

Carolinas' PETS 2020: Membership Engagement, Growth & Development

How to Gain, Train and Retain OUR Members

(Total Time: 60 Minutes)

Discussion Leader Notes

- ***Smile! Plan your “engagement” plan! (Note: This session has an IMPORTANT “Best Practices Grid and other Discussion Materials/Reference Documents)***
- ***Pre-arrange the location of your BLANK flip chart***
- ***Introduce yourself to the group and explain your role as the 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 (see below and also your notes)***
- ***Encourage participants to take notes on Discussion Materials (clean copies of all material available on the PETS website); try to gauge the participants’ knowledge and Rotary experience and adjust the facilitated discussions accordingly***

IMPORTANT: Please allow enough time for work on the last section of the participant Discussion Materials -- the ***Club Membership Growth Plan***

Session Opening

Learning Objectives

Review with group (in Discussion Materials)

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

- 1. Understand the relationships between Retention, Attrition and Attraction Rates**
- 2. Understand the 4 Key Success Factors of membership growth:**
 - a. Prospect Identification (Lead Generation)**
 - b. Attracting Members**
 - c. Onboarding New Members**
 - d. Retaining Members**
- 3. Identify one or more Intentional Strategies to accomplish each of the 4 membership Key Success Factors**
- 4. Understand 2016 Council on Legislation (COL) flexibilities, including:**
 - a. Meeting Flexibility**
 - b. Alternate Membership Types**
 - c. Satellite Clubs (#1 District Growth Strategy)**
- 5. Share proven “best membership practices” for communicating with and engaging potential, new, and current members**
- 6. Leave PETS with the framework of an effective Club Membership Growth Plan**

Membership Development Section

Discussion Leader: Opening (“Just to get you thinking . . .”)

- **As your club’s President, WHAT is YOUR ROLE in membership development?** (*Listen For: Lead by example by attracting new members*)
- **Is your club:**
 - A. Growing and retaining members?
 - B. Maintaining its membership (*not growing but not losing members*)?
 - C. Losing members?
 - D. Don’t know? Hint: DACdb Club Dashboard - Membership Trend
- **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: Intentional Membership Strategies)
- **Does your club have a specific action plan for member education and maintaining interest in your Rotary Club *and* in Rotary International?** (Hint: Capture ideas from others here in this Carolinas’ PETS session)

Membership Development (12-14 Minutes) (Move briskly)

Introduction To Membership Development

RETENTION, ATTRITION & ATTRACTION (In Discussion Materials)

Q. What are average Attrition and Attraction rates for your District? Did you realize that there's a normal "turnover rate" in a membership organization?

Discuss the importance of knowing whether your club has an Attrition problem, an Attraction problem, BOTH or NEITHER

Hint: Link to actual data, by club, on Membership Plan page

Q. The data suggests that many clubs work just hard enough at membership to almost maintain their membership year-to-year, with a decline of 1 or 2 members. Is yours one of those clubs?

Discuss the importance of consistent, moderate membership growth and appropriate membership goals -- if you're shooting for "breakeven", any unexpected termination will leave you with a net loss of membership for your year as President.

Q. Looking at "5 Things I Wish All Rotarians Knew (and Believed) about Membership" (in Discussion Materials) --

Let's discuss each:

- 1. Nothing Else Matters - We're a membership organization first and foremost! If you get membership right, pretty much everything else falls into place**
- 2. Attrition is Real**
- 3. Retention is a Long-Term and essential strategy, but it's only one piece of the puzzle.**
- 4. Clubs need *consistent and moderate* membership growth every year**
- 5. It takes Intentional Strategies**

Q. What are your club's (or your own) Intentional Strategies for each of the Membership Key Success Factors? *Discuss each* (in Discussion Materials - Intentional Membership Strategies):

1. Prospect Identification (Lead Generation)
2. Attracting Members *NOTE: Strategy #4, a regularly-scheduled Rotary Information Hour is the #1 proven ROI Attraction Strategy*
3. Onboarding New Members
4. Retaining Members

***DL/Facilitator Comment:* As we work through this session, let's continue to think about **FOCUSING ON OUR MEMBERS, with CURRENT members FIRST**; then, "How will we inspire our members to invite their friends, neighbors and business associates to look at Rotary?"**

We have a great product - we don't have enough potential members exposed to it.

Q. How do your members “feel” about your club? When was the last time your club conducted a membership satisfaction survey? (Hint: another “Best Practice”; regular membership satisfaction surveys yield **VITAL information about the climate and “feel” of your club)
(See link in reference section)**

Q. Does your club conduct member exit surveys? (Hint: This is yet another “Best Practice”)

Q. Is it important for your existing members to **KNOW the value of membership *and* the benefits of membership? Does your club give them reasons to **STAY**?**

DL/Facilitator remarks to further engage your group:

Strategically, YOU, as the leader of your club, SHOULD know the BENEFITS of being a Rotarian (in Discussion Materials)

DL: Let's get started on a worksheet for a Club Membership Plan (in Discussion Materials):

- What is a reasonable GROWTH goal? 5%, 10%? If your goal is only +1 or +2 members and you miss, what happens?
- Considering an average attrition rate of 14%, how many "replacement" members are also needed?
- What strategies will you use for each of 4 Key Success Factors?
 1. Prospect Identification (Lead Generation)
 2. Attracting Members **NOTE: Strategy #4, a regular Rotary Information Hour is the #1 proven ROI Attraction Strategy**
 3. Onboarding New Members
 4. Retaining Members

Additional considerations, if time permits:

Q. Most members don't leave Rotary -- they leave Rotary clubs. Why do members *leave* Rotary clubs?

Talking Points (Look for these ideas):

- ***Lack of fellowship and involvement (they "weren't connected") ("I never really felt I had a friend there")***
- ***Competing time commitments with family and work (did we suggest another area club that better met their needs?)***
- ***Could we have scared them off with an implied need for perfect attendance?***
- ***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/job change***

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 on the Carolinas' PETS website and in the PETS 2020 Program)
 1. *Understand the relationships between Retention, Attrition and Attraction Rates*
 2. *Understand the 4 Key Success Factors of membership growth:*
 - *Prospect Identification (Lead Generation)*
 - *Attracting Members*
 - *Onboarding New Members*
 - *Retaining Members*
 3. *Identify one or more Intentional Strategies to accomplish each of the 4 membership Key Success Factors*
 4. *Understand 2016 Council on Legislation (COL) flexibilities, including:*
 - *Meeting Flexibility*
 - *Alternate Membership Types*
 - *Satellite Clubs (#1 District Growth Strategy)*
 - *Share proven "best membership practices" for communicating with and engaging potential, new, and current members.*
 5. *Leave PETS with the framework of an effective Club Membership Growth Plan*
- Ask participants to share something that they learned during the session and an action they will take as a result of this session. REINFORCE the "Best Practices" Grid. Participants can share with the person next to them or with the entire group.
- **THANK THE GROUP**

MEMBERSHIP ENGAGEMENT, GROWTH

&

DEVELOPMENT

DISCUSSION MATERIALS

&

ROTARY REFERENCES