

# **Carolinas' PETS 2017: Membership Engagement, Growth & Development**

## ***How to Gain, Train and Retain OUR Members***

*(Total Time: 60 Minutes) (Final 12/09/15)*

### **Discussion Leader Notes**

- ***Smile! Plan your “engagement” plan! (Note: This session has an IMPORTANT “Best Practices Grid and other Handouts/Reference Documents)***
- ***Pre-arrange the location of your BLANK flip chart***
- ***Introduce yourself to the group and explain your role as the facilitator of their discussion; you may wish to greet each participant individually as they enter and find a seat***
- ***Discuss your expectations and group guidelines (such as taking turns speaking, welcoming and accepting all questions/comments, and asking the group to turn off all cell phones)***
- ***Review the session’s learning objectives with the participants (see below and also your notes)***
- ***Encourage participants to take notes; try to gauge the participants’ knowledge and Rotary experience and adjust the facilitated discussions accordingly***

## **Session Opening**

### **Learning Objectives (This is ALSO HANDOUT #1)**

*At the end of this session, participants will be able to:*

- 1. Identify strategies to engage and communicate with existing members and attract new members on a continuing basis.**
- 2. Share proven ideas/ways for communicating with and engaging potential, new, and current members.**
- 3. Develop a written club membership PLAN and appoint a membership chair. Engage ALL members in “membership” activities.**
- 4. Understand the vital roles that member engagement and member education (i.e., continuing member education) play in member retention and club enthusiasm (aka morale).**
- 5. Identify the “best practices” of successful clubs.**

**ALSO, specifically point out the “Best Practices” GRID for this session. A copy follows NEXT; it is also HANDOUT #2**

# **SHARE YOUR BEST PRACTICES**

(HANDOUT #2)

|                                  |                                    |
|----------------------------------|------------------------------------|
| <b><u>Attracting Members</u></b> | <b><u>Educating Members</u></b>    |
| <b><u>Engaging Members</u></b>   | <b><u>Prospective Members</u></b>  |
| <b><u>Retaining Members</u></b>  | <b><u>Exit Interviews</u></b>      |
| <b><u>Diversity</u></b>          | <b><u>Sponsoring New Clubs</u></b> |
| <b><u>Innovation</u></b>         |                                    |

## **Membership Development Section**

(Beginning of Session)

Discussion Leader: Opening (“Just to get you thinking . . .”)

- **As your club’s President, WHAT is YOUR ROLE in membership development?** (*Listen For: Lead by example by attracting new members*)
- **Is your club:**
  - A. Growing and retaining members?
  - B. Maintaining its membership (*not growing but not losing members*)?
  - C. Losing members?
- **Is your club:**
  - A. *Excited* about its future?
  - B. *Complacent* about its future?
  - C. *Concerned* about its future?
  - D. *Really worried* about its future?
- **Does your club have a specific approach to BOTH membership *development* AND membership *retention*?** (Hint: Look for ideas in this Carolinas’ PETS session)
- **Does your club have a specific action plan for member education and maintaining interest in your Rotary Club *and* in Rotary International?** (Hint: Capture ideas in this Carolinas’ PETS session)

**Membership Development** (12-14 Minutes) (Move briskly)

### **Introduction To Membership Development**

**Q. From the perspective of attracting members, WHO are potential members?**

**Potential Answers**

- Business and/or Community leaders
- Young professionals
- Diversity opportunities (women, minority groups, retirees)
- \_\_\_\_\_

**Emphasis Point: How about our *existing* members? Have you ever thought about it that way?**

**Now, hold this thought for a few minutes!**

**Q. What are the obstacles that we face to bring in member?**

***DL/Facilitator Comment:* As we work through this session, let's continue to think about **FOCUSING ON OUR MEMBERS, with CURRENT members FIRST**; then, we'll look at some very successful ways of attracting (NOT JUST SIMPLY "RECRUITING") new-members.**

**Q. How do your members "feel" about your club? When was the last time your club conducted a membership satisfaction survey? (Hint: another "Best Practice"; regular membership satisfaction surveys yield VITAL information about the climate and "feel" of your club) (See link in reference section)**

**Q. Does your club conduct member exit surveys? (Hint: This is yet another "Best Practice")**

**Q. Is it important for your existing members to KNOW the value of membership *and* the benefits of membership? Does your club give them reasons to STAY?**

**DL/Facilitator remarks to further engage your group:**

**Strategically, YOU, as the leader of your club, SHOULD know the BENEFITS of being a Rotarian (HANDOUT # 3)**

**DL: (Potential Group Exercise) Ask the attendees in the room for their responses. In particular, let's be sure that these *benefits* come up:**

- *YOU give service to others*
- *YOU create new networks and connections*
- *YOU grow personally THROUGH the sharing and learning of leadership skills*
- *YOU gain friendships and regular fellowship*
- *YOU can participate in Rotary Fellowships (more than 70 available)*
- *YOU receive many outstanding programs from high-impact speakers*
- *YOU mentor youth and others*
- *YOU receive recognition through awards (see link in references)*
- *Rotary Rewards Program (See Rotary link in References)*

**DL: New topic follows:**

**Q. What makes a Rotary Club *attractive*?**

**Attractive Rotary Clubs are those where:**

- **ALL members play a role (they are “engaged”)**
- **The club emphasis is on strengthening the club**
- **Members know and articulate the value/benefits of membership**

- **Member satisfaction is HIGH (morale is excellent)**
  - **High member satisfaction = people who WANT to join!**
- **The club is relevant. This means that:**
  - **the projects serve where the club member's interests are**
  - **the diversity of the club matches the demographics of the area where it meets.**
  - **The meeting location meets the needs and desires of the membership**
  - **The meeting day and time continues to meet the desires of the current and potential new members.**
    - ***Possible Satellite Club opportunity?***
    - ***E-Clubs***
    - ***Flexible meeting times***
    - ***All service meetings***

**Q. ASK participants to raise their hands IF their club offers the following types of training to their members? (You may wish to tally the results). Alert your group that these ARE some of the “Best Practices” we are continuing to identify throughout this session! BE SURE THAT YOU GET THESE:**

- **New member orientation (formal)**
- **Leadership development program (formal)**
- **Mentoring program**
- **Support from a Club Trainer**
- **Annual Member Involvement Appraisal (Survey)**
- **Rotary Leadership Institute (RLI)**

## **Key Points (Cover these; this is also HANDOUT # 4)**

### **EFFECTIVE Club Membership Development**

- **A club can't exist/grow without a stable AND engaged AND committed membership**
- **A solid membership base can increase the club's service, fellowship, and community visibility**
- **Membership "development/engagement" is an ongoing *process* that requires leadership and emphasis**
- **Membership development includes:**
  - **Attraction/Recruitment**
  - **Retention**
  - **Education**
  - **Engagement (of all members)**
  - **Organizing new clubs – includes Satellite clubs, Interact & Rotaract clubs, new Rotary clubs**
  - **Engaging Alumni Connections**
    - **Interact**
    - **Rotaract**
    - **Rotary Youth Exchange**
    - **RYLA**
    - **Rotary Peace Fellows**
    - **Rotary Scholarships & Ambassadorial Scholarships**
    - **Vocational Training Teams / GSE teams**
    - **Rotary Volunteers (Rotary Community Corps)**
- **KEY POINTS: An active, vibrant *Club Membership Committee* and a *Club Trainer* can greatly assist you and your club in achieving its goals!**



**Q. What are your club's membership development goals for the year? (Hint: We're not just talking about "new" members or club growth!) TWO goals are important here:**

- A. Retention Rate***
- B. New members***

**Q. Who will you work with to carry out your club's membership goals?**

**Talking Points (Look for these ideas!)**

- **A club membership committee can greatly assist your club**
- **The membership committee is the primary resource for achieving the club's membership/engagement goals**
- **The committee develops, implements, and follows-up on an action plan for retaining, engaging, educating, and attracting club members**
- **The club Membership Committee: A "Best Practice"!**

**Q. How will you assess your club's current membership situation?**

**Key Points (Refer to your HANDOUT # 5)**

- ***To assess club membership needs, club presidents can:***
  - ***Conduct an Annual Member Involvement Appraisal \*\****
  - ***Review the five-year membership profile of the club available through Club Central***

- **Complete a classification survey and membership diversity assessment early in the year to ensure that the club is reflective of the community \*\***
- **Network with other growing clubs in your district; the district governor and assistant governors can assist here**
- **Visit <https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership> for membership resources**

**\*\* See Club Assessment Tools in Handout #7**

## **Retention & Engagement** (8-10 Minutes)

**Q. What “Best Practices” does your club use to retain new members?**

**Talking Points (Look for these ideas):**

- ***Conducts a thorough new member orientation program to inform and educate new members***
- ***Assigns a mentor to each new member***
- ***Learns the new member’s interest and then involves new members quickly in committees, activities, and projects***
- ***Holds relevant and interesting programs***
- ***Features new members at regular meetings to get them involved (and noticed)***
- ***Involves all members in committee and projects; club offers a variety of projects aligned with club member and community needs***
- ***Ensures the club is relevant to all members***
- ***Conducts regular club assemblies to keep members better informed***
- ***Improves leadership skills by conducting a leadership development program***
- ***Budgets for and sends new members to Session 1 of Rotary Leadership Institute***

**Q. Why do existing members *leave* Rotary clubs?**

**Talking Points (Look for these ideas):**

- ***Lack of fellowship and involvement (they “weren’t connected”)***

- *Competing time commitments with family and work (did we suggest another area club that better met their needs?)*
- *Could we have scared them off with an implied need for perfect attendance?*
- *Expenses associated with Rotary club membership*
- *Poorly structured meetings*
- *Lack of service projects and programs that interest members and that relate to community needs*
- *Unavoidable circumstances such as relocation/job change*

## **Attracting New Members** (7-8 minutes)

### **Q. Why is it important to attract new members?**

Talking Points (Look for these ideas)

- *Having more Rotary club members increases the capacity for service*
- *New Rotarians bring: fresh ideas, new interests, increased energy*
- *Club membership that reflects the professional diversity of the community makes your club more attractive to the community*
- *New members can assume leadership roles within the club*
- *New members provide for the long-term continuity of clubs and of RI*

### **Potential Group Activity**

### **Q. What are some of YOUR club's "Best Practices" to ATTRACT new members?**

**Discussion Leader Notes (Allow 4-5 Minutes)**

- 1. Have participants work in pairs (or small groups)**
- 2. Use the "Best Practices Grid" to stimulate thinking**
- 3. IF TIME PERMITS, list the responses on your blank flip chart**

## ***New Section Follows:***

### **DL Note: NEW SECTION: Rotary Education (7-8 Minutes)**

**Q Why is it important to make Rotary education a HIGH priority within your club?**

#### **Key Points (Refer to your handout #6)**

- ***Education about Rotary***
  - ***Keeps members involved***
  - ***Increases retention***
  - ***Keeps members aware of Rotary activities worldwide***
  - ***Creates motivation and enthusiasm***
  
- ***Education is important for those in all stages of Rotary club membership, including***
  - ***Prospective members***
  - ***New members***
  - ***Current members***
  - ***Tenured members***
  
- ***Club Assemblies are VERY effective for member education/engagement***
- ***Rotary Leadership Institute: proven to significantly increase member retention*** (<http://rlnews.blogspot.com/2015/10/study-links-rli-to-26-increase-rotary.html>)

**Q. How can you and your club educate or inform prospective members about Rotary?**

***Talking Points (Look for these ideas)***

- ***Prospective members should be informed of the basics of Rotary, your club's history, traditions, projects/activities, and of new member expectations***

- *Potential members should be provided (in advance) with realistic expectations about the benefits and obligations of membership*
- *Encourage prospective members to review the many publications available from RI and to visit your club's, district, and RI websites*
- *Have new members sign up for relevant-to-them Rotary newsletters at [www.Rotary.org/newsletters](http://www.Rotary.org/newsletters). They should at least sign-up for the weekly newsletter. Also, get new members to attend at least session 1 of Rotary Leadership Institute (RLI) (<http://rlinews.blogspot.com/>). REMINDER: Rotary Leadership Institute has proven to retain members at almost 25 more basis points*

## **Q. Why is it important to educate current members?**

Talking Points (Look for these ideas)

- *Knowledgeable members can become immediately involved in club activities and possess a sense of belonging to the club*
- *Informed members will be more successful at attracting new members by sharing enthusiasm about Rotary*
- *Informed members can lead new initiatives and generate creative ideas*
- *Knowledgeable members are likely to be MORE engaged members*

## **Q. What resources are available to help you and your club?**

- *District governor and assistant governor*
- *Past district governors*
- *District membership development committee*
- *District membership development seminar*
- *Other Rotary clubs*
- *Regional Rotary International membership coordinator (aka Rotary Coordinator) and Membership at Rotary.org*

**DL: IF TIME PERMITS**, mention the following ROTARY INFORMATION club resources; refer the group to the Rotary International website. You have it as HANDOUT #7:

- *Chapter 4 of the Lead Your Club: President 2016-19 Edition*
- *Rotary Club Central*
- *Get More Out Of Membership: Connect For Good*  
(<https://www.rotary.org/myrotary/en/document/connect-good>)
- *Strengthening Your Membership: Creating Your Membership Development Plan*  
(<https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan>)
- *Lead Your Club: Membership Committee Manual 2016-19 Edition*  
(<https://www.rotary.org/myrotary/en/document/lead-your-club-membership-committee>)
- *Club Assessment Tools*  
<https://www.rotary.org/myrotary/en/document/club-assessment-tools>
- *Membership section of MyRotary*  
(<https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership>)
- *New Member Orientation: A How-to Guide for Clubs*  
<https://www.rotary.org/myrotary/en/document/new-member-orientation-how-guide-clubs>
- *Rotary Basics (such as the ABC's of Rotary)*  
<http://shop.rotary.org/Membership-Development-Shop-by-Category/b/2314901011?ie=UTF8&title=Membership+Development>
- *Rotary Awards: <https://www.rotary.org/myrotary/en/learning-reference/learn-topic/awards>*
- *Rotary Rewards Program: <https://www.rotary.org/myrotary/en/member-center/rotary-global-rewards>*
- *Newsletters: <http://www.Rotary.org/newsletters>*

***(End of Session)***

**As we wrap-up this session, much of what we discussed today needs some advanced planning. Please turn to HANDOUT # 8 to see 5 Things You Can Do Now!**

1. *Make your meetings dynamic and inviting.*
2. *Give members that chance to use their knowledge and expertise, or learn new skills, by providing interesting and challenging assignments.*

- 3. *Provide flexible meeting times. Maybe even consider starting a Satellite club.***
- 4. *Plan family-friendly/involved events***
- 5. *Invite young professionals to experience Rotary by including them in your club's projects and social events.***

## **Review**

- Review the Learning Objectives to ensure that all topics were covered sufficiently. Answer any questions and let the participants know how to contact you if they have questions later (Your contact information is on the Carolinas' PETS website and in the PETS 2016 Program)
  - *1. Identify strategies to engage existing members and attract new members on a continuing basis.*
  - *2. Share proven ideas/ways for communicating with and engaging potential, new, and current members.*
  - *3. Collaborate with peers (here at PETS and at your club) on membership plans throughout the year.*
  - *4. Understand the vital roles that member engagement and member education (i.e., continuing member education) play in member retention and club enthusiasm (aka morale).*
  - *5. Identify the “best practices” of successful clubs.*
  
- Ask participants to share something that they learned during the session and an action they will take as a result of this session. REINFORCE the “Best Practices” Grid. Participants can share with the person next to them or with the entire group.
  
- **THANK THE GROUP**



**MEMBERSHIP ENGAGEMENT, GROWTH**

**&**

**DEVELOPMENT**

**HANDOUTS**

**&**

**ROTARY REFERENCES**

# **Carolinas' PETS 2016**

## **Membership Engagement, Growth & Development Handout #1**

**Reference: Lead Your Club, 222 EN–(315), Chapter 4**

### **Learning Objectives**

***At the end of this session, participants will be able to:***

- 1. Identify strategies to engage existing members and attract new members on a continuing basis.***
- 2. Share proven ideas/ways for communicating with and engaging potential, new, and current members.***
- 3. Collaborate with peers (here at PETS and at your club) on membership plans throughout the year.***
- 4. Understand the vital roles that member engagement and member education (i.e., continuing member education) play in member retention and club enthusiasm (aka morale).***
- 5. Identify the “best practices” of successful clubs.***

# Carolinas' PETS 2016

## *Membership Engagement, Growth & Development* **Handout #2 - SHARE YOUR BEST PRACTICES**

|                                  |                                    |
|----------------------------------|------------------------------------|
| <b><u>Attracting Members</u></b> | <b><u>Educating Members</u></b>    |
| <b><u>Engaging Members</u></b>   | <b><u>Prospective Members</u></b>  |
| <b><u>Retaining Members</u></b>  | <b><u>Exit Interviews</u></b>      |
| <b><u>Diversity</u></b>          | <b><u>Sponsoring New Clubs</u></b> |
| <b><u>Innovation</u></b>         |                                    |

## **Carolinas' PETS 2016**

### **Membership Engagement, Growth & Development Handout #3**

#### ***The Benefits of Being a Member of Rotary!***

- **Giving of service to others**
  - **Rotary Action Groups**
- **Creating new networks and connections**
- **Personal growth via the sharing and learning of leadership skills**
- **Sharing of fellowship**
- **Participating in Rotary Fellowships (more than 70 available)**
- **Hearing outstanding programs from high-impact speakers**
- **Mentoring youth**
- **Recognition through awards**  
(<https://www.rotary.org/myrotary/en/learning-reference/learn-topic/awards>)
- **Rotary Rewards** (<https://www.rotary.org/myrotary/en/member-center/rotary-global-rewards>)

# **Carolinas' PETS 2016**

## **Handout #4: Effective Club Membership Development**

- **A club can't exist/grow without a stable AND engaged and committed membership**
- **A solid membership base can increase the club's service, fellowship, and community visibility**
- **Membership "development/engagement" is an ongoing process that requires leadership and emphasis**
- **Membership development includes:**
  - **Attraction/Recruitment**
  - **Retention**
  - **Education**
  - **Engagement (of all members)**
  - **Organizing new clubs – includes Satellite clubs, Interact & Rotaract clubs, new Rotary clubs**
  - **Engaging Alumni Connections**
    - **Interact**
    - **Rotaract**
    - **Rotary Youth Exchange**
    - **RYLA**
    - **Rotary Peace Fellows**
    - **Rotary Scholarships & Ambassadorial Scholarships**
    - **Vocational Training Teams / GSE teams**
    - **Rotary Volunteers (Rotary Community Corps)**
- **KEY POINTS: A vibrant, active Club Membership Committee and a Club Trainer can greatly assist your club in achieving its goals!**

# **Carolinas' PETS 2016**

## **Handout #5:**

### **Assessing Your Club's Membership Needs:**

**To determine membership needs, club presidents can:**

- **Conduct an Annual Member Involvement Appraisal \*\***
- **Review the five-year membership profile of the club available through Club Central**
- **Complete a classification survey and membership diversity assessment early in the year to ensure that the club is reflective of the community \*\***
- **Network with other growing clubs in your district; the district governor and assistant governors can assist here**
- **Visit <https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership> for membership resources**

**\*\* See Club Assessment Tools in Handout #7**

# **Carolinas' PETS 2016**

## ***Membership Engagement, Growth & Development Handout #6***

### **Rotary Education**

- Education about Rotary
  - Keeps members involved
  - Increases retention
  - Keeps members aware of Rotary activities worldwide
  - Creates motivation and enthusiasm
  
- Education is important for those in all stages of Rotary club membership, including
  - Prospective members
  - New members
  - Current members
  
- Club Assemblies are VERY effective for member education/engagement
  
- Rotary Leadership Institute: proven to significantly increase member retention  
(<http://rlinews.blogspot.com/2015/10/study-links-rli-to-26-increase-rotary.html>)

## Carolinas' PETS 2016

### **Membership Engagement, Growth & Development Handout #7 - Resources & References**

- The following are suggested informational club resources; they are valuable tools and come from the Rotary International website:
  - **Chapter 4 of the Lead Your Club: President 2016-19 Edition**
  - **Rotary Club Central**
  - **Get More Out Of Membership: Connect For Good**  
<https://www.rotary.org/myrotary/en/document/connect-good>
  - **Strengthening Your Membership: Creating Your Membership Development Plan**  
<https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan>
  - **Lead Your Club: Membership Committee Manual 2016-19 Edition**  
<https://www.rotary.org/myrotary/en/document/lead-your-club-membership-committee>
  - **Club Assessment Tools**  
<https://www.rotary.org/myrotary/en/document/club-assessment-tools>
  - **Membership section of MyRotary**  
<https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership>
  - **New Member Orientation: A How-to Guide for Clubs**  
<https://www.rotary.org/myrotary/en/document/new-member-orientation-how-guide-clubs>
  - **Rotary Basics (such as the ABC's of Rotary)**  
<http://shop.rotary.org/Membership-Development-Shop-by-Category/b/2314901011?ie=UTF8&title=Membership+Development>
  - **Rotary Awards:** <https://www.rotary.org/myrotary/en/learning-reference/learn-topic/awards>
  - **Rotary Rewards Program:**  
<https://www.rotary.org/myrotary/en/member-center/rotary-global-rewards>
  - **Newsletters:** <http://www.Rotary.org/newsletters>



## **Carolinas' PETS 2016**

### **Membership Engagement, Growth & Development Handout #8**

#### **5 Things You Can Do Now!**

- 1. Make your programs/meetings dynamic and inviting.***
- 2. Give members the chance to use their knowledge and expertise, or learn new skills, by providing interesting and challenging assignments.***
- 3. Consider providing flexible meeting times. Perhaps, even consider starting a Satellite club.***
- 4. Plan family-friendly/involved events.***
- 5. Invite young professionals to experience Rotary by including them in your club's projects and social events.***