



Member Care Manual

V2.0 – August 2023

“Supporting the membership journey”



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Introduction

“The Member Journey”

Understanding “The Member Journey” begins with understanding Rotary. Simply stated, Rotary is an international organization of over 1.4 million members in 200 countries organized into Rotary and Rotaract Clubs and providing service to others, both locally and globally; promoting integrity; and advancing goodwill, peace, and understanding in the world. Rotarians “see a world where people unite and take action to create lasting change, across the globe, in our communities and in ourselves.”¹

As a Rotarian, each member’s journey in Rotary is unique. Collectively, that journey can be thought of in three segments:



A Prospective Member is one who has not yet made the decision to apply for membership or been accepted into membership by a Rotary Club. Prospective members may be identified by current Rotarians seeking to introduce Rotary to a friend or colleague, through an inquiry by a potential member (perhaps as a result of reading an article on Rotary or seeing a public image story by one of its clubs), or through the Member Leads Program explained later in this manual.

Our focus during the Prospective Member portion of the Member Journey is on introducing the prospective new member to Rotary as well as to ensure both the club and the individual feel Rotary is a good fit (i.e., the individual understands and agrees to fulfill the responsibilities of membership and the Club concludes the individual is ready to do so and will contribute as a member of the Club).

A New Member is one who has decided to join a Rotary Club and has been approved for membership by that Club. The New Member portion of the Member Journey typically takes two years, during which time our focus is on induction, orientation (expanding the new member’s understanding of Rotary and the Club) and engagement (getting the new member involved in Club activities and administration).

¹ Rotary’s Vision Statement



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An Experienced Member is one who has completed the New Member portion of the Member Journey and now seeks to further expand their knowledge and engagement in Rotary, both at the club level and beyond.

Management of each member's Rotary journey, particularly in the initial stages, is a joint responsibility of both the individual and the club. This manual focuses primarily on the Club's responsibilities, and as such will provide tools and techniques that have proven successful assisting Clubs in support of their members on their individual Rotary journeys.

The manual provides a collection of information, ideas and approaches used successfully by other clubs. Not all will necessarily apply to your club and that's OK. Our hope is that by consolidating these ideas and approaches in one manual, we will cause you to reevaluate the approaches used in your club, introduce some new ideas, adapt some of the ideas presented to meet your needs, and ultimately strengthen your management of the Membership Journey for your members.



Chapter I

“The Prospective Member”

1.1 Chapter Summary

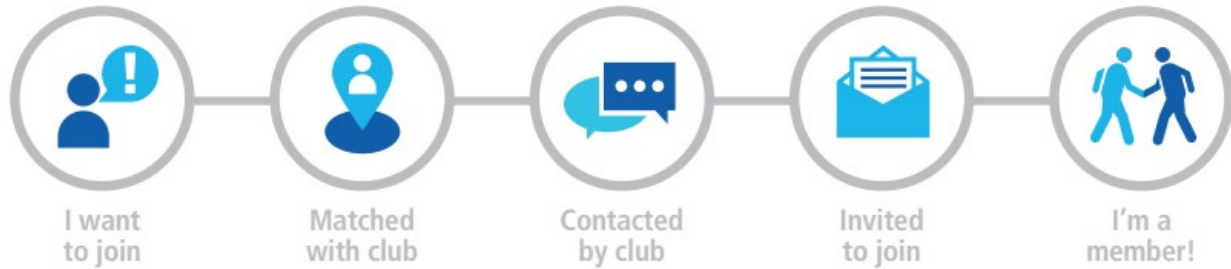
The Member Journey begins as soon as a prospective member is identified. Being provided basic information about Rotary, as well as learning the expectations and benefits of Rotary early in the process, helps prospective members make informed decisions to accept the invitation to join Rotary, when it is extended. Chapter I provides an outline for this process as well as introduces the Membership Leads program as a tool to identify prospective Rotarians. It also introduces a Rotary Facts Reference Guide (Appendix A) which provides a collection of information and facts on Rotary to support each club’s efforts to nurture and support the journeys of their members. Finally, it provides a summary of useful acronyms and abbreviations that are often encountered in conversations about Rotary (Appendix B).

1.2 The Membership Leads Program

The Membership Leads Program routes prospective members to your club to help you grow your membership.

HOW IT WORKS

1. A prospective member, relocating member, or Rotarian who is referring a potential member submits information on [Rotary.org](https://www.rotary.org)
2. Rotary staff members screen the lead to make sure the candidate meets basic membership qualifications and then assigns it to a district in the candidate’s preferred club meeting location.
3. The district governor, district membership chair, and assistant governor get an alert about the lead.
4. The district membership chair or designee goes online to review the lead and match the prospect to a club within the district.
5. The club’s president, secretary, and membership chair get an alert to review the lead and take the next steps. Club officers decide whether to contact the prospect or ask the district to consider the prospect for another club.



Note: Additional information on using the Membership Leads Program can be found in Appendix C.

1.3 Discover Rotary

Discover Rotary is a term used to describe a process through which an interested individual can learn about Rotary before making a decision to become a member.

The format for a Discovery Rotary session is flexible. It can range from a formal Discover Rotary slide presentation for larger groups to an informal meeting for smaller groups or perhaps for just one prospective member. When possible, it is recommended more than one Rotarian attend each Discover Rotary session. In cases where a presentation to a group is being made, several Rotarians should attend.

Clubs are encouraged to consider partnering with neighboring clubs in making Discover Rotary presentations.

Regardless of the format utilized, it is recommended that the Discover Rotary session cover:

- Introductions of those attending
- Rotary's mission
- How Rotary got started (history)
- The 4-Way Test
- The Object of Rotary
- Rotary's Avenues of Service
- Rotary's Areas of Focus
- Our Foundation
- Youth Programs
- Why Join Rotary?
- Expectations of members (involvement, cost, etc.)
- Club service projects
- How to join (including your club's membership options)



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Appendix A provides a Rotary Facts Reference Guide that can be used by clubs as resource material in tailoring their membership training throughout the member journey.

Appendix B provides a summary of relevant Rotary Acronyms and Abbreviations.

Appendix D provides a sample Discover Rotary slide presentation which can be used and/or tailored to the desires of your club.



Chapter 2

“The New Member”

2.1 Chapter Summary

Once an individual is invited to join a Rotary club, accepts that invitation, and is approved for membership in accordance with your club bylaws, they are considered a new member. The focus of the Member Journey then shifts to getting the member inducted, discovering more about the new member and where they will best fit as a member of the club, orienting the member to the club and getting them engaged in club committees and activities.

2.2 Induction Ceremony

The first step for a new member is their induction ceremony. A new member should be inducted as soon after being approved for membership as possible.

While the induction ceremony need not be elaborate, it should be meaningful. It should be held during a regular club meeting in front of the entire club and marked with some formality. It is highly recommended the new member’s family be included as family support is a key component of a successful Rotary membership experience.

While there is no prescribed new member induction ceremony, several example ceremonies are provided in Appendix E.

2.3 New Member Orientation

The next step in the member journey following induction is the new member orientation. In contrast to the Discover Rotary presentation that introduces prospective members to Rotary, new member orientation is more in-depth, focused on your club, and slower paced, to allow new members to transition smoothly into active club participation.

New Member Orientation is comprised of three parts:

- The New Member Orientation Presentation
- The New Member Interview
- The New Member Orientation Process



2.3.1 New Member Orientation Presentation

Much like Discover Rotary, your club has a great deal of flexibility in deciding how to conduct their New Member Orientation presentation. Once again, it can be done in an informal or formal setting and presented conversationally or in a formal presentation format.

Some clubs hold informational sessions and others have fun “start classes” in a less formal setting. The size of your club may influence the format you choose.

Regardless of the setup, pacing the orientation allows new members to form relationships and get involved in ways that best fit their interests and needs.

Similar to the Discover Rotary outline presented in the previous chapter, it is recommended the following topics be covered in your new member orientation:

- Introductions of those attending
- Rotary’s structure
- Your club’s history, size and service area
- Your club’s leadership (officers, Board and Committee Chairs)
- Your club’s meetings (days, time, format)
- Introduction to your club’s governance structure
 - Rotary’s Core Values
 - Object of Rotary
 - 4-Way test
 - Club constitution
 - Club bylaws
- Club communication channels (e.g., newsletter, social media, P-mail)
- Outline of your club’s community service activities
- Introduction to RLI
- Ways to give to the Foundation used by your club
- Mentor assignment
- Outline of your club’s orientation process (whatever your club uses – see below for examples)
- Introduction to the new member’s assigned mentor

A skeletonized New Member Orientation slide presentation is provided in Appendix F.

2.3.2 New Member Entrance Interview

Shortly after a new member’s induction, a new member entrance interview should be conducted. The purpose of this interview is to explore the new member’s interests, get them



engaged in your club's organization and activities and start them on their new member orientation.

The new member entrance interview should be conducted by either the new member's mentor or a Rotarian that has similar interests to that of the new member (e.g., vocation, hobbies, extracurricular interests).

Sample new member entrance interview questions are provided in Appendix G.

2.3.3 New Member Orientation Process

The New Member Orientation Process is a series of activities accomplished by the new member over a specified period of time (normally six to eight months), during which the new member is provided more depth of knowledge in Rotary and your club, and becomes engaged in club activities. The steps accomplished during new member orientation are at the discretion of your club. Two examples of techniques used in other districts are provided in Appendix H:

- New Member Activity Check Sheet
- New Member Scavenger Hunt

2.4 The Mentor Program

An active and effective mentor program is a key component of a successful new member orientation. There is no substitute for a new member having a guiding hand to assist them throughout the new member journey, someone to answer their questions, encourage their involvement, and guide them through the indoctrination process.

An effective mentor program begins with selection of the right mentors, ensuring they are properly trained and understand their role, and following up to verify they are engaged in supporting their assigned mentee and that the mentee is progressing adequately on their journey.

2.4.1 Selecting Mentors

In selecting potential mentors, look for these qualities: Someone that...

1. Is passionate about Rotary.
2. Is an experienced Rotarian with in-depth knowledge of Rotary and their club.
3. Has the willingness to spend the time necessary to enhance the integration of new Rotarians into the club by providing personal support, consulting and coaching.

Sponsors should not be selected as mentors unless they possess the above qualities.



2.4.2 Training Mentors

Mentoring is one of the most important parts of the orientation process. Mentors cannot just be appointed and left on their own. They must be trained. Their duties and expectations must be clear and a list of expected activities or actions with the new member delineated.

Once selected, a mentor should receive instructions and coaching on the scope and method of being an effective mentor. The job is not difficult, but it does require a commitment of time to shepherd new members through several events and activities to ensure they fully understand the expectations and responsibilities of membership and are engaged in club work.

The club president should appoint an individual responsible for the mentor program who has served as a mentor and can act as trainer for new mentors. New mentor training should include a walk-through of the responsibilities outlined in Appendix I to ensure they are understood and followed.

2.4.3 Mentoring New Members

The activities assigned to be accomplished by the new member under the guidance of their mentor may vary depending upon the new member's orientation to date (e.g., Discover Rotary Attendance) as well as the club's practices (e.g., conducting new member activities). Guidelines for mentoring new members as well as a comprehensive list of suggested mentor activities is provided in Appendix I.



Chapter 3 “The Experienced Member”

3.1 Chapter summary

Experienced members are those that have completed the new member journey and are now engaged in club activities. Clubs with experienced members should be focused on the retention of these members through:

- Periodic assessments of their members’ membership experience and the associated adjustments (continuous improvements) that result from those assessments.
- Expanding the engagement of their members beyond the club level (i.e., in district and above Rotary activities and experiences)

This chapter focuses on practices and techniques to conduct member assessments as well as outline opportunities for members to engage in Rotary activities beyond the club level.

3.2 Assessment Tools

Three tools are available to Rotary Clubs through which to receive feedback from club members regarding the quality of their member experience:

- The Rotary Club Health Check, is typically conducted by the Club Leadership Team;
- The Member Satisfaction Survey, solicits direct feedback from individual members; and
- The Club Assembly, is a forum through which club leaders can solicit feedback in a “town hall” format.

Each of these tools are outlined below.

3.2.1 Rotary Club Health Check

The Rotary Club Health Check is best completed by your Club Leadership Team. It can be completed individually with the results reviewed by comparing the results of each team member’s input or completed in a group discussion.

The Health Check evaluates five primary areas:

- The Member Experience
- Service and Socials
- Membership Trends
- Club Image
- Business and Operations



In each case, the health check provides ideas on what actions to take to address potential weaknesses.

Appendix J provides the Rotary International recommended Rotary Club Health Check. Clubs are encouraged to conduct a health check annually in conjunction with the change in club leadership.

3.2.2 Member Satisfaction Survey

The Member Satisfaction Survey is a method for soliciting feedback directly from members on the quality of their member experience. Appendix K provides a sample survey which can be modified to fit the needs of the club.

Member Satisfaction Surveys can be completed at the discretion of the club leadership, but doing so in conjunction with the annual club health check is highly recommended as the results of the two provide valuable insights into the member experience in your club.

3.2.3 Club Assembly

Rotary Code of Policies, paragraph 7.040, defines a Rotary club assembly as a meeting of all club members, including the club's officers, directors and committee chairs, held for the purpose of conferring on the program and activities of the club or for membership education. All members of the club are urged to attend the assembly. The club president, or other designated officer, presides at club assemblies.

The relevant term to this chapter of the Member Care Manual is "confer." Club Assemblies provide an opportunity to have an open discussion with the membership on subjects such as the leadership's goals for the year, progress toward those goals, and feedback from Rotary Club Health Checks and Member Satisfaction Surveys. They provide a forum for an open discussion on how things are going, an opportunity to identify areas in which the member experience can be enhanced, and a chance to brainstorm possible new directions to ensure the clubs activities remain relevant and engaging for the membership.

Club assemblies allow club members to:

- Review goals and action plans
- Coordinate committee activities
- Understand how the club's action plans are being implemented
- Participate in informal discussions that stimulate creative solutions
- Learn about Rotary and its programs
- Discuss your club's strengths and opportunities for improvement

Relevant topics for discussion include:

- Service projects and club activities
- Membership growth and retention strategies
- District, Zone and Rotary International meetings
- Rotary programs
- Any topic raised in an open forum

The frequency of club assemblies is at the discretion of the club, although at least two are recommended, one early in the term of a new leadership team and one near the midpoint in that Rotary year.



3.3 Expanding Your Rotary Knowledge

Rotarians who are fully engaged at the club level should be encouraged to expand their knowledge of Rotary through training and engagement beyond the club level. The opportunities range from participation at the district level, to expanded use of the Rotary Learning Center (see next section), to engagement in one of Rotary's affiliated groups and participation in a Zone Summit or participation in a Zone training opportunity or Rotary International Convention.

Appendix L provides a high level summary of some of these opportunities. The slides in this presentation can be used together or selectively at Club Assemblies to introduce these opportunities to your membership.

3.3.1 The Rotary Learning Center

The Rotary Learning Center is an on-line resource of short courses in a multitude of topics that cover everything from club leadership roles to personal development. The individual chooses the courses of interest which are all self-paced and can be taken when time permits.

The Learning Center can be found at www.learn.rotary.org. Navigation is straightforward as courses are organized into logical categories such as About Rotary, Club Leadership and Personal Development. The Club Leadership category will be particularly helpful in supporting your club as it not only contains topics aligned to each club committee, but also addresses such topics as Creating an Inclusive Club Culture, Diversifying Your Club, Preventing and Addressing Harassment and many others.

A convenient and easily accessible source of information, club members and club leaders are encouraged to use The Rotary Learning Center as a ready source of supporting their members' Rotary journeys.

3.3.2 Rotary Leadership Institute

The Rotary Leadership Institute (more aptly referred to as the Rotary Learning Institute) is an opportunity to experience a guided learning experience with Rotarians from within and often outside our district. It is an adult educational experience where learning occurs largely by sharing ideas and experiences with other Rotarians in a classroom environment (either in person or on-line depending on the session being offered).

RLI is comprised of three parts, each of which is intended to both strengthen a member's engagement within their club as well as develop them personally. Topics include The Roots of Rotary, Strategic Planning, Team Building, Communications, Public Image, Attracting Members and many more.

RLI is often the first exposure to Rotary beyond the club level that is open to club members. In addition to the personal benefits of attending RLI, graduates become a valuable resource to their club.

Every club should encourage members to attend RLI early in their member journey. RLI sessions are scheduled throughout the year in various locations both inside and outside our district. Scheduled RLI sessions can be found on our district website or on the DACdb calendar.



3.3.2 District Training Opportunities

There are five primary district training events held annually in our district:

- **President-elect Training Seminar (PETS):** PETS is an annual district-level seminar typically held in the spring of each year. PETS' primary purpose is to train incoming Rotary and Rotaract club presidents on their role and responsibilities during their year as club president. President-nominees and emerging club leaders who show promise as future club presidents are welcome to participate in this unique leadership development experience.
- **District Membership and Foundation Summits:** These two events are focused specifically on developing club membership and foundation teams. They feature in-depth discussions of current initiatives and techniques in their specific areas and typically include presentations by Zone and other experienced Rotary leaders outside our district. While specifically targeted toward membership and foundation team members, all Rotary members are welcome to join and further develop their knowledge at these annual training events.
- **District Training Assembly (DTA):** The annual District Training Assembly is typically held in June and is the major training event in the district. Its primary purpose is to train the incoming leadership teams for the clubs within the district. District Assembly workshops offer motivation, inspiration, Rotary information, and new ideas for club officers, directors, and key committee chairmen of each club.
- **District Conference:** The annual district conference is typically held in May and is a time to network; reconnect with friends; find inspiration for continuing service and community leadership; and pursue opportunities to broaden your knowledge and engagement with Rotary. The conference usually lasts two days and includes:
 - A visit from the current Rotary International President's representative, who gives an update on Rotary International and inspires and motivates participants
 - A report on the district, including its successes and challenges
 - An official business meeting to discuss and vote on important district matters
 - Local and international speakers who provide information on topics relevant to district members.
 - A district service project

3.3.3 District Projects and Events

Participation in district-wide service projects and events is a great way to expand your engagement in Rotary. The nature of these events can vary from year to year, but they always provide opportunities to expand Rotary fellowship and engagement beyond the club level.

Monitoring the district Facebook page, website and the DACdb District calendar is the best way to stay current on upcoming district events.

3.3.4 Zone Training Opportunities

Our Zone 33/34 leadership team is one of the most proactive training teams in Rotary. Monthly meetings and training opportunities are typically offered in both the Membership and Public Image areas.



Participation in these virtual sessions as well as in the monthly Zone information meeting hosted by our Zone Director is open to all interested Rotarians.

For information about these sessions, contact the corresponding District Leadership Team member or search the DACdb calendar for upcoming Multi-District events.

3.3.5 Rotary International Conventions

On 15 August 1910, Paul Harris convened the first Rotary convention. At the time, there were 16 clubs in the United States. Today, Rotary Conventions gather Rotarians from around the world on an annual basis to combine fellowship with Rotary business and inspire attendees with notable guest speakers and entertainers, workshops, and messages from Rotary leaders.

The experience of attending a Rotary International Convention is unmatched in Rotary. No matter who you are or where you're from, you're bound to find inspiration throughout the convention. It's an experience unlike any other Rotary event and it will renew your commitment to service and leadership while providing opportunities to make new friends and connect with old ones in fascinating global venues (the conventions, while frequently held in the United States, rotate to various venues around the world).

Rotary Clubs should keep their membership informed on upcoming Rotary International Conventions and encourage their participation. Our district appoints an International Rotary Convention chairperson for each conference. They are the point of contact for current information on the upcoming conference.

3.3.6 The Rotary Minute

A mechanism many Rotary clubs use to expand the Rotary knowledge of their membership on a continuous basis is The Rotary Minute. Rotary Minutes become a component of each meeting's agenda and focus on a particular element of Rotary that may be of a historical nature or merely a brief summary of an aspect of Rotary with which your club members are not familiar.

Appendix M provides a collection of Rotary Minutes which can be used. You can also create your own (Appendix A is a good source of information to assist in doing so).



Chapter 4

“Rotary Leadership Opportunities”

4.1 Chapter summary

Leadership is one of Rotary’s five core values. Every members’ journey should include the opportunity to enhance their leadership skills. A great way in which to do that is through assuming a leadership role in Rotary.

Rotary offers a broad array of leadership opportunities at the club level and beyond. This chapter outlines those opportunities both to encourage clubs to expand their use of these leadership positions and to provide individual Rotarians options for leadership development opportunities outside their club.

4.2 Club Leadership

Typically a new member’s involvement will begin as a member of one of their club’s committees. New members should be strongly encouraged to join a committee of their choice both to further their individual development and to ensure they become engaged with club activities.

The committee structure forms the basis for an effective club leadership team. Assigning members to club committees ensures all members are contributing in some way to the club’s operations and avoids the club falling into the practice of depending on a small proportion of its membership to accomplish the work of the club.

4.2.1 Club Leadership Positions

While each club has a great deal of freedom to organize as they see fit, certain leadership positions are required by the Rotary Club Constitution which is applicable to all clubs and reads as follows:

“The club officers shall be a president, the immediate past president, a president-elect, a secretary, and a treasurer, and may include one or more vice presidents, all of whom shall be members of the board. The club officers shall also include a sergeants-at-arms, who may be a member of the board as the bylaws shall provide.”

In addition to these requirements, clubs typically establish a set of committees in line with those established at the district level to facilitate interaction with the district. At a minimum that includes Membership, Foundation, Public Image and Community Service; each of which provide a leadership opportunity for a chair who typically serves as a Board member on the club board. Use of this committee structure is strongly encouraged.

Committee chairs form the entry level leadership positions in Rotary Clubs and should be chosen with consideration of the member’s area of interest, experience as a committee member, and willingness to accept the responsibilities of leadership.



Assuming a leadership role in a Rotary Club is an important milestone in a Rotarian's member journey. It should be celebrated and marked with an official induction ceremony to ensure all members are aware of those leading their club activities. While the nature of the induction ceremony is at each club's discretion, a sample ceremony is provided in Appendix N.

4.2.2 Succession Planning

Succession planning is a key component of club leadership. In the case of the Club President, succession planning is required by the Rotary Club Constitution which states:

"The president shall be elected as provided in the bylaws, not more than two (2) years but not less than eighteen (18) months prior to the day of taking office and shall serve as president-nominee upon election. The nominee shall take the title of president-elect on 1 July in the year prior to taking office as president. The president shall take office on 1 July and shall serve a period of one (1) year or until a successor has been duly elected and qualified."

Succession planning for other leadership positions of the club is equally important. One of the advantages of using the committee structure outlined in the previous section is to provide a cadre of club members with experience in each committee's area of responsibility from which to select future leaders. Ideally, each committee chair should identify and develop at least one committee member capable of serving in their absence and/or assuming the committee leadership position when their term is completed. The same is true for all leadership positions in the club.

4.3 District Leadership Opportunities

The District Leadership Team is comprised of district officers, committee chairs and a select number of individual assignments as outlined in the *D7545 Leadership Plan and Articles of Operation*. Each provides an opportunity for leadership beyond the club level.

While the process for selection of the District Governor is stipulated in the Articles of Operation, all other leadership positions are by appointment of the then serving District Governor. Typically, the leadership team for the next Rotary year is selected by the upcoming governor during his or her year as Governor-elect.

While all district leaders serve at the pleasure of the then serving district governor, several district leadership positions benefit from an extended period of service, typically three year terms. These include Assistant Governors, District Treasurer, District Membership Chair and District Foundation Chair.

Much like committee membership provide entry level engagement opportunities at the club level, the same is true at the district level. Rotarians serving as chairs of committees are encouraged to participate as members of the corresponding district committee, but any Rotarian with interest in serving at the district level may contact the corresponding district committee chair and express interest in serving as a member of their committee. Doing so is highly encouraged as a great way to expand a member's knowledge of Rotary and the operations of the district; another important step in the member journey.



Chapter 5 “The MAP Membership Success Center”

5.1 Chapter summary

During the 2022-23 Rotary year, Zone 33/34, of which our district is a part, introduced a new Membership Action Plan (MAP) intended to provide a multi-year approach to creating a club culture of consistent moderate membership growth. A key component of the MAP is an on-line membership support tool set entitled the MAP Membership Success Center.


This chapter provides an introduction to The MAP Membership Success Center and outlines how to go about accessing the Center and utilizing its tools to support your club. To access Zone webinar recordings outlining key features of the MAP initiative, go to this link: <https://www.rizones33-34.org/membership-action-plan/>.

If, after reviewing this chapter, you have additional questions or need further assistance in utilizing this tool, reach out to one of the District Membership Ambassadors or contact the District Membership Chair directly. Contact information can be found in District 7545 Leadership Team under the Our District tab.

5.2 Accessing MAP Tools

The MAP Membership Success Center is accessed through the Club Tab on DACdb using the icon shown at right. If you do not see this icon under the club tab, click on the gear icon that appears in the upper right section of the page as shown below:



 and drag the MapSys box from the “Available Icons” section up into the “Icons Displayed” section. Then click on “Set My Configuration box” which will place the Membership Success Center icon on your club tab display.

5.3 Summary of MAP Tools

The MAP Membership Success Center provides club leaders access to an array of membership tools including:

- A Progress Dashboard which summarizes your club goals and progress against those goals
- A Membership Goals section where Club Presidents can easily set/modify their membership goals for the year
- A Reports Section which provides access to membership attraction, attrition and overall membership growth progress in tabular form
- A Survey Section which enables club leaders to quickly create, distribute and analyze member surveys to gain feedback and insights from club members

To learn more about using each of these tools, scroll to the bottom of the Home page when you first access The MAP Membership Success Center, there you will find access to Video Guided Tours that explain how to utilize these tools effectively.



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The MAP Membership Success Center should be a key component of every club President's and Club Membership Chair's tool box. If you have questions regarding its use, reach out the District Membership Team and attend the next District Membership Summit.