



Member Care Manual

"Supporting the membership journey"

Appendix J

Rotary Club Health Check



ROTARY CLUB HEALTH CHECK

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.



YOUR CLUB EXPERIENCE



Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary experience for others, because their enthusiasm is contagious. If your club's members genuinely enjoy being a part of the club, you're on the right path. Your experience includes not just your club meetings and other activities, but also the connections you've made and your pride in Rotary's work.

- I look forward to attending club meetings.
- Our club meeting programs are relevant, interesting, and varied.
- We have a greeter who welcomes members to meetings.
- Our meetings are organized and run professionally.
- Members sit at different tables each week to meet and talk to different people.
- Some of the members of my club are my close friends.
- Members other than club leaders participate in Rotary events at the district or international level.
- Most members are aware of Rotary's progress toward polio eradication and feel proud to be a part of it.
- Our members contribute to The Rotary Foundation.
- We raise funds in a way that allows members to contribute what they wish.
- We recognize members of the club or community at least monthly.
- I have made international connections through Rotary.
- Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.

**SEE THE FOLLOWING PAGE
FOR YOUR PROGNOSIS**





While some members leave for logistical reasons, many leave because of a lack of engagement, an inflexible club culture or other unmet expectations, all of which affect a member's experience. If members are not having a good experience, your club is at risk of losing them. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> <li data-bbox="597 569 1406 638">+ Change the meeting format or style. For ideas, see Lead Your Club: President, chapter 2, and Be a Vibrant Club's "Ideas to try." <li data-bbox="597 680 1401 749">+ Find out what your members want using the Member Satisfaction Survey and then give them that experience. <li data-bbox="597 791 1445 861">+ Develop leadership skills among club leaders and members by holding a leadership skills training.
Rotary experience beyond the club	<ul style="list-style-type: none"> <li data-bbox="597 940 1364 1010">+ Sponsor an Interact or Rotaract club, organize a RYLA event, create a scholarship, or start an exchange. <li data-bbox="597 1052 1252 1083">+ Join a Rotary Fellowship or Rotarian Action Group. <li data-bbox="597 1125 1466 1194">+ Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience. <li data-bbox="597 1236 1463 1346">+ Promote the work that Rotary does globally, including polio eradication, by showing a short Rotary video or projects on Rotary Showcase during a club meeting.

SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons Rotarians join and stay in Rotary. The healthiest clubs vary their activities and offer multiple ways to get involved. Try a new kind of social event or a different service experience and watch the impact it has on your club.

- Our club holds regular get-togethers (aside from club meetings) for socializing and networking.
- Our club encourages members to bring partners, spouses, and family members to club meetings and events.
- Our club offers members leadership opportunities and professional development.
- Our club invites Rotaractors, Interactors, and Youth Exchange students to participate in meetings and is active in Interact and Rotaract clubs and mentors their members.
- Our club sponsors a Rotaract or Interact club, sponsors or hosts a Youth Exchange student, or sponsors a RYLA participant.
- We consult community leaders and community members to determine needs before choosing a project.
- We visit Rotary Ideas, an online project idea starter, before choosing a new project.
- Our club has a service project in progress.
- All members can give input on service and social activities.
- Our club service projects are aligned with Rotary's areas of focus and Avenues of Service.
- Our club has applied for or used Rotary grant funds for a service project.



Clubs that have inadequate social or service opportunities are at risk of losing members who don't feel connected or empowered. The good news is that these deficiencies can be remedied in fun and rewarding ways. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> ⊕ Sponsor an Interact or Rotaract club, organize a RYLA event, create a scholarship, start an exchange, join a Rotarian Action Group, or support the Rotary Peace Centers.
Quality of projects	<ul style="list-style-type: none"> ⊕ Use Community Assessment Tools, Guide to Global Grants, and Rotary Ideas to improve the quality of your projects.
Social activities	<ul style="list-style-type: none"> ⊕ Put one or two members in charge of organizing socials throughout the year. ⊕ Join a Rotary Fellowship.
Leadership	<ul style="list-style-type: none"> ⊕ Hold a leadership training.

MEMBERS



A healthy club is one that is growing and changing. Having members with diverse perspectives and backgrounds will fuel innovation and give your club a broader understanding of your community's needs. Pay attention to how your members are feeling about the club. Research shows that one of the most common reasons members leave is that club leaders are not open to new ideas. Involving members and giving them a voice in their club's future will strengthen both the club and members' commitment to Rotary.

- Our club has had a net increase in members in the past year.
- Our club has had a net increase in female members in the past year.
- Our club has had a net increase in members under age 40.
- Our club seeks to recruit members from professions in the community that are underrepresented in the club.
- Our club keeps in touch with Rotary alumni (former Rotaractors, Youth Exchange students, peace fellows, and participants of other Rotary programs).
- Our club actively recruits Rotary alumni.
- Our club actively recruits recently retired professionals.
- Our club retains at least 90 percent of its members each year.
- At least 75 percent of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
- Our club has a process for soliciting feedback from members.
- A designated person checks and follows up on membership leads assigned to the club.
- Guests are asked to introduce themselves and are invited back.
- Member benefits are explained and promoted to new and continuing members.
- New members are provided with an orientation and opportunities to get involved.
- Newer and seasoned members are paired for mentoring relationships.
- We ask members to speak at meetings about their vocations or other topics of interest.



Clubs that have deficiencies in membership are at risk of becoming outdated, dull, and less valuable to their members and community. Fortunately, there are many tools available that are proven to give results. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> ⊕ Take action to diversify your club using Diversifying Your Club: A Member Diversity Assessment.
Professional diversity	<ul style="list-style-type: none"> ⊕ Make your club a microcosm of your community with Representing Your Community's Professions: A Classification Assessment.
Stagnant or declining membership	<ul style="list-style-type: none"> ⊕ Create a membership development plan with Strengthening Your Membership. ⊕ Connect to Membership Leads assigned to your club using How to Manage Membership Leads (For Clubs) and resources for prospective members. ⊕ Target prospective members using this exercise. ⊕ Show members how to propose new members to their own club and explain that they can refer qualified prospects to other clubs.
Members leaving	<ul style="list-style-type: none"> ⊕ Start with the Member Satisfaction Survey to enhance current members' experience. ⊕ Learn and act on trends using the Retention Assessment and Analysis. ⊕ Use the Exit Survey to understand why members resign. ⊕ Let resigning members know they can rejoin or change clubs when they are ready.
Orientation and Rotary knowledge	<ul style="list-style-type: none"> ⊕ Offer new member orientation, leadership development, and ongoing learning opportunities with Rotary's Learning Center.

IMAGE



Clubs that have fun and make an impact are attractive to those who see that. A positive public image improves your club's relationship with your community and prospective members. Make sure your club is getting the credit for the service you provide. Demonstrating that your club meets real needs confirms your value to your community.

- We have an online presence, including a public-facing, visually appealing club website, Facebook page, or other social media page that explains what the club does, who its members are, and the benefits of membership.
- Our club has members dedicated to public image and outreach.
- Our club appeared in the local media multiple times last year.
- We promote our club and Rotary through various media in the community.
- Our club invites members of the media to cover our service work.
- Our club materials follow Rotary's updated branding guidelines.
- We use branded materials and templates from Rotary's Brand Center.
- We use marketing materials provided by Rotary International, such as public service announcements, videos, images, and logos.
- We display Rotary signs and banners at our meeting place.
- Our club's presence is known in our community.
- We have a customized brochure that we give to community members and prospects.
- We use Rotary Showcase to promote our finished projects.



Clubs that don't have a visible presence in their community are at risk of minimizing their impact or being perceived as irrelevant. Rotary has resources that can help. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> <li data-bbox="597 533 1380 600">+ Use the resources in Rotary's Media Center and use them in your community's media. <li data-bbox="597 642 1468 709">+ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's Brand Center.
Outdated materials	<ul style="list-style-type: none"> <li data-bbox="597 791 1445 858">+ Find customizable club brochures and membership materials on Rotary's Brand Center. <li data-bbox="597 900 1445 968">+ Follow the Voice and Visual Identity Guidelines in any materials your club creates. <li data-bbox="597 1010 1386 1077">+ Use Rotary Images and Rotary videos, as well as images of your members, in your materials.
Online presence	<ul style="list-style-type: none"> <li data-bbox="597 1163 1438 1230">+ Find a tech-savvy member to create and manage your club website and social media pages. <li data-bbox="597 1272 1237 1306">+ Take the social media course in the Learning Center. <li data-bbox="597 1348 1458 1415">+ Use Rotary Images and Rotary videos, as well as images and videos of your own members. <li data-bbox="597 1457 1110 1491">+ Share your projects on Rotary Showcase.
Marketing expertise	<ul style="list-style-type: none"> <li data-bbox="597 1570 1403 1638">+ Find tips in Lead Your Club: Public Relations Committee and put members with public relations expertise on the committee. <li data-bbox="597 1680 1445 1747">+ Recruit professionals with marketing expertise using ideas from Finding New Club Members: A Prospective Member Exercise. <li data-bbox="597 1789 1429 1856">+ Build your own social media expertise using the Social Media Toolkit in Rotary's Brand Center.

BUSINESS AND OPERATIONS



When your club runs smoothly, you likely have good leaders who are looking toward the club's future. The leaders shape the club as a whole, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development is also a way to fortify your club.

- We have a strategic plan for our club that we update regularly.
- We have annual goals and enter them in Rotary Club Central.
- Our club has committees that support the activities and regularly report to the club board on progress toward goals.
- Our club board changes what isn't working well and updates club bylaws accordingly.
- We have a process for ensuring continuity that includes preparing members for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
- Our club president attends PETS, and club leaders attend the district training assembly.
- Members attend district events and seminars on Rotary topics that interest them.
- New members are officially inducted and are presented with appropriate materials.
- At least half of our club's members have a My Rotary account.
- Club officers conduct Rotary business using My Rotary or integrated club software.
- Our club sets and approves a budget for the upcoming Rotary year, designates a treasurer, and keeps separate bank accounts for administration and fundraising or project funds.
- Our club sets and achieves fundraising goals using a variety of fundraising activities.
- We ask our members to complete a member satisfaction survey each year.
- We offer ongoing learning opportunities for our members.



Clubs that don't have skilled members in leadership roles or that neglect member needs are at risk of becoming ineffective and obsolete, and losing their members as a result. There are plenty of remedies for clubs that want to thrive. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	<ul style="list-style-type: none"> <li data-bbox="597 531 1442 604">+ Create a vision for your club and set long-range and annual goals using the Strategic Planning Guide. <li data-bbox="597 642 1182 674">+ Track your annual goals in Rotary Club Central. <li data-bbox="597 716 1357 789">+ Use Strengthening Your Membership to make a membership development plan.
Innovation	<ul style="list-style-type: none"> <li data-bbox="597 867 1419 940">+ Ask members for input using the Member Satisfaction Survey, and try their ideas. If they're successful, edit your club bylaws accordingly. <li data-bbox="597 978 1370 1010">+ Use templates in the Brand Center to create your own materials.
Processes	<ul style="list-style-type: none"> <li data-bbox="597 1087 1438 1161">+ Develop standard processes for new members, prospective member follow-up, proposing a new member, leadership continuity, etc.
Leadership	<ul style="list-style-type: none"> <li data-bbox="597 1234 1365 1308">+ Find tips and resources in Lead Your Club: President, Secretary, and Treasurer. <li data-bbox="597 1346 1401 1419">+ Offer leadership development opportunities and promote self-paced learning with Rotary's Learning Center.
Managing funds	<ul style="list-style-type: none"> <li data-bbox="597 1493 1349 1566">+ Use The Rotary Foundation Reference Guide to learn about giving options. <li data-bbox="597 1604 1198 1635">+ Find best practices in Lead Your Club: Treasurer.
Managing your club on MyRotary	<ul style="list-style-type: none"> <li data-bbox="597 1717 1414 1822">+ Use the Club Administration section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads.

WHAT'S NEXT?



Using the Rotary Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most check marks and which had the fewest. Look at the suggested remedies and take action. When you visit your doctor, you may get advice about maintaining your good health or possibly a prescription or two to combat an ailment. If you don't follow the advice or take the prescriptions, you aren't making the most of your visit. Similarly, to make the most of your club health check, use the suggested resources to treat your problem areas. Paul Harris said, "May our happiness increase with our usefulness." As our communities and their needs change over time, Rotary clubs must adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

FEATURED RESOURCES

Membership Assessment Tools

Membership resources

Brand Center

Learning Center

Rotary videos