

## Member Survey Guidelines

The purpose of a member survey is to, in effect, hold a frank "discussion" with your club members so they can give their open and honest opinion about club direction and operations. A survey enables club members to direct the club, with results and recommendations streaming into the club's strategic planning.

The club member survey does not seek just "satisfaction" opinion. A club member who does not value a particular feature or service of the club can express complete satisfaction with something for which they have no use. If each feature is also assessed by its "importance" to the member to see where the bigger gaps are, priorities can be set. Without going into that gap analysis, the survey simply seeks opinion about the "value" to the member of each feature or service, in a measurable way, so targets can be set and action taken in response to the survey results.

Survey results using the same questions, three months, one year or two years later, can indicate success in achieving the targets.

Here are some guidelines for conducting a club member survey.

1. Form a survey team of two or three members.
2. Determine areas of focus for which you want to measure opinion of members in terms of value to them in achieving the club priorities chosen. Review club's strategic plan. Discuss priorities with club board and club members. The most thorough process is to start with a "qualitative" survey, or focus group discussion(s), among a representative group of members about key areas of strategy and other aspects of the club to determine issues and trends. Then draft questions for the survey based on outcomes of those discussions.
3. Who are they? Provide demographics section in the survey: number of years a Rotary member, male/female, age group, where member lives (club in one community, member lives in another). This allows you to cut the data afterwards to see if there are any significant differences by those demographics.
4. Draft questions, or statements with a scale of agreement (from 1 "strongly disagree" to 5 "strongly agree"), for each area of focus. It should be stressed that responses to questions are anonymous so members can express their opinion openly and honestly. The responses should be quantitative using the scale 1 to 5, and then space provided for comments. The questions should aim to produce measurable results upon which you can act as a club and measure again, often a year later. If there is a crisis of trust and confidence in the club, you may want to measure at the time of the crisis and then three months or so after the club has acted to determine how opinion has changed. A sample of questions your club could use is provided in the format of an online survey. [\[LINK\]](#)
5. Decide whether to distribute the survey as hard copy questionnaire or using an online survey system. The hard copy is easy to produce, but more of a challenge to, therefore barrier for, members, and then requires more work for the survey administrator in

preparing a report. For an online version of your club member survey, please contact District 5040 PR Chair Peter Roaf (contact information below).

6. Propose the survey to the club board with questions to be asked, administration dates of start and finish, usually two or three weeks, and report to the board with recommendations, then report to the members with board approved recommendations and action for members' discussion and endorsement of recommendations. See sample board proposal [LINK]
7. Announce to the club members at a club meeting. Advise all club members by email or in periodical communications before the survey starts. Stress confidential nature of the survey and invited open, honest responses.
8. Distribute the survey to all members, remind mid-way and remind with "last call" two days before the closing date. You are aiming for a response level of at least 25% of club members to be statistically valid in representing opinion of all members, preferably closer to 50% or higher. See sample messages to club members [LINK]
9. Draft report on survey results with recommendations.
10. Present survey report to the club board: sample report [LINK]. Discuss. Board to vote on approving to accept the report and recommendations for presentation to, and approval of, club members. An action plan to respond to the recommendations could be approved at the board meeting, or at a future board meeting. Action arising from the survey could be included in the club's strategic plan.
11. Present the survey results to club members as a presentation at a club meeting. See sample [LINK]. Announce in a message to all club members with a link to the survey report posted as a document on the club's website, but not as a public document found on the home page.
12. In the club's annual review and report, action arising from the most recent member survey and any results to date could be reported.

Check out the Rotary District 5040 website's Public Image and Public Relations Committee page for related files from the February 27, 2018 webinar, "Clubs, Plan to Communicate for Results". The page provides an overall multi-media package of links on communication planning to: a) webinar recording; b) slides; c) slides with notes; d) document version of the webinar; e) workbook to support club team planning.

While you are at it, find all sorts of other links to resources for club communication on that committee page. Rotary International's Club Assessment Tools document may be useful to your club. [LINK]

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