

Membership Committee Duties
Updated 2/9/2010

The Membership Committee consists of the formal Membership Committee itself plus two Subcommittees. It also oversees the organization's Sponsor/Mentor program. The duties of all are described below.

The Membership Committee has the following roles and responsibilities:

1. Annually, establish and then maintain a Membership Committee Plan defining specific activities to be completed by each committee member for the next year. Provide monthly status reports on progress against this plan and update the plan as appropriate.
2. Develop and maintain descriptions of the duties of the following:
 - a. The Membership Committee itself
 - b. The "Rotary Cares" Subcommittee
 - c. The "Orientation" Subcommittee
 - d. The "Sponsor/Mentor" Program
3. Provide a membership status report and update at each Rotary Board Meeting. A Membership Directory will provide a report at the monthly board meetings which provides statistics regarding attendance to ensure active and engaged club members who attend meetings regularly.
4. Conduct activities necessary to maintain and/or increase total membership in accordance with the Goals of the Strategic Plan.
 - a. Seek out new members to reflect the Edmonds community
 - b. Seek out new members who are informed, motivated, and effective in leadership
 - c. Ensure that a membership survey is conducted annually to assess level of interests and satisfaction
 - d. As new candidate members are identified and express interest in becoming a member, ensure that a Sponsor/Mentor is assigned to guide the new candidate member through the subsequent steps
 - e. Once the subsequent steps have been completed (see Sponsor /Member Duties below), the Membership Director will recommend to the Board that this candidate be invited to join and with Board approval, notify the Sponsor of this action
 - f. Provide an effective new member orientation program. See the "Orientation Subcommittee Duties" section provided below
 - g. Conduct exit interviews with members who choose to resign from the Club to identify those things that could be improved within the Edmonds Rotary to identify ways to prevent future resignations. See "Exit Interview Steps" below
 - h. Provide a list of members who frequently miss meetings to the Membership Director who will attempt to determine the cause and encourage them to participate more actively
5. Establish and conduct a meaningful new member Sponsor/Mentor Program.
 - a. Identify active members who are interested in and willing to become mentors
 - b. The "Sponsor/Mentor Duties" section provided below provides a list of duties to consistently aid Sponsor/Mentors in guiding new members through all of the steps necessary to become a fully engaged member of the Edmonds Rotary Club
6. All members are encouraged to identify and recommend to the Membership Committee, ideas to improve the membership committee program.

Rotary Cares Subcommittee Duties

To increase retention of new and current members, subcommittee called "Rotary Cares" subcommittee has been established. The tasks of this subcommittee are to:

1. Providing support and encouragement to new members as they move through the red to blue badge process. This includes communication with the new member to answer questions and help track the essential elements of the process including help with scheduling tasks such as "Greeter," "Invocator," taking attendance, classification talk, relaying dates/time of Board meetings and/or Firesides; resources for joining a committee, etc.
2. Informing the Membership Director and Club President when all tasks have been completed so that the blue badge can be awarded at a club meeting.
3. Contacting members who missed meetings to encourage them to keep their attendance current. Includes identifying any make-ups on record and providing options for other make-ups.
4. Sending cards to members who missed a meeting when their anniversaries or birthdays would have been celebrated.
5. Initiating regular communication with members who are on a leave of absence, offering encouragement and support.
6. Sending cards to members who are ill or in need of sympathy. When someone has an illness or is in need of sympathy it should also be a time for the president to make appropriate announcements and inform the membership regarding how that member is doing.
7. Identifying and recommending to the Membership Committee modifications of these duties and/or proposed additional duties aimed at continually improving the effectiveness of Rotary cares. Examples of recommendations currently under review are:
 - a. Identify 4-6 individuals who are willing to provide mentorship to new members if the original sponsor is not available for this task and to guide/sponsor "walk-ins" who come to the club without an official sponsor.
 - b. Initiate regular communication with new members and their Sponsor/Mentor as a "check-in" to ensure the system is working according to plan or adjusting as needed.
 - c. Follow-up communication with visitors/guests and/or their sponsor/hosts to determine if membership in our club will be pursued.

Orientation Subcommittee Duties

To ensure that candidate new members are provided a clear, in depth understanding of Rotary and the roles and responsibilities that will be expected of them as a part of their membership, each will be given a detailed orientation. This orientation will be provided by a senior member of the Membership Committee's Orientation Subcommittee. The duties necessary to successfully complete the orientation are:

1. Greet the candidate and ask questions to determine Rotary interest, relationship with the Sponsor, profession, significant lifetime experiences that are relevant to being a Rotary member, determine the appropriate Classification and learn what led to the candidate's interest in Rotary.
2. Provide to the candidate a review of the Edmonds Member Information Manual, reminding the candidate that they will receive a copy of their new member manual and advising them to use it as a reference. The review should include as a minimum the following:
 - a. A detailed walkthrough of the Manual with the candidate addressing selected specific sections and paragraphs to include at least:
 - i. The four way test
 - ii. The object of Rotary
 - iii. Things unique about Edmonds Rotary
 - b. Review how the candidate was selected and the importance of membership, participation, and attendance
 - c. Review in detail the fees, dues, costs, etc. associated with Rotary membership to ensure full understanding of these elements and if the candidate expresses the interest to join at that time, provide the candidate with an initial bill.
 - d. Describe the purpose of the Red Badge and Blue Badge steps to full membership and review the requirements to achieve each level. Note that a "Sponsor/Mentor" will be assigned to help guide the candidate through this transition.
 - e. Cover the two foundations and examples of fund raising projects and community and international projects undertaken by the club, using the latest list.
 - f. In the Manual, go over the club roster, organization of committees, suggesting that the candidate be prepared to choose a committee on which to serve as soon as possible.
 - g. Provide the link to the Club Runner website and encourage the candidate to take the time to become familiar with it.
 - h. Briefly describe the budget and note where and when the Board of Directors meets, noting that attendance at a Board meeting is one possible requirement to move to Blue badge status.
 - i. Provide a recent copy of the Rotary magazine
 - j. Take time to answer questions.

This orientation session should require approximately 45 – 50 minutes.

Sponsor/Mentor Duties

As a part of the process of recruiting new members, each Rotary member is encouraged to identify people in the community who they believe would be good members especially those with classifications that are lacking within the current membership. Once a potential member has been identified that person who identified the potential member should invite that person to attend a regular meeting and guide that person through the initial introduction to Rotary. To ensure that a guest is properly welcomed, the steps defined in “Guest/Walk-In Duties” described below should be followed. If the guest expresses further interest in becoming a member of the Edmonds Rotary, a regular member will then be assigned to take on the role of Sponsor – see “Sponsor Duties” below.

While we recommend that the member who makes the initial contact to invite the guest take on the duties of a Sponsor, we recognize that this person may not wish or be able to perform these duties in which case another member can be requested to pick up this role. In any event, the duties listed below should be completed.

Occasionally, someone will notice that a Rotary meeting is being held and will drop in to see what Rotary is all about. These guests are to be welcomed similarly to invited guests as described in the “Guest/Walk-in Duties” provided below.

Sponsor Duties

1. Invite a proposed candidate member to a luncheon meeting and introduce him/her to the members at that time.
2. Provide the Secretary the name and contact information for a proposed candidate member
3. Provide, as a loan, a copy of the Rotary DVD which provides a formal overview of Rotary International for the potential member to review at their leisure.
4. Contact the proposed candidate member after their initial meeting with the Edmonds Rotary to identify those things that they found attractive and anything they found to be potential barriers to their becoming a new member
5. Encourage the proposed candidate member to return to a subsequent luncheon meeting and complete the “Rotary Club of Edmonds Member Information for Club & RI Records” application form (Attached). The Sponsor will also complete the attached “Rotary New Member tracking sheet” form and then provide both forms to the Secretary for processing.
6. The candidate’s application will be posted on the Badge Box at the entrance to the meeting room and members will have the opportunity over the next two weeks to raise any objections to this candidate becoming a member. After that time and at the next the Board of Directors meeting, the Board will approve/disapprove the candidate’s application for membership and notify the Sponsor of that action.
7. When the proposed candidate member indicates sufficient interest in becoming a member, set up and interview session with the Orientation Subcommittee. At this session, an orientation will be conducted in accordance with the Orientation Duties defined.
8. The Sponsor will inform the candidate of the Board’s decision and if the candidate’s application is approved, the Sponsor will invite the candidate to receive an orientation conducted by a senior Club member covering the topics described under the Orientation Subcommittee Duties noted above. At a subsequent Club meeting an induction ceremony will be conducted. At this ceremony, the Sponsor will introduce the new member, provide a “Red Badge” and Rotary Pin and formally induct the new member into the Club.

A letter of welcoming and explanation of the mentor program and its purpose signed by the president of the club will be provided to each new member by their sponsor.

Mentor Duties

Because it is very important that the Mentor Program be effective and performed consistently, the membership committee has proposed to institute a practice whereby a set of 4 or 5 experienced Active Members are identified as Mentors and it is from that group that a Mentor for each new member will be drawn. These identified mentors will be asked to commit to actively performing all of the Mentor Duties described below and to be available to the new member as necessary to ensure that the new member feels welcome and is comfortable asking for any guidance to make the transition to full membership as smoothly and effectively as possible.

Once a candidate has agreed to become a new member and has been inducted into the club (i.e. paid their dues and given a “Red Badge”), a “Mentor” will be assigned to guide the new member in completing their obligations to become a full (“Blue Badge”) member and assist the new member in becoming a fully functioning member of the Edmonds Rotary Club.

1. Although it is the responsibility of ALL members of the club to contribute to the development of each new member, the responsibility primarily lies with the new member’s Mentor.
2. The overall duty of a Mentor is to foster the development, growth and retention of new members to the club by integrating them more fully and deliberately via participation in key activities and experiences that make one a Rotarian.
3. The responsibilities of the Mentor are primarily to ensure that new members are guided through the initial steps to:
 - a. Reinforce the member’s understanding of the history and overall purpose and objectives of Rotary, building upon and clarifying the information that was provided during the Orientation meeting.
 - b. Help them become familiar with and apply the 4-Way Test
 - c. Help each new member to:
 - i. Understand the Rotary Cares initiative
 - ii. Review and understand the Edmonds Rotary by-Laws to include the steps the candidate must take to become fully fledged member.
 - iii. Participate as necessary to complete the steps required to transition from Red Badge to Blue Badge status. See “Rotary Club of Edmonds Membership Committee New Member Mentor Checklist” below. The expected time for completion of this transition is up to 6 months to 1 year with encouragement to complete it as soon as possible.
 - iv. Become committed, active, participating members of the Edmonds Rotary and Rotary International as appropriate.
4. Identify and recommend to the Membership Committee, ideas to improve the Mentor program.

ROTARY CLUB OF EDMONDS

MEMBER INFORMATION FOR CLUB & R.I. RECORDS

1. Today's Date: _____
2. Name (please include first, middle, last & nickname): _____
3. Home address: _____

4. Business name & address: _____

5. Where do you want your mail sent? Home____ Business____
Your Rotary mail and messages will be sent by e-mail to your office and home unless you indicate otherwise:
7. E-mail addresses: Home: _____ Office: _____
8. Phones: Home: _____ Business: _____ Fax: _____

PERSONAL DETAILS

1. Occupation: _____
2. Date of Birth _____
3. Spouse's first & last name _____
4. Is your spouse a Rotarian? Y/N _____
5. Wedding Anniversary: _____
6. Spouse's birthday _____
7. Children (please list names/sex/date of birth):

8. Hobbies: _____
9. Languages: Spoken fluently: _____
Written fluently _____
10. Other activities & organizations _____

CLUB DETAILS

1. Classification: _____
2. Member since: _____
3. Sponsor: _____
4. Paul Harris Fellow? Y/N _____

Rotary Club of Edmonds Membership Committee
New Member Checklist

WELCOME TO EDMONDS ROTARY!

As a new member, you have been provided with a Red Badge. You'll notice that other regular members were a Blue Badge. Your first duties as a new member are to accomplish a set of required activities necessary to become a "full fledged" member and be provided with your own Blue Badge. Some information about each activity is provided below.

To help you do this, a regular member has offered to be your mentor to guide you through these steps and answer any questions you may have about the Edmonds Rotary. When the full requirements have been met, the Club Secretary will order your Blue Badge and arrange for a presentation ceremony. The following checklist is provided to guide the process:

New Member's Name: _____

Sponsor's Name _____

Mentor's Name: _____

THE FOLLOWING FOUR ITEMS ARE REQUIRED:

<u>ITEM</u>	<u>DATE COMPLETED</u>
1. Volunteer for a committee assignment	_____
2. Give a five-minute classification talk	_____
3. Act as a co-greeter at a club meeting	_____
4. Deliver an Invocation or "Thought for the day"	_____

THEN CHOOSE THREE FROM THIS LIST:

1. Attend a fireside meeting	_____
2. Take attendance at a club meeting	_____
3. Attend a meeting at another Rotary club	_____
4. Sponsor a new member	_____
5. Attend a district assembly meeting	_____
6. Attend a district new member orientation	_____
7. Attend a board of directors meeting	_____
8. Maintain perfect attendance for six meetings	_____
9. Participate for at least 2 hours at a club project	_____

Here are some details regarding the above items:

VOLUNTEER FOR A COMMITTEE ASSIGNMENT

Part of being in a service organization is to help at least one of the various club committees with their work. It is fundamental to idea of participation as a Rotary club member. The list of committees is available on the Rotary Club of Edmonds web site. The section of the By-Laws relating to and identifying the committees is provided below.

GIVE A FIVE MINUTE CLASSIFICATION TALK

The purpose of the classification talk is to allow club members to get to know you better. The classification talk typically covers three areas in the course of five minutes:

- (1) personal life of the member
- (2) the career life of the member
- (3) why they chose to be involved with Rotary.

There is usually adequate time for a classification talk at any of the weekly meetings. Contact the Rotary Cares chairperson or the President to schedule.

ACT AS CO-GREETER AT A CLUB MEETING

Acting as a greeter is the best way to get to know the other members of your club. The member scheduled to be the Greeter at any Tuesday are published in the Backwash newsletter and on the website Calendar (*Select Calendar on the left margin*)

Contact the scheduled Greeter and arrange for your participation.

DELIVER INVOCATION OR THOUGHT FOR THE DAY AT A CLUB MEETING

The invocation consists of a thought for the day or wish for the future or prayer that you would like to express to the club. The member scheduled to do the Invocation at any Tuesday are published in the Backwash newsletter and on the website Calendar. (*Select Calendar on the left margin*)

Contact the scheduled Greeter and ask him or her if you can substitute for them.

ATTEND A FIRESIDE MEETING

Fireside meetings are an informal get together in the evening at a members home. They typically have a topic for discussion and refreshments are served. Fireside meetings are scheduled approximately four times per year. They are announced at the weekly meeting and appear on the calendar. (*Select Calendar on the left margin*)

TAKE ATTENDANCE AT A CLUB MEETING

Taking attendance is another good way to learn the names of the other members of the club. The club secretary takes attendance at each club meeting.

Contact the secretary and arrange for your participation.

ATTEND OR MAKE UP A MEETING AT ANOTHER ROTARY CLUB

It is helpful and enlightening to discover how different Rotary clubs operate and address the four avenues of service. Convenient clubs for visiting/make-up meetings are published in the Backwash newsletter or on the [District 5030 website](#) or the [Rotary International Website](#)

SPONSOR A NEW MEMBER

Communicate your passion for the Rotary mission and activities to one of your friends and associates. There is a document describing the process for sponsoring a new member. Also the Membership Committee chair can guide you through the process.

ATTEND A DISTRICT ASSEMBLY OR MEETING

The district meetings/conferences/assemblies will be announced at the Edmonds Rotary weekly meetings.

They will also be listed on the calendar and the District 5030 website. (*Select Calendar or Links on the left margin*)

ATTEND A DISTRICT NEW MEMBER ORIENTATION

The district new member orientation is a good way to hear stories about how other clubs in our district are addressing the four avenues of service. The district new member orientation will be announced at the Edmonds Rotary weekly meetings. They will also be listed on the calendar and the District 5030 website. (*Select Calendar or Links on the left margin*)

ATTEND A BOARD OF DIRECTORS MEETING

The board determines the expenditures that the Edmonds Rotary spends on programs as well as determining the direction of the club. Typically, committee chairpersons give reports on the activities of their respective committees at the board meeting.

The board meets on the third Wednesday of every month at 7:30am at the Port of Edmonds conference room 336 Admiral Way. The information is also available on the Edmonds Rotary calendar page. (*Select Calendar on the left margin*)

MAINTAIN PERFECT ATTENDANCE FOR SIX MEETINGS

Perfect attendance comprises either attendance at four consecutive Tuesday Edmonds Rotary meeting or six meetings in any eight week period.

Convenient clubs for make-up meetings are published in the Backwash newsletter, on the [District 5030 website](#) or the [Rotary International Website](#)

PARTICIPATE FOR AT LEAST 2 HOURS AT A CLUB PROJECT

A good example of a club project is the work the Edmonds Rotary does in support of the Trinity Place facility. The works typically consists of yard cleanup, apartment painting, cabinet repairs or installation, etc. Opportunities are typically announced at the regular club meetings.

Article 9 Committees - Club committees are charged with carrying out the annual and long-range goals of the club based on the four Avenues of Service. The president-elect, president and immediate past president should work together to ensure continuity of leadership and succession planning. When feasible, committee members should be appointed to the same committee for three years to ensure consistency. The president-elect is responsible for appointing committee members to fill vacancies, and conducting planning meetings prior to the start of the year in office. It is recommended that the chair have previous experience as a member of the committee. Standing committees should be appointed as follows:

- *Membership* - This committee should develop and implement a comprehensive plan for the recruitment and retention of members.
- *Club Public Relations* - This committee should develop and implement plans to provide the public with information about Rotary and to promote the club's service projects and activities.
- *Club Administration* - This committee should conduct activities associated with the effective operation of the club.
- *Service Projects* - This committee should develop and implement educational, humanitarian and vocational projects that address the needs of its community and communities in other countries
- *The Rotary Foundation* - This committee should develop and implement plans to support The Rotary Foundation through both financial contributions and program participation.
- *Fund Raising* – This committee shall be responsible to oversee all fund raising activities of the club.

Additional ad hoc committees may be appointed as needed.

(a) The president shall be ex officio a member of all committees and, as such, shall have all the privileges of membership thereon.

(b) Each committee shall transact its business as is delegated to it in these bylaws and such additional business as may be referred to it by the president or the board. Except where special authority is given by the board, such committees shall not take action until a report has been made and approved by the board.

(c) Each chair shall be responsible for regular meetings and activities of the committee shall supervise and coordinate the work of the committee and shall report to the board on all committee activities.

Article 10 Duties of Committees

Section 1 - The duties of all committees shall be established and reviewed by the president for his or her year. In declaring the duties of each, the president shall make reference to appropriate RI materials. The service project committee will consider vocational service, community service and international service avenues when developing plans for the year.

Section 2 - Each committee shall have a specific mandate, clearly defined goals, and action plans established by the beginning of each year for implementation during the course of the year. It shall be the primary responsibility of the president-elect to provide the necessary leadership to prepare a recommendation for club committees, mandates, goals and plans for presentation to the board in advance of the commencement of the year as noted above.

GUEST/WALK-IN DUTIES

An important part of the Greeter's duties is to ensure that a guest is either accompanied by the person inviting them or handed off to the Secretary. It is very important that we extend our hospitality to the guest from the time they arrive until the meeting ends. If the person inviting the guest cannot do this, it is critical to identify a regular member to take on that duty. Consequently, the Secretary will find an active member at the meeting who will be willing to take on this important task. The following are steps for welcoming a guest:

1. The Secretary will obtain the guest's contact information and, if necessary, introduce the guest to an active member who will be responsible for the guiding the guest throughout the meeting by doing the following:
 - a. Introduce the guest to at least the members seated at the table where lunch will be taken
 - b. Help the guest get a meal
 - c. Engage the guest in relevant conversation and explain how the meeting will unfold, i.e., what activities will take place, the purpose of the "Happy Bucks", etc. and answer any questions as best you can or take a note to find an answer if you are unable to provide one immediately. .
 - d. Ensure that the guest is comfortable and at the end of the meeting, ask if there is anything about Rotary (in general or Edmonds, specifically) that you could provide. Also invite the guest to return to a subsequent meeting if interested in becoming a member and indicate that you will be happy to follow up in the near future to reinforce the invitation.
 - e. After the guest has left, brief the Secretary and/or President with a summary of your interactions and observations regarding the potential of this guest as a new member.
2. Unless this guest explicitly indicates that he/she is not interested in becoming a member, the Secretary will ensure that the Membership Committee is provided with the guest's contact information and any relevant personal information provided by the person who guided the guest during the meeting
3. The Membership Committee will specifically assign a committee member to follow up with the guest to discuss the possibility of becoming a new member and encourage the guest to return to a subsequent meeting. Specific duties are:
 - a. Offer to provide a loan copy of the Rotary DVD to gain a greater understanding of Rotary and what it means to be a member.
 - b. Offer to meet the guest and the next meeting that is convenient for him/her to attend and be willing to help the returning guest be comfortable at the next meeting, introducing him/her to additional members, getting lunch, answering questions, etc.
 - c. Ensure that the returning guest is introduced to the Orientation Subcommittee chair (Carl Swenson) or if that is not possible, to a senior member who can provide a more historical background of the Edmonds Rotary and/or Rotary in general during the meeting.
 - d. If the returning guest indicated a further interest in becoming a member, identify which active member will be willing to act as that person's Sponsor and/or Mentor. This person should then take on the tasks identified above for those roles.

EXIT INTERVIEW STEPS -- DRAFT

When our Club is notified that a member has chosen to resign, the Membership Committee will identify someone to conduct an exit interview with the resigning member. It is important to the Club to understand why the member has made that choice and if that choice is related to anything the Club should be doing differently to prevent others from making the same choice. The questions provided below are aimed at obtaining the information however, as the interview proceeds, the interviewer is encouraged to let the interviewee talk freely and consider other questions that may develop a deeper understanding. Thus, this list of questions is simply a starting point and should be used as a guide. At the completion of the interview, if you have used additional or different questions, please note those and provide them to the Membership Committee (along with the responses) for possible addition to the list provided and future use.

Draft for Discussion

Rotary Club of Edmonds Member Exit Interview

Interviewee Name: _____ **Date** _____

Interviewer Name: _____

The Edmonds Rotary Club has received your notice of resignation. As part of my job on the Membership Committee, I would like to spend a few moments visiting with you about your Rotary membership. Please know that we honor your decision; but we will miss seeing you at meetings and working with you on projects. Because membership is such an important part of our Rotary Club, it would be very helpful to the Club if you would please share a little candid feedback with me.

Per your letter (or phone call, etc.), it is my understanding that you are resigning because of:

We would like to know if you would consider taking a leave of absence at this time, instead of resigning.

Do you think you will want to return to our Rotary Club at some point?

Will you be joining another Rotary Club and if so, is there anything we can do to help facilitate that?

Knowing you have probably considered this for some time, was your decision at this time due to what might be viewed a negative situation that occurred at our Club?

Did your decision have anything to do with something that our Club can correct or change?

What was the best part of your Rotary experience?

Was there an aspect of your Rotary membership that was a disappointment?

Is there anything else that you would like to add that might make the Rotary experience more valuable for others?

What committee(s) were you serving on so that I can notify the chair that committee that you have resigned?

I want you to know that if you ever decide you would like to attend an Edmonds Rotary Club meeting in the future, you would be very welcome. Please do let me know so that I could personally have you as my guest. Additionally, if you decide to rejoin our Rotary club within the next 12 months, your initiation fee would be waived.