

**Club Spring Team-Building Experience (CSTE-Zoom)**

**"Talking Points & Results"**

*Modified 2020-06-01*

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# Agenda

* There will be two CSTE sessions, Saturday 16 May (for clubs in the U.S.A.) and Saturday 23 May (clubs in Canada)
* The program for each event will be...
  + ~9:30-9:55 am: ALL meet at the "Home" room (single large Zoom meeting)
  + 9:55-10:00: Log out & go to first Breakout (all links at [rotary5060.org](http://rotary5060.org/))
  + 10:00-10:55: Breakout Session (1)
  + 10:55-11:00: Log out & go to second breakout
  + 11:00-11:55: Breakout Session (2)
  + 11:55-12:15: Beverage & Bathroom break, then log in to "Home" room
  + 12:15-12:30: Everybody directed to Club Breakouts
  + 12:30-1:30: Club Planning Session: Plans for 2020-2021!

# Morning Breakouts:

* Each ~55 minute breakout session is intended to achieve the following goals:
  + Discuss key issues important for the session topic as related to running more effective Rotary clubs.
  + "Talking Points" are provided in this document to start conversations, but they are a guide only (up to you what is important to discuss!)
  + Develop "classmate" relations with others with similar interests or responsibilities from clubs in the same general area of the District.
  + Potentially develop a list of key "best practices" for the session topic.
  + To refine and grow the key "talking point" list for future discussions.
* There is a Zoom-Meeting Host (Facilitator) assigned to be the "Table Leader". The table leader role will be to:
  + Make sure the conversation stays reasonably on topic.
  + Make sure that all opinions are respected.
  + Make sure that all at the table participate as appropriate.
* Keep a record in the “Chat” box of your breakout meeting primarily of two things:
  + (a) "Best Practices" and actionable recommendations that can be shared with all clubs. These are short, simple, good ideas!
  + (b) Any changes (additions or deletions) to the "Table Talk" points for future meetings.
  + All of the above will be combined for all 4 CSTE sessions this spring and shared.
* Contact information is collected for all participants at registration (Name, Club, E-mail, breakouts). Recommended that you stay in contact throughout the year as a multi-club resource group for your breakout discussion area.
* Consider forming a WhatsApp group (really useful for quick sharing of questions, comments, successes, etc)

# Club Planning Session (12:30-13:30):

**Background:**

* The afternoon breakout session objective is to have CSTE participants gather by club and to begin addressing key priorities for the start of RY 2020-2021.
* The exercise needs to promote team building and transition of the incoming club leadership teams into a dynamic new Rotary Year. Metaphorically, we thought of a relay race and a passing of the baton.
* If there are individuals without other members of their club in attendance, they can join another club or remain in a plenary group to discuss the same topics with a G5 and T3 member.

**The Task:**

Move to the assigned breakout sessions by club and discuss what is needed in your club to move forward to a smooth transition for the 2020-2021 Rotary Year. We suggest a discussion of the following.

1. What are two or three key priorities, recognizing the implications and uncertainties associated with COVID-19, that the incoming club leadership team needs to have in place for a successful transition to the start of the new Rotary Year.
2. What specific actions are needed to address, effectively, those priorities in your club, including using ideas from the two breakout sessions this morning.

If you wish to share your ideas with other participants in the District, please send them to Ron Hooper ([ron.hooper.5060@gmail.com](mailto:ron.hooper.5060@gmail.com)) and we will post them along with the notes from the morning breakout sessions.

# (1) Leadership Sessions CSTE – May 16 and May 23, 2020

Host/Facilitator: Susan McIntyre (Rotary Club of Kelowna Sunrise)

## Questions to ponder:

1. How do you stay organized with people coming to ask for time on the agenda, special requests, getting their connections on the agenda, remembering when there is something special to acknowledge, etc.?
2. How do you make meetings engaging?
3. Every year the new Board needs to prepare for their new roles and understand where the existing Board is coming from. How have you helped this process?
4. What are the challenges with using ClubRunner, My Rotary, file sharing (i.e., Dropbox, Google Drive)?
5. How to engage people now and reduce attrition (Zoom meetings), new ways of engagement – what ideas have worked – agile ideas.
6. How would you like to change Rotary?

## Key Concepts:

* My business has been affected by COVID and our club’s ability to fundraise has been challenged. We are going to focus on service and use our time, expertise, connections, and knowledge to improve our community. People of Action – through service. May not be able to work side by side, but can support local businesses
* Contact past sponsors and ask what can we do to help? How can we support them? Rather than supporting the homeless
* Reinvigorate the image of Rotary – ask what is important, what do you need?
* Provide service – Women’s shelter – work parties, hands on – landscaping, fence painting
* Send letter of support to past sponsor – ask what can Rotary do for you?
* One club believes in adding value to their clientele (our membership). They are putting hands on people by having board members contact each member and asking a. how are you doing? and b. what can we help you with (financial, health?). Some need help and we are doing what we can – connecting people to local resources.
* Older members who may not have the technology and may need help with zoom. One club had a member with an extra camera. He dropped if off on the porch and then guided the other member through the installation process. Creating a Tech Team to visit members.
* New members plan and run a meeting (Acting President) as part of their duties to complete their passport. They have to plan the whole meeting, speaker, agenda and then physically run the meeting.
* Membership Monday on Facebook page: created an image, post new person every week. The person provides the standard information and a photo of themselves (with their kids, their dog). They talk about what they love about Rotary, why they are in Rotary and invite people to come to Rotary with them

**How to engage people now and reduce attrition (Zoom meetings), new ways of engagement – what ideas have worked – agile ideas**

* Must continue every aspect and every way possible to continue meetings (humour, respect, achievement)
* Hybrid meetings
* Engage members to donate money they would have spent on other things such as a charity that you have supported that you bring to speak at your meeting
* Zoom meetings enable working people to attend and still do work at their desks
* Zoom meetings: seeing people be Zoomed out. Daytime meetings seem harder to get attendance – better with morning or evening sessions
* Every Friday have a social distancing social on some driveway or by a pool with 6 people – emphasis on the fellowship
* Zoom has been great tool to bring people together to brainstorm
* Starting meeting early and letting people socialize for ½ hour before meeting and then ½ hour after meeting
* Keeping to traditional meeting format with guest speakers
* On-line trivia night as fundraiser and social event
* Bring on past exchange students
* Bring on partners for Global Grants – they can talk about the project and how things are going
* You can hear from more people through Zoom
* Some members have a much bigger job as a result of COVID-19 in running their businesses and cannot attend meetings. Keep in touch and make sure they know you are there to help them
* Holding regular socials via zoom. Should do with all clubs so everyone can interact
* Feel like on Zoom we sit at the same table – more equal
* Zoom make meetings more productive
* Can invite speakers from anywhere in the world – don’t be afraid to ask people
* Zoom has increased attendance. Provides access to snowbirds and people out of town for work – plan to have one Zoom meeting per month when face-to-face meetings return
* Had a reverse parade for local charity, showing the community our support for them
* We may switch to a virtual club as we are having a hard time finding a venue we can meet at. Have already been to 3 different places. But we have a social bond and like to meet at the pub and do things together
* Use Zoom Agenda to get decisions made – less chit chat
* Concern that Zoom does not retain Rotary Fellowship and friendship – which is why people join Rotary – scared all Zoom would lose more members
* Getting social contact by delivering Save-on Cards to members (fundraiser)
* The whole program (music, invocation, sergeant at arms, etc. The tech people record and put on YouTube. Normally 180-200 people attend. On Zoom, less than 100 coming.
* One club starts with dialogue or chit chat for the first ½ hour. 25-30 out of 55 show up for the meeting and a dozen show up early to talk to one another.
* Some members are sending dollars not spent on meals at meetings to Treasurer via e-transfer
* WhatsApp being used by virtual club to stay connected between meetings – chat with each other and no one is left out
* Some members are resistant to Zoom – have offered to go in (sanitizing) and help set them up – personal touch
* Held Birthday party in a local park – capped at 50 people and did not allow spouses. Kept people 6’ apart and everyone brought own food and beverages. Thinking of doing same for installation event. Negative no partners.
* Positive for some, negative for the senior crowd. Hold committee meetings via Zoom. Membership concern will lose members. Have to encourage them to stay and hang on.
* One member is looking after his wife so cannot attend meetings. We visit him
* Invite other clubs to hear speaker
* Shorten meeting to 45 minutes to 1 hour to reduce Zoom fatigue
* Held live cooking class with professional cook (wife of a member) and cooked with her
* Change up the program (ideas: tacky tourist, bad hair day, crazy shirt day, bring a pet to Rotary …)
* End on time – respect people who have to be at work
* Malcolm (Mac) Paterson – Penticton Sunrise has done presentations via Zoom to 6 nations – Also recommended by Salmon Arm who held joint meeting of all Salmon Arm, Revelstoke, and Chase clubs when Mac spoke
* Look at District Website for videos that can be used as programs
* Other new and exciting things: inductions via Zoom, joint club meetings with other clubs in your community – once a quarter get multiple clubs together to do initiatives, coordinate timing of fundraisers (so not asking the same businesses to donate to Rotary)
* Invite a member of another club to attend your meeting. At the end get them to say a few words. Get closer through Zoom
* “Never miss out on a good crisis – Winston Churchill”
* Some regulars never show up – intimidated by the technology. Take time to help them. Some do not have computer. We gave them a phone number and they can call – we cannot see them, but they can hear and speak.
* Holding Friday afternoon social. Everyone has a drink.
* TGIF Social held via Zoom
* Social fellowship via Zoom
* Should develop work parties to keep in contact with members
* Working parties via Zoom – i.e. man phones for a telethon
* Get new members to give you ideas on membership
* Need to engage members to keep them – support local businesses – joining local clubs
* Look within your club for local businesses to support – do our best to reach out and support them
* personally, call people for engagement. Emphasis on the areas of focus, and bring smaller groups of people such as 20 or less to meet at a café, do some community service, or plan an International project
* Penticton are using social distancing and delivering lunch to members
* We expect to lose 30-35 members and then need 40 new ones a year. How can they engage them early?
* Orientation used to set expectations and get feedback. The sponsor takes the person by the hand and invites them to socials, lunches and makes sure they get incorporated into the club
* Another club uses the red badge system to engage new members: they act as greeter, visit a Board meeting, have coffee with a Board member (etc.) before they get a new badge
* Another club has new members assigned to an older member as more than a buddy system. They have 8 things they must do together. The process is connecting and task oriented.
* One club is sending birthday cards in the mail to their members
* Using “You Rock” cards to send to members to appreciate them
* Inviting engaging speakers to the meetings
* Some record Zoom meetings and share with those that were not present
* One club has shifted the time of their regular meeting to an evening time period. They have covered different topics from pets, how to give haircut. They are seeing members who have not been coming to in-person meetings
* One person suggested using the TED talk format to cover Rotary material at a meeting
* Look for ways to engage – hands on project may be hard to do but schedule something to keep people connected
* One club invited past students to attend the meeting and that increased overall attendance as members wanted to reconnect
* One club uses Spotlight, a weekly publication to highlight their meetings
* One club has a work trailer full of tools and plans to get a hands-on project going ASAP. Work projects are a big draw and they want to set a goal
* One club has new members plan and run a meeting (Acting President) as part of their duties to complete their passport. They have to plan the whole meeting, speaker, agenda and then physically run the meeting.
* When asked, how do I quit Rotary, one member realized they needed to get this person involved before she decided to go. She took the person to a Scholarship dinner at a Rotarian’s home. This was what bonded the member and she has stayed and is a very active member

**What are the challenges with using ClubRunner, My Rotary, file sharing (i.e., Dropbox, Google Drive)?**

* Use Clubrunner email to create messages and time delay them to be sent out automatically
* Set up Committees and can email them
* Google Drive for Non-Profits: In Canada apply through TechSoup Canada to obtain proof/qualification for non-profit status. Then apply to Google for Non-Profits for account. 1 MB free storage and email addresses. They also provide free AdWords – this is another application process.

**Every year the new Board needs to prepare for their new roles and understand where the existing Board is coming from. How have you helped this process?**

* We often ask people to do jobs but do not tell them what is entailed. Had Interact student write job descriptions for all positions
* Use MyRotary to give direction and help to understand the role of the Board of Directors. Want those guidelines in advance to run meetings more efficiently
* Looking forward to doing strategic planning, addressing Mission, Vision and making a plan for the club
* Would like to have JD and roles as part of plan
* RI training on website or MyRotary
* One club has co-treasurers and co-secretary positions so there is backup
* The agenda is sent out to every person who will participate in the time period. President is the timekeeper. Sent out in advance with time allocated so everyone knows.
* Send an email to the speaker in advance so they know the format
* Board retreat on Zoom (agenda, budget, what are you responsible for, what do you need from me?)
* Reaching out is a team effort. People need to participate in spots (multiple times in roles on Board and/or President)
* Mentoring handbook available on District 5060 website: under download files (left side)

**How would you like to change Rotary?**

* Let more people know what we do – we do not brag enough
* In some communities, you cannot go a mile without a sign or some recognition
* Tell our stories
* New Aquatic center has huge Rotary wheel

## Resources:

Mentoring Manual: <https://portal.clubrunner.ca/50005> scroll down left to Download Files

Role of President: <https://my.rotary.org/en/learning-reference/learn-role/president>

TechSoup Canada: <https://www.techsoupcanada.ca/en>

# (2) Club Secretary Sessions

Host/Facilitator: Joyce Ericson (Rotary Club of Penticton Sunrise)

## Minimum suggested by RI

**(in the "Club Secretary's Manual" 229-en-512 and** **RI website:**  https://my.rotary.org/en/learning-reference/learn-role/secretary

*"As club secretary you help your club run smoothly and eﬀectively. You also monitor club trends to help identify strengths and areas for improvement, and share this*

*information with club and district leaders.*

***What you do***

*Maintain membership records: Update your club membership data. Your club invoice is*

*based on the number of members in Rotary's database for your club as of 1 July and 1*

*January. Rotary International sends the club invoice by email and mail. Save paper by opting*

*out of the paper (mailed) version.*

*Maintain minutes of club, board, and committee meetings*

*Work with incoming secretary to ensure smooth transition*

***How to prepare***

*Take online courses for club secretary in the Learning Center*

*Attend district training assembly*

*Work with outgoing secretary"*

*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\**

## Additional functions

* Assist and be a resource to the club president as needed
* Awareness of club bylaws and Rotary principles and guidelines
* Assist with end-of-year transition planning and details
* Assist with new-member orientation and welcoming
* Coordinate member transfers with other clubs
* Assist with annual meeting preparations, elections
* Provide agenda for meetings
* Assist with visual media for meetings
* Manage & prepare or ensure preparation of club newsletter
* Maintain club website (if not done by others)
* Purchase supplies as needed, such as new-member orientation items, pins and awards
* Maintain contact with district leadership and other local clubs
* Provide delegate credentials for conferences
* Attend district events

## Results from 16 May Club Secretary Sessions

On the Zoom meeting with me were Katie Atkinson (Wenatchee Confluence), Marty Blackson (Ellensburg Morning), Frank Clifton (Wenatchee), Carolyn Flory (Yakima), Aaron Haynes (Yakima Sunrise), Karin Kristjanson (East Wenatchee), Julie McCoy (Lake Chelan), Duane Monick (Yakima) and Ann Risvold (Upper Kittitas).

Aaron and Marty are new to the Secretary role but the remainder are well seasoned. There was a great exchange of ideas and best practices. It was a pleasure facilitating this session.

**Basic Practices**

* Value in having one individual serve in the role for at least two to three years (maintains continuity and provides assistance to new members on the Executive).
* Minutes of previous meeting, Treasurer and other reports, along with the agenda for the next Executive meeting are sent out with enough advance notice to ensure officers have time to read and prepare. ClubRunner app on phone has the ability to send text messages to some/all members advising of upcoming meetings.
* If by-laws need reviewing, form a sub-committee as Secretary doesn’t need to do all the work.
* Keep on top of membership. At some clubs, adding members is the job of the Membership Chair. One Secretary asks members yearly to provide updated phone/email information and then updates the information on ClubRunner.
* Register new members on Club Central first as this is where a membership number (new or archived) is given. From there, register on local ClubRunner site. Concern expressed by some that there is no clear idea of the way Club Central and ClubRunner connect. What is the relationship?
* New member information package could be given out by Membership Chair instead of the Secretary.
* Keep accurate records that are readily accessible. Consider digitizing old Executive and AGM minutes and storing on a USB. Perhaps a second USB copy could be given to another Executive member – “just in case”.
* Post meeting minutes (Executive and regular) in the “members” area of ClubRunner or club’s website.
* With advance permission given, recording club meetings (speakers) and Executive meetings can be used. This allows the Secretary time later to ensure all pertinent information is captured.
* Seek permission from guest speakers to post videos/recordings on club website/ClubRunner. One club has a You Tube account where these are downloaded.
* When possible, send out a weekly newsletter – this is a job that could be directed to a volunteer member.
* Ensure at least two (better if three or four) members are fluent in the use of ClubRunner or the club’s website.

**Reminders:**

* Duane is very knowledgeable about ClubRunner and can provide assistance to any Club Secretary – just have to ask!
* Not all members are tech savvy and know their way around the basics in ClubRunner so be patient and kind with them!

# (3) Club Treasurer

Host/Facilitator: Jordana LaPorte (Rotary Club of Lake Chelan)

1. The position can be a demanding (and sometime unappreciated) job, could Co Treasurers work and if so how would duties be split? Bottom line, a collaborative approach to fulfilling the needs of a treasurer for the club aid in club retention and willingness to take on the position.
2. Many Clubs have developed Worksheets, Records Timeline, and Flow Charts etc to better monitor and control flow of funds but we have no mechanism to share a lot of good ideas developed throughout the District, how can this be addressed?
3. How can we share expertise within Rotary or from other organizations (ie work experience) to develop best practices
4. Many Clubs are registered Societies able to provide charitable tax receipts but it is a fairly complicated task. The charitable status can be lost by issuing receipts outside CRA guidlines. Perhaps a district sponsored group could assist or take over this function?
5. Very small club Treasurers face the realization that no one else knows or understands the process.  That means a check and balance system that satisfies the Treasurer that everything is in order and a “mini-reporting” system that is quick to read and easy for others to understand.

1. Another stumbling block is when signing officers change – it’s easier to get a mortgage than it is to change signing authority at banks these days.  Easier to be treasurer forever. How do others handle this or how can it be done easier?
2. Today electronic Banking is common - e-payments requested by several suppliers – tedious to do when 2 signatures are required.  Often means using one’s personal account or credit card which results in writing club cheques to oneself – could get awkward and needs good record. How can this be handled effectively and still maintain duel control on cheques etc.
3. Budgeting can be challenging particularly for new Treasurers, often with minimal imput from others and documents to work with – others must have budget sheets/information that could be shared – minimal training seems to be available – how could this be better addressed?
4. Many step into this role without much (financial) experience. As a smaller club, often have not 'invested' in a program or know what has worked effectively in the District. Sharing a more streamlined way (program) to make it easier to do and pass on would be helpful. How could such a process be implement or even if coaches were available would be better. It is not a 'simple' job!
5. Managing funds – a major responsibility – how should Bank Reconciliations be best handled – ideally probably by someone other than the Treasurer but for most Clubs not practical but should independent monthly review be undertaken and how?
6. Financial Statements – most Clubs probably have independent Financial Statements prepared but changing Accounting Practices is making it very expensive – can or should this be handled internally and if so how?
7. Gaming is a facet that needs a lot of knowledge, online work and vigilance in reporting! And the rules are always changing with them! Would it not be better if we had a few with more in-depth knowledge to guide others – everyone cannot be expected to know everything – how could it be better shared?
8. The treasurer has to have a complete handle on the club budget and everything related to any monies as changes and issues do crop up. We can't be expected to 'just write a cheque" without significant back -up. (and budget referral). Effective processes are probably in place with other Clubs but no mechanism for sharing.
9. The Treasurer is up on how to get the certificate of liability insurance as they may not change as often as the secretary.
10. We have had a debit card for both our club account and our Foundation account to try to reduce the number of reimbursements.   That has had its own problem with people turning in the receipts so you know when the debit has hit the account what it is for.
11. Are there any Canadian instructions/guidance regarding GST (when to register, on which items to charge GST and on what expenses ITCs (Input Tax Credits) can be recovered? A resource person knowledgeable about GST/PST/State tax etc would be an improvement – probably need a separate person for each side of the border.
12. Treasurer’s Training – what is available besides the Learning Center (RI) and the Treasurers Manual – suggestions?

# (4) Membership

May 16th, 10am & 11am (US Clubs) May 23rd, 10am & 11am (Canadian Clubs)

Facilitator: Marjolein Lloyd, Rotary Club of Kelowna Sunrise

Chair, Strategic Assistance Committee

Ambassador, ShelterBox Canada

Assistant RPIC (Rotary Public Image Coordinator), Zone 28

Marjolein.lloyd@icloud.com

## Topics for Discussion:

1. How do you encourage members to invite guests and potential new Rotarians to a club

meeting?

2. Are guests and potential new Rotarians able to find your club website online? If so, does it

convey a relevant and positive impression of your club?

3. What other resources does your club employ to attract new members?

4. How and when to “ask” a guest/potential new Rotarian to join your club?

5. How does your club get new members immediately engaged in your club?

6. Do you have a mentorship program for new members? If so, is it working?

7. How does your club engage seasoned members in club committees and activities?

8. Does your club have a person or committee that contacts members who have been absent for a period of time?

9. Does your club send out surveys to club members for member feedback (i.e. programs,

fundraisers, volunteer events and other fun activities)?

10. If a member leaves your club, do you do an exit interview to find out what your club could have done differently to keep that member in Rotary?

## Making the first ask to a guest

Membership operating manual (so you are not re-inventing the wheel everytime the club has a new Membership Chair)

Socials are a great way to invite new guests

Recruitment is the first step - how do we get members actively engaged after that?

Co-chair positions to help the membership committee to balance the workload

Be sure that commitments are clearly spelled out so that there are no surprises

All new members bring a new guest in the red/blue badge program

Bring in a group of new members with similar interests/age at the same time

Invite past Rotarians to meeting

Reach out to former students

Invite student of the month to zoom, with principal and/or parents to meetings

We have a new member that saw our Rotary Food Drive success in April and came as a guest.

New members are those we have touched with projects

Talk about what you do in your club to your friends

-Low pressure to attend an online meeting as a guest (in your own home, not surrounded by strangers)

Brochure to new and potential members

Incentive program for current members to invite guests

- Keep track of guests brought in by members every quarter; member with most guests wins wine

Guests who have come to meetings prior to zoom

## Potential Members…now what?!

Interview with potential new member; take the potential members out for a socially distanced hike/walk.

Invite guests to help out at outdoor events

Don’t be afraid to set expectations

Former Rotarians who move into the area are great new Rotarians to your club! (R/C Osoyoos has had great success with this)

Instagram for younger members?

Recognition to members who are involved in posting online etc; a simple “thank you” during a club meeting goes a long way

Discounted dues for younger/new members…be sure the club is covering international/District dues

Info sheet to guests and potential members

-maybe include a 10 year re-cap to let the community know what you’ve done in the past and that you intend to stick around!

Speakers are often involved with clubs and could bring that info out and recruit.

## Keep a high profile in the community

We are still doing our Ribfest Raffle.

Concerts in the park with banners etc

“Hearts March” support essential frontline workers - wearing rotary shirts

Club can sponsor keynote speaker and invite public or special interest group

Be sure that website and social media are current

-share the workload; make sure there is more than one person able to edit/post, just in case someone moves or leaves the club…

Mention upcoming and recent meetings on social meeting so the community sees what you’re doing

Rotary shirts, pins, stickers (Penticton Sunrise has rotary facemasks that were made and donated by a local business/Rotarian)!

## Offer different types of Memberships

I read in a Rotarian about offering discounted membership for younger members for the first year. The joining fee can be a barrier for some. How about offset fees with volunteer hours commitment...

Corporate memberships - 3 individuals per membership

Note that a Club sets their own rules for spousal/corporate memberships

Invite potential new member to coffee for more information

Offer contact info of other members who may have similar interests to chat with potential new member

-Introduce new people to other who they may bond with

“Take the temperature” of potential new member

-might help to take the mystery out of the general membership

Does your club follow up on leads from Rotary International?

Wenatchee Confluence Rotary Board of Directors has discussed assigning each board member a group of members to stay in touch with on a regular basis as a means of keeping members engaged and connected.

## What do your online meetings look like? (There is no right answer here)

I like the idea of offering everyone a quick chance to check in.

How about sharing social isolation recipes??

Coffee meeting breakouts? 30 minute happy hour sessions to just gab?

Our ZOOM's are getting slowly more formal.

maybe every other meeting has a speaker? 30 muinutes one week for social, 60 minutes the next week...

We mimic our Zoom meetings like our morning meetings would normally be, with social, presentation, happy/sad bucks, and committee reports

That's a good idea, to opt in no tech people with paper info.

Spotlights on programs and members sent to non-zoom members via email or snail mail

Safe sharing zoom link; Password available by request...

We still do our new/weather/business reports and they have added graphics/share screen that members love.

Maintain some of your traditional elements at the Zoom mtg (greeter, gratitude)

Ask new members “what are the top 3 reasons you joined your club?"

## Who’s job is it to invite guests?

Task force committee - dominant members of the club who will go out to recruit members

Make rotary compelling, visual (whether at an in-person meeting or online)

New member socials

Get people into a committee relatively quickly, but not to overwhelm them

-Get people engaged right away

Let new members try something new right away

-Maybe a budget of $$$xxx for new members to complete a project - provides ownership

- I love the idea of project budgets for new members

## Challenges with Zoom meetings

Canceled speakers? How about fill with a focus time on local organizations that need immediate help

Fill time with current events in the community - ie. local nurse, update on farmer’s market

Pre-recorded speakers on zoom

Put up on You-Tube and Facebook page

Keynote speakers from District Conference are on the District Vimeo page

Our customer are our Rotarians

Follow up with those who are challenged with technology - offer one-on-one orientation

-contact Marjolein if you need help with this (email address at top of this document)

Be sure to contact those members you have not seen in meetings lately (that goes for online **and** in-person meetings)

## Mentorship program

Assign new member a mentor

-this is a great opportunity to re-engage some of your legacy members

Check in and follow up with the member/mentor relationship to ensure that it’s a good fit on **both** ends

As a mentor, what does the mentee want from me?

in with new member to ensure that new member is familiar with the Rotary lingo

Have a checklist of things to do - review club runner, attend a board meeting, go to a social etc

Ensure that new members of comfortable before moving to the next step

Have new member be the greeter for a few weeks (even if you’re still meeting online!)

New member helps with set-up

“Red ribbon” program, which helps to identify them

“To do” list for new members - fireside, attend a board meeting, front desk/ greeter duties, join a committee etc

Membership committee members can be mentors, but you can certainly go outside of that.

## Fun ideas to engage members and their families, too!

Children of Rotarians have their own badges - have a kids day at the club

Social fundraisers - trivia nights etc, often draws in the spouses

Invite former exchange students

An active mentorship program - a booklet or checklist of things to do (ie meet the president over coffee, attend a board meeting etc)

if we keep some form of zoom meetings, our members can be anywhere!

The Rotary Fellowship Programs are a great and inexpensive way to enjoy the Rotary Family

- here is a list of fellowships: <https://www.rotary.org/en/our-programs/more-fellowships>

Phone tree - going old school…love it!

Utitilzing “snail mail” (newsletters while meetings are online, for example)

Brainstorming ideas to physically re-engage

Remind rotarians about next week’s meetings

## When it’s just not the right fit…

Financial struggles - what can we do to keep members…just be sure that the club is covering international and district dues

Many of our communities have several Rotary Clubs to choose from; let’s play nice in the sandbox! If a potential member loves the concept of Rotary but not your club, let them know about the other clubs in the area.

-“I’d love to take you to one of the other meetings” or “Here’s the contact info for the President/Membership Chair of the other club in the community.”

Exit interviews with members who have left the club are vital

- Wait a few months before doing the interview, so that they have had a chance to think about it (you may find that you get a more honest answer as to why they really left)

Exit interviews - what did you like about Rotary, what interested you?

We have to be DOING things, or we will not compel others to join!

What are we selling, what is the value to joining our club and what are our expectations?

Like a tomato plant needs to be watered every day, think about those new members and how much attention they require to stay engaged

# (5) Public Image & Marketing

Host/Facilitator: Anna Harrison (Rotary Club of Kamloops West)

## Possible Discussion Topics

* Does your club have a Public Image and Marketing director
* How can your club be more active in PI and marketing
* Are your public Image campaigns working
* Do you partner with other clubs to get the most impact
* Is social media important? How does your club use social media
* What can you do as a club to increase your presence
* How are you communicating, what platforms are you using
  + internal
  + external

## Results from all Sessions

* Use Public Image and Marketing to get new members
* Use Public Image for current members
* The main goal of social media is engagement
* Instagram is about the pictures
* Snapchat and TicTok is for the younger members
* Posts on Instagram can be shared on Facebook
* Rotapen thru clubrunner

## Training sessions for membership

* Incorporate a training session on technology for the alumni in our clubs
* Clubs could have a program that would show the members how to use social media
* Have all the members like your club’s page and then have them share a post
* One on one sessions to show senior members how to use social media platforms
* A Tech training session, if needed invite Rotaract to participate

## Marketing streams

* Websites
* Social media: Facebook, Instagram, Twitter, Linked in,
* Facebook live
* Instagram live
* Newspaper
* Newsletters
* Phone calls
* One on one
* Zoom meetings
* Linked in for businesses
* You tube

Comment: do not ask what can the media do for me but what can I provide the media

Use personal interest stories when sending out press releases. Make it interesting

## Suggestions:

* Canva.com or unsplashed.com easy design software to create your posts
* Use Facebook advertising it is reasonably priced and reaches a target market
* Paid boost posts on Facebook to increase the reach
* How to get clubs with older members to include social media – suggestion was to partner with other clubs or Rotaract Clubs to partner with
* Some clubs do not use Clubrunner so there is a challenge with sharing information
* Like Evan Burrell on Facebook
* Like the Facebook page Get the word out
* Facebook page Rotary Public Image graphics and ideas
* Domink Booney - Wenatchee Rotary
* Quinn Dalan – Yakima Rotary
* Like all the Facebook pages for clubs in our district
* Join your community Facebook pages (ask the administrator if you can post about Rotary events, what is Rotary, as well as any Rotary ads, get creative and target your posts based on the community that the page represents.
* Create an ad on YouTube <https://www.youtube.com/watch?v=sxgDwSto3mM>
* Use Facebook or Instagram Live to share your speaker’s message
* Use Zoom to do training videos on posting on Social media
* Partner with Toastmasters, younger members to assist with training
* Start a What’s App group for PI directors

## Frequency for ads

* Facebook 4-6 x a week
* Instagram 4-6 x a week or more
* Twitter 20 x day

# (6) TRF & International Service

Host/Facilitator: Sherry Chamberlain (Rotary Club of Kamloops West)

## Discussion Topics

The two sessions were held and attended by 50 people total. Ideas to be shared included the following regarding TRF:

1. A few clubs hold annual Foundation dinners that allow the club to recognize new donors and multiple PHF recipients as well to educate the club about TRF
2. Rotary Foundation Chairs for the club have researched their members donations and history in order to find out who is close to a PHF and who has points to use for a PHF
3. Some clubs have a Polio donation can at meetings in order they can fundraise regularly
4. TRF fundraising envelopes have been placed on tables at club meetings
5. No one is fundraising online that we know of or are they promoting TRF online during this COvid19 issue.
6. I have asked the clubs to look at sending me successful District Grant project videos in order we can create a TRF Grant video used for promotion of TRF and the benefits to our local communities
7. We have informed attendees to look at their budget now to see if they can send in their TRF monies now
8. A club adds $25 to the club dues invoice that will be sent to TRF if a member chooses to keep that amount on the invoice. Members are billed quarterly $25 plus dues.
9. Presentations made in November to show members where TRF money goes
10. Resources include showing Vimeo videos on Rotary topics
11. Some clubs attendance at meetings online are successful and clubs are encouraging members to donate their meal costs to TRF
12. New member education regarding TRF: education at Firesides, TRF tidbits at most club meetings, promote monthly deductions using bank debit
13. Events for TRF: October 24 Polio Pizza night, Foundation Banquet night,
14. Transfer points for awarding PHF to special Rotary members and/or community recipients
    1. If awarded to a community non Rotarian: educate them on Rotary and TRF
15. Giving to the Canadian TRF – government will give back 45c credit – Stan Fike

## International Service Projects

After the TRF discussions we opened it up for International service projects and asked the question how a club determines an International Service Project.

1. RC of Kelowna and Kathy Butler will be working on the Kenya project again
2. Global Grant for Bangladesh project ready to go
3. District grant applications for local community projects encouraged as people are thinking closer to home these days
4. Encouraging clubs to do a video regarding their own District Grant for local community projects
5. District Chair for International Service Projects Carol Eamer encourages folks to cluster with other local clubs to collaborate on a project working together on the same project
6. A few clubs do not have an international service committee – some use their TRF committee for their projects discussions

# (7) Community Service

Host/Facilitator: Ron Hooper (Rotary Club of Salmon Arm Daybreak)

## Considerations for Selecting New Projects:

* Members want projects in which they can “get their hands dirty” and come together to participate. Whenever possible, add a BBQ or something for fellowship and fun.
* Club is active with International Service projects but now looking for community projects that address local needs (i.e. mentoring troubled youth). Members want to be busy!
* In looking at future project, club is pursuing asking the community – similar to Mike Dedels approach in Kamloops (reference to District Conference Sunday break-out session. Session is on the District VIMEO site < <https://vimeo.com/412592219>>).
* Not always large projects, sometimes just need to look around, jump in and do things that are obvious.
* Timeframes for District Grants sometimes too time-consuming – prevents addressing obvious needs. Recognize that we need to adopt to a multi-year approach (Contact information for District multi-year planning support through Strategic Assistance <marjolein.lloyd@icloud.com> ).
* Re: collaborating with other clubs and not-for-profits – clubs are open to concept but difficult with multi-club participation without parameters and clear expectations.
* Have lots of small projects but need major project that is engaging with community partners - Yakima baseball facility with Rotary/ Kinsmen/ Lions signage is a possible model.
* Moving forward, need clear process to vet projects through membership and then take action. Discussion of the value of developing a 2- or 3-year plan and interest in the District’s approach.
* Consensus that the “needs analysis” requirements associated with successfully pursuing a District Grant are neither onerous nor unreasonable and that our District Foundation leaders are approachable and helpful.
* Hands-on projects are far more engaging to younger Rotarians than cheque-writing. Potential younger members want to know where a club is heading and so a plan with future community projects is a useful recruitment tool.
* To attract new and younger members, we need to be able to outline the club direction with community projects. So – we need to increase focus on communicating to the target community audiences through our website and, importantly, social media. As new member, the club projects, status and future direction is not as clear as it should be.
* Clubs need to actively promote community project involvement using social media. Advice given to not spread social media effort across too many platforms but to focus on one or two – do well and update regularly.
* While need to respond to circumstances surrounding COVID, need to plan for life afterwards and this is a good a time to develop implementation plans for projects post-COVID.
* Need to strengthen the culture that active participation in community projects is an important part of being a Rotarian.

## Community Service and COVID:

* With COVID need a quick community response but hard to do much more than support financially with isolation protocols. Need to now plan for possible responses to likely COVID return in the fall.
* Much of COVID response involves “writing checks” understandable but need to look beyond current situation.
* Fundraising is now limited by COVID response and future efforts need to be sensitive to economic recovery realities.
* Rotarians need to ‘dig down and serve their community’ – whether supporting the arts, environmental initiatives – but link into community core values and then just do it!
* This is a great opportunity to partner with other Not-for-Profits, including other Rotary clubs, and then continue those partnerships post-COVD.
* With COVID-related isolation, Rotary can support issues relating to mental well-being, domestic violence etc. Rotary should be ready to assist and meet community needs, particularly those at risk.
* We often forget that behind delivering new projects is the need for good administrative support and effective internal communication.
* Consensus that the “needs analysis” requirements associated with successfully pursuing a District Grant are neither onerous nor unreasonable and that Dave Campbell is approachable and helpful.
* To attract new and younger members, we need to be able to outline the club direction with community projects. So – we need to increase focus on communicating to the target community audiences through our website and, importantly, social media. As new member, the club projects, status and future direction is not as clear as it should be.
* Don’t forget that our fellow Rotarians are part of the community and we need to reach out to them – such as delivering a meal to members who are not attending weekly Zoom meetings.

## Fundraising for Community Service with COVID

* Clubs need to link fundraising on the basis of identified community needs – respect that many businesses and individuals are facing financial difficulties.
* Many community members want to support their community – so Rotary clubs need to find ways to consult and involve the community. This has benefits relating to not only addressing community needs but, also, maintaining awareness of the role of Rotary and perhaps even engaging future members.
* Many fundraising initiatives are cancelled or deferred – but a silver-lining in that clubs are forced to move beyond ‘cheque-writing’. We are forced to being ‘service-clubs’ that do work actively and safely. This is an opportunity, also, to deliver Rotarians leadership abilities in the community.
* There is an opportunity to actively and visibly give back to community businesses that have supported Rotary that are struggling with reopening and the economic recovery. A number of ideas including “Chefs in the City”, promotions for shopping locally.
* Can also support local businesses by not asking for donations but purchasing items for live and silent auctions – this is an opportunity to strengthen long-term relationships if done respectfully.

## Some Project Ideas . . . there were many!

* Kamloops 5-club Food Drive
* Rotary club matched foodbank donations
* Virtual Gala Dinners with partner restaurants and Rotarians deliver food
* Classic car rally
* Support local Blood Bank – Facebook promotion and provide refreshments to donors
* Chefs-in-the-City
* Graffiti clean-up – engage local artists
* Safe distance highway and trash clean-ups
* Support Women’s’ Safe House and other At Risk Community Residents
* Supporting local parks and heritage sites
* Car Rally with stops at local wineries and restaurants
* Local Drive-in Theatre sponsorship
* Donate Rotary weekly meal cost to foodbanks
* Online raffles

# (8) Fundraising

Host/Facilitator: Karl Ruether (Rotary Club of Leavenworth)

## Possible Discussion Topics:

* What is the purpose for a fund raiser
* What is the monetary goal
* Other goals
* Fund raising ideas.
* Auction event with silent and live auction items
* Raise the paddle for a specific topic like Polio Plus or your l
* Desert Dash at auctions very successful
* Raffle Ticket sales
* Progressive dinner
* Art collection clean your attic auction
* bike ride
* Ribb Fest
* Any Legal considertions like a Gambling License
* What are the implications of the COVID-19 response on fu Has the Context for Rotary Fundraising changed?
* What are the considerations in initiating fundraisers in this Selling Alkohol makes money what are the associated impli given the large amount of non profit fundraiers conducted

## Results from All Sessions

Specifically focused and promoted Fundraising Goals achieve the best results.

Watch out for any Legal implications like the Gambling Commission (US) or the Lottery (BC)

Check on Insurance issues some events especially where alcohol is served require additional or special insurance.

## Fund Raising Ideas Shared

* Clear the Attic Art Auction (Calgary Rotary club has had success with this)
* Dessert Dash
* Bike Ride, Virtual Bike Ride, Virtual run
* Uno tournament, Trivia night, Bingo
* Rib Fest
* During Life event Raise the Paddle for a specific purpose like Polio
* Life and Silent Auction during dinner gala
* Progressive dinner, Mystery Dinner (Who done it)
* Raffle ticket sales (for a nice BBQ or fishing Rod or…)
* The great Rubber Duck race
* Virtual Whiskey Tasting
* Virtual Dinner Gala
* The payment system “Square” allows for an online store
* Facebook as a fundraising venue (Use caution with this one)
* Save on Foods Gift Card sales with rebate to Rotary or perhaps local foodbank (BC)
* Haircut for a cause
* Virtual golf, Indoor Golf Tournament (Merit RC)
* Look at “Eventbrite.com” for ideas.
* Dream Auction (sorry I did not capture the club name)
* Golf Ball drop (Sell numbered golf balls and have a Helicopter drop them at one of the local golf course tee’s closest to the pin wins.
* Car Rally Scavenger hunt with social after
* Sponsor a fruit tree buyer gets to prune the tree (with help of course) and harvest the fruit when ripe
* Drive In Theater
* Mini Golf tournament with social event after.
* Ted Talk events with prominent Speaker or perhaps Comedian
* Horse Apple Gambling
* Casino Night
* The great Watermelon or Pumpkin race (kid’s activity) could be adult also
* Cinnabon sale associated with a holiday (Mother’s Day)
* Professionals day luncheon (secretary day)

Rotary International is working on ideas and resources and this information will be on the RI website soon check back often

Thank you all for joining us and sharing your great ideas.

# (9) Youth Services

Host/Facilitator: Richard DeRock (Rotary Club of Wenatchee Confluence)

# (10) Member Experience

Host/Facilitator: Cindy Piva (Rotary Club of Kamloops West)

## Member experience

Best practices and Member Experience Ideas from 4 different Member Experience sessions are listed below. Some of the questions that were asked throughout the sessions were:

* What are best practices for Club Member Experience
* How can we give all members a great rotary experience?
* What was your own best experience?
* From first visit until forever, how do we attract, engage, retain members?
  + Meetings?
  + Socials?
  + Projects?
  + Training?

## Best Practices for meetings:

* Have a greeter to welcome everyone including guests
* Greeting guests – always a good practice at every meeting – and can be done on Zoom as well.
* Making guests feel welcome, not like an “anomaly”
* Make the meeting fun (see fun ideas for meeting
* There are no Rotary “Police”
* Mixing up the agenda is great
* Allow people to sit anywhere, and encourage people to sit with different people each week
  + One person mentioned their club used to have “Clicky” groups – now more open seating and Zoom has also eliminated this
* One club assigned a greeter just like they do at a meeting but for when they enter the virtual room
* Happy bucks every meeting, but at different times of meeting – mix it up Put happies first
  + Relaxes and sets tone
  + Happies and sads – mostly happies
  + Highs and lows – of the day
* Make meeting exciting right at beginning of meeting
* People show up because they are getting value – what is the value
* Inviting exchange students to Zoom calls
* Magicians/speakers – can invite speakers from anywhere to our meetings on Zoom, so take advantage of this opportunity
* Survey members – learn something about the members and what they want from their clubs
* Taylor meeting around engaging members
* 7-10 minute speakers – short and sweet – hard to do long meetings on Zoom, and 7 to 10 minutes works great
* Length of speaker matters a lot
* Once a month include a learning session
* Same agenda every week is boring!
  + Break the mold!
* Give people an opportunity to shine – engaged people’s talents – had people sing, drum, doing different things and showing their talent
* Put the fun back in Rotary

## Program ideas:

* 2 minute stand up and dance in middle of meeting
* Mystery rotarian at every meeting
* Useless fact at every meeting
* Shorter speaking time at every meeting – guest speakers get 7 – 10 minutes max!
* Special induction and framing certificates for new members
* Allowing people to talk business
* Have a welcoming atmosphere – A new member commented they liked the welcoming atmosphere, and that’s why they joined
  + It was fun
  + Everyone shook hands (pre covid)
* Have a small celebration – recognizing someone who does something great with a special club salute
* 2 new members want to create a new member orientation program (they still felt a little lost)
* When in physical meetings, use smaller tables – 6 – always had to sit with others and this really mixes it up
  + Fines for sitting in same seats
  + Fun – words matter
  + Speaker – title – don’t use the word “speaker”, use the word “topic”
    - For example, today’s topic is

Call it a core topic – highlight the value

* Hoping Sherriff – rituals – are changing – recreating new rituals and making changes to regular meeting format – getting out of the “Rut”
* Presenting is Easier on Zoom – sharing screen
* One club is researching videos and sharing 4 minute fun/educational/interesting videos at meetings

## More ideas

* Mystery Rotarian at every meeting – the president gives 3 clues during the meeting and everyone has to guess the mystery rotarian
* Reminder – meetings don’t have to be the same

## When we make it more fun, we get people engaged

* Whose responsibility is it to make it fun?
  + Leader? – committee? Set it up and make it happen
* Let members know the Results of great projects, the Why of Fundraising, at meetings (Always asking for help with projects and fundraising without a why and without speaking of the great outcomes can be de-motivators, so motivate and inspire)
* Idea – One club has been having a Prize Draw at club meetings on Zoom – donations – names are drawn – and the prize is dropped off at people’s door
* Idea: Announce birthdays – sing happy bd
* Recite 4 way test – used to at regular meetings but doesn’t work on zoom, so changing format of meetings
* **Best practice - to have Fun – if it’s not fun, why are we doing it? So spell out what you mean by fun:**
  + Sgt of arms – end on upbeat note
  + If it’s your birthday – bring a joke
  + What are we thankful for at beginning of each meeting – sets a positive tone for meetings
  + Bent Zoom background
* Change format of meetings
* Online – treasurer keeps track of happy buck comments – at $25, invoices them
* Some clubs use E transfer

## After the meetings:

* Follow up calls- several mentions that clubs are following up with guests and asking how they enjoyed the meeting
* Another club mentioned they look for who hasn’t attended in a while and ensure they are okay, and ask if they’d like to join the next meeting

## Engaging members and guests:

* Questions – easier to show interaction – in person or virtually?
  + Engage guests by asking questions, welcoming them, give a chance to introduce
* Best practice for engagement - through activity
* One club has already had 3 guests – all applied to be members – since on-line meetings
  + Did this by recognizing guests – letting them introduce themself
  + Connecting with them personally after the meeting
* Many mentioned that now they have all experienced Zoom, will probably have Hybrid meetings – physical and Zoom – together – once able to meet in person again
* It’s sometimes easier for younger people to attend a Zoom meeting than an in person meeting because of extra time needed
* Easier for people with limited travel time
* Encourage all members to attend RLI, District Spring Training, Conferences to learn more, meet new people, and thus, stay engaged.

## New member orientation and engagement:

* **Several clubs mentioned having a Mentoring program for new members**
* Mentoring – a couple of clubs mentioned they have a formal mentoring process with a booklet
* Engage in service – record setting year even with covid because they engage new members into short, hand-on projects early
* Most normal thing during Covid – one club has bring a guest, to help engage people!
* New member guide
* Red ribbon program – one club has a new member ‘on-boarding’ system and encourages new members to get into a committee – engages them from the start
* One newer member mentioned they were confused about meeting format, they were pushed onto a committee, and wanted to create a new member orientation process in her club so it doesn’t happen to other new members
* Idea - Sitting down and asking expectations from a potential new member, both of Rotary and of new member
  + Getting to know new member
  + Front end – engagement
* Red Ribbon program – again – about new member orientation – certain things to complete for a new member
* Firesides – are great for learning, great for engagement, great for socials and allowing members to meet people easier

## Best practices:

* Mentors and new member’s guide books
* Also mentoring sessions on RI Learning Center
* Best practice
* Ask what they joined for – what ideal looks like
* One on one process? Small group, goals, what are they interested in, help them find their way?
* What about long – time members
  + Engagement? All clubs struggle
  + Burn out

## About Socials:

* Socials – once/month one club has an informal “TEAM” meeting

TEAM stands for: Thursday Evening Alcohol Meeting

* Idea - Online trivia as a social
* Idea - One club had a community clean up social – doing good and a social
* Put people together for a small Zoom social such as sewing masks together, cooking together, sharing coffee, etc.
* Any project, fundraiser, could be a social
* Guess who’s coming for dinner is a fun way to meet and learn more about others in the club

Membership ideas – diff Hybrid meetings – some in person, some at venues or Rotarian’s businesses, some at projects

Sometimes the rotary experience is confusing – how to make it better?

New to club – since Social for Youth

* + Keep members engaged – How?

One club mentioned their new member experience was awkward - onboarding – how to fit – applied for a committee – haven’t heard back if they are on it or not

* Run environmental sustainability committee
* Club looking at new ideas
* Expert on LEAN systems – how do people want to be involved in a variety of levels: social, philanthropic time, money

2 years, charter – rotary NOW – new type of club test

* What member experience is?

Best practice – discovered more people coming to Zoom meetings – Why?

Because they are getting phone calls asking if they know how to get on Zoom, how are you doing – realized phone calls work

* Personal touch and calls to engage and get them on Zoom
* Coffee once/year
* Engaging members outside of club meeting is critical
* Buddy system – mentoring
* Onboarding new members
* Rotorac – experience – as an example, a Rotarac club has a section of the meeting for Personal development exercises
  + Business personal development
  + Mock interviews
  + 10 min workplace conflict session
* Atmosphere of the room is key