**MEMBERSHIP BEST PRACTICES**

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**A. Attraction**

*“Recruiting” alone does not work to grow Rotary successfully. History shows that recruiting programs invariably result in a short term spike and subsequent net drop in membership. Instead we must focus on making Rotary and our clubs* ***attractive*** *to potential long term Rotarians****.***

1. Clubs must make a good first impression. Make sure your website or Facebook page is attractive and up-to-date, and presents an accurate picture of your club.

2. Consider how your club looks to a first time attendee – energy level, friendliness of members toward visitors and each other, value of the program, quality of food, even **fun**. Do you make visitors feel welcome? Will they feel their time is well spent? Does it **attract** people?

3. Know your club’s **value proposition**: the **value** does the club offer to members. **Value** derives from relevant and meaningful service projects, social events, networking opportunities, and activities that sync with members’ **passions.**

4. All Rotarians should be able to explain the club’s **value** proposition. *If a potential member asks, “What’s in it for me?” be able to answer!*

5. The more activities a club has in all **Five** Avenues of Service, the better its ability to **attract**, **engage** and retain members.

6. Caution: attraction and retention are not separate functions. Both depend on an active club with a large variety of member-oriented projects and activities.

**B. Pre-Induction and Induction of New Members**

*Creating active, long-term Rotarians starts with bringing in only those whose interests and* ***passions*** *align with those of the club. Traditionally we think only about telling potential or new members about Rotary, with the (arrogant) assumption that they will love Rotary once they know about it. In fact we first need to listen and learn about prospective or new members and their* ***passions*** *to see if the club can offer them the* ***value*** *they may seek from membership.*

1. “Interview” prospective members to gauge their interest in Rotary and in particular why they want to join: what do they want and expect from membership, what are their **passions**, etc., to determine if they are good fits for the club.

2. If the club cannot or will not provide what prospects want, that person should not be brought into the club but should be encouraged to join another club that can.

3. Information about Rotary and especially the expectations of members and membership should be communicated to potential members before they are proposed for membership. Utilize personal meetings with club leaders, along with information sheets/brochures that explain attendance/participation, service, club dues, support of Foundation, and other expectations of members.

 4. Conduct a meaningful induction ceremony for each new member (preferably a new member class with multiple inductees). Consider a guest speaker such as past President, District Governor, or PDG, to deliver a short address with twofold emphasis: to the new members, on the benefits Rotary membership offers; to the existing members, on the importance of getting to know the new member and involving him/her in the club. The importance of Rotary and involvement by each member should be communicated to the entire club as well as the new member.

**C. New (and Old) Member Training and Engagement**

*Studies consistently show that members leave Rotary due to lack of meaningful engagement. In short,* ***everyone joins Rotary for a reason, to get or accomplish something. They will stay if they receive that and leave when they don’t!*** *The key to retaining active members is early and meaningful involvement in the club in areas of the members’* ***passions****. Thus membership growth starts with a “member first” philosophy that shapes the clubs around the members’* ***passions****, not forcing members to fix into the club’s box.*

1. Consider members to be Rotary’s **customers** – just like successful businesses, clubs must offer the activities the members want.

2. Rotary/club orientation should comprise 2 equally important facets:

a. Member Training: New member training and orientation process (Red Badge program) for each new member with the goal of ensuring the member fully understands Rotary and the Club, and reinforcing duties and expectations of Rotary membership learned pre-induction. Some ideas:

i. Breakfast or happy hour meetings with club and committee leaders, with each explaining the club’s organization, activities, history, etc.

ii. “Red badge” activities, such as attending a board meeting, serving as greeter, giving a short personal story at meetings, becoming involved in one or more activities, etc.

iii. Utilize RI materials such as ABCs of Rotary.

iv. Consider a Rotary Friend (“mentor”) system and assign a Friend to each new member. The Friend should assist in orienting the new member to the club, monitoring and encouraging his/her involvement (including serving as his/her advocate to club officers to ensure the member’s involvement). *Be very picky about who serves as Friends*: utilize only experienced Rotarians with a passion for Rotary and who exude that passion.

b. Club Training: Equally important for retaining long term members is for the club and its leaders to get to know new members, their “hot buttons,” why they want to join Rotary and what they hope to get out of membership. Some ideas:

i. One on one meetings between club President and each new member, best in an informal setting (coffee, breakfast, lunch, etc.). While other officers can do this, a meeting with the President conveys the message that the new member is important to the President and the club.

ii. Create a “class” of new members, to give them a sense of camaraderie. The class should also be tasked with creating and implementing a new club project or activity. See 3.b.ii.

3. New members must be **immediately** involved in significant club projects or functions, consistent with their interests and capabilities.

a. Worst Practice. Handing new members a list of committees and saying pick one or two.

b. Best Practices:

i. Rotary Friend, officers and chairs explain club activities before joining and during orientation, then meet one on one with new members to invite them to participate in areas of interest. *This is an item of first importance- do not* wait a year, six months, or even two months*.*

ii. Each class of new members should be encouraged (required?) to come up with a class service project of their own interest. The board should engage club resources – including money in the club budget - to assist them in executing that project.

iii. Appoint a Club Engagement Chair, whose sole functions are to (a) learn about new members and get them involved in areas of their passion; and (b) monitor all members’ engagement and intervene with those who may be slipping. Engagement Chair is a Board level position and is the new members’ ombudsman to ensure the Board is focused on member involvement and value to members. The Chair can have a small committee of engaged, focused and enthusiastic Rotarians. He/she should report at every Board meeting.

4. Consider biannual surveys of all members to assess satisfaction with the club and its activities, their desired interests for membership, and whether the club is meeting them. Surveys should be comprehensive and touch on every club activity, meetings, and every aspect of club life. This can be done in a club assembly to ensure all members complete the survey.

5. The President should engage in small “focus groups” of a single demographic (e.g. members under 40, women, older members) to allow them to express their thoughts about the club and their involvement. Consider doing this in a relaxed setting, such as breakfast or lunch, to foster personal interaction and candor. This is best done annually. *Tip*: president-elect can do this in spring as preparation for the upcoming year.

6. Based on information gleaned from the surveys and focus groups, *add, delete, or change* club projects, activities, and processes so that current members’ interests are addressed to their satisfaction.

7. If activities or projects (including fundraisers) are not enthusiastically supported by a material part of the membership, they must be dropped (no matter how long the club has done them or how much money they make!). Member satisfaction is more important than money! **But see #8!**

8. **However**, the *number* of people who support a project or activity is less important than their *commitment* to it. If a project or activity is supported by only a small handful of members, but that is their touch point with the club, it should be maintained and supported.

9. Meeting attendance is an (but not the only) indicator of member satisfaction. Monitor attendance and participation records on a monthly basis. The President should personally call members who have been absent or not involved in club activities that month to determine if there is a problem and how to get the member re-engaged.

10. Emphasize club involvement outside meetings and consider implementing a “Touchpoints Program.” See *Retain to Gain – Part 5, Getting Touchy – Rotary Touch Points Create Stronger Clubs* by DGN Steve Sandbo (D6690) and *Rotary Touchpoints* by ARC Brent Rosenthal, PDG.

11. Put new members in positions of leadership consistent with their passions as soon as possible.

12. Encourage all members, especially new members, to attend District events and International Conventions. These high energy events help increase enthusiasm.

 **D. Club Structure and Administration**

*A club’s administrative attitudes and practices directly impact its ability to* ***attract*** *and retain members. If a club is organized and operated in a way that recognizes and serves its members as its* ***customers****, it is more likely to be vibrant and* ***attractive*** *to new members, and its members are more likely to be* ***engaged*** *and committed to the club and Rotary.*

1. All Rotary club leaders should adopt the attitude that the members are their **customers**. Thus the club should focus on learning and meeting the members’ (and potential members’) desires and passions, not on forcing members into the club’s box. Nike doesn’t force its customers to wear the shoes it dictates, it allows customers to custom make their own shoes!

2. Clubs should have an active and engaged Membership Chairperson and committee that is supported by the club officers and board. The committee should deal with membership development and member retention and engagement as a unified whole, recognizing that membership growth is a whole club effort. The chair and president should communicate regularly to discuss all club activities and changes necessary to facilitate membership attraction and retention. The chair should report at every board meeting.

3. ***But*** membership is not the responsibility of the membership committee only. All club officers and board members, and the membership chair are responsible for creating an engaged and growing club. All should attend the District Membership Seminar every year.

4. The President should regularly communicate with members, both as a whole and individually, to obtain continual feedback on member (**customer**) satisfaction. All club members should be informed about the club and its activities in meetings and by an attractive and interesting newsletter that members receive at least weekly.

5. Utilize RI materials, including the Club Assessment Tools (RI Publication EN-808)

6. Form a standing committee with the sole task of investigating and recommending new projects and activities in all **Five** Avenues of Service based on member preferences as revealed in surveys and focus groups.

7. All club officers should get to know new members: sit with them at meetings; meet with them away from Rotary to talk, etc.

8. Consider putting variety in meeting locations and times. Don’t be afraid to exchange a “regular” meeting with a monthly social event (happy hour, party, etc), or an onsite service project. Social meetings are excellent opportunities to introduce potential members to Rotary.

9. Consider being involved in a Rotary membership pilot program. Contact the District Membership Chair to discuss implementing a satellite club, associate membership, corporate membership, or “flexible and innovative” program for your club.

10. Meetings are the link to members. Have **fun** and varied programs. Don’t be afraid to laugh! Make sure all members are greeted warmly and made to feel welcome.

11. Be aware of the current RI “attendance” rules which focus on participation and engagement: attendance at any club activity and committee meetings is now included in measuring attendance. Utilize club engagement policies that respect members’ work and family needs. Use leaves of absence as necessary to keep members. Consider implementing a Touchpoints program.

12. Maintain a roster of former members and stay in touch with them. Continue to send them your newsletter and invite them back.

13. “Roster purging” is the practice of dropping inactive members from club rosters at the end of a Rotary year to avoid paying dues on these members. This obviously causes membership losses. To avoid this, consider these tips:

a. First, try to re-engage inactive members. At one time they were enthusiastic new members. Find out their current interests and try to involve them in activities relevant to them.

b. Second, analyze why this is happening – why is the club not resonating with all members? While some may have to leave because of unavoidable life commitments, most leave because of lack of engagement. *Don’t blame the members who leave!* The common denominator is the club and the club needs to assume responsibility for engaging and retaining members.

c. Finally, if you feel you must purge, do so early in the Rotary year, then work on rebuilding the club with new members to replace them (plus more).

 14. Consider engaging in club visioning.

15. Club leadership must continually embrace change as good and be willing to change to ensure **customer (member) satisfaction**!

**E. Special Areas of Focus to Increase Member Engagement**

1. Club Service (Social) – Successful clubs have a sense of camaraderie built by personal friendships. Regular social activities are indispensable for this. These should include spouses and families.

2. Vocational Service – younger members are drawn to Rotary for the opportunity to meet community and business leaders (**network**), exchange ideas and develop leadership and other skills. Regular social/networking activities are “beneficial to all concerned.”

3. **Public Image/Publicity** – we cannot grow as a secret organization. All club meetings and events should be well publicized on Facebook and other social media, local newspapers, etc.