

Membership Seminar Recap & Best Practices
6 Phases of the Membership Continuum
May 30, 2015

Prospecting: Facilitator – Marc Garfinkel (Centennial)

Best practices and recap from group breakout and presentation to entire seminar group:

1. Clubs that make you feel wanted will do the best.
2. Ask the guest (prospective member) to come back the following week and to stay for about 10 minutes after the meeting so you can discuss Rotary and your club in more detail.
3. Send a thank you card to the guest for coming to the meeting.
4. Have the Membership Chair say something about membership at every meeting.
5. Have finite projects – do them from start to finish.
6. Create an atmosphere where people want to be part of your club.
7. Give out business cards to prospective members with an invitation to come to one of your meetings.
8. Have a local business speak to the club. This is also a chance for a cash donation.
9. Invite guests to participate in your projects even if they are not joining right away or even considering it.

Vetting: Facilitator – Kris Clute (South Jeffco)

Vetting is a necessary process. Rotary will not maintain its ideals unless it selects its members through a vetting process. Vetting eliminates revolving door Rotarians who joined a club on a quick handshake following an open invitation and then leave the club with less than a year's attendance because it's "not what they thought it was". This is like a marriage on a blind date and drama will certainly follow. What will such members tell others about Rotary after they leave?

Rotary is composed of people who believe in Service Above Self and allow the 4-way test to control their relationships with others. This is what we want to see in new members. The process will vary from club to club, but it should be informal, with a light structure and face to face time with an established member of the club. Younger clubs use Facebook to accomplish this because it looks into past behaviors that may conflict with Rotary's ideals. Older clubs tend to use more rigid structure and more face to face time. In this changing social environment each club should decide what would work with younger prospective members. Each prospective member should have no questions about "what does Rotary do" before the invitation to join is approved by your board. Human nature values a process that seems to be selective, so it's important to make prospective members feel like they were "selected" because of their agreement with Rotary's ideals, not grabbed because they were curious and attended an invitational meeting. Yet, there is no set process and it is up to each Club to find out what works for them.

Induction & Orientation: Facilitator – Ray Anderson (Highlands Ranch)

What clubs do:

Boulder: prospective members visit club; paperwork in and voted on by board; name publicized in weekly newsletter. Orientation before club meeting with history; induction at a club meeting. Formal Red Badge program. Current member is the proposer plus need 2 other signatures.

Golden: before paperwork turned in: interview by a couple members; "Rotary College" as an orientation; induction at a club meeting.

Lakewood Foothills: before paperwork turned in: One on one meeting orientation with Past President plus a tenured member to go over dues, etc. If continue to become a member, then an official orientation and look at club project chart to see what new member might be interested in doing. Three page long summary sheets of club projects--to inform

prospective members what the Club does. Key is to call members to see how it is going **and** follow up. No formal vetting process, but club reminds members how to interact with prospective members to get them interested in clubs. No formal red badge program, but there is an expectation that they do things.

Longmont: Formal orientation once a month after induction occurs at someone's office. (Before that, sponsor proposes and email is sent out to members). (Induction at club meeting)

Highlands Ranch: invite to club meeting; get a new member packet which includes Rotarian magazine. Must attend meetings before Board votes on member. Orientation for 1 hour before a club meeting. Induction at a club meeting. Formal Red Badge process with "to do" list. Send follow up note -- thanks for coming to our meeting. Sponsor and the Mentor are different people-- mentor picks up responsibility after induction. Current member is the proposer. Use Russell Hampton New Member Kit for new members.

Denver LoDo: prospective members can come up to 3 times at no charge. Get acquainted session with a couple board members over coffee before induction. No formal board or member vote. They do a follow up call with visitors. No proposer; application Ok.

Summit County: attend at least 3 meetings before turning in proposal paperwork; background info given to prospective member with dues info, etc. Formal posting of names for 3 weeks plus Membership Committee votes. Orientation is at a senior member's house--cocktails, light food-- invite prospective and new members. Orientations are given information 2 or 3 times a year. Induction at a regular meeting. Satellite group creates some complexity to orientation, induction and Red Badge. Satellite group meets evening 2x per month. Regular club meets in morning. Responsibility is on sponsor pre- and post-induction for orientation and engagement.

Westminster: sponsor handles whole process coming into club. Guests come to meetings; assigned a sponsor that may not follow up. Not much follow up; Red Badge process without much follow up. Weak area.

Carbon Valley: new members can apply --does not need to be an existing member.

General:

- Need to have more formality, structure. Introduce to a number of club members. Need a mentor.
Need to see the value in the dues and being part of the club.
- Big issue that most clubs don't give a follow up call.
- Need structure / more formal process
- New Member Orientation booklet has lots of good information and good resources. (Ray will give us the link).
- Blue Dot program with RI-- need to sign up with RI and they will send blue dot to put with their pin.
- Visit other Rotary Clubs

Best practices:

- Rotary College (orientation)
- Interview with 2 club members-- a veteran and a newer member
- More formality/structure
- Follow up with visitors/prospective member

Engagement: Facilitator – Fred Slick (Castle Rock)

We had a spirited and very good discussion which resulted in a consensus opinion on our 5 key points. While we did touch on other subjects, we all agreed that these items were what is most important in Engaging new and in some cases, "fading" Rotarians.

1) **Engagement:** Engagement is the responsibility of all members of the Club. Too often this responsibility falls on the Membership Chair or President. This is true for new members as well as current members that are not as involved as they once were or just haven't found their passion. The Club in many ways is like a family, and when a member of the family is needing something, all of the family pitches in.

2) **Red Badge Program:** The Red Badge Program is a must for all new members. Formality here will allow the new member to understand more of what the club is about and also what is expected of them. Many Clubs have a Red Badge program but it is either dormant or not very formal. I have included a copy of the Castle Rock Red Badge program as an example. We also feel that separate meetings of the red badge members outside of the normal meeting allows them to speak more freely, ask more questions and allows them to meet more members if various committee chairs are included in the meetings. This will also help the red badge members to start to become more actively involved in the Club.

3) **Mentoring:** It is critical to the success of the new member to have a mentor. Often we default to the sponsor as the logical mentor; however, a fresh take on the club by assigning a mentor who the newbie does not know well, will accomplish 2 things: 1) The newbie will now essentially have 2 members that they can approach with questions and/or concerns, and hopefully this will provide a different spin on the Club. 2) Not everybody in the Club recruits new members, so by asking an existing Rotarian to help may just spark them to see the Club differently and get them involved in other areas of the Club. Mentoring should also not be limited to new members. All clubs have a few members that are going through changes in their lives, either professional or personal that may be causing them to rethink their involvement in Rotary. These members have been active in the Club, but for whatever reason they are fading away. Asking a fellow member to "put their arm around them" and help them stay involved will help them as well as the Club.

4) **Visioning:** Visioning has been a very useful tool for many Clubs and we feel that when this process is undertaken, the newer members should be active participants. The new members are in most cases going to be the ones implementing the plans down the road, so why not get their buy-in from the start. This will also help the more seasoned members see things differently and just because something did not work before, doesn't mean it won't work in the future. A fresh set of eyes is always helpful in planning.

5) **Socials:** By having social, non-traditional meetings occasionally, the new members feel less intimidated by the formal structure of our standard meetings. This is also a way for spouses of new members to understand the importance of Rotary. This will also allow the newbie and their spouse the opportunity to get to know the Club members and their spouses better. By having a strong understanding of the membership both inside and outside of the Club, we all benefit from a tighter bond.

Leadership & Development: Facilitator – Karen Briggs (Denver Southeast)

What does it mean to you? What systems were recommended?

- * Taking people who have potential and move them into positions that come available
- * We are leaders in the club, we just need to provide guiding principles
- * Provide them with the appropriate tools
- * Suggestion was made to take the information today and implement in our clubs
- * Club trainer in other clubs seems to offer structure with this type of knowledge or information, such as Rotary minutes, sharing today's event
- * Red Badge program has helped in the past in which the member has to go to another club which seems to have helped
- * Have an orientation presentation with new members, find out what their passion is, this is a service club
- * With guest members, have a follow up system, stay in touch
- * Every new member should have a mentor matched to them , and work with them for at least a year
- * Mentors need to be very active, hands on, with their mentee. However, it is suggested the mentor be someone different than the sponsor
- * Secret to membership is just to be aware of people in your surroundings, invite them to our meetings
- * In the club, if you have a couple of good sales people, have them chair the membership committee
- * What's in it for a mentor? Suggest waiving club fees or pay for their lunch , some type of reward system , if the new member stays for 6 months at least
- * Find people who could be passionate about "service", this has helped with retention
- * Have a training program for mentors, it helps establish continuity
- * Send more members to RLI, if a member wants to be President , must attend all 3 segments of RLI

How do you see visioning help develop new members?

- * It can get people excited about taking on leadership roles in the future
- * Have new members take the “Visioning” class through the district
- * It helps establish continuity
- * After the members attend, have a follow up system, to make sure the “vision” is followed through
- * Members sit with past presidents on the vision (past, present, future)
- * New members could be a board member at large (be able to sit in the meetings and observe)
- * Get new members involved in a committee right away

What could the clubs do to help recruit members to the district level?

- * Approach people who you think would be good for the district.
- * A personal “invitation” helps a member feel more special to join
- * A lot of members feel they are not qualified, suggest have the district come to the meetings and talk about positions within the districts (to educate) and mention when district positions will be available

Recap:

- * Good “Red badge”, and committed mentor program
- * Have a mentor training program
- * Have tools and resources to develop (i.e.: district workshop, available , especially inviting new members)
- * Part of being a good leader is to develop leaders
- * Stress important of attendance; however, there are many ways to make up a weekly meeting (i.e.: training meetings, service work)
- * Implement a “visioning “ program , to help develop new members, helps club get on the same page, re-energize the club, offers more involvement
- * Have a club trainer!
- *** With any program, have a system of follow through, follow up!!!

Departure: Facilitator – Bill Downes (Mountain Foothills)

Why people leave Rotary: departure

Classifications of Departure:

(Club Assessment tool for departure at District- termination profile available there - by groups and by reason - also a survey about what members feel about their club to do an analysis) (Resigning Member Questionnaire on rotary.org)

Secretary needs to fill out departure form - don’t want to see “other” for reason of departure categories: Business transfer, moved, poor or limited attendance, business pressure, disinterest, health, deceased, none given, joined other club, family obligations, duplicate record

Our District’s reasons for departure of a member: 8.5 % attendance, 23% business pressure, 8.1 % business transfer, 2.6% cost, 6.8% deceased, 7.2 disinterested, 8.9 family obligations, 6.4 health, not fit for club 0.4%, personal reasons 3.4%, 8.5% joined another club. 14.5 moved, 0.9 retirement and travel plans, 0.9% schedule issue, 7% none given, 6.6% duplicate record on Club Runner

Do you have an attendance obligation in your club??

If people are not coming, are we engaging them? Need someone to contact person and say we missed them and ask if they are OK? Not paying dues -- is someone contacting them to see why they haven’t paid?

Is flexibility an issue? People have other places, people and work taking their time, so how do we engage them so they join or stay in Rotary

Satellites- meet at a different time, different dues structure, different location,...

Flexibility - attracting younger members: company make a contribution to dues, different level of membership for dues to keep members

Business transfer: let them know what clubs exist where they are moving to. Call club in area they are moving to and let them know a prospective member is moving to your area.

Some categories we have little control over. 50-60% can't do anything about their leaving. 40% we could do something about. What are we doing?

How does cost of joining affect folks joining versus people leaving because of cost?

Deceased folks: Service above Self note card to send to the family of the deceased. Is there a plan? If the member is deceased, what do you do? Spouse deceased - what is the plan, a child deceased what to you do. Is there a plan in place?

Disinterested: what did we miss in engaging them to begin with? It's not about attendance, it is about engagement. Drop attendance requirement? Find out how they are getting engaged in the club and how to get them engaged.

Family obligations: what do you do in your club?

Health: family of Rotary call, what do you need and rotary provides it. Help the member, spouse. Service above self includes service to our members and their family when in need.

It's about joining Rotary, not necessarily joining "my" club.

Best Practices:

1. What are you doing about getting them engaged?
2. Having Flexibility such as satellite and flexibility within the club
3. Getting to know the members and contacting members who are missing for reengagement, having a Family of Rotary chair
4. Solid orientation is important to retaining members.
5. The statistics of why folks leave rotary was interesting information