



DISTRICT 5500 MEMBERSHIP SEMINAR

SATURDAY, JANUARY 28, 2023

8:00 – NOON, VIA ZOOM



AGENDA

- Welcome 8:00
- RI Director Vicki Puliz Remarks..... 8:05
- DG Anita McDonald Remarks..... 8:15
- D5500 Membership Growth Metrics..... 8:25
- Club Action Plan Process..... 8:35
- Attracting New Members..... 8:45
- **Break**..... **9:50**
- Onboard New Members..... 10:00
- Engage & Retain Existing Members..... 11:00
- Next Steps..... 11:50
- DGE Don Jorgensen Remarks..... 11:55
- Wrap - up 12:00



Vicki Puliz
RI Director



Anita McDonald
D5500 DG



Don Jorgenson
D5500 DGE



Jennifer Deroin
Zone 27
Coordinator



John Chase
Zone 26
Coordinator



Bruce Monroe
D5500 MC

Our Special Guests and Presenters

RI DIRECTOR VICKI PULIZ





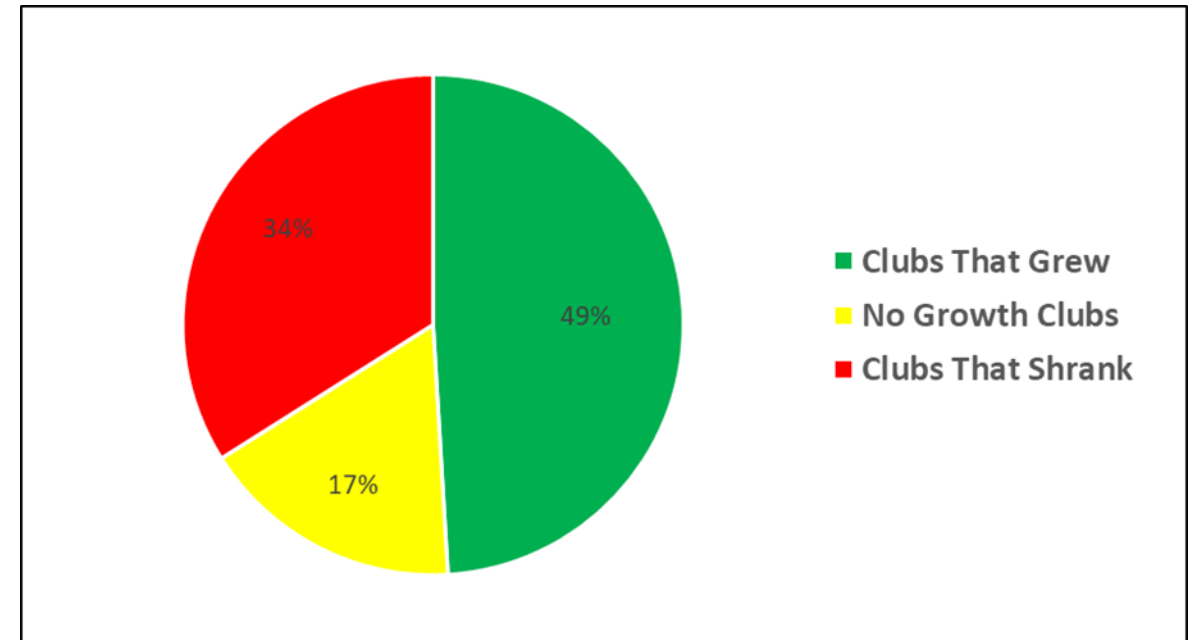
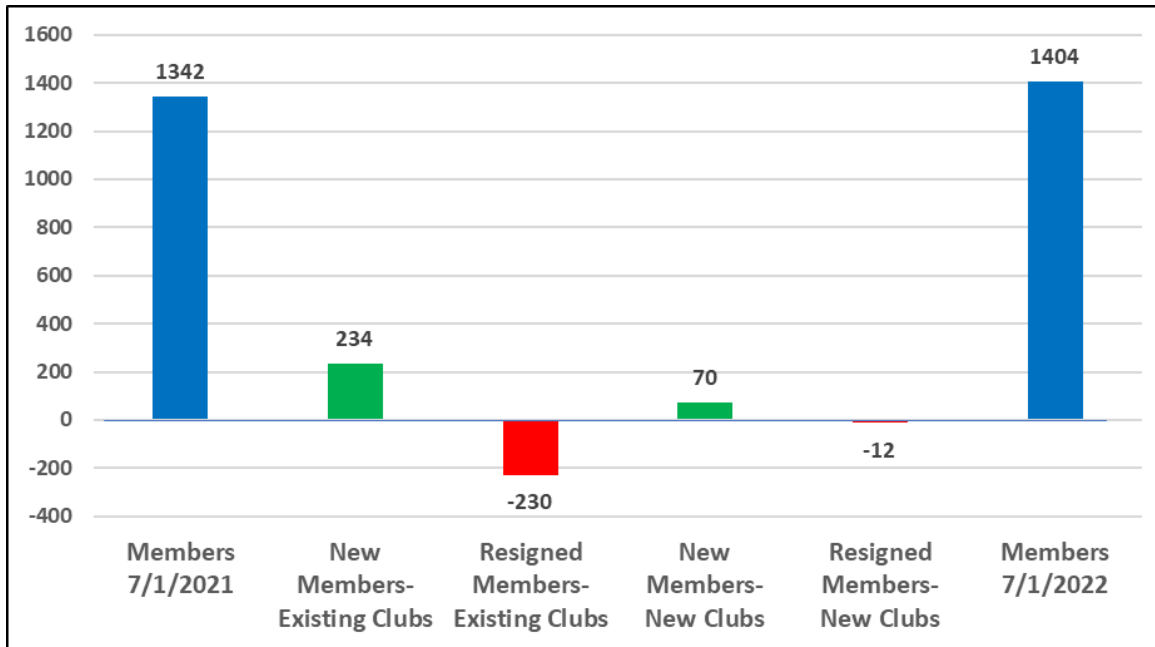
INSPIRE=E³

Empower :gear: Engage :gear: Enjoy

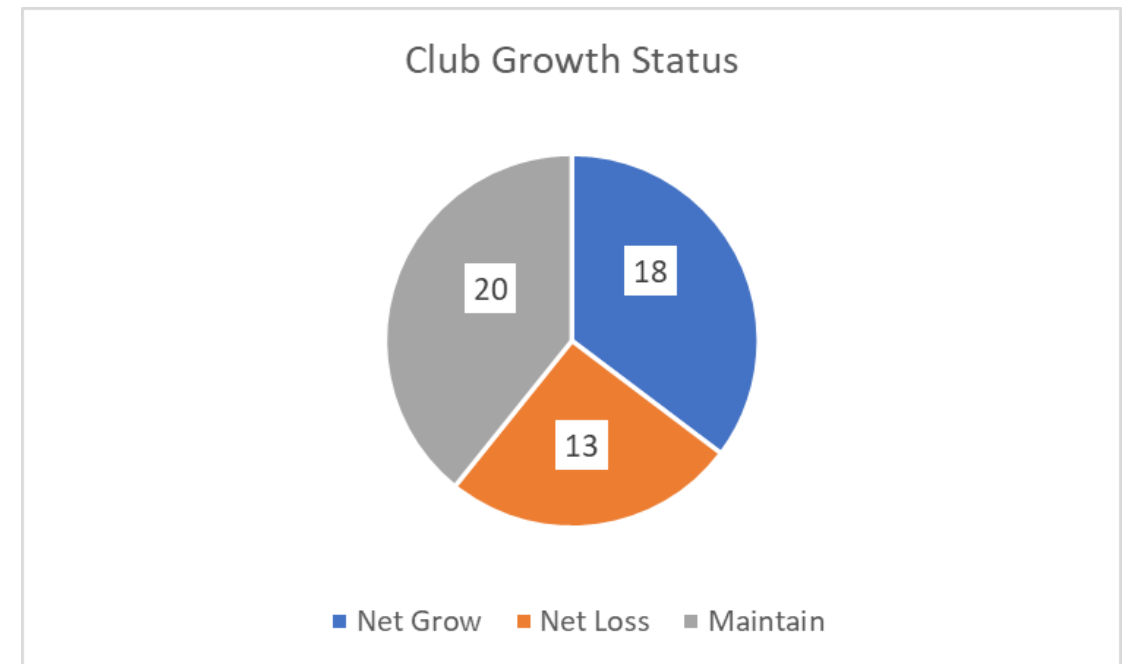
**DG ANITA
McDONALD**

2021-22 MEMBERSHIP GROWTH

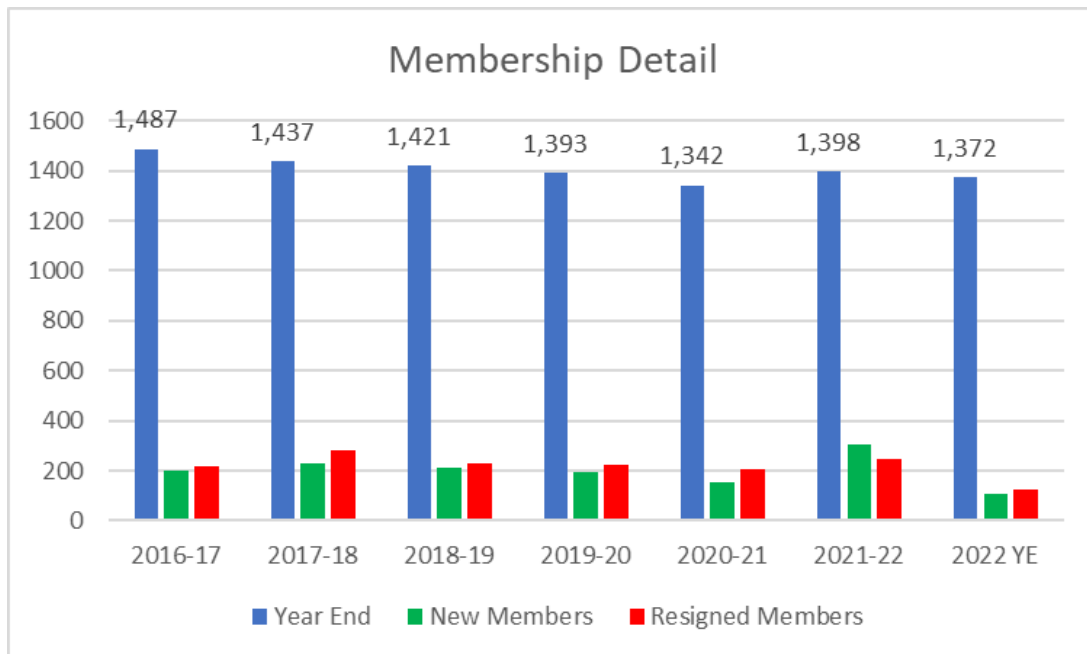
- Two New Clubs- 58 members
- Existing Clubs stayed steady- net 4 new members
- First year of membership growth in over 5 years!



D5500 MEMBERSHIP STATUS- DEC 22



D5500 5-YEAR MEMBERSHIP HISTORY



Year	New Members	Resigned Members	Year End
2016-17	13%	15%	1487
2017-18	16%	19%	1437
2018-19	15%	16%	1421
2019-20	14%	16%	1393
2020-21	11%	15%	1342
2021-22	23%	18%	1392
2022 YE	8%	9%	1372



CLUB ACTION PLANS

Four Step Process

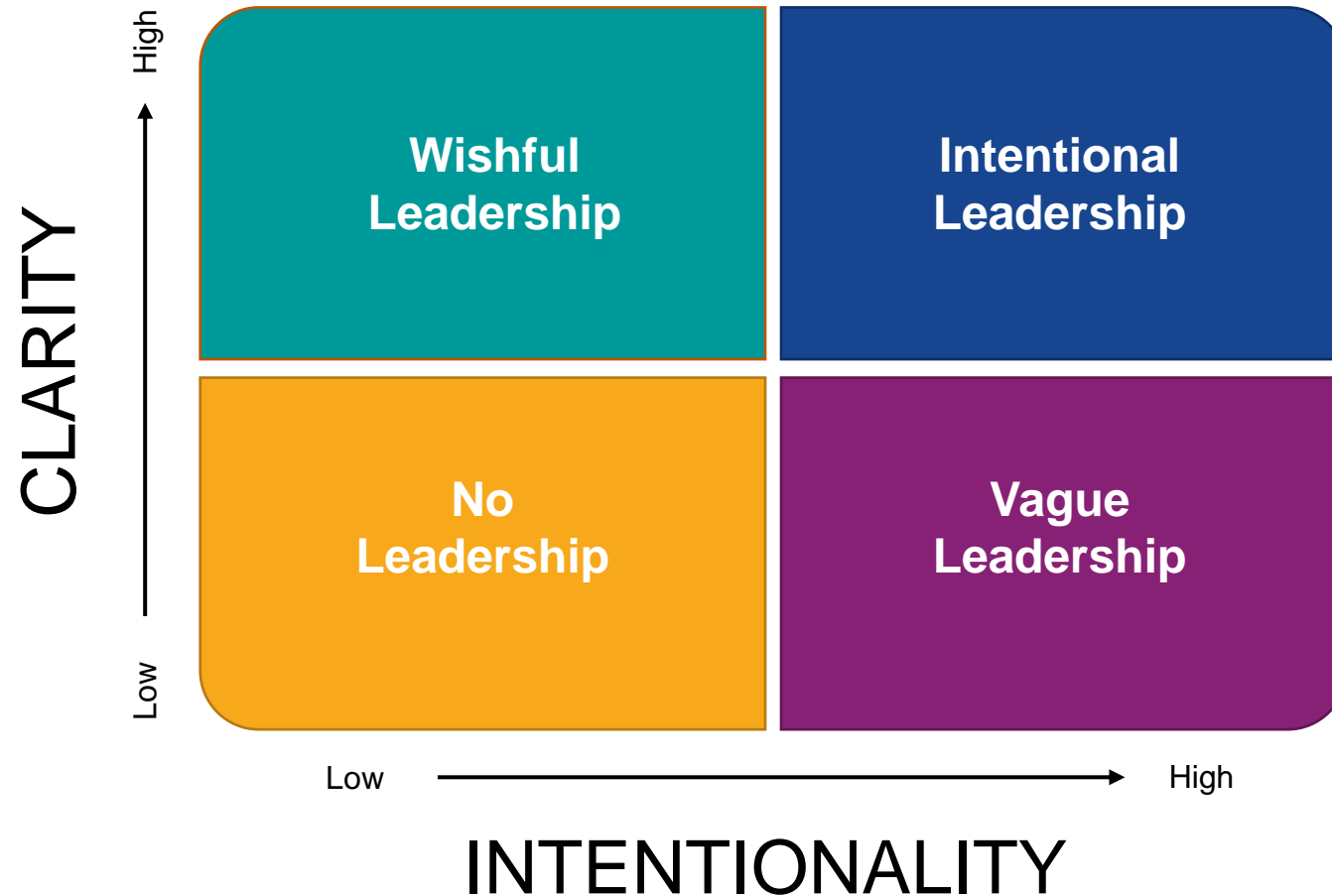
[Follow this link to the video](#)

CLUB ACTION PLANS

Miriam Keener, Cedar City Utah



INTENTIONAL LEADERSHIP



Club Example #1

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

Annual **Attrition Rate** (3-year average): **9.3%**

Annual **Attraction Rate** (3-year average): **8.0%**

Annual **Net Growth Rate**: **-1.3%**

Success Targets
 Attraction **greater than 15%**
 (July 1 membership x .15)
 Attraction **5% greater than Attrition**

The problem we need to solve is:

- ☐ **Low Retention** -- Our Attrition Rate Exceeds 15%
- ☐ **Insufficient New Member Attraction** - Our Attraction Rate is less than 5% above our Attrition Rate
- ☐ **Neither** - We need to build on our current membership growth culture and strategies

Club Example #2

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

Annual **Attrition Rate** (3-year average): **22.4%**

Annual **Attraction Rate** (3-year average): **10.2%**

Annual **Net Growth Rate**: **-12.2%**

Success Targets
 Attrition **less than 15%**
 (July 1 membership x .15)
 Attraction **5% greater than Attrition**

The problem we need to solve is:

- ☐ **Low Retention** -- Our Attrition Rate Exceeds 15%
- ☐ **Insufficient New Member Attraction** - Our Attraction Rate is less than 5% above our Attrition Rate
- ☐ **Neither** - We need to build on our current membership growth culture and strategies

STEP ONE | MEANINGFUL DATA

1. Review your club's Attrition/Attraction Data.
2. Verify against Club Membership Profile Report from Rotary Club Central.
3. Determine Agreed Upon Average Annual Attrition Number.

TIP: Club Membership Profile report can be found in Rotary Club Central.

- My Rotary
- Rotary Club Central
- Reports
- Club Membership Profile Report

Club Example #1

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

Annual **Attrition Rate** (3-year average): **9.3%**

Annual **Attraction Rate** (3-year average): **8.0%**

Annual **Net Growth Rate**: **-1.3%**

The problem we need to solve is:

- ☐ **Low Retention** -- Our Attrition Rate Exceeds 15%
- ☐ **Insufficient New Member Attraction** - Our Attraction Rate is less than 5% above our Attrition Rate
- ☐ **Neither** - We need to build on our current membership growth culture and strategies

Success Targets

Attrition **less than 15%**
(July 1 membership x .15)

Attraction **5% greater than Attrition**

Club Example #2

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

Annual **Attrition Rate** (3-year average): **22.4%**

Annual **Attraction Rate** (3-year average): **10.2%**

Annual **Net Growth Rate**: **-12.2%**

The problem we need to solve is:

- ☐ **Low Retention** -- Our Attrition Rate Exceeds 15%
- ☐ **Insufficient New Member Attraction** - Our Attraction Rate is less than 5% above our Attrition Rate
- ☐ **Neither** - We need to build on our current membership growth culture and strategies

Success Targets

Attrition **less than 15%**
(July 1 membership x .15)

Attraction **5% greater than Attrition**

STEP ONE | MEANINGFUL DATA

1. Review your club's Attrition/Attraction Data.
2. Verify against Club Membership Profile Report from Rotary Club Central.
3. Determine Agreed Upon Average Annual Attrition Number.

TIP: Club Membership Profile report can be found in Rotary Club Central.

- My Rotary
- Rotary Club Central
- Reports
- Club Membership Profile Report

GOAL SETTING WORKSHEET

Membership History		2022-2023 Membership Goal Setting	
Club Year	Members at start of year (July 1)	Starting Membership July 1, 2022	37 (a)
2022-2023 (Current Year)	37	Membership Goal July 1, 2023 (July 1, 2022 Start + Growth)	(b)
2021-2022	46	Net Membership Growth Challenge = 5% or 5 members	(c=b-a)
2020-2021	55	Average Annual Attrition to Replace (Greater of Actual or 10% = World Class)	12 (d)
2019-2020	49	New Members Needed (Growth + Attrition)	(c+d)
2018-2019	44		



STEP TWO | SURVEY MEMBERS

1. Members need to have a voice in the process for buy - in.
2. Utilize Rotary Tools in Discovery Process
 - a) [Rotary Club Health Check](#)
 - b) [Membership Assessment Tools](#)

Example:

July 1 Membership = 95

Membership Goal = 100 (Net gain of 5)

Average Annual Attrition = 15

New Members Needed to Meet Goal = 20

Current Membership	
Membership Goal	
Average Annual Attrition	
New Members Needed to Meet Goal	

Membership Goal – Current Membership + Attrition
= New Members Needed to Meet Goal

Attracting New Members		
Tactic	Responsible	Date
Onboard New Members		
Tactic	Responsible	Date
Engage and Retain Existing Members		
Tactic	Responsible	Date

STEP THREE | DEVELOP A PLAN

1. Utilize data to set current year membership growth goal.
2. Identify primary areas of focus.
3. Develop tactics to increase efficacy in each area.

TIP: there are many resources in the [Rotary Learning Center](#) to help form ideas.



STEP FOUR | MONITOR AND MANAGE

1. Launch action plan.
2. Assess progress monthly.
3. Adapt, refine, respond.
4. Follow-up with DMC Bruce.

TIP: *People tend to lose focus on annual goals. Break them down into quarterly priorities.*

Rotary



Attracting New Members



Rotary



The Value Alignment Interview



Sample Value Alignment Questions

1. Tell me a little bit about yourself personally and professionally.
2. How did you find Rotary?
3. What is appealing about it?
4. What are your expectations? *What else? What else?*
5. If we ended up deciding this was the right fit, and it's one year from now, how would you describe your experience in more detail?
6. Let me tell you about our club.
7. How do you think you would contribute to the club's success?
8. Manage Expectations:
 1. Is this what they really want?
 2. Money
 3. Time
 4. Talent
 5. If not us, then who?

Three Clubs



Club A

- Fellowship
- Diversity
- Service



Club B

- Service
- Fellowship
- Leadership



Club C

- Leadership
- Integrity
- Service

ATTRACTION

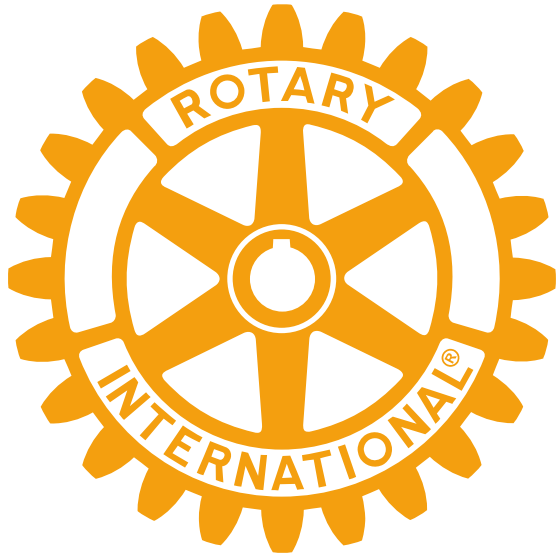
TOOLS

- Guide to Corporate Membership
- Guide to Satellite Clubs
- Engaging Younger Professionals
- Creating a Positive Experience for Prospective Members

ATTRACTION

DISCUSSION QUESTIONS

1. How might you influence your members to place the appropriate amount of emphasis on attraction?
2. What tools are available to your club to make your community aware of Rotary & your club? How can you use them?
3. What positive examples of Club Attraction can you share?
4. What actions might you (and your committee) take to ensure that a prospective member is making an informed decision to join your club?



BREAKOUT DISCUSSION

Attracting New Members



BREAK

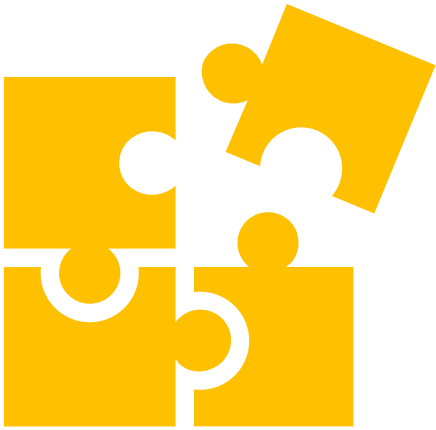
Rotary



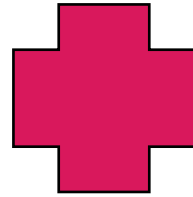
Onboard New Members



THE "STICKINESS" FACTOR



Feel of Value



Have a Friend

Onboarding is a process

ORIENTATION

- One-time Event
- Role in Rotary
- Classroom Style
- Big Picture
- Ready to Join the Club

ONBOARDING

- Ongoing
- Role in Club
- "On-the-job"
- Specific to the Member
- Ready to Contribute

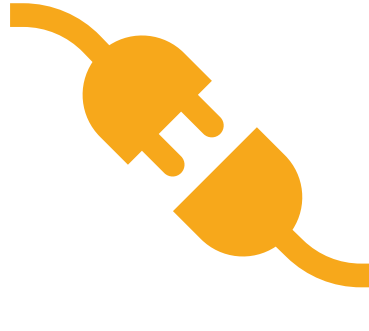
ONBOARDING IS A PROCESS



ORIENTATION



**DISCOVER
NEEDS**



**GET
CONNECTED**



MENTOR



FRIENDSHIP

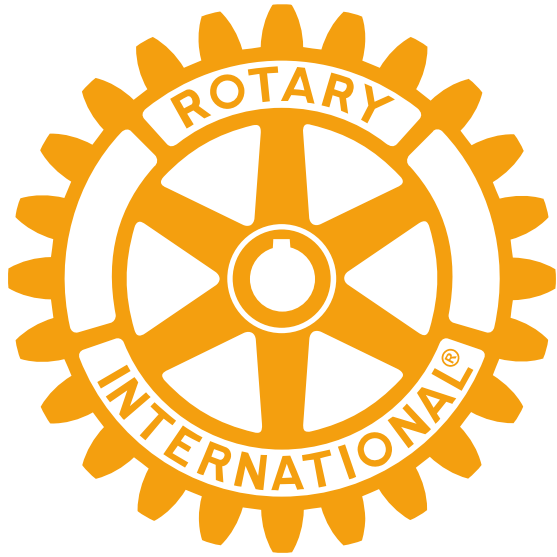
ONBOARDING IDEAS

Onboarding Activity "Drip" System Ideas:

- Send [Welcome Video](#) and Ask them to Create a My Rotary Account
- Take the [Rotary Basics](#) Course in the Learning Center
- Ask Them to Like Club, District, and International Social Pages
- Send "Open Jobs" with Descriptions
- Mentor Check-in
 - Discuss Experiences
 - Ask for Their Feedback & Questions
 - Discuss "Open Jobs" - Check for Interest
- Send a List of Other Suggested Learning Center Courses
- New Member Dinner
 - Invite New and Veteran Members to a Dinner
 - Ask for Their Feedback, Recommendations, and Answer Questions
- Leadership/Mentor/New Member Coffee Check-in
 - Ask for Their Feedback, Recommendations, and Answer Questions
 - Check to See if They Feel "Plugged In"

DISCUSSION QUESTIONS

1. What are some innovative onboarding ideas that would enhance member participation?
2. What are some best practices that would enable the sustainability of an onboarding process for a club?
3. What was your personal experience when joining your club? What more could have been done to enhance your experience?



BREAKOUT DISCUSSION

Onboard New Members

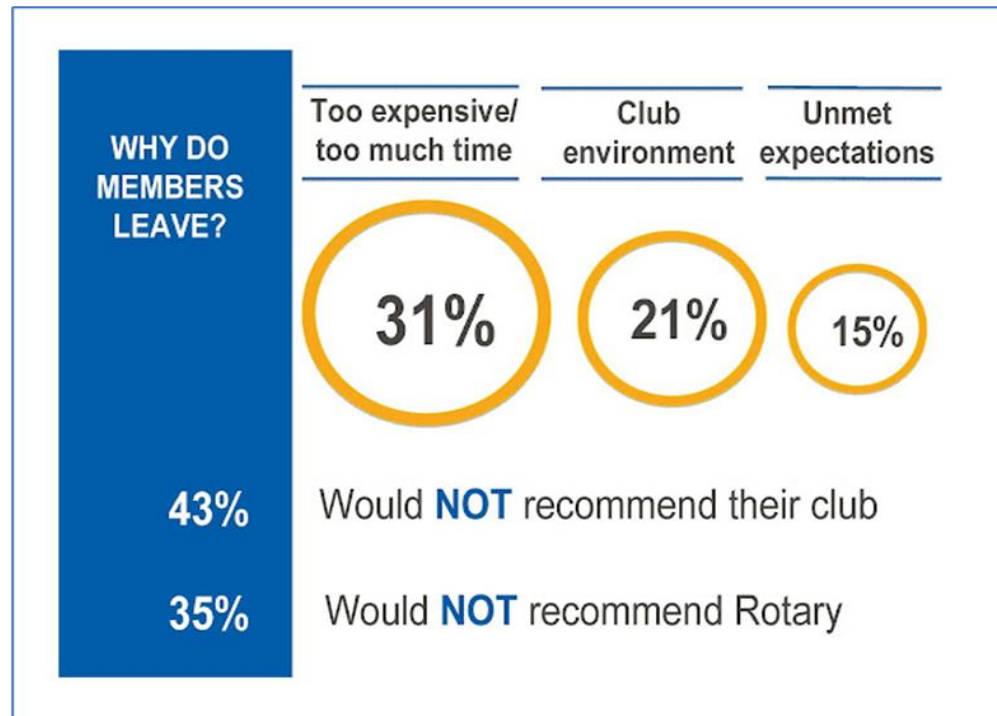
Rotary



Engage and Retain Existing Members

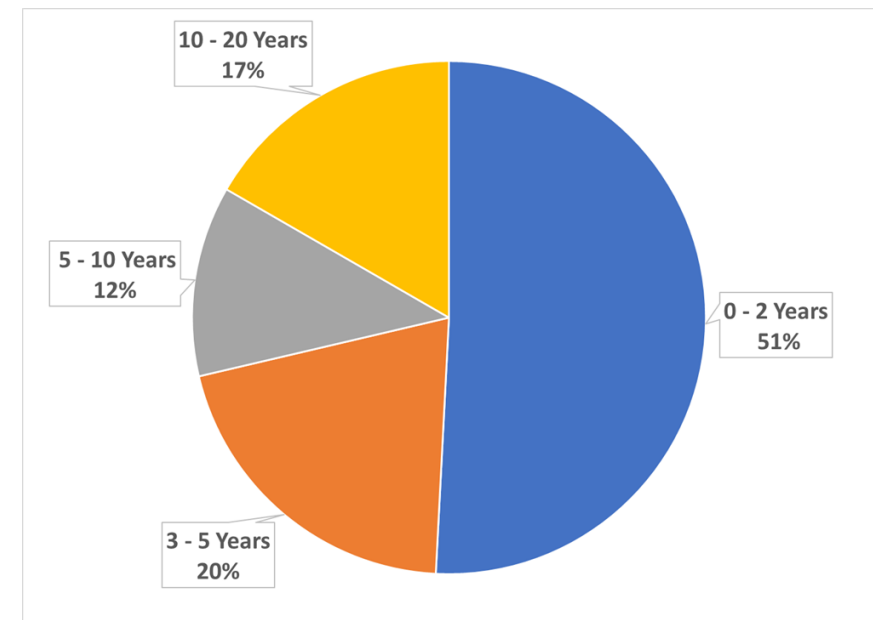


WHY MEMBERS LEAVE



A slide from the Rotary International PowerPoint "State of Rotary Membership as of July 1, 2018" reflecting worldwide membership statistics.

Membership Resignation Timeline

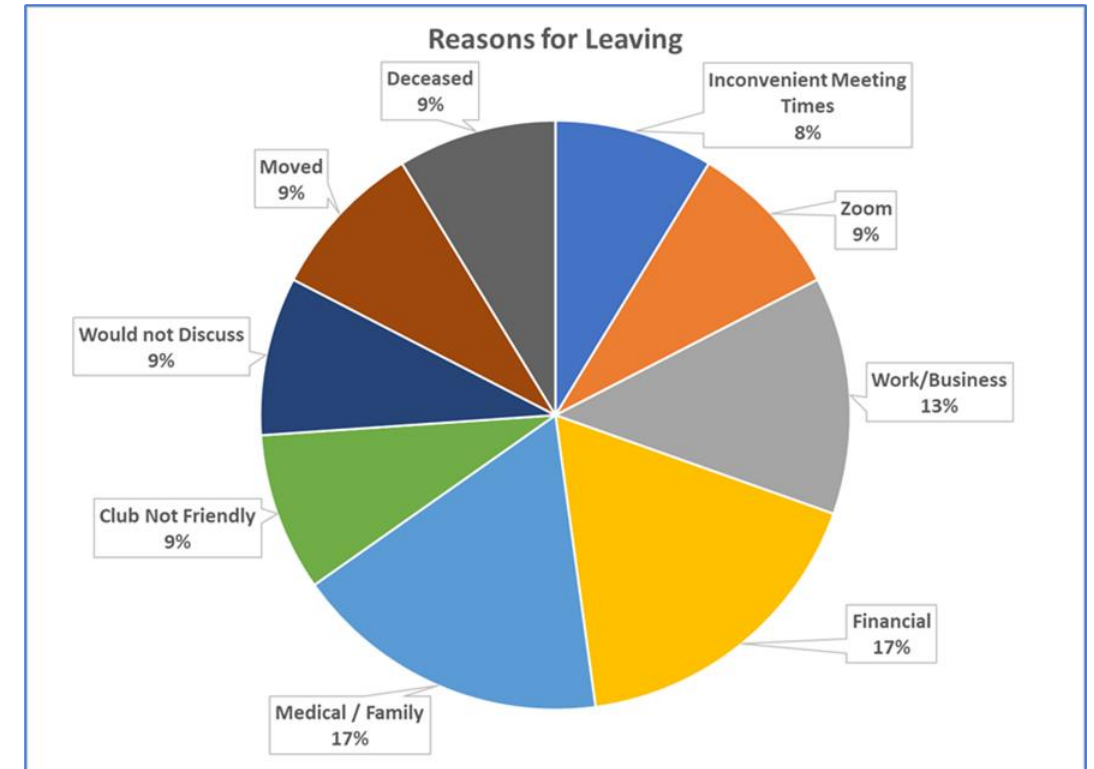


Members Resignation History- Survey

- Findings

- 44% of the reasons given were because their Rotary experience wasn't important in their lives.
- 40% did not have any conversations with the president or membership chair prior to resigning.
- 40% of the reasons entered into the RI database did not match what the respondent said.
- There is minimal to no contact with the member who resigned going forward, but some respondents expressed a willingness to maintain contact with their old club or consider another club.
- When financial reasons were given, the club dues included meals.
- Only 10% was because the member died.

Why D5500 Members Leave



Survey of resigned D5500 members 2020.

Members who stay for 1-2 years (50%)



- Do not feel engaged in club events and activities
- Their fellowship expectations aren't being met
- Competing priorities
- Financial reasons

What you could do:



Expectations	Ideas	Involve	Mentor	Educate	Financial
Ask them what their Rotary experience is vs. what they thought it was going to be before they joined.	Ask them for their feedback. They may have ideas for revitalizing the club's fellowship activities or service projects.	Make sure they are involved in a project or committee that interests them, but do not overload them.	Assign mentors to members who don't have them or suggest that they change mentors if they would like to.	Encourage them to attend the District conference and attend RLI to get a broader view of Rotary.	Can your club offer reduced dues for the first one-to-two years?.

Members who stay for 3-5 years



- Fellowship expectations are not being met
- Frustrated with the club's leadership
- Competing priorities

What you could do:



Leadership	District	Revitalize	New Ideas	Expertise
<p>Provide leadership opportunities. Members can get more involved by serving as club officers.</p> <p>Encourage them to enroll in RLA.</p>	<p>Encourage them to participate in district activities.</p> <p>Ask if they would like to serve as a liaison to your Rotaract or Interact club.</p>	<p>Organize new or revitalize club activities so that members remain engaged and excited about attending club meetings and fellowship opportunities.</p>	<p>Get members' feedback on their club experience and ask for their ideas on what could be improved.</p>	<p>Put their expertise and skills to use and recognize them for their efforts.</p>

Members who stay for 6 years +



- Burnout
- Fellowship expectations weren't being met
- Frustrated with the club & District leadership
- They retire and move

What you could do:



Leadership	Mentoring	Workload	Transfer	Recognition
Get them involved in more district activities, such as serving on a district committee	Ask them to mentor newer members. Ask if they would like to serve as a liaison to your Rotaract or Interact club.	Discuss reducing their workload or ask them to act as a consultant (vs. doing) for club activities.	Forward their contact information to the clubs in their new area.	Don't take their efforts for granted. Sincerely recognize their efforts to the other members of your club.

General Retention Actions

Vibrant Club

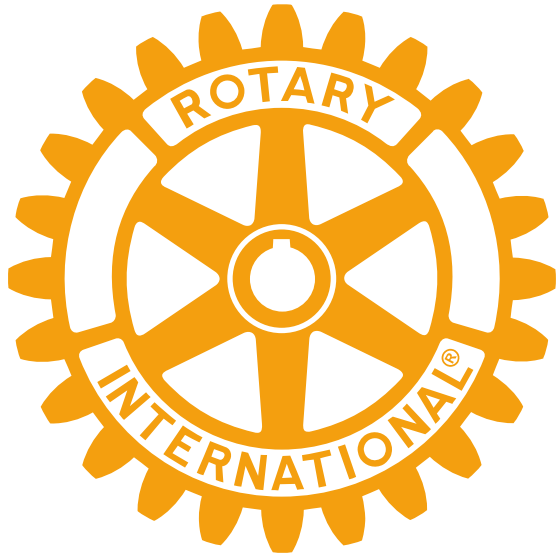
1. Make meeting fun & interesting
 - High-quality speakers and programs
2. Maintain regular contact with all members, especially members “on the fence.”
 - One-on-one meetings with members
3. Make sure each member has a role in the club that matches their interests.
4. Use membership surveys to get the overall sense of the club.
5. Include the members in developing goals & strategies and then communicate the results.
6. Implement a membership or Rotary minute in your meeting agenda.
7. Evaluate your meeting day/time and location.
8. Develop alternate memberships, e.g., corporate & family.
9. Hold more social events:
 - Combine meetings with social events
 - Do you have a social chair or committee?
10. More service projects.
11. Sincerely recognize and reward members for their efforts.
12. Encourage members to sign-up for RLI and other District training.
 - Offer to reimburse cost

TAKEAWAYS

1. These remedial actions DO NOT substitute for a conversation with the member about his/her satisfaction with the club. Each member is unique.
2. It's not all on you. You have your committee & board and there may be another member who is closer to the member in question. Ask for help.
3. If the recommended actions are done prospectively, the need for remedial action will be reduced. Be proactive.

DISCUSSION

1. How effective is your club in fulfilling a member's priorities after joining your club?
2. What are the signs that a member is dis-satisfied with your club?
What can you do to address the situation?
3. Based on your observations of your club's members, what actions can your club take to improve member engagement & satisfaction?



BREAKOUT DISCUSSION

Engage and Retain Existing Members



NEXT STEPS

1. Take this plan back to your clubs. Fine tune it with your committees & board.
2. Identify responsible parties to complete the actions.
3. Communicate the plan & get agreement.
4. Work the identified actions.
5. Assess progress monthly.
6. Adapt, refine, respond.
7. Follow-up with DMC Bruce.

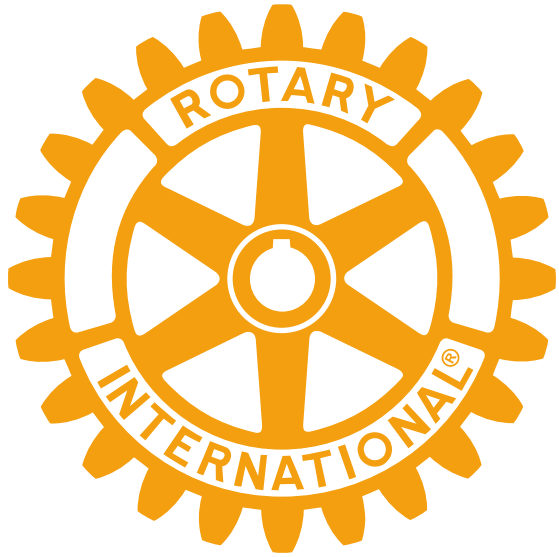
TIP: *People tend to lose focus on annual goals. Break them down into quarterly priorities.*

Slow, STEADY Progress

DGE DON JORGENSEN



CREATE HOPE
in the **WORLD**



THANK YOU