

# Rotary

## District 9350



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## Membership Strategy 2017-2020

Prepared by District Membership Committee

*Updated 1 September 2017*

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**1. OVERVIEW**

For membership growth to work, we need a long term plan that brings membership into the fundamentals of every club, rather than something done sporadically when the club perceives a problem.

This is also important as Rotary clubs have shown they are good at recruiting members, but terrible at keeping them – as evidenced by our membership numbers.

This plan has four stages, which are repeated regularly

**a) Prospecting**

This in itself has two elements: internal and external.

**Internal:**

Get members to work on a list of personal contacts that could be invited to the club for a visit.

**External:**

With all members work through all contacts that are in your area – from Rotary projects, to business connections etc.

The primary element of this phase is identifying WHO you can invite

**b) Recruitment**

A key element here is ensuring the meeting that members attend is inviting for visitors. See various RI documents. Various options are available and each club must decide what will work for them – and learn from the success of other clubs

Then prioritising who to invite to a specified meeting and getting them there. Again, what meeting – inviting retired members to a business networking event will be counter-productive.

Following their attendance, a clear strategy to engage each visitor and work on those who are interested until they are ready to apply to join

**c) Engagement**

Attracting new members has no benefit to the club unless they are involved. Specific action plans need to be implemented to identify the area of interest of the new member, and to get them involved in some aspect of the clubs activities

This involves all committee chairs and project champions

**d) Retention**

Our biggest failing in Rotary – We need to have a dedicated plan to engage every member regularly, listen to where they are and keep them motivated and positive as an active club member.

Too many members leave because they were not invited to get involved, or feel they are ignored by the club – just listening to them is a step forward

Another key aspect about this entire process: Our objective is to get people into or connected with Rotary – not only your club! Please consider the following options whether dealing with current members who are leaving, or prospective members who cannot easily get to your club:

- Refer them to another club in your area
- Refer them to the e-club (particularly if attendance is an issue)
- Consider the viability or a satellite club for your area – effectively extend your membership with a group who meet at a different time, and also run projects!

A graphic representation of the process / timeline of these steps could look like this

Prospecting		Engagement	
Recruitment		Retention	

The length of each action would be decided / agreed by the club. Some clubs may be continually busy with identifying prospects, others may do it at agreed intervals – your club needs to agree what works

Time period	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	
Retention																							
Prospecting																							
Recruitment																							
Engagement																							
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## **2. ACTION PLAN FOR CLUBS:**

These steps are proposals for clubs to consider and use whichever they feel are most relevant to their situation

### **2.1 PROSPECTING**

*When considering prospects to invite to ANY meeting, the key is personal contact with the person concerned. Invites by email without the person expecting it will not be effective*

#### **Prospecting: Internal**

Ask every member to complete a checklist that asks who they interact with regularly and know well enough to greet by name

This can be personalized and expanded, but the type of questions you ask are:

- Who cuts your hair?
- Who is the manager of your local grocery store?
- Who is your banker?
- Who services your car?
- Who are your neighbours? On your left, right, over the road...
- Who manages the service station where you fill up with petrol?
- Who manages your local bookstore?

From this you have a long list of names that members have probably never thought of inviting to your club

You then get them to prioritize them in order of who they know the best, and who stays in the area where your club meets (It is always easier to start with someone you know reasonably well, before approaching those you know by sight only)

The next stage is to task each member to speak to ONE of their contacts about your club, give them a pamphlet about Rotary and invite them to a meeting which is designated as a showcase meeting (part 2 below)

#### **Prospecting: External**

Often this requires a bit more work, but the potential payback is huge.

This prospecting has two elements to it – firstly to ensure more business people know about Rotary so are able to support your projects, and secondly that those interested are able to join the club

Again, we get every member to complete a checklist – those in business, and those involved in our projects:

#### **Projects**

- Who is the lead at this project?
- Which other businesses support them and who is the contact?
- Which other community leaders are involved in this community?

#### **Businesses:**

- Who is your landlord?
- Who do you buy office supplies from?
- Who does your cleaning?
- Who do you buy products from?
- Who supplies your raw materials from?
- Who does your deliveries?
- Which courier company do you use?

From these lists, again prioritise them in terms of who is based in your area and who you know well enough to chat to casually

Once done, extend an invite to attend ONE meeting of the club. Here the emphasis is to invite them to meet the club and know who Rotary is, so they can support you in the future. If you try and recruit them before they attend, you will get rejected

Once they have attended a meeting, they will clearly indicate if they are interested in joining, and can be followed up.

### **Prospecting Youth**

One sadly missed opportunity is the youth projects we run

If your club has an Interact or Rotaract club, two key points to be noted:

- a) The parents of these members clearly installed a sense of community in them, so are potentially candidates we need to identify and invite
- b) The members themselves need to connect with your club – they will leave the current organization and we need to have the door open for them to join your Rotary club!

So start by getting a list of members and their contact details. An event for the youth can be a great opportunity for your club.

### **2.2 RECRUITMENT**

Once you know who you want to invite, then you need to get them to a meeting that accurately and positively showcases your club to them.

This requires careful planning between the president, club service and the membership committee.

For any event where prospective members are involved, some key considerations your club needs to take into account:

- a) **Venue.** Needs to be large enough, easy to find and be in a safe area (secure parking)
- b) **Vibe.** Best summed up in two words: No Drama! Ensure your members agree that the meeting remains positive – any issues can be discussed at a later date when the prospective members are not present
- c) **Cultural Difference.** We have many different cultures in our communities, and we need to acknowledge their situation. E.g. when issuing the invite, ask if they have any dietary restrictions. If they are halaal (for example) you may need to arrange catering, as well as advising them if alcohol will be served at the meeting

Another great opportunity (particularly where a few clubs are in the immediate area) is arrange a multi club meeting for recruitment specifically – i.e. a showcase for Rotary, not just your club.

In addition to bringing them to a normal club meeting (always a good option, but see lower down), we are also aware of 5 different types of targeted recruitment meetings that can be hosted by your club / group of clubs, depending on the target market:

#### **a) Business networking events.**

**Target group:** Business Owners and managers in your area

**Focus of meeting:** Getting to meet them. By focussing on connecting people, they will attend for that purpose, and exposure to Rotary will help identify who is interested in finding out more, or already keen to join. This also helps connect clubs with business owners to support fundraisers and projects, even if they do not join!

**Venue:** A suitable venue for businesses. Often the venue will provide a free venue as they get to promote their business to the attendees as well

**Format of meeting:** Less talk, more action. A few short presentations – Welcome, what is Rotary, Venue promotion, why are we here (networking talk). Then mingle, and talk to recipients one on one, and identify who is interested

Displays and info tables help to channel this interest

Works well as a multi club event in a specific area

**Timing:** Keep formal event to a maximum of 1 hour (better attendance if time limit is known)

**b) Rotary Information evening.**

**Target Group:** People of all ages who have indicated they want to know who we are. Event covers a broad age spectrum, so issues below may be important

**Focus of meeting:** Giving people enough information to help them decide that they are ready to join. Due to the broad group, this includes everything from Rotary International to what your meetings cost each week

**Venue:** Club venue can work, but key elements are: easy to find, safe and secure parking

**Format of Meeting:** Here a more detailed overview of the club – from who Rotary are, to what we do (current projects), who we are (club structure), costs of Rotary, fellowship and social activities. This agenda will be personalized based on the group invited – e.g. if used for friends of members, focus on fellowship as much as projects

**Timing:** To keep their attention, keep formal part of meeting to under an hour, with each part of the presentation limited to 15 minutes. Any longer and you risk losing their attention

**c) Rotary Interest meetings.**

**Target Group:** These are people who have either come through one of the other meetings, or have approached the club and shown serious interest in joining Rotary

**Focus of evening:** Detailed information that enables the attendees to confirm their decision to join. This type of meeting could also be described as a group fireside chat – with one member you meet them individually, with a group an event like this covers the majority of questions and issues

**Venue:** Club venues are probably best – they are keen to join, so use your venue

**Timing:** Can be longer than an hour – but a suggestion that it is broken into segments, allowing time for questions between each segment, as well as drink and bathroom breaks

**d) Youth evening**

**Target Group:** Parents / families involved with youth projects (including members themselves)

**Focus of Evening:** As with information evenings – telling them who we are, but with more emphasis on the youth side of the clubs activities (i.e. common ground)

**Venue:** Whatever is suitable, based on size of group

**Timing:** Again, a new group, so keep it to a reasonable time (max 1 Hour)

**e) Community or project driven meeting**

**Target Group:** Community leaders, business owners and people active in helping the community/project

**Focus of Evening:** This event is specific around the community or project, but should always include a Rotary showcase and invitation to chat to the members – if they are committed to the community, they are potential Rotarians!

**Venue:** Whatever is suitable, based on size and dynamics of group

**Timing:** Will be decided by the organizers and agenda – but don't fill the evening in Rotary only, just pique their interest and make connections!

Whatever type of meeting you plan to use, please bear the following in mind:

While a speaker evening is often a great “hook” to get your visitors to attend, please ensure the meeting includes enough Rotary business to pique their interest. A great speaker on a non Rotary topic may be very interesting, but have no benefit to the club as your visitor has no idea what the club does after they have visited you.

Alternatives are a speaker about a current project, or an evening focussed on updates on current and future projects.

The second point on this meeting is planning:

- Meeting format? (Casual or formal?)
- Have names tags for each visitor
- Designate visitor hosts to look after each visitor
- Plan meeting to keep to time!
- Ensure everything is tested beforehand (e.g. if a presentation, is equipment working etc.)

Then the invites can be sent out. Here it is important that information to be communicated clearly. Time, Date, how long will the meeting last? (Be specific and stick to this time), is there a cost etc. etc.

Invites can (and should) be done verbally and followed up by an email (or delivered invite). Don't pressurize visitors to confirm instantly – give them a date to respond by and follow up if no reply received.

At the meeting, finish off by asking for feedback on how they enjoyed the meeting and if they are interested in finding out more about Rotary – here your visitor will clearly indicate what needs to happen next.

**Now stage 2 of recruitment occurs.** Have a dedicated team who are tasked to meet with these prospects (over a cup of coffee is a great way to do this) and discuss Rotary in general, and their interest in particular.

This meeting sets the ground rules and covers items normally not discussed at the regular meetings

- cost (annual and weekly)
- attendance
- time commitment etc.

After this meeting, there may be some prospects who need to be referred to clubs more convenient to them – a great way to help neighbouring clubs and build a relationship between clubs. Offer to visit the club you suggest with them so they don't feel lost as a complete stranger at the meeting.

Another idea to bear in mind is if you have prospective members interested but your club's time is not suitable, you may have the potential to launch a satellite club, or charter a new club as a result

Those keen on your club are invited back again, and the membership committee advise all existing members that this person is now a prospective member

From here the club's recruitment procedures as laid out in the bylaws are followed, with two specific notes:

- a) Do not neglect the fireside chat (including partners) as Rotary needs to become part of the family, not something that takes members away from their family!
- b) Don't take too long! If a prospect is keen, get them on board as quickly as possible so they can get involved

### **2.3 ENGAGEMENT**

Engagement starts the day the visitor is confirmed as a prospective member. As one of our members put it “People are naturally drawn to passion, fun and vigour. Success attracts success”

Here a plan with your various committee chairs is essential, as this process gets the member involved, and increases their knowledge of Rotary

Two avenues can be followed: It is your clubs choice which they choose

- a) From the initial chat, allocate them to a specific avenue / project and get them to work
- b) Set a series of tasks to expose them to different projects and avenues, so they get a wider range of knowledge about the clubs activities – not just one area

In addition, encourage them to attend at least one district workshop / mini conference / annual conference to get early exposure to the greater Rotary family, and for them to see the larger picture

If you have a larger group here, the Rotary Information Evening is a great option – effectively a training for new members!

Various options exist as to how to manage the process – find what works for your club.

## **2.4 RETENTION**

While shown as step 4, this is actually part of Step 1 (and should start immediately)

The club needs a plan to engage with EVERY member, to understand where they are in Rotary, what their interests and concerns are and what they would like to see the club involved in, ideas for speakers, meetings etc.

In smaller clubs, the President may be in a position to, while in larger clubs part of the membership committee needs to be tasked with this, and have a schedule to ensure every member is included.

A starting point is in the RI Documents – get every member to complete a member satisfaction survey, and analyse the results. Trends will give you direction, and specific answers will help identify members who need to be addressed by the leadership of the club to resolve /understand their concerns.

A key part of this element is communication. Here too much can be as bad as too little, and the format of communication needs to work for the member concerned – so a multi-pronged approach may be better.

I refer specifically to:

- Does your club have a Facebook page? Is it regularly updated, and do members follow your club and read the posts
- Does your club have a website? Is it up to date, and does it accurately portray your clubs activities?
- How do club communications work (from newsletters, emails, WhatsApp groups etc.). Do members want these, and are they responded to.

Another key point about retention is balance!. If the club is only busy on projects, then the social side of being in Rotary is lost – look at events that appeal to members (Don't try and agree on one event that everyone wants to do – you are unlikely to succeed). Ensure some of these are family events as well – particularly if working on attracting younger members.

Another strategy to make older members feel appreciated and engage younger members in club activities is to ask members with more experience to mentor the new members, passing on the knowledge and experience to the newer generation

Extra attention needs to be given to members not involved / not attending to identify why BEFORE they resign, and hopefully get them re-engaged in club activities

Being sensitive to member's situations can make them feel more comfortable, and potentially giving a member time to resolve issues outside the club with no pressure from members may ensure they remain a member rather than leave because they feel they are letting the club down

### 3. RESOURCES

The challenge when working on membership is not lack of information – it is an information overload!

Resources available to assist you are numerous, and you need to identify which are relevant to your club.

Some of these are:

#### **Rotary International**

All available from [www.rotary.org](http://www.rotary.org)

Membership committee Guide – 226b\_en.pdf

Job Description – Membership chair – 226b\_job\_description\_en.pdf

Membership Development Plan – 417en.pdf

Connect to membership leads – 641en.pdf

Membership Assessment tools – 801\_membership\_assessment\_tools\_en.pdf

Enhance the club experience – 801E\_member\_satisfaction\_survey\_en.pdf

#### **Rotary District 9350**

*These will be available off district website and via district office once updated*

e-book (Doubling your membership in 6 months)

Membership Guide (being updated)

Membership information sheet (being updated)

#### **Club activities**

Please contact district chair for copies. These are not official district documents, but are useful tools to consider

New member orientation guide (ex Bellville)

Hout bay recruitment process