

# **PETS 2012: Membership Development**

*(Recruitment, Retention, & Member Education)*

(Total Time: 60 minutes)

## **Discussion Leader Notes**

- **Pre-arrange your flip chart(s)/slides and markers to a location that you are comfortable with**
- **Introduce yourself to the group and explain your role as a resource and facilitator of their discussion; you may wish to greet each participant individually as they enter and find a seat**
- **Discuss your expectations and group guidelines (such as taking turns speaking, welcoming and accepting all questions/comments, and asking the group to turn off all cell phones)**
- **Review the session's learning objectives with the participants (HINT: Have the preprinted flip charts for this session near you and be familiar with their content)**
- **Encourage them to take notes and to get to know each other; try to gauge the participants' knowledge and Rotary experience and adjust the facilitated discussions accordingly**

## **Learning Objectives (Refer to your flip chart)**

At the end of this session, participants will be able to:

1. **Lead the club in establishing membership goals for growth**
2. **Understand the components of effective membership development**
3. **Develop strategies for membership recruitment, retention, and education**
4. **Understand the vital role that member education (i.e., continuing member education) plays in member retention and club enthusiasm**

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**If you haven't already done so, please distribute PETS 2012 Membership Development Handout #1. A copy follows next.**

# Membership Development – Handout #1

(Beginning of Session)

- As your club's President, WHAT is YOUR ROLE in membership development?
- Is your club:
  - A. Growing and retaining members?
  - B. Maintaining its membership (not growing but not losing members)?
  - C. Losing members?
- Is your club:
  - A. *Excited* about its future?
  - B. *Complacent* about its future?
  - C. *Concerned* about its future?
  - D. *Really worried* about its future?
- Does your club have a specific approach to BOTH membership *development* AND membership *retention*? (Hint: Look for ideas in this Carolinas' PETS session)
- Does your club have a specific action plan for member education and maintaining interest in your Rotary Club *and* in Rotary International? (Hint: Look for ideas in this Carolinas' PETS session)
- With respect to Membership Development (*growth, retention, and member education*), what will be YOUR legacy?

## My Notes & Follow-up Items:

## **Membership Development** (10 Minutes)

**Q. What has been your club's approach to membership development?**

**Q. How will your club encourage each member to assume an active role in membership development for your club?**

### **Key Points** (Refer to your flip chart)

- A club cannot exist or grow without stable membership
- A solid membership base can increase the club's service and fellowship
- Membership "development" is an ongoing *process* that requires leadership and emphasis
- Membership development includes:
  - *Recruitment*
  - *Retention*
  - *Education*
  - *Organizing new clubs*
- A Membership Committee can greatly assist your club in achieving its goals

**Q. What is your role in membership development?**

**Q. What are your club's membership development goals for the year?**

**Q. Who will you work with to carry out your club's membership goals?**

### **Key Points** (Refer to your flip chart)

- A club membership committee can greatly assist your club
- The membership committee is the primary resource for achieving the club's membership goals
- The committee develops, implements, and follows-up on an action plan for recruiting, retaining, and educating club members.

## **Q. How will you work with the membership committee?**

### *Sample Responses*

- *Meet with the membership committee chair at the beginning of your term and throughout the Rotary year to assess current, annual, and long-range membership goals*
- *Oversee the membership plan to reach the club's membership goals*
- *Ensure that new members have an orientation program/process and that current members receive continuing education*
- *Provide membership development resources from RI and the district*
- *Ensure that your board fully/actively supports club goals*

## **Q. How will you assess your club's current membership situation?**

### **Key Points** (Refer to your flip chart)

- **To determine membership needs, club presidents can:**
  - **Use the membership section of the *Planning Guide for Effective Rotary Clubs (Appendix I of the Club President's Manual)* to assess the club and membership goals**
  - **Review the five-year membership profile of the club available through the district governor or governor-elect**
  - **Complete a classification survey and membership diversity assessment early in the year to ensure that the club is reflective of the community**
  - **Visit the Membership development Best Practices Exchange at [www.rotary.org](http://www.rotary.org) for ideas that have worked in other clubs; network with other growing clubs in your district; the district governor and assistant governors can assist here**
  - **Go to [www.rotary.org](http://www.rotary.org) for club assessment resources**

## **Q. What other club committees can support the membership committee?**

### *Sample Responses*

- *Public relations committee: to elevate the awareness of the club in the community making it more visible and attractive to new members*
- *Service projects committee: to identify and plan interesting projects and activities that engage and satisfy current members and attract new members*
- *Club administration committee: to plan weekly programs that educate members about Rotary and address their personal needs and interests*

## **Recruitment** (15 minutes)

### **Q. Why is it important to recruit new members?**

#### **Key Points** (Refer to your flip chart)

- **Having more Rotary club members increases the capacity for service**
- **New Rotarians bring fresh ideas, new interests, and increased energy**
- **Club membership that reflects the professional diversity of the community makes the club more attractive to the rest of the community**
- **New members can assume leadership roles within the club**
- **New members provide for the long-term continuity of clubs and of RI**

### **Q. Who is responsible for identifying and bringing in prospective members?**

### **Q. What is your role in recruiting new members?**

#### *Sample Responses*

- *Lead by example and recruit a new member*
- *Work with your board of directors encouraging each of them to recruit a new member as examples for the club*
- *Conduct a club assembly on the importance of recruitment and the value of new members*
- *Promote attendance at the district membership seminar*

### **Q. How is your club working to achieve a diverse membership?**

#### **Key Points** (Refer to your flip chart)

- **Membership that reflects the diversity of the community can be characterized by:**
  - **Profession**

- Age
  - Gender
  - Ethnicity
- A club that is more representative of the professional community is better able to identify and meet local service needs and becomes more attractive to potential new members

## **Q. What challenges does your club have when attracting new members?**

### *Sample Responses*

- *Competing priorities, such as work and family commitments*
- *Lack of diversity among members*
- *High cost of membership*
- *Misconceptions about the benefits and responsibilities of membership*
- *Lack of awareness of what Rotary does in the community and in the world*

### *Potential Group Activity:*

## **Q. What strategies will you use to attract and recruit new members?**

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### **Discussion Leader Notes**

- Allow five minutes for this activity
- Have participants work in pairs or small groups of three or four
- If there is time, list additional strategies on your flip chart

**USE Worksheet 11 (from Club President's Manual - *Strategies for Membership Recruitment*)**

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**Retention** (15 Minutes)

**Q. Why have you remained a member of your club?**

**Q. Why have members continued their membership in your club?**

**Q. How does your club retain new members?**

*Sample Responses*

- *Conducts a thorough new member orientation program to inform and educate new members*
- *Assigns a mentor to each new member*
- *Involves new members in committees, activities, and projects*
- *Holds relevant and interesting programs*

**Q. How does your club retain current members?**

*Sample Responses*

- *Involves all members in committee and projects; club offers a variety of projects aligned with club member and community needs*
- *Ensures the club is relevant to all members*
- *Conducts club assemblies to keep members better informed*
- *Improves leadership skills by conducting a leadership development program*

**Q. What is your role in retaining club members?**

**Q. Why do existing members leave Rotary clubs?**

*Sample Responses*

- *Lack of fellowship and involvement*
- *Competing time commitments with family and work*
- *Expenses associated with Rotary club membership*

- *Poorly structured meetings*
- *Lack of service projects and programs that interest members and that relate to community needs*
- *Unavoidable circumstances such as relocation*

*Potential Group Activity:*

**Q. What are some ways to improve membership retention?**

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**Discussion Leader Notes**

- **Allow five minutes for this activity**
- **Have participants work in pairs or small groups of three or four**
- **If there is time, list additional strategies on your flip chart**

**USE Worksheet 12 (from Club President's Manual) –  
*Strategies for Membership Retention***

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**Q. Does your community have a potential group of people who could support a new Rotary club?**

**Key Points** (Refer to your flip chart)

- **Sponsoring a new club in your community can help recruit prospective members whose schedules conflict with the meeting times of existing clubs**
- **If a club is interested in sponsoring a new club, the president should**
  - **Talk with the district governor or district membership development committee for help in sponsoring a new club**
  - **Assist the governor's special representative in planning and organizing the administrative process**
  - **Help organize the new club's programs and projects**
  - **Report to the district governor as requested during the new club's first year**
  - **Support the new club during its first two years of operation**

## **Education** (10 Minutes)

### **Q Why is it important to make Rotary education a priority within your club?**

#### **Key Points** (Refer to your flip chart)

- **Education about Rotary**
  - **Keeps members involved**
  - **Increases retention**
  - **Keeps members aware of Rotary activities worldwide**
  - **Creates motivation and enthusiasm**
  
- **Education is important for those in all stages of Rotary club membership, including**
  - **Prospective members**
  - **New members**
  - **Current members**

### **Q. How can you educate or inform prospective members about Rotary?**

#### **Key Points** (Refer to your flip chart)

- **Prospective members should be informed of the basics of Rotary, your club's history, traditions, projects/activities, and of new member expectations**
  
- **Potential members should be provided with realistic expectations about the benefits and obligations of membership**
  
- **Encourage prospective members to review the many publications available from RI and to visit your club's, district, and RI websites**

### **Q. Why is it important to educate current members?**

#### *Sample Responses*

- *Knowledgeable members can become immediately involved in club activities and possess a sense of belonging to the club*
- *Informed members will be more successful at recruiting new members and sharing enthusiasm about Rotary*
- *Informed members can lead new initiatives and generate creative ideas*

## **Q. What resources are available to help you and your club?**

### **Key Points** (Refer to your flip chart)

- Resources for membership development include
  - District governor and assistant governor
  - Past district governors
  - District membership development committee
  - District membership development seminar
  - Other Rotary clubs
  - Regional Rotary International membership coordinator (RRIMC)
  - Membership Development Division at RI World Headquarters
  
- The following are suggested informational club resources:
  - *Membership Development Resource Guide*
  - *Club Assessment Tools* (Web only supplement to the *Membership Development Resource Guide*)
  - *New Member Orientation: A How-to Guide for Clubs*
  - *Membership Video Set*
  - *Rotary Basics* (such as the *ABC's of Rotary*)

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**Please distribute PETS 2012 Membership Development Handout #2 at this time. A copy follows on the NEXT page in your notes.**

## Membership Development – Handout #2

(End of Session)

- In your club, is Membership Development (*growth, retention, and member education*) a well-designed, intentional process or something less (random, sporadic, haphazard, or \_\_\_\_\_)?
- Does your club have an *active* Membership Committee? If not, why not? If so, is it functioning effectively and making a difference? (Hint: This could be an important *leadership opportunity* for members of your club!)
- WHY do individuals JOIN your club?
- WHY do members STAY in your club?
- WHY do members LEAVE your club?
- Is it important that you and your leadership team KNOW THE ANSWERS to the above 3 questions?
- Would regular Club Assemblies featuring the elements of Membership Development (*growth, retention, and member education*) keep this important matter before your club?
- What needs to happen (or change) within your club to strengthen all 3 elements of Membership Development?

### My Notes & Follow-up Items:

## **Review**

- **Review the Learning Objectives to ensure that all topics were covered sufficiently. Answer any questions and let the participants know how to contact you if they have questions later (Your contact information is in the Event Program for Carolinas' PETS 2012)**
- **Ask participants to share something that they learned during the session and an action they will take as a result of this session. Participants can share with the person next to them or with the entire group.**
- **THANK THE GROUP**