BEYOND 2000

“Need More – Keep More”

Club Implementation Manual for BEYOND 2000
Membership Recruitment & Retention Programme

The BEYOND 2000 programme was developed in District 9710
by PDG Noel Trevaskis & PDG Grahame Jones

Third edition, April 2008
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Presentation Kits and hard copies of the BEYOND 2000 manual are available from PDG Grahame Jones, the cost is $4.00 each including postage.

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**BEYOND 2000 – The Club Implementation Process**

It is important to have the commitment of all your Club Members to the programme, it needs to be a coordinated whole of Club effort.

BEYOND 2000 gives a structured process with clear and manageable steps.

Importantly BEYOND 2000 operates on the power of two.

- Two Club Membership Coordinators.
- Club with teams of two Members.

The BEYOND 2000 programme has a professional presentation kit for prospective Members.

Support for the programme comes from the District Governor, Assistant Governors, the District Chair of BEYOND 2000 and the BEYOND 2000 committee.

There are five steps for the implementation of the BEYOND 2000 programme for success, importantly BEYOND 2000 takes into account the retention of the Members who will be recruited, not only do we “Need More” we need to “Keep More”

**The Five Steps:**

- Preparation
- Research
- Introduction
- Becoming Friends
- Staying Friends

If the Club average age is high, in the late sixties or seventy age group it is going to be hard to attract younger people to join your Club. It can be done though, initially you need to target the decade below your average age, if your average age is seventy you need to aim for people in their sixties, aim to bring a number of people in that age group in as Members. Once you have achieved that then start the same process with people, who are in their fifties, again once you have introduced a number of Members in that age group you then can target those who are in their forties.
PREPARATION:

Two Club Membership Coordinators are appointed prior to the Club Membership Forum, give consideration to having two Past Presidents as the Membership Coordinators, they should have a strong knowledge of Rotary. It is critical that they have a clear understanding of their role as joint Club Membership Coordinators and how BEYOND 2000 works. The District BEYOND 2000 Chairperson or a committee member will be available for the initial Club presentation. One full Club meeting needs to be set aside to start the programme.

The Club Membership Coordinators will be committed to the recruitment and retention of Members

The task of membership recruitment is a big task and a lot of people don’t have the time to be effective at the task, with two Members looking after Membership it will happen, for one person it can appear just a little too hard.

It is critical that the Membership Coordinators report to each weekly meeting on the progress of each team, and to give an overall update on progress of when potential Rotarians will be in attendance at the Club, this report is done in the same manner as all Director reports, it must be weekly.

Week 1 – Club Membership Forum, (only membership to be discussed.)

- Two Club Membership Coordinators will need to be appointed before the Club Membership Forum.
- Club Membership Coordinators, and BEYOND 2000 District representative to articulate and explain the roles that are required of the Members involvement in the BEYOND 2000 Programme.
- Prepare a Club brochure that best presents your Club.
- Form the Club Members into teams of two.
- The Club makes a decision on how many Members the Club proposes to induct in this Rotary year.
- Coordinators guide discussion on the classification the Club should be seeking.
- Teams are then allocated a classification.
- Guidelines are given regarding the age bracket to target.
- Provide teams with guidelines and work sheets.
- Teams leave meeting and over the next two weeks each team is to thoroughly research the most suited people holding the classification that they are seeking to fill as a prospective Member. It is vitally important that no contact is to be made with the prospective Member. The team is to come back with names within 14 days.
RESEARCH

Week 2 – Club meeting.

- Club Membership Coordinators ask teams how they are progressing on their research for suitable candidates in their allocated classifications. (It is highly important that this is done each week).
- Teams provide progress updates.

Week 3 – Club meeting.

- Club Membership Coordinators ask teams how they are progressing with names for their allocated classifications.
- Teams provide progress updates, each team should have a name or names to put forward to the Membership Coordinators.
- Teams to have the prospective Members mail address, preferably their home address.
- Mentors receive instructions on the role that they are to play in the mentoring of the Member.
- The names of the prospective Members are presented to the Club Membership Coordinators and from them to the Club Board. The Club Board considers the names and then allow for circulation in writing of the proposed Members to all existing Club Members for approval or otherwise. Once endorsement is confirmed by Club Members invitation packs are posted to the prospective Members and their response acted upon.

It is best not to discuss in an open meeting the suitability or unsuitability of a prospective Member when there are prospective Members in attendance at a Club Meeting. DO TAKE CARE with this process so that people won’t be offended.
INTRODUCTION

Prior to the Week 4 Club meeting the Club Membership Coordinators post to the prospective Members the Invitation Pack, preferably to their home address. Experience has shown that the spouse of the prospective Member can have an influence on the decision of the invitee.

The Information pack allows the prospective Member to gain an understanding of Rotary International and help them to say “yes” when they are invited to attend a meeting.

Week 4 – Club meeting.

Dinner Fees for the prospective Member are borne by the Club not the Team.

- Club Membership Coordinators ask each team how they are progressing with names for their allocated classifications.
- If the prospective Member is accepted as a likely Member they are sent an information pack with a personal invitation to attend a meeting just as soon as they are available to attend.
- Mentors for prospective Members attending their first meeting are to welcome and be with the prospective Member.
- Mentors introduce the prospective Member to the Club President and other Members.
- The Club Membership Coordinators follow up with a telephone call to those invitees who have not responded to the invitation during the week.

BECOMING FRIENDS

Week 5 – Club meeting.

- Club Membership Coordinators ask each team how they are progressing with names for their allocated classifications.
- The Club Membership Coordinators report on the progress of responses to the mail out the previous week and advise the Club when other prospective Members will be attending their first meeting.
- Mentors greet and introduce prospective Member to the Club President and other Members.
STAYING FRIENDS

The mentor has the responsibility of introducing the prospective Member to other Club Members and helping them to understand Rotary.

Role of the Mentor with the prospective Member:

- Introduce the prospective Member to the Club President and Club Members.
- Explain the process of the Club meeting, e.g. Grace, National Anthem, role of the Sergeant, etc.
- Responsibilities as a Rotarian.
- Rotary education, introduce them to the Rotary e learning site which is on the front page of the District website: www.d9710.rotary.org.au

Week 6 – Club meeting.

Club Membership Coordinators follow up with a phone call to prospective Members that have not responded to the initial invitation.

- Prospective Members welcomed to the Club meeting by their designated mentors.
- Mentors invite the invitee to more meetings and invite them to join Rotary.

Week 7 – Club meeting.

Clubs inducting Members should work to induct Members in groups of a minimum of three; one Member may feel alone whereas in a group of three, they will have support as Members in the Club, they all have one thing in common they are new to Rotary! Clubs inducting their first female Member should work to induct a minimum of two or three as the induction of a single female into this Club may result in the loss of that Member shortly after.

Maintain a data base of all contacts in order to return to at a later date to those who as an initial contact may not be able to accept an invitation at that point of time to join Rotary, but may be able to accept a further invitation at a more suitable time.
• **Induction of Members!**

• When the answer is Yes then make arrangements for the induction, invite their partner, family and friends.
• Club Coordinators plan the Induction ceremony with the Club President.

*Induction of Members must make the Member feel privileged and honoured to be asked to join Rotary. Include their partner and present them with their Club dinner badge at the same time as you induct the Member. Ask the Member to invite their friends to the meeting to witness their induction. Take time to plan the induction programme. Have all Club Members welcome the Member into their midst.*

*Members should be encouraged to introduce people to the Club and to Rotary, with an aim of introducing a prospective Member within their first twelve months of Membership.*

**MENTOR SUPPORT**

*The role of the Mentor has been one that has been overlooked by a lot of Clubs. After the induction of a Member the role of the Mentor involves three areas to ensure that the Member continues to enjoy Rotary and is able to realise their full potential as a Rotarian.*

*Consider using a number of different Mentors to mentor Members over the next few weeks so that one person doesn’t get locked in with the one Member. This also means that the Member gets to know different Members through the mentoring process.*

*Following are suggestions that the Mentor could do to help orientate the Member, Clubs should develop their own mentoring programme with a check list of activities to be completed by the Mentor and the Member.*

- Education
- Involvement
- Retention.

**Mentor Check List for the Member:**

**Suggested essential Mentor tasks:**

- Periodically meet with the Member and review how they are coping within the Club.
- Offer suggestions and the opportunity to participate in Club activities and programmes.
- Offer encouragement and advice.
- Find the most suitable committee for them.
- Encourage and support their accomplishments.
• Involve families.
• Rotary beyond the Club; beyond District.
• Facilitate opportunities for the Member to perform tasks within the Club.
• See that the Member does meet and interacts with other Members.
• Show the Member how to welcome at a Club meeting or assist with attendance.
• How to make up a missed meeting.
• Show the usefulness of the District Directory and other tools.

Other suggested Mentor tasks to encourage the Member to achieve.

• Attend Member Orientation meeting.
• Serve as Chairman at a Club meeting.
• Serve on Welcome at Club meetings at least three times.
• Host Rotarians to Vocational visit at workplace.
• Object of Rotary and Four Way Test displayed at place of work.
• Learn the Four Way Test.
• Visit two other Rotary Clubs.
• Present a classification or Interest talk to Club.
• Attend a Board meeting.
• Participate in one hands on project.
• Have 100% attendance for a specified month.
• Attend a District function.
CRITICAL ROLES IN THE CLUB MEETING

President

- Welcomes the prospective Members with genuine enthusiasm!
- Welcome them as soon as possible in the meeting.
- Farewell and thank them for coming and invite them to attend the next weeks meeting.
- Have your meeting running sheet worked out before you arrive at the meeting so that you do have time to talk to the prospective Member.
- Work with the Sergeant to ensure that the meeting starts on time and finishes on time.
- Speak to all Club Directors & Club Secretary prior to the Meeting to ensure that they all have reports to give when called upon during the meeting. The prospective Member will notice that the Club is active and doing things!
- Communicate with Club Service Director/Programme Director before meeting to ensure that there is an interesting guest speaker for the night.

Club Programme Director

- The role of the Club Service Director and or the Programme Director is critical in making sure that the prospective Members first experience is an enjoyable one and that they will want to come back.
- The Club Service Director/Programme Director needs to ensure that they do have interesting speakers arranged for the next few weeks ahead.

Sergeant

- The primary role of the Sergeant is to ensure that the meeting room has been set up prior to the meeting; they also have the responsibility of the meeting starting on time and finishing on time.
- The Sergeant liaises with the Club President during the meeting to help keep the meeting flowing and running on time.
- The Sergeant usually conducts a “Fines Session” it is not necessary to hold a “fines session” every week. If a fines session is held it can be for happy fines or good story fines, they should never be personal or used to “score points” against a fellow Member. They need to be sharp, short and not be drawn out affairs.
- It is not necessary for the Sergeant to tell jokes or stories in the Sergeants session.

The prospective Member may never have experienced a Sergeant session before; prospective Members have been turned away from Rotary because of the Sergeants
session. Sergeants need to err on the side of caution, be aware that some people are more sensitive than others.
If the Sergeants feel that they must tell jokes, they need to ask themselves “would they tell the joke to their daughters, sons or grandchildren”, if they wouldn’t, don’t tell it!

Club Membership Coordinators

- Communicate with the Mentors responsible for the prospective Members during the week prior to the Club meeting to ensure that the prospective Members will be attending the Club meeting and that they will be there early to welcome them when they arrive.

FINALLY!

Keep on repeating this programme to recruit more Members!

The BEYOND 2000 programme was developed in District 9710 by PDG Noel Trevaskis & PDG Grahame Jones

Third edition April 2008

(BEYOND 2000 has been adopted by Clubs and Districts outside of District 9710 and is known as TWO UP in some Districts)
BEYOND 2000 MEMBERSHIP DRIVE
Rotary Club of Batlow 05/06

The Rotary Club of Batlow (the only service club in a town of 1300 in the foothills of the Snowy Mountains) had nothing to lose and everything to gain from an increase in membership; as our membership had dropped to eleven members. The Board made a decision to give the “BEYOND 2000” membership method a try, three members made a personal commitment to keep the program alive throughout the year. That was crucial to our success.

When we started the programme we identified a large number of people as potential members, this initial group of potential new members was trimmed back to 30 people. All members of the Club were given more than one opportunity to “vet” the invitation list. It was stressed that once the people had been invited (using the Prospective Membership Kit as suggested by District) no-one could refuse their application for membership. Everyone agreed and the kits were mailed out.

By the end of the Rotary year we had 19 members in our Club and in this new Rotary year we have inducted another two members with three more to be inducted soon.

The results for us as a Club have been exciting, it shows what can happen when all the members of a Club get involved in Membership, the BEYOND 2000 method was the catalyst for us in obtaining new members, and does it work? The results speak for themselves!

The increase in membership has been a great thing for our Club. It has not only provided us with extra people to carry the responsibilities of the various arms of service, but has re-ignited the spark of enthusiasm in longer-term members.

(Footnote: The Rotary Club of Batlow now has a membership of 25 Members)
# BEYOND 2000

## Membership Development District 9710

### Team Coordinators Worksheet

<table>
<thead>
<tr>
<th>Team Members:</th>
<th>Team Number:</th>
<th>Classification/s</th>
<th>Commencement Date</th>
</tr>
</thead>
</table>

**Prospective Member Details:**

- Name
- Address
- Phone
- Business Details

- Date Information Posted
- Attendance Dates
- Induction Date

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Team Member
Team Number
Classification/s
Commencement Date

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Name
Address
Phone
Business Details:

Date Information Posted
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Induction Date

________________________________________________________________________

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Name
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Phone
Business Details:

Date Information Posted
Attendance Dates
Induction Date

________________________________________________________________________
BEYOND 2000

Membership Development District 9710
Team Guide Lines

Date ............

Team Number

......

• The classification you are seeking to fulfil is ...............................

• Your ‘research’ will produce what you consider to be the very best available in this classification within the Club area.

• In the weeks prior to induction, the cost of meals is met by the Club not by you.

• You do not approach the prospective member, but simply make the details of the person available to the Membership Team Coordinators.

• Current experience has shown that almost without exception, it is no longer possible to ‘walk’ into the place of business and successfully engage in conversation with an invitation to the individual to visit the Club. Presentation now requires a professional information package with a letter of invitation from the Club President, including Rotary Information.

• If from your ‘research’ it is possible to secure a private address, all the better, as the presentation package ‘at home’ is possibly of greater advantage than in the office, especially if it is a large organisation.

• Having secured your prospective member, the next vitally important step for you both is to meet, greet and look after the prospective new member, to become their mentor. In the lead up to induction, and then in the weeks that follow, provide friendship and education for the new member in the ways of Rotary!

Rotary Basics is a new publication by RI, the best ever, and is included in the Professional Package folder, allowing the prospective new member to gain a true understanding of what we are about, our history and what we do, also included with this brochure is a copy of Rotary Down Under, and an outline of the Club and of course the letter of invitation from the President.

This method of finding new members can be used on an ongoing basis; it involves every member in the Club in gaining new members.

Regards,
Noel Trevaskis.
Classification guidelines for Clubs:

Abattoirs, Accommodation establishments motels, hotels, B&B’s, Accountants and Auditors, Agricultural Services and providers, Agronomists, Alternative health services eg, acupuncturists, chiropractors, herbalists, hypnotherapy, masseurs, meditation, naturopath, osteopaths, etc, Ambulance officers, Animal welfare organisations, Antennae services, Antique dealers, Architects, Art gallery operators, Artists - commercial, Auctioneers, Auto detailers, Auto electricians, Auto wreckers, Auto mechanics.

Baby health centre, Back hoe operators, Bakers and Pastry cooks, Bankers lending, borrowing, commercial and business, Barbers, Beauticians and beauty salon operators, Bed and Breakfast operators, Beef cattle farmers, Blacksmith or Farriers, Animal boarding, Book sellers new and second hand, Brake and clutch centres, Builders – contractors, excavations, maintenance, bricklayers, carpenters, tilers, plumbers, electricians, Business agents and consultants, Business brokers, Butchers, Buyers – wool, livestock.

Cabinet makers, Caff owners, Cake and pastry shops, Calligraphy, Camera store owners, Caravan park owners, Camping equipment suppliers, Car accessories suppliers, Car dealers – new and second hand, Car detailing, Car electrical services, Car rental services, Car windscreen repairs, Car wreckers, Carpet suppliers, Carpet cleaners, Caterers, Cattle handling equipment, Cattle transport, Celebrants – marriage, Chain saw equipment and repairs, Chemists, Child care centres, Children’s wear, Civil engineers, Cleaning services – domestic, retail, carpets, Clergy and religious orders, Clothing stores, Clubs – Workers, RSL, Golf Bowls, Community advisory services, Community health centres, Computer suppliers, Computer services, Concreters, Concrete contractors and suppliers, Concrete kerb and guttering, Conveyancers, Cordial and drink suppliers, Cosmetics and cosmeticians, Credit unions, Curtain manufacturing.

Defence personnel, Delicatessens, Dentists, Dental technicians, Department stores, Desktop publishers, Diesel engineers, Dieticians, Discount stores, Disposal stores, Dog boarding, Doors and door fitting, Drafting services, Drainers, Dressmakers, Dress materials, Driving schools, Drug and alcohol counsellors, Dry cleaners.


Farm and agricultural advisory services, Farm contract services, Farm equipment supplies, Farmers, Fencing contractors, Fertiliser spreaders, Financial planners, Fire brigade, First aid suppliers, Floor covering layers, Floor sanding and polishers, Florists, Flying school, Food and general stores, Footwear – retail, repairs, wholesale, Freight operators, Fruit and vegetable suppliers, Fuel merchants, Funeral service, Furniture retailing new and second hand, Furniture removals.

Garage builders and pre-fabricators, Garden equipment and supplies, Gardeners, Gas appliances and equipment, Gas industrial and or medical, Gift shops, Glass merchants and glaziers, Glass tinting, Golf professional, Graziers – beef, sheep, goats, horses, Grocers, Guest houses, Guns and ammunition, Gymnasiums.
Haberdashery, Hairdressers, Hardware stores, Health food, Health support, Hearing consultants, Heating providores, Hire operators, Hobby shops, Home maintenance, Horse breeders, Horse transport, Horticulturalist, Hospital services, Hotel and Motel owners and managers, Ice creameries, Hydraulic equipment and supplies.

Importers, Information services, Insurance Agents, Insurance brokers, Insurance life, Insurance motor vehicle, Internet services, Investment services, IT suppliers, Irrigation and reticulation.

Jewellers, Joinery, Journalists.

Kerb and guttering, Kindergartens, Kitchen suppliers.


Machinery – general, Manchester retail, Management consultants, Manufacturing, Marriage counsellors, Masseurs, Mechanical engineers, Medical agents, Menswear, Milk vendors, Monumental masons, Mortgage brokers, Motor engineers and repairers, Motor radiator services, Motor service stations, Motor vehicle inspection and testing, Motor vehicle leasing, Motor wreckers, Muffler and exhaust suppliers, Museums, Mushroom growers, Music arrangers and composers, Music teachers, Musicians.

Naturopaths, Newsagents, Nightwatchmen, Nurseries – child care, Nurseries plants – wholesale, retail, Nurses, Nursing services, Nursing homes, Nutritionists.

Obstetricians, Occupational Health and Safety, Office and business systems, Office cleaning, Office supplies, Olive growers, Opportunity shops, Optometrists, Optical suppliers, Orchardists, Offices of local, state and federal government, Orthotists, Osteopaths, Ostrich Farmers, Outdoor activities and supplies.

Paint retail, Painters, Paint manufacture and supply, Panel beaters, Parachuting instructors, Parcel delivery, Parks gardens and reserves, Party supplies, Pathologists, Pathology laboratory, Pawnbrokers, Pay television services, Perfumes and toiletries, Personal trainers, Personal coaches, Pest control, Pet care services, Pet shops, Pet shop supplies, Petrol pumps and marketing equipment, Petrol service stations, Petroleum products, Pharmacists, Photographers, Photocopier services, Photographic equipment and supplies, Physiotherapists, Piano teachers, Picture framers and supplies, Picture theatres, Pig breeders, Pizza shop, Plan printing equipment and supplies, Plant producers, plasterers, Plumbers and gasfitters, Plumbers supplies, Podiatrists, Political consultants, Pool shops, Post office, Potteries, Poultry farmers, Poultry retail, Powder coating equipment and servicing, Power tools retail and repairs, Prefabricated buildings, Pre-schools, Primary schools, Printers, Private investigators, Programmers, Property consultants, Property valuers, Property management, Property finance, Psychiatrists, Psychologists, Psychotherapists, Public relations consultants, Publicity services, Publishers, Pump repairers.

Quarry operators.
Racecourse, Radio communication and services, Radio stations, Radiographers, Radiologists,
Radios and stereos automotive, Railway construction, Rail services, Real estate agents, Recycling
services, Refrigeration – retail and servicing, Refrigeration commercial, Rental services – vehicle,
caravans, party equipment, indoor plant hire, Restaurants, Retirement home administrators, Road
contractors, Road or line marking, Road transport, Road transport equipment, Roof construction,
Roller door supply and fitting, Roof trusses and wall frames, Rubbish removal, Rural consultants.

Saddlers, Safety consultants, Sales tax consultants, Saleyards, Salvage and recovery towing, Sand
soil and gravel – retail and wholesale, Sandwich shops, Satellite equipment and supplies, Saw
Millers, School supplies, Scrap metal merchants, Screen printers, Second hand dealers,
Secretaries, Security companies and providers, Septic tank cleaning services, Sewage and waste
water treatment, Sewing and dressmaking, Sewing machines, Shearers, Shearing contractors,
Sheds – Rural and industrial, Sheep graziers, Sheep classers, Sheet metal workers, Sheltered
workshops, Storage centres, Shire councils, Shop and office fitting, Shopping centres, Shower
screen manufacturers, Sign writers, Skin treatment, Slashing contractors, Small business – corner
stores, Soft drink manufacturers and distributors, Soil testing and advising, Solar energy
equipment, Solicitors, Speech pathologists, Sporting goods, Sports centres, Spray painters,
Squash courts, Stained glass and lead lighting, Stamp dealers, Stationery – retail, commercial,
manufacturing and wholesale, Steel fabricators and manufacturing, Steel scrap, Stock feeds,
Stock and station agents, Stone masons, Storage – cold, general, Structural engineers, Stud
breeders – sheep and cattle, Suit hire, Supermarkets and grocery stores, Surveyors, Swimming
schools and coaches.

Tailors, Take away food outlets, Tanks and equipment, Taxation consultants, Taxi cabs, Taxi
trucks, Teachers, Technical colleges and trade training centres, Television antennae services,
Television repairs and service, Television retailers, Television stations, Tennis coaches, Textile
mills, Theatres and cinemas, Tile layers – wall and floor, Tiles roofing, Timber – trade or retail,
Tip truck operators, Tobacconists, Tool suppliers, Tourism officer, Tourism Information services,
Tow truck operators, Towing services, Toys retail, Tractor dealers, Traffic engineers, Trailers and
equipment, Transmission specialists, Transport service and operators, Travel agents and
consultants, Tree consultants, Tree surgeons, Trenching contractors, Trophy suppliers,
Typesetters, Tyres – retail, repairers.

University and Academy staff, Upholsterers.

Valuers Real Estate, Variety stores, Vegetable growers, Vehicle testing and inspection,
Veterinarians, Video hire.

Waste reduction and disposal, Watchmakers, Water cartage, Waste merchants, Watchmen, Water
treatment and equipment, Waterproofing contractors, Wedding reception operators, Weed control
services, Weighbridge operators, Welders, Welding suppliers, Wheel alignment and balancing,
White ant exterminators, Wildlife rescue, Window tinting, Windows aluminium, Windscreens
and repairs, Wine or spirit merchants, Wineries or vineyards, Women’s wear, Wood merchants,
Wood turners, Wool brokers, Wool buyers, Wool classifiers, Wool processing, Word processing
services, Wreckers, Writers.

Youth counsellors. Youth workers.
Dear Sam,

Rotary is a well known organisation that you would have heard about either through friends and associates who are members of Rotary or from press coverage of our many humanitarian and Student projects at home and overseas.

At our meetings we have a guest speaker who is of interest to all of us, may we extend an invitation to you to join us at one of our meetings to engage in fellowship with like-minded Business and Professional people and enjoy dinner and the guest speaker?

Rotary International is an extraordinary organisation of 1.2 million members who belong to 32,000 Clubs in over 200 countries. Rotary International through its Clubs and Members have contributed to local communities and the international community through its wide ranging programmes and projects.

We meet on Tuesday evenings at the Uptown Sporting Club from 7.00pm to 9.00pm sharp. Would you please phone me on (02 0585 3409) during the next few days to let me know a date that is suitable for you to join us for dinner and also for us to enjoy your company?

Kind regards,

Mike Merry
President
Uptown Rotary Club Inc.