



# Membership retention strategy

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## Preamble

This paper sets out a vision for the way in which the Club Service Avenue of Service can contribute to membership retention within clubs through the enrichment of the membership experience.

District Governor Michael Lapiña has stated that he wants the D9800 priorities for 2024-25 to promote Rotary club membership as a further dimension in providing members with a great experience in service to our communities. The focus of this paper is on newer members and those 20%-30% of existing members who for whatever reasons, seem to have become disengaged from Rotary and the club's activities.

## Issue clarification, i.e. the problem we are trying to solve

Rotary's membership recruitment has over several years, become focused on delivering service projects and has to some extent been successful in attracting new members. Yet despite successes in recruiting new members, membership losses continue to outweigh gains through recruitment.

In my view, in our efforts to harvest the undoubted motivation of people to contribute to service projects, we may have lost sight of what provides members with "the awesome experience" that most of us have experienced through the Family of Rotary.

That enrichment of our lives through Rotary membership comes from the development of personal friendships and acquaintances among members and the personal and professional growth that comes from the unique experience of Rotary club membership. In other words, while we have promoted engagement in community projects, we may have overlooked the value of other forms of engagement in our clubs, the fun, fellowship, friendship and sense of belonging.

Club Service has a key role to play in maintaining and building the awesome experience of Rotary membership, that is, the experience of membership of the Family of Rotary.

## Discussion

The club is the cornerstone of Rotary, where the most meaningful work is carried out. All effective Rotary clubs are responsible for four key elements: (1) sustaining or increasing their membership base, (2) participating in service projects that benefit their own communities and those in other countries, (3) supporting The Rotary Foundation of RI financially and through program participation, and (4) developing leaders capable of serving in Rotary within and beyond the club level.

While the club is the cornerstone of Rotary, the Club Service portfolio is the cornerstone of a healthy club. It is important to frequently review the effectiveness of the Club Service portfolio and to make sure it has a clear direction and is resourced to contribute meaningfully to membership retention through maintaining a vibrant club and the development of future leaders.

Rotary is putting extensive resources into attracting enthusiastic new members and establishing new clubs. Yet due to low attendance at meetings and club activities, they have limited ways to become fully engaged through meeting and getting to know existing members. As a result, existing members have limited opportunities to meet new members and their families.

Sustainable service projects develop from members serving together through enjoyment of each other's company, i.e. developing strong friendships and participating in the Family of Rotary. In my view, unless we strengthen our member engagement, in the long term, we put our achievements at risk.

### Guiding principles of Rotary

The guiding principles of Rotary include the Object of Rotary, the Four-Way Test, and the Avenues of Service.

*The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and in particular, to encourage and foster:*

- **FIRST: The development of acquaintance as an opportunity for service;**
- *SECOND: High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;*
- *THIRD: The application of the ideal of service in each Rotarian's personal, business, and community life;*
- *FOURTH: The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.*

*We channel our commitment to service at home and abroad through five Avenues of Service, which are the foundation of club activity.*

- **Club Service focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.**
- *Vocational Service calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society.*
- *Community Service encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest.*
- *International Service exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.*
- *Youth Service recognises the importance of empowering youth and young professionals through leadership development programs such as Interact, Rotary Youth Leadership Awards, and Rotary Youth Exchange.*

## Why is “family” a focus in Rotary?

The Family of Rotary has been variously defined broadly and narrowly over the years. For the purpose of this discussion, I prefer to define it as the members and their families within our own clubs.

Rotary is about community. The community we live in, the worldwide community and the community of Rotarians. When we share in community, your problems become my problems and your joys, my joys. Therefore, Rotary families matter to Rotary, the family of Rotarians and the Rotarian's family. If we are to live out the Rotary ideal, to create a better world, we must start with the family. An effective Family of Rotary strategy will provide new members with a great membership experience which will in turn lead to improved membership retention and service project participation.

In the long term, sustainable service is possible only through strong engagement of members, including knowing other members as friends and taking an active interest in other members' families.

I propose that we consider a series of strategies that are designed to strengthen our Rotary family, thereby strengthening our clubs for future generations.

## Components of a rejuvenated Club Service portfolio

### Review the role of Director of Club Service

The Director of Club Service is a highly strategic role. Based on the foregoing discussion, this role is vital in enhancing the health of the club, which in turn prepares the club for its success in the other avenues of service.

The Director of Club Service could be considered the club's Chief Operating Officer, providing effective management of a healthy organisation. As a senior leader in the club, the Director of Club Service should take on key strategic responsibilities of learning and leadership development.

### Consider a prospective member quid pro quo

Review the club's recruitment process to emphasise what the club offers to a prospective member and what the club expects in return.

Rotary clubs are attractive to young members as a means of serving the local and international communities. Though they may not realise it at the time, as members of Rotary clubs, they will experience significant personal growth as well as the rewards to be gained from attending meetings, social events and service activities, in other words, belonging to the Family of Rotary.

The recruitment process needs to focus on the potential for and willingness of new members to form close relationships with existing members as a means of building the sense of belonging that comes from Rotary membership.

Some prospective members may feel unable to commit the effort to building relationships with other members within the first six months of membership. Consider offering “Friends of Rotary” status. This includes invitations to join in the club's community volunteering, but without the extensive commitment to engagement that membership requires.

### Focus on Rotary leadership development.

Broaden the board's focus on future leaders within the club and implement leadership development programs, including an emphasis on developing Rotary knowledge. Improved knowledge provides members with the confidence to try new leadership roles within the club.

Implement succession planning for all key club roles.

Commence discussions with new members at the appropriate time to explore their potential for leadership roles.

### Promote Club Service as a worthy (and necessary) avenue of service.

Promote the importance of Club Service roles in creating a vibrant and fun experience.

- Speaker engagement and coordination
- Fulfilling meeting roster duties
- Club bulletin editor or other key communication platforms to assist members to maintain connection and participation
- Social activity coordinator and team member – hold regular activities to promote social connection
- Almoner – to maintain a relationship with members and their families
- Membership development and retention, including mentoring new members
- Photographer for meetings and events
- Media manager to develop a relationship with local media
- Web and membership database manager
- Social media editor
- Protection/Public Officer – for Working with Children checks and other risk management responsibilities
- Storage/archiving – caring for the club's physical assets that represent its rich history
- Special functions – Changeover and Christmas functions and celebrations of important events for our club
- Club historian – preserve the valuable stories that demonstrate our clubs' long-term successes.

Consider allocating club jobs to new members as soon as practicable after their induction. Engaging new members in club service activities provides an opportunity to re-energise the club's meeting program.

### Emphasise the importance of mentorship for new members.

Once new members have been inducted, it is crucial that they experience the spirit of the Family of Rotary from the outset. The mentor plays a critical role in meeting the new member's Rotary expectations and balancing those with the club's expectations of engagement.

The mentor's handbook should include specific responsibilities for both new members and mentors. Mentors should be trained with the expectation of developing an active, supportive relationship with new members for a period of at least six months and as required, possibly up to two years. Topics for mentors might include the following.

- Rotary International information.
- Individual Rotary club information and history.
- Assessment of the new member's preferences and priorities and opportunities arising from your club's portfolio of projects.
- Active contact program for new member (and family) to meet existing members. Invitations to social events.
- Introduction to the importance of Club Service roles and how to fulfil rostered duties.
- Assessment of opportunities to develop skills that can easily be applied to one's career such as public speaking, project management and event planning, participating in Rotary leadership and development courses run by District and RI.

The board should also develop a schedule of progress reporting from mentors at say, 3 months, 6 months, 12 months, 18 months and 24 months. This will allow the board to focus on membership development on a regular basis. Mentor reporting would add significant value as a standing item on the board's agenda.

### Governance.

Clubs may use a Membership Committee, whether as a subcommittee of Club Service or a committee of the board. In either case the membership committee needs to be properly resourced with experienced members and the chair of the Membership Committee should maintain a close relationship with the Director of Club Service.

Whatever the governance structure, the board should have a clear view through the organisation of the progress of every new member for as long as the mentorship of that member is in place.

It may also be advisable to implement a "re-engagement" strategy for those existing members who demonstrate minimal engagement or are no longer actively involved in the club.

## Summary of future actions

Expand the scope of the role of the Director of Club Service to include learning and leadership development.

Consider promoting a quid pro quo for membership recruitment.

Develop ambitious new member induction program, including responsibilities in Club Service, learning about Rotary, meeting existing members and engaging in preferred club projects and developing the true sense of belonging within the club.

Review function and resources of Membership Committee.

Review role and responsibilities of new member mentors, including required training.

Implement revised governance system to monitor new member progress.

Consider strategy for re-engagement of existing members.

Consider ways of promoting leadership development for critical roles, e.g. club officers and directors.