

扶輪社
社員
委員會手冊

CLUB
MEMBERSHIP
COMMITTEE
MANUAL



ROTARY INTERNATIONAL®

國際扶輪

本手冊為 2006 年版扶輪社社員委員會手冊。本手冊旨在供 2007-08、2008-09、2009-10 年度扶輪社各委員會使用。手冊內資訊的根據為模範扶輪社章程、建議扶輪社細則、國際扶輪章程、國際扶輪細則及扶輪政策彙編。2007 年立法會議或國際扶輪理事會對這些章程文件所作之改變應取代本書中所述之政策。

This is the 2006 edition of the *Club Membership Committee Manual*. It is intended for use by 2007-08, 2008-09, and 2009-10 club committees. The information in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, and the Rotary Code of Policies. Changes to these documents, by the 2007 Council on Legislation or the RI Board, override policy as stated in this publication.

前言

扶輪社社員委員會手冊編製的目的，在協助你設定目標，並瞭解你在增加扶輪社效能的責任。一個有效能的扶輪社能夠：

- 維持或增加其社員人數
- 成功推動計畫來因應其社區與其他國家之社區的需求
- 透過參與計畫與捐獻來支持扶輪基金會
- 培養能夠在扶輪社階層以上服務扶輪的領袖

根據扶輪社領導計畫，建議的扶輪行政架構應有以下5個常設委員會：

- 扶輪社行政管理
- 社員
- 公共關係
- 服務計畫
- 扶輪基金會

每個委員會都有一本手冊，內容簡介該委員會與責任，以及可用的資源、委員會特定的職責、與其他可支援你與委員會委員的相關資料。請將扶輪社社員委員會手冊中相關的部份影印並分發給各委員。也可自www.rotary.org免費下載本手冊。扶輪社職員資料袋(The Club Officers' Kit,225-EN)也有這份手冊，可參考國際扶輪目錄購買。

扶輪社社員委員會主委

在地區講習會之前，請先閱讀本手冊，以便瞭解你的角色與責任。並請將本手冊攜帶至地區講習會作為參考。

在地區講習會，扶輪社領導人—包括扶輪社社長當選人與下屆秘書、財務、各委員會主委—將討論其角色與責任，訂定年度目標，並培養其來年的工作關係。

請事先填妥以下討論問題，以便在地區講習會中充分參與討論：

社員委員會的角色是什麼？

你在這個角色的責任有哪些？

你如何尋找與招募新社員？

Introduction

The **Club Membership Committee Manual** was developed to help you establish goals and understand your responsibilities related to increasing club effectiveness. An effective Rotary club is able to:

- Sustain or increase its membership base
- Implement successful projects that address the needs of their community and communities in other countries
- Support The Rotary Foundation through both program participation and financial contributions
- Develop leaders capable of serving in Rotary beyond the club level

Under the Club Leadership Plan, the recommended administrative structure of Rotary Clubs has the following five standing committees:

- Club administration
- Membership
- Public relations
- Service projects
- Rotary Foundation

Each committee has a manual which provides an overview of the committee and its responsibilities as well as available resources, specific committee duties, and other relevant materials to support you and your committee members. Copy related sections of the *Club Membership Committee Manual* and distribute to committee members. Additional copies of this manual can be downloaded for free at www.rotary.org. The **Club Officers' Kit** (225-EN), including this manual, can be purchased through the **RI Catalog**.

Club Membership Committee Chair

Before the district assembly, review this manual in order to understand your role and responsibilities. Bring it to your district assembly to use as a reference.

At the district assembly, club leaders, including the club president-elect and the incoming secretary, treasurer, and committee chairs, will discuss their role and responsibilities, work on annual goals, and develop their working relationship for the coming year.

Complete the following discussion questions in advance to fully participate in the discussions at the district assembly.

What is the role of the membership committee?

What are your responsibilities in this role?

How can you identify and recruit new members?

你要如何讓新社員參與扶輪社計畫、委員會、及活動？

防止社員流失的策略有哪些？

你如何協助委員會委員更有效服務？

你的長期目標與年度目標是什麼？

建議？

如果你對本手冊或國際扶輪任何訓練資料有疑問或指教，請直接聯絡：

國際扶輪領導人教育及訓練處

Leadership Education and Training Division

Rotary International

One Rotary Center

1560 Sherman Avenue

Evanston, IL 60201-3698 USA

電子郵件地址：leadership.training@rotary.org

電話：847-886-3000

傳真：847-866-0974

How can you involve new members in club projects, committees, and activities?

What are some strategies for increasing retention of members?

How can you help committee members serve effectively?

What are your long-range and annual goals?

Comments?

If you have questions or comments about this manual or any of RI's training resources, please direct them to:

Leadership Education and Training Division

Rotary International

One Rotary Center

1560 Sherman Avenue

Evanston, IL 60201-3698 USA

E-mail: leadership.training@rotary.org

Phone: 847-866-3000

Fax: 847-866-0974

角色與責任

要有效能，扶輪社需要社員。貴社服務社區、支援扶輪基金會、及培養能在扶輪社階層以上服務扶輪的能力，都與貴社社員的能力與人數有直接的關係。

角色

社員委員會訂定與推動一項行動計劃來招募、防止流失、及教育扶輪社員。

責任

社員委員會有以下責任，將依次於本手冊中說明：

- 達成未來一年的扶輪社社員目標(參見有效能扶輪社規劃指南中有關社員的部份)
- 教育與訓練社員有關招募及防止流失優秀、多樣化社員的重要(參見招募社員、職業分類、防止社員流失、及教育)
- 進行職業分類調查確使扶輪社的職業分類可因應目前的職業趨勢(參見職業分類)
- 進行扶輪社評鑑確使社員發展工作有成效(參見防止社員流失)
- 可行的話，訂定一個全社的行動計劃，以擔任地區內新扶輪社的輔導社(參見成立新扶輪社)

和扶輪社各委員會合作

社員委員會應與以下扶輪社委員會合作以達成社員目標：

- 公共關係委員會(以提升貴社在社區的形象，使其能更吸引潛在社員，並建立現在社員的尊嚴)
- 服務計畫委員會(確使服務計畫與扶輪社員有關，並讓非扶輪社員參與服務計畫使其更瞭解扶輪社員資格所提供的服務機會)
- 扶輪社行政管理委員會(規劃能教育社員瞭解扶輪、並配合其個別需求與興趣的例會節目)

Role and Responsibilities

To be effective, a Rotary club needs members. Your club's ability to serve the community, support The Rotary Foundation, and develop leaders capable of serving Rotary beyond the club level is directly related to the strength and size of your club's membership base.

Role

The membership committee develops and implements an action plan for recruiting, retaining, and educating club members.

Responsibilities

The membership committee has the following responsibilities, which are explained in this manual:

- Achieving club membership goals for the coming year (see Membership Section of the *Planning Guide for Effective Rotary Clubs*)
- Educating and training club members about the importance of recruitment and retention of qualified, diverse members (see Recruitment, Classifications, Retention, and Education)
- Conducting classification surveys to ensure the classifications are relevant to current business trends (see Classifications)
- Conducting club assessments to ensure membership development efforts are effective (see Retention)
- Developing an action plan for the club to act as a sponsor club for a new club organized in the district, if applicable (see Organizing New Clubs)

Working with Club Committees

The membership committee should work with the following club committees to meet membership goals:

- Public relations committee (to elevate the image of your club in the community, making it more attractive to potential members and building pride in current members)
- Service projects committee (to ensure that service projects are relevant to club members and to involve non-Rotarians in service projects to better understand the opportunities for service that Rotary membership provides)
- Club administration committee (to plan weekly programs that educate members about Rotary and address their personal needs and interests)

針對社員與擴展月 Membership and Extension Month (8月)與新世代月 New Generations Month (9月)來規劃每周例會節目與活動。

Plan weekly meetings and activities in observance of Membership and Extension Month (August) and New Generations Month (September).

可向地區總監或地區總監當選人索取貴社5年來的社員記錄。

Your club's five-year membership history is available from your district governor or district governor-elect.

小組委員會

貴社視目標而定可設立下列小組委員會

- 招募社員
- 職業分類
- 防止社員流失
- 準社員教育
- 新社員訓練及教育
- 社員持續教育
- 扶輪家庭

內容

如有需要，可將以下資料複印分發給委員會委員

社員資料 第 5-6 頁

扶輪社社員委員會主委 第 7-10 頁

有效能扶輪社規劃指南有關社員的部份 第 11-12 頁

招募社員 第 15-18 頁

職業分類 第 19 頁

防止社員流失 第 20-24 頁

教育 第 25-26 頁

成立新扶輪社 第 26 頁

Subcommittees

Depending on the goals of your committee, it may have the following subcommittees:

- Recruitment
- Classifications
- Retention
- Prospective member education
- New member orientation and education
- Continuing member education
- Family of Rotary

Contents

Copy and distribute these materials to committee members as needed.

Membership Resources 5-6

Club Membership Committee Chair 7-10

Membership Section of the **Planning Guide for Effective Rotary Clubs** 11-12

Recruitment 15-18

Classifications 19

Retention 20-24

Education 25-26

Organizing New Clubs 26

社員資源

資料資源

下列出版品可利用國際扶輪目錄RI Catalog(019-EN)或自www.rotary.org下載。



社員發展資源指南 Membership Development Resource Guide(417-EN)—簡述增加扶輪社社員基本程序，並列舉吸收與防止流失社員的建議。

- 職業分類調查Classification survey—協助扶輪社尋找潛在新社員的工具。
- 社刊Club bulletin—扶輪社的主要溝通工具，應包含社員發展資訊，例如吸收策略與持續教育的機會。
- 社員興趣評估Club member interest assessment—協助扶輪社瞭解社員需求及興趣的工具。
- 扶輪社基本資料Club profile—給新社員及準社員的扶輪社資訊。
- 總監月報Governor's monthly letter—給扶輪社的社員發展資料，包括防止流失與吸收社員的策略以及續教育的機會。
- 『如何推薦新社員』How to propose a New Member(254-EN)—挑選及選舉新社員的基本程序。
- 『新社員訓練』New Member Orientation(414-EN)—供扶輪社建立或更新其新社員教育計畫。
- 『公式名錄』Official Directory(007-EN)—國際扶輪與扶輪基金會職員、各委員會、特別任務小組、與秘書處辦員的聯絡資訊；全世界各地區及總監的名單；按字母順序列出地區內的扶輪社名單，包括聯絡資訊。
- 『有效能扶輪社規劃指南』Planning Guide for Effective Rotary Clubs—扶輪社規劃社員目標時，評估與設定目標的工具(參見第11-12頁)。
- 『扶輪基礎』Rotary Basics(595-EN)—社員教育出版品，包含每位扶輪社員都應該知道的資訊。
- 『扶輪ABC』The ABCs of Rotary(363-EN)—有關扶輪歷史、傳統、架構以及計畫的短文集。
- 『這是扶輪』This Is Rotary(001-EN)—向準社員與一般大眾簡單介紹扶輪的小冊子。
- 『英文扶輪月刊』The Rotarian(或扶輪地域雜誌)—國際扶輪的公式月刊，報導扶輪社與地區計畫、國際扶輪理事會決策、以及國際扶輪會議。此外，全世界總共有23種語言的30種地雜誌服務全球的扶輪社員
- 『何謂扶輪?』What's Rotary?(419-EN)—解答經常被問起的一般扶輪問題的皮夾大小卡片。

國際扶輪網站www.rotary.org

國際扶輪網站提供有關扶輪各方面的線上資源與最新資料。你可以下載免費的出版品，利用線上目錄訂購，也可查詢任何扶輪社的例會與地點。

Membership Resources

Informational Resources

Order publications through the *RI Catalog* (019-EN), or download them at www.rotary.org.



Membership Development Resource Guide (417-EN) — Outlines basic procedures for building club membership and lists suggestions for recruiting and retaining members.

- **Classification survey** — Tool to help clubs identify potential new members.
- **Club bulletin** — Club's main communication tool, which should include membership development information such as recruitment strategies and continuing education opportunities.
- **Club member interest assessment** — Tool to help clubs identify the needs and interests of their members.
- **Club profile** — Club information for new and prospective members.
- **Governor's monthly letter** — Membership development resource for clubs that includes retention and recruitment strategies as well as continuing education opportunities.
- **How to Propose a New Member (254-EN)** — Brochure outlining the procedure for selecting and electing members.
- **New Member Orientation (414-EN)** — Resource for Rotarians responsible for creating or updating their club's new member education program.
- **Official Directory (007-EN)** — Contact information for RI and Foundation officers, committees, task forces, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing of clubs within districts, including contact information.
- **Planning Guide for Effective Rotary Clubs** — Club assessment and goal-setting tool used to plan membership goals (see pages 11-12).
- **Rotary Basics (595-EN)** — Member education publication containing the information that every Rotarian should know.
- **The ABCs of Rotary (363-EN)** — Compilation of short articles about Rotary history and programs.
- **This Is Rotary (001-EN)** — Brochure providing brief overview of Rotary for prospective Rotarians and the public.
- **The Rotarian (or Rotary regional magazine)** — RI's official monthly magazine, which reports club and district projects, RI Board decisions, and RI meetings. In addition, 30 Rotary regional magazines in 23 languages serve Rotarians around the world.
- **What's Rotary? (419-EN)** — Wallet-size card answering frequently asked questions about the organization and scope of Rotary. Popular as a handout to non-Rotarians.

www.rotary.org

The RI Web site provides online resources and up-to-date information on all aspects of Rotary. You can download free publications, shop the online catalog, and locate the meeting time and place of any Rotary club.

點選：

- **Membership(社員)**(www.rotary.org/membership)—內容廣泛的扶輪社員資料，包括招募與防止流失社員的資源。許多出版品都可供免費下載。

關鍵字搜尋：

- **Recognition Programs 表彰計畫**—國際扶輪與扶輪基金會的獎項與表彰計畫，包括國際扶輪社員發展及擴展獎和國際扶輪社員發展計畫獎。
- **Membership Development Best Practices Exchange 最佳社員發展辦法交換**—包括世界各地扶輪社與地區所提出，已成功地使用過的社員發展辦法。
- **Rotary E-Learning Center 扶輪 e 學習中心** (www.rotary.org/training/elearning) — 供新社員與扶輪職員獨立學習的簡短課程。
- **Termination Profile 終止社籍簡介**—協助扶輪社瞭解社員遭終止社籍原因的線上工具。

人力資源

- **地區社員發展委員會**—被指派支援扶輪社之社員發展工作的扶輪社員。(聯絡資料請洽各地區)。
- **地區公共關係委員會**—被指派提供資源給扶輪社以在社區上建立正面形象的扶輪社員。(聯絡請洽地區)。
- **地域國際扶輪社員協調人(RRIMC)與國際扶輪社員地帶協調人(RIMZC)**—由國際扶輪社長指派作為特定地域主要社員發展資源的扶輪社員。(聯絡資料參見公式名錄或 www.rotary.org)
- **國際扶輪扶輪社與地區支援代表 RI Club and District Support representative**—國際扶輪世界總部或國際辦事處的辦事員，負責回簽有關行政管理的問題，並將其他問題轉交給相關的國際扶輪與基金會的辦事員。(聯絡資料請參見 www.rotary.org)
- **國際扶輪社員發展辦事員 RI Membership Development staff**—國際扶輪世界總部專門協助扶輪社與地區推動社員發展工作的辦事員。(聯絡資料參見 www.rotary.org)

Click on:

- **Membership** (www.rotary.org/membership) — Comprehensive, current source of Rotary membership information, including resources for recruitment and retention. Many publications are available for free download.

Keyword searches:

- **Recognition programs** — RI and Rotary Foundation awards and recognition programs, including the RI Membership Development and Extension Award and RI Recognition of Membership Development Initiatives.
- **Membership Development Best Practices Exchange** — Contains successful membership ideas submitted by Rotary clubs and districts around the world.
- **Rotary E-Learning Center** (www.rotary.org/training/elearning) — Brief modules designed for independent study by new members and club officers.
- **Termination profile** — Online tool to help clubs identify why members were terminated.

Human Resources

- **District membership development committee** — Rotarians appointed to support clubs in their membership development efforts. (Request contact information from your district.)
- **District public relations committee** — Rotarians appointed to provide resources to clubs for developing a positive image within the community. (Request contact information from your district.)
- **Regional RI membership coordinator (RRIMC) and RI membership zone coordinator (RIMZC)** — Rotarians appointed by the RI president to serve as a primary membership development resource within a specific region. (Find contact information in the *Official Directory* or at www.rotary.org.)
- **RI Club and District Support representative** — Staff member at RI World Headquarters or international offices available to answer administrative questions and direct other inquiries to appropriate RI and Foundation staff. (Find contact information at www.rotary.org.)
- **RI Membership Development staff** — Staff members at RI World Headquarters dedicated to assisting clubs and districts in their membership development efforts. (Find contact information at www.rotary.org.)

扶輪社社員委員會主委

身為委員會主委，你負責確保委員會達成委員會及扶輪社的目標。

責任

在就職前，你有以下責任：

- 詳讀委員會手冊
- 出席地區講習會
- 詳讀貴社的細則，其中應包含貴委員會宗旨的資料
- 與社長當選人合作，根據專業能力與個人興趣來挑選委員會委員，並使其準備好接掌來年的工作
- 運用有效能扶輪社規劃指南，與社長當選人一起評估與建立扶輪社長期目標與年度目標
- 為貴委員會訂定行動計劃以達到年度目標

在擔任委員會主委這一年中，你有以下責任：

- 籌劃與舉辦委員會定期會議與活動
- 確保委員會各司其責
- 向扶輪社社長、理事會與全社報告委員會的活動與進度
- 與適當的地區委員會合作，推動跨社活動或計劃
- 表彰委員會委員的工作與努力

委員會委員

在扶輪年度開始前，和社長當選人合作挑選委員會委員並召開籌劃會議。在可能範圍內，為求延續性，應指派委員會委員連續在同一委員會服務 3 年。委員會委員應與社區各階層或領域的人士有密切聯繫。其他應列入考慮的重要特質包括：

- 具有招募、聘雇、或業務方面的專業經驗者
- 對扶輪有全面的知識者
- 性格外向擅長社交者

所有下屆委員會委員應出席地區社員研討會，以瞭解地區的社員目標，和其他扶輪社的同僚討論社員策略與合作，並且瞭解有哪些可用的資源。

扶輪社長為所有扶輪社委員會的當然委員。

要讓委員會委員準備就緒必須：

- 提供新委員有關委員會與其活動資訊。
- 讓新委員會與較有經驗的委員配對工作。
- 鼓勵與其他扶輪社的同僚建立聯繫(利用地區名錄)。
- 瞭解貴委員會可用的資源
- 給委員會一張地區活動與會議一覽表。

Club Membership Committee Chair

As the chair of your committee, you're responsible for ensuring your committee achieves committee and club goals.

Responsibilities

Before taking office, you have the following responsibilities:

- Reviewing your committee's manual
- Attending the district assembly
- Reviewing your club's bylaws, which should contain information on your committee's purpose
- Working with the president-elect to recruit committee members based on their professional abilities and personal interests, and preparing them for the year
- Reviewing and establishing club long-range and annual goals with the president-elect using the *Planning Guide for Effective Rotary Clubs*
- Developing an action plan for your committee to achieve annual goals

During your year as committee chair, you have the following responsibilities:

- Planning and conducting regular committee meetings and activities
- Holding members accountable for the responsibilities they've accepted
- Reporting committee activities and progress to the club president and board of directors and the full club
- Cooperating with the appropriate district committee on multiclub activities or initiatives
- Recognizing committee members' work and efforts

Committee Members

Work with the president-elect to select committee members to fill vacancies and conduct planning meetings before the start of the year. When feasible, committee members should be appointed to the same committee for three years for continuity. Committee members should have connections to a cross-section of the community. Other important characteristics to consider include:

- Professional experience in recruiting, hiring, or sales
- Thorough knowledge of Rotary
- Outgoing and sociable personality

All incoming committee members should attend the district membership seminar to learn the district's membership goals, discuss membership strategies and cooperation with their counterparts in other Rotary clubs, and know what resources are available.

The club president serves as an ex officio member of all club committees.

To prepare committee members:

- Supply newer members with information on the committee and its activities.
- Pair new committee members with more experienced ones.
- Encourage networking with counterparts in other clubs (use the district directory).
- Know the resources available to your committee.
- Give members a list of district activities and meetings.

設定目標

有效能扶輪社規劃指南 Planning Guide for Effective Rotary Clubs 是一個設定目標的工具，可協助社長當選人與扶輪社委員會一起評估扶輪社的現況，並建立能支持該社長長期目標的該年度的年度目標。這份規劃指南也可提供委員會達成目標的策略。針對每個建議設立的扶輪社委員會，這份規劃指南都有專屬的內容。在地區講習會中，你將有機會與貴社社長當選人和其他下屆扶輪社領導人一起使用這份規劃指南。一整年中也都可使用有效能扶輪社規劃指南來評估達成目標的進度。這份指南應定期評估，必要時亦可更新。

建立有效的目標。為了確保所建立的目標能確實反映委員會的能力與扶輪社的興趣，委員會目標應為：

- **分享的。**參與設定目標及訂定達到目標之策略者，都必須努力達成目標。在設定目標時須諮詢扶輪社領導人、扶輪社員與地區領導人。
- **可測量的。**目標應提供可追求的具體項目。
- **具挑戰性的。**目標應夠弘遠，足以超越貴社過去的成就。
- **可達成的。**扶輪社員應有能力以可用資源達成目標。比較你的目標與過去委員會和貴社已達成的目標。
- **時間明確的。**目標應有截止日期或時間表。

訂定行動計畫。和扶輪社領導人與委員會委員合作，訂定一個行動計畫，簡述達成每個目標所需的步驟。以下的步驟可以協助你訂定一個行動計畫：

- 為每個步驟訂定一個時間表。
- 決定執行每個步驟的負責人。
- 建立評估每個步驟進度與成功的標準。
- 考慮貴社、地區與國際扶輪可支持該目標的可用資源與工具。
- 在採取行動前先取得人力、資訊、與財力資源。
- 評估之前目標的成就與現有的計畫，有必要時做修正。
- 確保按預定規劃，持續穩定朝達成目標邁進。

鼓勵委員會委員遵循行動計畫。因為扶輪社員屬義工性質，專業上的成就動機可能無法成為他們在扶輪的動力。考慮每個委員的動機需求。一般動機包括：

- 相信目標可造福社區以及所屬的扶輪社、地區與扶輪
- 聯誼的機會
- 建立人脈的機會
- 相信目標是可達成的，計畫或活動將會成功
- 指派的工作具挑戰性或運用其專業知識
- 投入達成委員會目標的努力與時間獲得表彰

運用這些激勵因素可以協助委員更投入扶輪，並鼓勵持續參與扶輪社活動。

Goal Setting

The *Planning Guide for Effective Rotary Clubs* is a goal-setting tool that helps the club president-elect work with club committees to assess the current state of the club and establish annual goals that support the club's long-range goals for the year. The planning guide also provides strategies that committees can use to achieve their goals. Each recommended club committee has a section in the planning guide. You'll have an opportunity to work on the planning guide with your club president-elect and other incoming club leaders during the district assembly. The *Planning Guide for Effective Rotary Clubs* can be used throughout the year to help measure progress toward established goals. It should be reviewed periodically and updated as needed.

Establishing effective goals. To ensure that the goals established accurately reflect committee capabilities and club interests, committee goals should be

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it. Consult with club leaders, club members, and district leaders in setting a goal.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available. Compare goals to previous goals achieved by the committee and the club.
- **Time specific.** A goal should have a deadline or timeline.

Developing an action plan. Work with club leaders and committee members to develop an action plan that outlines the steps needed to achieve each goal. The following steps can help you develop an action plan:

- Establish a time frame for each step.
- Determine who is responsible for implementing each step.
- Establish the criteria for measuring progress and success for each step.
- Consider the resources and tools available from your club, district, and RI to support the goal.
- Secure human, informational, and financial resources before taking action.
- Evaluate the success of previous goals and your current plan, making modifications as necessary.
- Ensure steady progress is being made toward achievement of goals as envisioned.

Motivating committee members to follow the action plan. Because Rotarians are volunteers, what motivates them in their profession may not motivate them in Rotary. Consider the motivational needs of each committee member. Common motivators include:

- Belief that the goal will benefit the community and their club, district, and Rotary
- Opportunities for fellowship
- Opportunities for networking
- Belief that the goal is achievable and they will be successful
- Assignments that are challenging or use their expertise
- Recognition of efforts and time spent working toward committee goals

Using these motivating factors can help maintain member commitment to Rotary and encourages continued participation in club activities.

貴社的社員評估工具與 5 年社員記錄請參見 www.rotary.org/membership

Review your club's membership assessment tools and five year membership profile available at www.rotary.org/membership.

預算

在 7 月 1 日之前，和委員會與下屆扶輪財務一起決定貴委員會要達成目標所需求的金，也要考慮已規劃的募款活動。確使貴社的預算已納入貴委員會的資金需求。

監督貴委員會的資金、金錢往來、與報告，隨時注意貴委員會預算的使用狀況。定期與貴社的財務會面可確使在問題發生時能及早採取補救措施。

溝通

在年度開始之前，和其他扶輪社領導人一起訂定一個聯絡計畫，簡述你溝通的對象、時間、與方式，包括和下列人士的溝通：

- **委員會委員。** 委員會應定期集會來評估與尋找可用的資源，討論現行的計畫與新提案，並擬定達成委員會與扶輪社目標的策略。
- **扶輪社。** 向貴社社長、理事會、與所有社員，報告貴委員會的活動，包括行動計畫與達成目標的進度。
- **其他委員會。** 一個委員會的工作往往涉及其他委員會。舉例來說，公共關係委員會增加社區對扶輪社認識的工作，便會影響社員委員會招募社員的行動。有效的溝通將有助於委員會間協調其計畫與提案。
- **地區。** 若貴委員會需要指導或資訊，請與地區同一委員會委員或助理總監聯繫。

其他資源

除了貴委員會的資源外，以下資源可協助你履行職責與回答委員會委員的問題：

資訊資源

利用 [國際扶輪目錄](#) (019-EN) 訂購出版品，或自 www.rotary.org 下載。

- **地區名錄 District Directory**-地區領導人名單與活動清單 (視地區是否有編訂而定)。
- 『**程序手冊**』 **Manual of Procedure** (035-EN) -由立法行動、國際扶輪理事會、扶輪基金會保管委員會所制定的國際扶輪與其基金會的政策及程序。每隔三年在立法會議召開後發行。包含國際扶輪章程文件。
- 『**建議扶輪社細則**』 **Recommended Rotary Club Bylaws**-擴充扶輪社章程中扶輪社運作準則的法律文件。
- 『**扶輪政策彙編**』 **Rotary Code of Policies**與『**扶輪基金會政策彙編**』 **Rotary Foundation Code of Policies**-國際扶輪理事會及扶輪基金會保管類會根據國際扶輪章程與細則所訂定的政策與程序，每次理事會或保管委員會集會後會修訂。
- 『**模範扶輪社章程**』 **Standard Rotary Club Constitution**-作為扶輪社運作架構的章程文件。

Budget

Before 1 July, work with your committee and the incoming club treasurer to determine what funds your committee will need to achieve its goals. Also include any planned fundraising activities. Ensure your committee's financial needs are included in the club budget.

Provide oversight of committee funds, transactions, and reports, and be aware of the financial condition of your committee's budget at all times. By meeting regularly with your club's treasurer, you can take early corrective measures if issues arise.

Communication

Before the start of the year, develop a communication plan with other club leaders that outlines with whom, when, and how you'll communicate, including communications with:

- **Committee members.** Committees should meet regularly to review and identify available resources, discuss ongoing projects and new initiatives, and develop strategies to achieve committee and club goals.
- **Your club.** Report your committee's activities, including action plans and progress toward goals, to your club's president, board, and all club members.
- **Other committees.** Often, the work of one committee affects the work of another. For example, the public relations committee's work to raise community awareness of Rotary may influence the membership committee's recruitment efforts. Effective communication will help committees work together to coordinate projects and initiatives.
- **Your district.** If your committee needs guidance or information, contact your district counterpart or your assistant governor.

Additional Resources

In addition to your committee's resources, the following resources can help you fulfill your responsibilities and answer committee members' questions:

Informational Resources

Order publications from the **RI Catalog** (019-EN), or download them at www.rotary.org.

- **District directory** — Listing of district leaders and activities (if your district produces a directory).
- **Manual of Procedure** (035-EN) — RI and Rotary Foundation policies and procedures established by legislative action, the RI Board of Directors, and the Trustees of The Rotary Foundation, issued every three years following the Council on Legislation. Contains the RI constitutional documents.
- **Recommended Rotary Club Bylaws** — A legal document that expands on club operations guidelines in the club constitution.
- **Rotary Code of Policies** and **Rotary Foundation Code of Policies** — Policies and procedures established by the RI Board of Directors and the Trustees of The Rotary Foundation in support of the RI Constitution and Bylaws, revised following each Board or Trustees meeting.
- **Standard Rotary Club Constitution** — A constitutional document that is a framework for Rotary club operations.

國際扶輪網站 www.rotary.org

國際扶輪網站提供有關扶輪各方面的線上資源與最新資料。你可以下載免費的出版品，利用線上目錄訂購，也可查詢任何扶輪社的例會時間與地點。

點選：

- 扶輪社-地區支援 (www.rotary.org/support) -供扶輪社職員參考的資源，包括新版的『建議扶輪社細則』與『模範扶輪社章程』。

財務資源

- 個人或當地企業的捐獻
- 其他基金會的獎助金
- 扶輪基金會核發給扶輪社與地區人道計畫的獎助金

人力資源

除非另有說明，聯絡資料請洽貴地區。

- 助理總監-被指派協助總監管理特定扶輪社的扶輪社員。你的助理總監至少每季會到貴社訪問一次，以回答問題或提供建議。
- 貴地區其他扶輪社委員會主委-可協助支援貴社計畫與提案的扶輪領導人。
- 地區總監-負責指導讓貴社運作更有成效的國際扶輪職員。(聯絡資料參見公式名錄)
- 前任扶輪社委員會主委與扶輪社領導人-他們都是知識豐富的扶輪社員，可指導你進行年度規劃，也可派任他們領導委員會活動。
- 國際扶輪與扶輪基金會資源小組/特別任務小組 **resource groups/task forces**-由國際扶輪社長任命的扶輪社員團體，可協助扶輪社與地區推行社長工作重點。(聯絡資料參見公式名錄)

www.rotary.org

The RI Web site provides online resources and up-to-date information on all aspects of Rotary. You can download free publications, shop the online catalog, and locate the meeting time and place of any Rotary club.

Click on:

- Club-District Support (www.rotary.org/support) — Resources for club and district officers, including the most up-to-date versions of the Recommended Rotary Club Bylaws and Standard Rotary Club Constitution.

Financial Resources

- Funds from individual donors or local businesses
- Grants from other foundations
- Rotary Foundation grants for club and district humanitarian projects

Human Resources

Unless otherwise noted, contact information is available from your district.

- Assistant governor — Rotarian appointed to assist the governor with the administration of designated clubs. Your assistant governor will visit your club quarterly (or more often) and is available to answer questions or provide advice.
- Other club committee chairs in your district — Club leaders who can serve as a resource to help support your club's projects and initiatives.
- District governor — RI officer responsible for advising your club on strategies to make your club more effective. (Find contact information in the *Official Directory*.)
- Past club committee chairs and leaders — Knowledgeable Rotarians who can advise you as you plan your year and can be assigned to lead committee activities.
- RI and Rotary Foundation resource groups/task forces — Groups of Rotarians appointed by the RI president to assist Rotary clubs and districts with the presidential emphases. (Find contact information in the *Official Directory*.)

有效能扶輪社 規劃指南



『有效能扶輪社規劃指南』是協助扶輪社評估該社現況，訂定來年目標的工具。它是根據扶輪社領導計畫。請注意每個部份之下所列舉的策略乃反映出一般扶輪社為達成目標可能都會選擇的方法。鼓勵扶輪社在時機適當時研擬其他替代策略來達成其目標。社長當選人應與扶輪社合作填寫這份表格，並在 7 月 1 日之前送交一份給助理總監。

微軟 Word 版之『有效能扶輪社規劃指南』可在 www.rotary.org 下載。

社員

現況

目前社員人數：_____

截至上個扶輪年度 6 月 30 日止之社員人數：_____ 5 年前的 6 月 30 日：_____

男性社員人數：_____ 女性社員人數：_____

社員平均年齡：_____

社齡 1—3 年的社員人數：_____ 3—5 年：_____ 5—10 年：_____

最近兩年內曾推薦一位新社員入社的社員人數：_____

貴社社員能反映社區哪些方面的多樣性，請勾選：

專業 年齡 性別 種族

最近職業分類調查日期為 _____，總計包含 _____ 種職業分類，尚有 _____ 種職業分類未補足。
(日期) (數字) (數目)

請描述貴社目前的新社員訓練計畫：

請描述貴社對新社員及目前社員的持續教育計畫：

本社在過去 24 個月曾輔導新扶輪社。 是 否

社員們參加多種扶輪聯誼會及扶輪社員行動團體：

本社有哪些因素可吸引新社員？

本社吸引新社員有哪些障礙？

未來狀況

下個扶輪年度的社員目標：社員 _____ 人， _____ 年 6 月 30 日
(數字) (年)

本社已經在社區內找到以下可能成為社員的來源：

本社計劃如何達成社員成長目標？（在適當項目打勾）

- 擬定一個防止流失計劃，重點在於以參與有趣的節目、服務計劃、持續教育與聯誼活動來維持社員高度熱忱
- 確定社員委員會瞭解有效之吸收社員技巧
- 擬定一項招募社員計畫，以使本社反映社區的多樣性
- 向可能成為社員的人士解釋扶輪社對於社員的期望
- 執行一項新社員訓練計畫
- 為潛在社員編印一份提供關於扶輪一般資訊與本社資訊的摺頁
- 指派一名經驗豐富的扶輪社員擔任新社員的導師
- 表彰輔導新社員的扶輪社員
- 鼓勵社員參加一個扶輪聯誼會或扶輪社員行動團體
- 參與『國際扶輪社員發展獎』計畫
- 輔導一個新社
- 其他(請說明)：

行動步驟：

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in this section are common ways clubs might choose to pursue membership goals. Clubs are encouraged to develop alternative strategies to achieve their membership goals when appropriate.

Download a Microsoft Word version at www.rotary.org.

MEMBERSHIP

Current State

Current number of members: _____

Number of members as of 30 June last year: _____ 30 June five years ago: _____

Number of male members: _____ Number of female members: _____

Average age of members: _____

Number of Rotarians who have been members for 1-3 years: _____ 3-5 years: _____ 5-10 years: _____

Number of members who have proposed a new member in the previous two years: _____

Check the aspects of your community's diversity that your club membership reflects:

Profession Age Gender Ethnicity

Our classification survey was updated on _____ and contains _____ classifications, of which _____ are unfilled.
(number) (date) (number)

Describe club's current new member orientation program:

Describe club's continuing education programs for both new and established members:

Our club has sponsored a new club within the last 24 months. Yes No

Number of Rotary Fellowships and Rotarian Action Groups members participate in:

What makes this club attractive to new members?

What aspects of this club could pose a barrier to attracting new members?

Future State

Membership goal for the upcoming Rotary year: _____ members by 30 June _____
(number) (year)

Our club has identified the following sources of potential members within the community:

How does the club plan to achieve its membership goals? (check all that apply)

- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Ensure that the membership committee is aware of effective recruitment techniques
- Develop a recruitment plan to have the club reflect the diversity of the community
- Explain the expectations of membership to potential Rotarians
- Implement an orientation program for new members
- Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- Assign an experienced Rotarian mentor for every new club member
- Recognize those Rotarians who sponsor new members
- Encourage members to join a Rotary Fellowship or Rotarian Action Group
- Participate in the RI membership development award programs
- Sponsor a new club
- Other (please describe):

Action steps:

招募社員

社員委員會招募可能成為社員的人士，並告知所有社員尋找與邀請這些人士加入扶輪社的重要。因為扶輪社員須邀請方可加入，社員必須主動邀請朋友、眷屬、同事、與其他地區成員加入。

新社員可為貴社帶來重要益處包括：

- 增加扶輪社區的能力
- 未來的領導人
- 多元化
- 新的構想、興趣、與能量
- 扶輪社與組織長期的延續性

貴社招募新社員之能力的關鍵在於有效、有意義的計畫、公共關係、有趣的例會、多元化的社員、以及扶輪社整體的效能。預期會面對招募新社員的挑戰，並與其他扶輪社領導人推動策略來因應。

責任

- 社員委員會有以下招募新社員的責任：
- 瞭解扶輪社與招募新社員相關的指導原則
- 協助社員尋找可能成為社員的人士
- 確保貴社社員能夠代表社區專業與事業人口的多元性
- 新社員歡迎與入社儀式
- 推薦新社員加入扶輪社
- 瞭解職業分類制度

行動步驟

要招募優秀的扶輪社員，你的社員發展行動計畫應該包含以下步驟：

- 找出
- 介紹
- 邀請
- 入社

針對上述每個步驟訂定一個時間表，決定負責推動的委員，建議評量進度的標準，並考慮可用的資源工具。這些行動步驟的策略解釋如下：

Recruitment

The membership committee recruits prospective candidates for club membership and informs all club members of the importance of identifying and inviting prospective members to join the club. Because membership in Rotary is by invitation only, club members must reach out to friends, family, business associates, and other community members by asking them to join.

New members bring important benefits to the club, including:

- Increased capacity to serve your community
- Future leaders
- Diversity
- Fresh ideas, interests, and energy
- Long-term continuity of clubs and the organization

Your club's ability to recruit new members is dependant on effective and relevant projects, public relations, interesting meetings, diverse membership, and overall club effectiveness. Anticipate the challenges of recruiting new members and work with other club leaders to Resource Guide. implement strategies for addressing them.

Responsibilities

- The membership committee has the following responsibilities for recruiting new members:
- Understanding club guidelines for recruiting new members
- Helping members identify potential Rotarians
- Ensuring the club's members are a diverse representation of the community's professional and business population
- Welcoming and inducting new members
- Proposing new members to the club
- Understanding the classification system

Action Steps

To recruit high-quality Rotary club members, your membership development action plan should include the following action steps:

- Identify
- Introduce
- Invite
- Induct

For each of these steps, develop a timeline, determine which committee member is responsible for implementing it, establish criteria for measuring progress, and consider the resources and tools available to support you. Recruitment strategies for these action strategies. steps are explained below.

有關吸收社員的詳情請參見『社員發展資源指南』Membership Development Resource Guide

For more information on recruitment, consult the Membership Development Resource Guide.

吸收社員的策略可參考 www.rotary.org 上的「社員發展最佳辦法交換」(Membership Development Best Practices Exchange)。

Browse the Membership Development Best Practices Exchange at www.rotary.org for recruitment strategies.

找出

找出社區所有符合資格的專業人士。每年，扶輪社社員委員會應儘早進行一次職業分類調查，以編列一份名冊列出社員未持有的職業分類。利用這份名冊來決定招募行動中須鎖定的職業分類。和全體社員分享這份資訊，有關所有職業分類的問題也須與理事會協商。詳情請參見「職業分類」(19頁)。

為了鼓勵招募社員，你應在扶輪年度的第一個月便親自招募一名新社員，並鼓勵每位社員也起身效尤。全社一起從下列人士中找出新社員：

- 當地傑出的企業或公司
- 專業及職業協會
- 商會
- 當地及區域的政府單位
- 扶輪基金會受獎人
- 現任及前任的扶輪青年服務團團員
- 扶輪社員的配偶、伴侶、及眷屬

介紹

確使向準社員介紹有關國際扶輪的計畫、貴社的服務工作、以及成為社員的益處和責任。準社員在加入前若由熱心扶輪社員介紹扶輪與貴社服務計畫的資訊，比較可能會深入參與並保持活躍。

鼓勵社員和朋友、眷屬、及同事討論扶輪與其目標。也可運用貴社的社區服務計畫來尋找可能成為社員的人士。有關告知準社員扶輪資訊的詳情，請參見「教育」(第23-24頁)。

邀請

由推薦人與一名社員委員會委員親自前往邀請準社員加入。這趟雙人拜訪可讓準社員在扶輪社有第二個聯絡對象，多一個可以增加扶輪知識與經驗的人。提出邀請的扶輪社員應瞭解準社員的興趣及能力，以便指出相關的扶輪活動和計畫。社員委員會應確使輔導新社員的扶輪社員可獲得表彰。

協助理事會調查所有被推薦者的品行、事業與專業、社區地位、以及一般資格。找到優秀的準社員有助於防止流失社員。

- 在評估準社員的資格時，考慮以下問題：
- 其品行是否不使人非議？
- 其公司之信譽是否良好？
- 是否有服務的熱忱？
- 其財務狀況是否足以負擔社員的義務，並出席每週例會？
- 候選人是否承諾將參與貴社的計畫、節目、及委員會？

Identify

Identify professional members of your community who are qualified to join your club. Each year the club membership committee should conduct a classification survey as early as possible, in order to develop a list of classifications not held by members of the club. Use this list to determine the classifications to target in recruitment efforts. Share this information with all club members and consult with the board on all classification issues. See Classifications (page 19) for more information.

In order to encourage recruitment, personally recruit a new member during the first month of the Rotary year and encourage club members to do the same. Work with the entire club to seek out new club members among the following groups:

- Local businesses
- Professional and trade associations
- Chamber of commerce
- Local and regional government offices
- Rotary Foundation alumni
- Current and past Rotaractors
- Spouses, partners, and family members of Rotarians

Introduce

Ensure that prospective members are introduced to Rotary International's programs, your club's service efforts, and the benefits and responsibilities of membership. A prospective member who has been introduced to Rotary by enthusiastic Rotarians and is informed about the club's projects before joining is more likely to become involved and remain active.

Encourage club members to discuss Rotary and its goals with friends, family, and colleagues. Also use your community service projects to identify and involve potential members. See Education (pages 23-24) for more information on informing prospective members about Rotary.

Invite

Invite a prospective member to become a club member with a personal visit from both the proposer and a member of the membership committee. This two-person visit provides the prospective member with a second contact in the club, one who brings additional Rotary knowledge and experience. Rotarians extending the invitation should know the personal interests and abilities of the prospective member in order to point out relevant club activities and projects. The membership committee should ensure that club members who sponsor new members are recognized for their efforts.

Assist the board in investigating the character, business or profession, community standing, and general eligibility of all people proposed for membership. Membership retention will be improved by identifying quality prospective members.

- In assessing a candidate's qualifications for membership, consider the following questions:
- Is the individual above reproach?
- Is the reputation of the individual's firm exemplary?
- Is the person service-minded?
- Can the candidate meet the financial obligations of membership and attend weekly meetings?
- Is the candidate committed to getting involved in the club's projects, programs, and committees?

委員會應快速處理所有社員推薦表。你對理事會的報告應解釋委員會調查的程度與結論的根據理由。

The committee should act promptly on all membership proposals. Your report to the board of directors should explain the extent of the committee's investigation and the reasons for its conclusions.

入社

新社員入社應採用一個莊嚴隆重且有意義的方式。利用入社儀式做為解釋成為扶輪社員之益處和責任的機會。可能的話，邀請新社員的家人觀禮。在儀式中，讓新社員有機會發表5分鐘的談話，介紹自己、事業、及家人。貴社應提供新社員下列物品：

- 扶輪領章
- 社員證
- 社刊
- 地區名錄
- 地區總監月報
- 『英文扶輪月刊』或地域雜誌
- 當地扶輪社名單，俾利補出席
- 扶輪社名牌
- 社旗

在社刊或例會中表彰這名新社員與其輔導社員。

Induct

New members should be welcomed in a dignified and meaningful manner. Use an induction ceremony as an opportunity to explain the benefits and responsibilities of being a Rotarian. If possible, invite family members to attend. During the ceremony, offer new members the opportunity to give a five-minute talk about themselves, their businesses, and their families. Your Rotary club should provide a new member with the following items:

- Rotary lapel pin
- Membership identification card
- Club bulletin
- District directory
- District governor's monthly letter
- *The Rotarian* or Rotary regional magazine
- List of local clubs for make-up meetings
- Club name badge
- Club banner

Recognize the new member and sponsor in your club's bulletin or at the weekly meeting.

有關新社員入社儀式的構想，請參見『社員發展資源指南』Membership Development Resource Guide 及『新社員入社訓練』New Member Orientation。

See the Membership Development Resource Guide and New Member Orientation for ideas on inducting new members.

扶輪社細則

第 13 章 選舉社員之方法

第 1 條—凡由本社現職社員提名加入本社之新社員，須以書面經由本社秘書提請理事會審核。遷入本社所在地方之扶輪社員或其他扶輪社之前社員可經由其前屬扶輪社提名為(本社)現職社員。此項提名案除在本細則另有規定外應暫時保守機密。

第 2 條—理事會應確定被提名人符合本社章程中職業分類及社員資格。

第 3 條—理事會應在收到提名後 30 天內決定核准或予拒絕，然後將其決定經由本社秘書通知提名人。

第 4 條—如經理事會決議通過，被提名人應予告知扶輪之宗旨及社員之權利與義務，然後由被提名人填具入社申請書，並向本社社員公佈其姓名及擬貸予之職業分類。

Recommended Rotary Club Bylaws

Article 13 Method of Electing Members

Section 1 – The name of a prospective member, proposed by an active member of the club, shall be submitted to the board in writing, through the club secretary. A transferring or former member of another club may be proposed to active membership by the former club. The proposal shall be kept confidential except as otherwise provided in this procedure.

Section 2 – The board shall ensure that the proposal meets all the classification and membership requirements of the standard Rotary club constitution.

Section 3 – The board shall approve or disapprove the proposal within 30 days of its sub-mission, and shall notify the proposer, through the club secretary, of its decision.

Section 4 – If the decision of the board is favorable, the prospective member shall be informed of the purposes of Rotary and of the privileges and responsibilities of membership, following which the prospective member shall be requested to sign the membership proposal form and to permit his or her name and proposed classification to be published to the club.

第 5 條—公佈被提名人姓名後，如 7 日內無名譽社員以外之社員依本細則規定以書面列舉理由向理事會提出異議，則該被提名人於繳清入社費（名譽社員不須繳付）後即當選為社員。

如有任何社員向理事會反對該被提名人入社時，則理事會應於下次會議時以投票表決。如雖有反對但理事會投票結果仍然通過，則該被提名人（若非名譽社員）於繳清應納之入社費後即當選為社員。

第 6 條—當選後，社長應安排該新社員入社儀式、發給社員證及新社員之扶輪文獻。此外，社長或秘書應向國際扶輪報告新社員的資訊，且社長應指派一名社員協助新社員融入本社並指派新社員參加本社的一項計畫或職務。

第 7 條—本社應，依照模範扶輪社章程，選舉理事會推薦之名譽社員。

Section 5 – If no written objection to the proposal, stating reasons, is received by the board from any member (other than honorary) of the club within seven (7) days following publication of information about the prospective member, that person, upon payment of the admission fee (if not honorary membership), as prescribed in these bylaws, shall be considered to be elected to membership.

If any such objection has been filed with the board, it shall vote on this matter at its next meeting. If approved despite the objection, the proposed member, upon payment of the admission fee (if not honorary membership), shall be considered to be elected to membership.

Section 6 – Following the election, the president shall arrange for the new member's induction, membership card, and new member Rotary literature. In addition, the president or secretary will report the new member information to RI and the president will assign a member to assist with the new member's assimilation to the club as well as assign the new member to a club project or function.

Section 7 – The club may elect, in accordance with the standard Rotary club constitution, honorary members proposed by the board.

職業分類

扶輪社利用職業分類的制度來協助確保扶輪社員能夠反映當地事業與專業社區的多元性。職業分類說明社員所屬公司行號的主要活動，或說明其個人的主要事業或專業活動，而不是指職業或職務，例如「建築」或「銀行」（而非「建築師」或「銀行總裁」）。職業分類名冊並非絕對，因為扶輪世界各地的事業活動及用語差異甚大。當地的工商名錄或電話簿，均為進行職業分類調查的資源。

職業分類原則的應用

扶輪社某一職業分類如已有5名社員時，不得再選舉該職業分類之人士為社員，若社員人數超過50名，則某一職業分類的社員不得超過社員總數的10%，退休之社員不得列入一項職業分類之社員人數計算。

如社員變更職業分類，扶輪社得在新的職業分類之下繼續保持其社員資格。扶輪社員若轉社或之前為社員，即使仍超過某個職業分類的人數限制，依然可加入。扶輪社應將這些例外視為暫時現象。

進行職業分類調查

為了瞭解社區內有何職業與事業必須進行職業分調。這項調查列出社區內所有事業與專業機構，重點在扶輪社所在地方與鄰近社區或所在城市的優秀主管。它應該包含居住在扶輪社所在地方、但事業地點在他處的居民的職業分類。一旦進行調查之後，製作一份註明已補充與未補充的職業分類的名冊。這份名冊應將現有社員姓名與職業並列。招募社員時，利用這份名冊來鎖定貴社尚無代表的職業分類。

職業分類只是扶輪社員資格的其中一項標準。社員的完整資格請參見『模範扶輪社章程』。

Classifications

Rotary clubs use the classification system to help ensure they represent the diversity of the local business and professional community. A classification describes either the principal activity of a firm or a person's business or professional activity, not a profession or office: "architecture" or "banking" (not "architect" or "bank president"). There is no definitive list of classifications, because business activities and terminology vary greatly throughout the Rotary world. Use your local business directory or phone book to develop a classification survey.

Applying the Classification Principle

Clubs are limited to five members for each classification, or 10 percent of their total membership if the club has more than 50 members. Members who are retired should not be included in the total number of members from a classification.

If a member changes classification, the club may continue the member's membership under the new classification. Rotarians who transfer from another club or who are former members should still be admitted even if they exceed the membership limit for a classification. Rotary clubs should consider these exceptions as temporary.

Conducting a Classification Survey

In order to know what professions and businesses are in the community, conduct a classification survey. This survey is a list of all business and professional establishments in your community, focusing on qualified executives found within the locality of the club and bordering communities or the corporate city limits. It should also include classifications of residents in the locality whose places of business are outside the club's locality. Once you have a survey, prepare a roster of filled and unfilled classifications. The roster should list the names of current club members beside their classification. Use the roster to target classifications that are not represented in the club for membership recruitment.

Classification is just one of the criteria for Rotary club membership. See the Standard Rotary Club Constitution for a complete list of membership qualifications.

若貴社因為職業分類無法讓一位優秀的人士入社，請推他或她給鄰近的其他扶輪社。

If your club cannot induct a qualified prospective member due to the classification principle, recommend him or her to another Rotary club in the area.

防止社員流失

防止社員流失對增加和維持貴社的社員人數十分重要。現有扶輪社流失率偏高，是目前扶輪所面臨的迫切社員議題之一。熱誠、活躍又受到鼓勵的社員可使扶輪社的運作發揮效能，也比較能夠吸引新社員。

先判斷貴社面臨何種流失問題，然後執行因應的策略。扶輪社成功的防止流失策略包括社員教育以及讓社員保持參與和掌握資訊。

責任

扶輪社社員委員會對於防止社員流失有以下責任：

- 利用防止社員流失模組 **Retention Model**(第20-22頁)找出現有策略的優點及缺點
- 監控出席、社員年資、服務計畫參與情形、以及對扶輪基金會之捐獻的變動趨勢。這些趨勢可以凸顯出可能需要關注的問題
- 告知新舊社員扶輪與社員資格的重要
- 執行策略來讓新社員和舊社員參與扶輪社活動
- 表彰現有社員對扶輪社計畫與活動的貢獻

行動步驟

為了防止流失社員，你的社員發展行動計畫應該包含以下行動步驟：

- 告知與教育
- 參與

每一項步驟都要訂定一個時間表，決定執行每個步驟的負責人，建立評估每個步驟進度的標準，並且考慮可支持你的可用資源與工具。這些行動步驟的防止流失策略解釋如下：

告知與教育

扶輪社社員委員會應使社員持續教育成為扶輪社固定的活動，並告知新社員有關貴社與國際扶輪的資訊。訓練和教育提供扶輪社員知識與技能，對防止社員流失十分重要，有些社員退社的原因是因為覺得未被告知足夠資訊。有關新社員教育及持續的社員教育方面的更多資訊，請參見「教育」(第25-26頁)。

參與

確使所有扶輪社員都能參與扶輪社委員會、活動、募款活動、理事會會議、每週例會以及社交活動。踴躍參與的社員對扶輪社有歸屬感，會讓扶輪成為其生活的重心之一。鼓勵全社參與社區服務及扶輪基金會的計畫。

Retention

Retention is crucial to increasing and sustaining your club's membership. A high turnover rate in existing clubs is one of the most pressing membership issues facing Rotary today. Current members who are dedicated, active, and motivated support the effective functioning of the club and are also more likely to attract new members.

Determine what retention challenges your club faces and then implement strategies for addressing them. Successful club retention strategies include member education and keeping club members involved and informed.

Responsibilities

The club membership committee has the following responsibilities for retaining members:

- Identifying current retention strengths and weaknesses using the Retention Model (pages 20-22)
- Monitoring trends about attendance, length of membership, service projects participation, and contributions to The Rotary Foundation. Such trends can point out concerns that may need to be addressed.
- Informing and orienting new and continuing members about the importance of Rotary and membership
- Implementing strategies to involve new and current members in club activities
- Recognizing existing members for their contributions to club projects and activities

Action Steps

To retain club members, your membership development action plan should include the following action steps:

- Inform and Orient
- Involve

For each of these steps, develop a timeline, determine which committee member is responsible for implementing it, establish criteria for measuring progress, and consider the resources and tools available to support you. Retention strategies for these action steps are explained below.

Inform and Orient

The club membership committee should make continuing education for members a regular club activity, and inform and orient new club members about the club and RI. Training and education provide knowledge and skills to Rotarians and is fundamental to membership retention. Some members resign from their clubs because they feel uninformed. See Education (pages 25-26) for more information on new and continuing member education.

Involve

Ensure that all club members are involved in club committees, activities, fundraisers, board meetings, weekly club meetings, and social activities. An involved member will feel a part of the club and will make Rotary a priority in his or her life. Encourage club wide participation in community service and Rotary Foundation programs.

讓新社員參與扶輪社活動時，也應考慮用以下方法：

- 指派新社員加入某委員會或給予其例會的任務。
 - 製作新社員特別名牌，佩戴時間一年。鼓勵其他社員留意這名牌，努力找機會與這些新社員交談。
 - 讓新社員擔任出席地區年會的代表，以深入瞭解扶輪世界以及其所屬扶輪社之外正在進行的計畫。有些扶輪社會支付該社員部份或全部的年會費用。地區年會後，請該名新社員對扶輪社提出報告。
 - 推動一項入社起始計畫，讓所有在同一扶輪年度入社的社員一起辦理一項計畫。
 - 鼓勵新社員出席國際扶輪年會或招待團體研究交換團團員吃一頓飯或其他活動，以體驗扶輪的國際性。
 - 請新社員從其同儕中找2到3位新社員。當新社員向友人推廣扶輪社時，對扶輪的歸屬感便越強，對扶輪也越熱誠。
- Also consider the following methods of getting new members involved in the activities of the club:
- Assign new members to a committee or give them a weekly meeting assignment.
 - Create special name badges for new members to wear for one year. Encourage other members to look for the badges and make a special effort to talk with the new members.
 - Have a new member serve as a delegate to the district conference to learn about the world of Rotary and the projects being done outside of his or her own club. Some clubs assist the new member by paying part or all of the costs of the conference. After the conference, ask the new member to give a report to the club.
 - Introduce a commencement program, where all club members who join in the same Rotary year work together on a project.
 - Encourage new members to experience the internationality of Rotary by attending the RI Convention or hosting a Group Study Exchange team member for a meal or other activity.
 - Ask new members to find two or three other new members from among their peer group. When new members promote Rotary to their friends, they become stronger and more enthused about Rotary.

其他扶輪社成功的社員保留策略請參見

Find membership retention strategies that have worked for other clubs at www.rotary.org/membership.

防止社員流失模組

扶輪社必須防止流失現有社員並招募合格的新社員才能有活力。防止社員流失模組是一項工具，協助扶輪社計算在一段特定時間內，社員淨增加(或淨減少)的人數以及判斷其來源是原有社員或新社員。

利用貴社的社員記錄以及以下的圖表與指示，來為貴社製作一個防止社員流失模組。你需要3到5年期間所有社員入社與退社的日期。(如果你的扶輪社沒有完整的記錄，貴社社長或秘書可自www.rotary.org的社員事務入口Membership Access下載。)

一旦填妥模組之後，請利用指示來解釋。

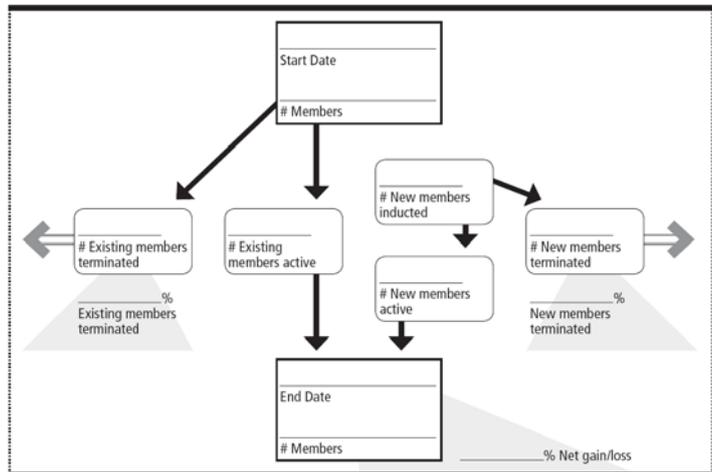
Retention Model

To remain viable, a Rotary club must retain its current members and induct and retain new, qualified members. The retention model is a tool to help clubs calculate their net membership gain (or loss) over a specified time period and determine its source: existing or new members.

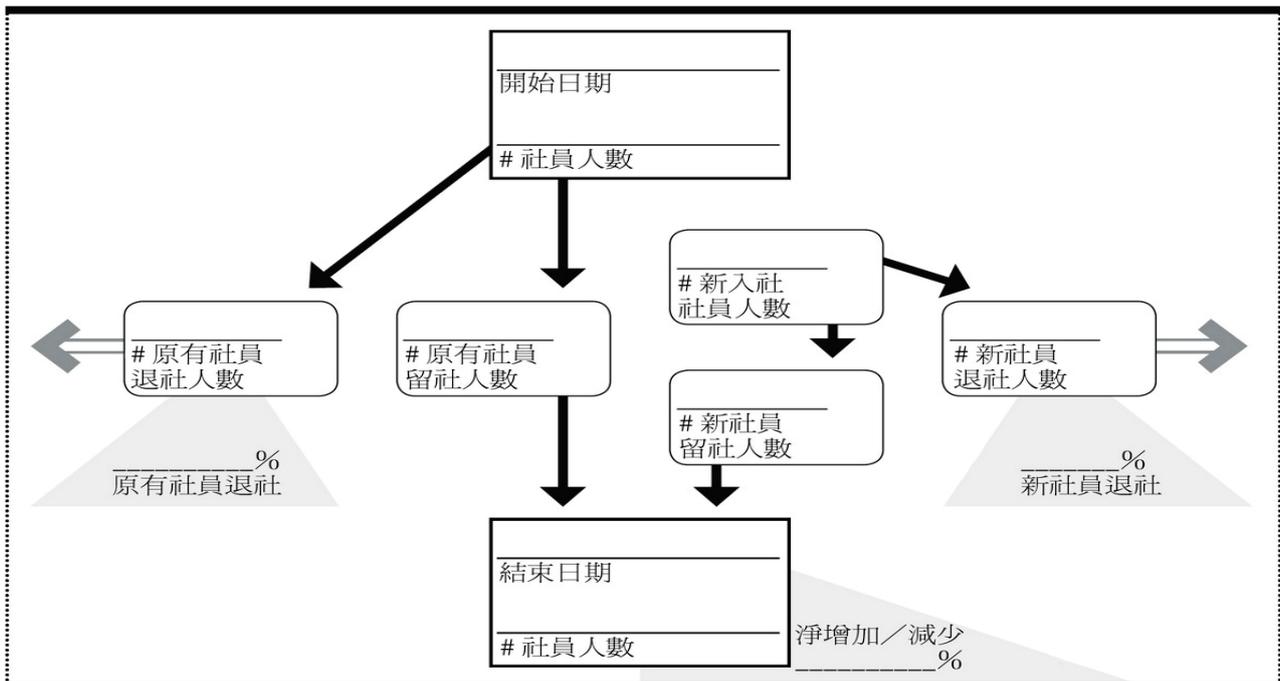
Use your club membership records and the following diagram and instructions to create a retention model for your club. You'll need induction and termination dates for all members in the three-to-five-year period. (If your club doesn't have complete records, your club president or secretary can download them from Member Access at www.rotary.org.)

Once you've completed your model, use the instructions to interpret it.

Retention Model



防止社員流失模組



建立貴社的防止社員流失模組

1. 決定你希望調查的時間範圍。在防止社員流失模組最上層的方框填入「開始日期」，在底層方框填入「結束日期」。(我們建議的時間範圍為3到5年。)
2. 在「開始日期」的方框內，填入當時貴社現職社員的人數。
3. 在「結束日期」的方框內，填入當時貴社現職人員的人數，並用以下公式計算出淨增加／減少 的比例為 _____%：

$$\frac{(\text{結束日期人數} - \text{開始日期人數}) \times 100}{\text{開始日期人數}} = \text{_____} \% \text{淨增加／減少}$$

4. 在「原有社員退社人數」方框內，填入在開始日期為現職社員但於結束日期前退社的人數，並利用以下公式計算出「原有社員退社比例」為 _____%：

$$\frac{\text{原有社員退社人數} \times 100}{\text{開始日期人數}} = \text{_____} \% \text{原有社員退社}$$

5. 用以下公式計算「原有社員留社人數」：

$$\text{開始日期社員人數} - \text{原有社員退社人數} = \text{原有社員留社人數}$$

6. 在「新入社社員人數」方框中，填入在開始日期與結束日期之間入社在新社員人數。
7. 在「新社員退社人數」中，填入在結束日期前退社的新社員人數，並用以下公式計算「新社員退社比例」為 _____%：

$$\frac{\text{新社員退社人數} \times 100}{\text{新入社社員人數}} = \text{_____} \% \text{新社員退社}$$

8. 用以下公式計算出「新社員留社人數」

$$\text{新社員入社人數} - \text{新社員退社人數} = \text{新社員留社人數}$$

注意：結束日期的社員人數應等於「原有社員留社人數」加上「新社員留社人數」。

Creating Your Retention Model

1. Establish the time frame you wish to study by entering a Start Date in the top box of the retention model and an End Date in the bottom box. (We recommend a time frame between three and five years.)

2. In the Start Date box, enter the number of active members who were in the club on that date.

3. In the End Date box, enter the number of active members who were in the club on the end date and calculate the _____% Net gain/loss by:

$$\frac{(\text{End Date number of members} - \text{Start Date number of members}) * 100}{\text{Start Date number of members}} = \text{_____} \% \text{ Net gain/loss}$$

4. In the Existing members terminated box, enter the number of members who were active on the start date but terminated before the end date and calculate the _____% Existing members terminated by:

$$\frac{\text{Existing members terminated} * 100}{\text{Start Date number of members}} = \text{_____} \% \text{ Existing members terminated}$$

5. Calculate the number of Existing members active by:

$$\text{Start Date number of members} - \text{Existing members terminated} = \text{Existing members active}$$

6. In the New members inducted box, enter the number of new members inducted between the start date and end date.

7. In the New members terminated box, enter the number of new members who were terminated before the end date and calculate the _____% New members terminated by:

$$\frac{\text{New members terminated} * 100}{\text{New members inducted}} = \text{_____} \% \text{ New members terminated}$$

8. Calculate the New members active by:

$$\text{New members inducted} - \text{New members terminated} = \text{New members active}$$

Note: The number of members at the End Date should equal the number of Existing members active plus the number of New members active.

解釋你的防止社員流失模組

在你瞭解貴社社員淨增或淨減的組成後，便可開始找出貴社防止社員流失工作優缺點。

淨增或淨減

社員人數淨增或淨減，是扶輪社防止社員流失的第一個指標。淨增表示該社的社員人數增加，這可能表示該社留住其原有社員並吸收新社員，或者也可能意味著該社招募的新社員人數超過退社的原有社員。

淨減表示該社流失的社員人數超過入社的人數。

評估退社比例

扶輪社可能有社員流失問題的主要證據就是退社人數是否很多。將原有社員退社人數(最左邊的方框)加上新社員退社人數(最右邊的方框)便可得到該社退社的總人數。這樣的退社總人數對該社的規模來說是否適當？考慮這些退社者的理由以及貴社能夠減少這些社員流失的方法。

新社員

繼續做退社分析，必須考慮新社員退社人數(最右邊的方框)。這個數字顯示出該社在這段期間內招募的新社員最後退社的人數。盡量讓這個數字接近零。從新社員退社人數方框下列出的比例(%新社員退社)，可判定新社員退社的比例。儘可能降低這個比例。偶爾有新社員因故離開是可理解的；但如果扶輪社充份讓準社員瞭解社員的責任，並有效推行新社員訓練計畫，新社員退社的人數應該會非常低。

原有社員

原有社員退社人數(最左邊的方框)顯示在開始日期的現職社員中退社的人數，也可算出該社的縮減率(即有%原有社員退社)。縮減低表示該社保留原有的社員。

其他資源

其他防止社員流失的策略可參照社員發展資源指南 *Membership Development Resource Guide*。有關防止社員流失工作，請向你的地域國際扶輪社員協調人(RRIMC)以及他們的地帶協調人(RIMZCs)諮詢。

填妥與分析防止社員流失模組的詳細說明請參見 www.rotary.org

Interpreting Your Retention Model

Once you know who constitutes your club's net membership gain or loss, you can begin to identify the club's retention strengths and weaknesses.

Net Gain or Loss

A net gain or net loss of members is the first indication of a club's retention status. A net gain indicates that the club has more members. This could mean that the club retained its active members and brought in new members or it could indicate that the club is inducting enough new members to compensate for the active members who are leaving.

A net loss indicates that the club has failed to retain more members than it inducts.

Evaluating Termination Rate

The primary evidence that the club might have a retention problem is if it has terminated a large number of members. Add the number of Existing members terminated (far left box) and number of New members terminated (far right box) to determine the total number of members the club has terminated. Is the total number of terminations reasonable for the size of the club? Consider the reasons for these terminations and the steps the club can take to limit these losses.

New Members

To continue the termination analysis, consider the number of New members terminated (far right box). This indicates how many new members the club inducted and subsequently terminated within the time frame. Keep this number as close to zero as possible. The percentage listed under the New members terminated box (% New members terminated) identifies what percentage of new members have been terminated. Keep this percentage as low as possible. It is understood that occasionally a new member may leave unexpectedly; however, if the club fully informs prospective members about the responsibilities of membership and maintains an effective new member orientation program, the number of new members terminated should be extremely low.

Existing Members

The number of Existing members terminated (far left box) identifies how many of the members that were active on the start date have been terminated, the club's attrition percentage (% Existing members terminated). A low attrition percentage is an indication that the club is retaining its existing members.

Other Resources

Additional retention strategies can be found in the *Membership Development Resource Guide*. Contact your regional RI membership coordinator (RRIMC) and their zone coordinators (RIMZCs) for guidance on your retention efforts.

Detailed instructions on completing and analyzing the retention model are available at www.rotary.org.

教育

知識豐富的社員比較可能採取主動，活躍於扶輪社與地區。傳達有關扶輪的訊息給準社員給和新社員以及舊社員。

責任

社員委員會關於社員教育有以下責任：

- 向可能成為社員的人士解釋社員資格的好處與責任
- 和社長一起提供扶輪持續教育及訓練給所有的扶輪社員
- 鼓勵出席地區社員研討會和地域國際扶輪社員協調人與國際扶輪社員地帶協調人所舉辦的社員研討會
- 推行新社員訓練與教育的策略

準社員教育

讓準社員瞭解扶輪，包括扶輪的歷史、理想、以及扶輪社與其活動的資訊。和社長及公共關係委員會一起合作，提供入門介紹性質的資訊給準社員。

社員委員會應將此資訊編纂成扶輪社簡介，可連同「這是扶輪」This is Rotary的摺頁和新版的「扶輪基礎」Rotary Basics送給來賓。最近一期的「英文扶輪月刊」The Rotarian或扶輪地域雜誌也是扶輪最好介紹。

新社員訓練與教育

新社員訓練的程序應以提供給準社員的資訊為基礎，並在入社後立刻展開。

貴社的每位社員都應該積極讓新社員融入貴社。指派一名導師給新社員，提供如何成為更有效能之扶輪社員的建議。

在前半年，新社員應用以下方式擴展對扶輪的瞭解：

- 參加新社員訓練會議
- 瀏覽 www.rotary.org 的「扶輪 e 學習中心」(Rotary E-Learning Center)
- 參加扶輪社社務行政會議、理事會會議、或委員會會議
- 在例會中發表關於職業分類的演講
- 在其他扶輪社補出席
- 邀請來賓出席扶輪社例會或推薦新社員
- 選擇想參與的扶輪社委員會

Education

Knowledgeable members are more likely to take initiative and become more active in your Rotary club and your district. Communicate information about Rotary to prospective and new members, as well as experienced Rotarians.

Responsibilities

The membership committee has the following responsibilities for membership education:

- Explaining the benefits and responsibilities of membership to potential members
- Working with the president to provide continuing Rotary education and training to all club members
- Promoting the district membership seminar and membership seminars sponsored by regional RI membership coordinators and RI membership zone coordinators
- Implementing new member orientation and education strategies

Prospective Member Education

Inform prospective members about Rotary, including its history, ideals, and information about the club and its activities. Work with the president and the public relations committee to provide prospective members with introductory Rotary information.

The committee should compile this information in a club profile that can be presented to visitors along with the **This Is Rotary** brochure and a current copy of **Rotary Basics**. A recent issue of **The Rotarian** or a Rotary regional magazine is also a good introduction to Rotary.

New Member Orientation and Education

The process of new member orientation should build on the information provided to prospective members and should begin immediately after induction.

Every member of your club should play an active role in introducing new members to the club. Assign a mentor to each new member to advise him or her on how to be an effective club member.

During the first six months, new members can expand their understanding of Rotary in these ways:

- Attending new member orientation meetings
- Visiting the Rotary E-Learning Center at www.rotary.org
- Attending club assemblies, board meetings, or committee meetings
- Giving a classification talk at a club meeting
- Making up a meeting at another club
- Inviting a guest to a club meeting or proposing a new member
- Choosing a club committee on which to serve

社員持續教育

社員持續教育應確保使扶輪社員覺得有挑戰性、受到鼓舞、並感受到熱情。社員委員會應有一項社員持續教育計劃，現有社員瞭解扶輪與扶輪社的最新狀況。此等計畫可包括以下各項：

- 定期舉辦扶輪社社務行政會議來討論社員想延續哪些扶輪社活動，想要改變哪些活動
- 年度目標、計劃、與策略
- 新社員與吸收策略的重要
- 每年至少有4次扶輪社例會節目重點為扶輪以及其歷史、宗旨、規模、與活動
- 扶輪社員參與探討持續教育的地區會議

運用貴社與地區的網站、例會、電子郵件、社刊來散播地區總監或國際扶輪的資訊。確認每個人知道國際扶輪與基金會的計畫，例如青少年交換、大使獎學金、世界社區服務等。參與這些計畫可能促成一生對扶輪投入。

國際扶輪出版品也是理想的持續教育工具。閱讀「英文扶輪月刊」*The Rotarian*或扶輪地域雜誌等出版品，扶輪社員可掌握世界各地扶輪活動的最新動態。鼓勵社員瀏覽 www.rotary.org 網站，掌握最新活動與資源的狀況。

成立新扶輪社

如果貴社輔導新扶輪社，須擬定一項行動計畫來分派以下責任：

- 協助特別代表規劃與籌劃新扶輪社行政程序
 - 協助規劃新扶輪社的節目與計畫
 - 在新扶輪社在第一個年度向地區總監報告
 - 在新扶輪社加盟國際扶輪後，至少擔任該社輔導社2年
- 詳情請洽地區總監、地區社員委員會、或地區擴展委員會

Continuing Member Education

Continuing member education ensures that members remain challenged, motivated, and enthusiastic. The membership committee should have a continuing Rotary education plan in place to keep existing members up-to-date on Rotary and the club. Such a program could include the following:

- Regular club assemblies to discuss which club activities club members want to continue and which they want to change
- Annual goals, plans, and strategies
- The importance of new members and recruitment strategies
- Four or more weekly club programs a year focused on Rotary, its history, object, scope, and activities
- Participation of club members in district meetings that address continued education

Use your club and district Web sites, weekly meetings and e-mails, and club bulletins to share information from your district governor or Rotary International. Make sure every-one knows about such RI and Foundation programs as Youth Exchange, Ambassadorial Scholars, and World Community Service. Becoming involved in one of these programs can spark a lifelong commitment to Rotary.

RI publications are also excellent continuing education tools. By reading publications such as *The Rotarian* or Rotary regional magazines, club members can stay up-to date on Rotary activities worldwide. Encourage members to visit www.rotary.org often to keep up-to-date on events and resources.

Organizing New Clubs

If your club sponsors a new Rotary club, develop an action plan assigning the following responsibilities:

- Assisting the special representative in planning and organizing the administrative processes of the new club
- Helping to organize the new club's programs and projects
- Reporting to the district governor as requested during the club's first year
- Serving as a mentor to the new club for at least two years after its admission to membership in RI

For more information, contact your district governor, district membership committee, or district extension committee.

使貴社發揮最大的潛力
Maximize your club's potential.

善用有效能扶輪社規劃指南
掌控貴社的未來

此一指南可在扶輪社扶輪基金會委員會手冊中或在 www.rotary.org 中找到



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