prospective, referred, and former or current members who are rejoining or changing clubs. It's an effective way to keep clubs and districts informed about the progress of your candidates.

You are viewing membership leads for the **Rotary Club of**

**Active and historical membership leads report**

## Show leads by:

Prospect type

Any

▼

Status

Any

▼

FILTER

Submission date ▼	Prospect type	Candidate	Current status
20-Feb-2018	Prospective member	▼ Fozzie Bear	Staff assigned candidate to club ▼ Manage status
9-Nov-2017	Prospective member	▼ Miss Piggy	Staff assigned candidate to club ▼ Manage status
12-Oct-2017	Referral	▼ Deborah McPhearson	Auto assigned to district ▼ Manage status
23-Jun-2017	Prospective member	▼ Camilla the Chicken	District assigned candidate to club ▼ Manage status
21-Jun-2017	Prospective member	▼ Animal	District assigned candidate to club ▼ Manage status



## Show leads by:

Prospect type

Any ▼

Status

Any ▼

Assigned club

Any ▼

FILTER

Submission date ▼	Prospect type ▼	Candidate ▼	Current status ▼	Assigned Club
7-Feb-2019	Prospective member	▼ Todd Plocher	Auto assigned to district ^ Manage status	

## Current status

Auto assigned to district

## Feedback

## Change status \*

- Select - ▼

District reviewed inquiry

District contacted candidate

District assigned candidate to district officer

District assigned candidate to club

District assigned candidate to youth

Active and historical membership leads report

Show leads by:

Prospect type

Any

Status

Any

FILTER

Submission date	Prospect type	Candidate	Current status
12-Aug-2016	Prospective member	Elizabeth Carson	District assigned candidate to club Manage status

Current status

District assigned candidate to club

Feedback

Change status \*

- Select -

Club contacted candidate

Club assigned candidate to club officer

Club assigned candidate to youth program

Candidate attended club meeting

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# Club Reports

## My Rotary Account Status

### ★ Status of Club Members in the District

Lists all club members in the district, indicates which have active My Rotary accounts, and gives their email addresses.

[View report](#)

### ★ Status of Club Members

Lists club members, indicates which have active My Rotary accounts, and gives their email addresses.

[View report](#)

## Membership

### ★ Rotary Club Members

Active and terminated members of your Rotary club

[View list](#)

### ★ Club Data

Club Growth, Member Viability and Growth, Membership Termination Profile, Members in a Club, Listing of Sponsored and Satellite Rotary Clubs, Goal History by Club, Goals and Achievements by Club, Sponsor Relationship Information

[View reports](#)

### ★ Membership Leads

Find a list of active and historical leads in the Membership Leads Report. Review demographics of your leads, and see the average time to admit them in the Membership Leads Executive Summary.

[View reports](#) | [About the membership leads program](#)

### ★ Donor History Report

[View report](#) | [Give online](#) |

[Mail your contribution](#)

### ★ Rotary Citation

### ★ Update Member Data

[Add, edit, or remove members](#) |

[Add, edit, remove club officers](#) |

[Record a new member sponsor](#)

## FAQ & Help

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# THANK YOU!

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