**Response rate & responses to Q 1 & 2:**

Sixty-six members of our club responded to the March 2022 survey. That is a remarkable 66% response rate!

Here’s who responded:

18 are newer members (27 %) and 48 are seasoned members (73%).

32 are working in their profession (48 %) and 34 are retired (52 %)

Age profile of current membership. *Note* University Rotary membership is on the mature side (77% over age 60. 54% over age 70).

**Question #1: Why did you stay in the club**?

You said:

* *University Rotary (my fellow members) gave me a sense of community…. of connectedness…..of friendships…of kinship.*
* *Inspiring speakers lifted me. During an isolated time, they educated and inspired me.*
* *Rotary gave me an opportunity to do good/to serve.*
* *Rotary helped me grow. That prior investment in me kept me tied to the club.*

**Question #2: If you were a newer member, what was your experience**?

You said:

* *You felt welcomed. Club members were warm and helpful.*
* *Joined to Serve and to Connect*
* *You are now looking to realize your original goals for joining/for the club to deliver on the promising opportunities that brought you to University Rotary.*
* *You are trying to figure things out—How does the club work? How does Rotary work?*

**RECOMMENDATIONS FOR THE UDRC MEMBERSHIP COMMITTEE-** Extracted from the March 2022 member Survey-Question #3

1. **ESTABLISH A RECRUITMENT TEAM**
2. **Create a new member Recruitment plan. Designate the leads & teams for each**

To execute such a plan would mean (a) identifying specific people who are willing and excited to serve on each team (b) that an invitation and contact plan be developed (c) that the team understands what that person (or persons in these groups) finds worthwhile and rewarding in joining University Rotary. WIFM.

1. **University District businesses**

This should be linked with the club’s (BoD and Community Service Committee’s) decision to establish a sustained, real presence in NE Seattle & U District, through funded projects, partnerships, and hands-on volunteering

*For example—some ideas:*

* + *Invite U District leaders to join club (YMCA ED Joshua Stabenfeldt)*
  + *Make UDP Exec Dir Don Blakeney an Honorary Member (until such time as his bandwidth allows him to join the club).*
  + *Bring in leader from Burke Museum (consult with Ellen Ferguson to help with ask)*
  + *Bring in member of U District Parking Associates (i.e., Scott Soules, UDPA secty, & owner of Soules Property inc. former U District Rotarian)*

1. **Women**

The 2022-23 Rotary International President is Jennifer Jones, Canada—the First woman president. She has not made women a focus of her year as president---her existence does that.

Governor Kae Peterson has a goal to increase the number of women Rotarians, as part of the clubs’ overall recruit effort.

**(c) Businesspeople and professionals in their 40’s and 50’s to build a healthy middle layer of 40- & 50-year-olds who can bolster the club’s strength for the future.**

University Rotary membership is on the mature side (77% over age 60. 54% over age 70).

**B. ESTABLISH AN ORIENTATION TEAM -GET NEW MEMBERS STARTED OFF AND CONNECTED EARLY ON**

The Membership committee at its May 2022 meeting decided the following:

* The membership committee to review the current orientation packet. **Jeff** will share with the Membership Committee
* **Other recommendations for the Membership Committee to consider at the June meeting**:

WHO will be responsible for new member orientation starting in 2022-23?

Topics to cover at Orientation:

* Provide an updated written document- listing each committee, what they do, the chairs, and time frames. Discuss what the new member is interested in—what expertise they want to bring to the table. *PE Jeff to ask his new committee chairs to produce this? By when?*
  + - Discuss “what engagement means to the new member” and “what it means in Rotary”. “How do Friday lunches, committee meetings, service projects create connectedness?”
    - Describe internal functioning: How do committees work? How to move a project from idea-thru recommendation (application)-thru funding-thru the Service Fund? What are partnerships all about?

**C. “MEET THE MEMBERS WHERE THEY ARE”. ENCOURAGE MORE ENGAGEMENT OPPORTUNITIES.**

Engagement does not equal only Friday lunches. Lunches are certainly a component of engagement, along with committees, socials, hands on projects and more.

The Membership committee at its May 2022 meeting decided the following:

* PE Jeff considering more opportunities to get members engaged at Friday lunches—as Greeters and to introduce visitors.
* **Other recommendations for the Membership Committee to consider at the June meeting:**

Add more members to the Membership Committee teams (recruitment, for example). Ask newer members to join.

Membership Committee to reinforce the message that “engagement” is our goal for all University Rotarians.

**D. KEEP NEWER MEMBERS CONNECTED AND ENGAGED**

The Membership committee at its May 2022 meeting decided the following:

* New Members-Mentor assigned from the Membership Committee. (**Lisa)**
* Sponsor and mentor Role defined (**Lisa)**
* **Other recommendations for the Membership Committee to consider at the June meeting:**

Coffee Ambassadors 2x year (Membership Committee)

New Member follow up: after 2 weeks (selected a committee? Getting involved?) At 6 months ascertain whether they are having the promising opportunities they wanted *Who agrees to own this responsibility?*

Make their 1-year anniversary a special occasion at the club---cover it in bulletin. *Who agrees to own this responsibility?*

Connect newer members to hands-on service opportunities, proactively inviting them. *Who agrees to own this responsibility?*

Get newer members involved in the effort to develop partnerships and the strategy for U District/NE Seattle priority & presence (*Who will be chairing this club effort—and thus would own this outreach to the newer members?)*

**E. MEMBERSHIP COMMITTEE STRUCTURE REFLECTS ALL ITS FUNCTIONS**

The Membership committee at its May 2022 meeting decided the following:

* Bring the Family of Rotary committee under the membership umbrella **(Brenda)**
* **Other recommendations for the Membership Committee to consider at the June meeting:**

Update the subcommittees under the Membership umbrella. *The listed membership subcommittees are currently: membership, membership orientation, Recruitment & Retention, New members engagement, family of Rotary/angel brigades/fireside chats. Need to add Inductions, the new teams, etc.*

**F. PROMOTE OUR MEMBERS AND THEIR PROFESSIONS**

* **Other recommendations for the Membership Committee to consider at the June meeting:**

**Promote our businesses and professionals**: Add a semi-monthly feature in bulletin to report on professional advancement/promotions, of our members who are working in their careers/professional. *An interested individual should be asked to take on this responsibility on an ongoing basis—possibly a newer member (last 5 years) who is not already on a committee or on the Board*

**G. KEEPING OUR MEMBERSHIP INFORMED ABOUT WHAT’S GOING ON WITH MEMBERSHIP**

* **Other recommendations for the Membership Committee to consider at the June meeting:**

Reporting status of our YTD membership growth. Highlighting the work of the Membership Committee.

**RECOMMENDATIONS TO CLUB PRESIDENT AND PRESIDENT-LINE (PREZ, PE, PEN) -** Extracted from the March 2022 member Survey-Question #3

1. **University Rotary to be forward looking. Develop future leadership.**

Throughout the document, there were comments and recommendations that positioned University Rotary for its future and enable it to be forward looking.

Following are a few specific recommendations that deal with leadership and with mindset.:

* “Be open to new ways of doing things”. Newer members and members with prior Rotary experience bring new ideas that should be considered for 2022 forward.
* “Do our best to make sure we have strong and progressive leadership both within our club and within the District”
* Rotate Committee chairpersons/responsibilities….to increase the number of people involved in making things happen/running the show
* Purposefully appoint club members who are our future leaders to chairmanships, board positions, service fund and significant projects.
* Continue to support the development of our members, particularly our new ones so that they can move into leadership roles and share their talents and abilities.

1. **Consider an overall EDUCATION committee** (umbrella for dictionaries or schoolbooks and possibly more).
2. **Schedule Club Assembly to talk about certain topics from March survey and resultant recommended actions.**

Recommend hold in July-Sept 2022 time frame.

1. **Make Club meetings sizzle-Add value**

Many members made short comments that relate to the Club meetings. The # of individuals wasn’t quantified. The goal was high energy and value-added meetings/program. Some onsey-twosey specific member recommendations regarding the club meetings follow:

Detailed Recommendations or ideas from members:

* Meetings treated as “events”
* Special meetings that have high energy (i.e., Apple cup)
* Maybe shorten the meeting to less than 90 minutes---at least reduce by 15 minutes
* Table talks once a month, for members to talk about specific issues/policies of import to the club or the community. Have more mini programs where members report on their project or work *(ala Ezra speaking of polio eradication efforts).* Periodic Club meetings to hear exciting reports of committee work/decisions/project completions.
* Provide a diversity of Music (i.e., recorded music, piano, other). If provided, should be soft enough not to overwhelm those with hearing problems
* Consider a few summer outdoor meals at SYC (hot dogs, etc.)
* Re-introduce peppy greeters
* Recognize that the in-person meeting is noisy for zoomers (*i.e., plates clattering)*

1. **Establish processes by which the Club has discussion/dialogue about significant club policies or topics-- ---topics or policies that may feel political or controversial.**

Three respondents brought up this topic in their survey responses. The reason for including is the survey manager’s experience with members mentioning this topic in 1:1 conversation, but not recording their comments in the survey.

During COVID (early 2020-into later 2021), discussions and decision making regarding a number of significant topics occurred on e-mail. This tool didn’t allow members to have open, two-way discussions that led to understanding and consensus. One member commented that “it is critical that members work out differences, since the individuals are not single-minded. Some members don’t like leaning left or right.” Another said they felt a politicization of topics.

Recommendations:

* Club leadership establish a (written) process/guidance for the club’s addressing of important issues such as DEI, Peacebuilding.
* Continue to have our member Roger Goodman give updates from Olympia

1. **Convene the Service Fund Board leadership and Committee leadership to address the misunderstandings and lack of clarity between both.**
2. **Give the Committees the direction and expectation so they are more successful *(See recommendations for committees)***

1. **Address the undercurrent/confusion between “Friday lunch attendance” and “Engagement”.**

Per Rotary International, “engagement” is more than the regular club meeting (meal). Members are engaged, friendships built, and a sense of community are engendered by committee work, hands-on volunteering, social events, district events and committees as well as the weekly meetings.

Rotary clubs and Rotary International have recognized for a long time that the weekly meeting is not the only way to be engaged and connected (hence attendance was expanded to include committee meetings, socials, hands-on activities, international project teams, scholarship interviews, and more events when members are “together” and interacting).

Respondents referenced the emergence of “us vs them”. That Zoomers coming to lunch meetings heard critical comments to or about people who attended on zoom or who only came to in-person meetings occasionally. Probably not meant to hurt and probably comes from people who truly value in person lunch —but it has an unintended harmful affect.

*Quotes:*

*“It seems like the Friday meetings at the Yacht Club are the main focus for many members, which makes it feel more like a social club. Others, like me, are focused on service efforts. Both are legitimate ---they are just different and each has its value”*

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Recommendations:

* Address this conflict with the few individuals who feel so strongly about the value of the in-person lunch that they cannot refrain from commenting.
* Discuss as a **Club assembly topic**: This is a nuanced topic that members should discuss in order to understand what “engagement” means in 2022 and going forward. Our goal should be to remove the stigma of not attending lunches (when one is active on committees and doing hands-on service). *The Membership Committee received this message as well.*
* Leadership to reinforce the message that “engagement” is our goal for all University Rotarians.

**RECOMMENDATIONS TO THE 2022-23 ROTARY CLUB OFFICERS & BOARD-** Extracted from the March 2022 member Survey-Question #3

**A. Establish a sustained, real presence in NE Seattle & U District, through funded projects, partnerships, and hands-on volunteering**

10 respondents specifically recommended the club be more engaged with the University District & NE Seattle.

*Quotes: “I lament the toll that the last years have taken on the University District (laissez-faire capitalism by absent LLC property owners and then the pandemic)”.*

*“When I joined, I had in mind a focus on helping local organizations in the area”.*

Recommendations:

* The 2022-23 Club Board to make this a club priority. The President to bringing to club at assembly or a 15 min table discussion at upcoming meeting.
* 2022-23 President to create a subcommittee with charge to develop a proposal within the next 4-6 months—to guide hands-on projects, “official” partnerships, community service & peacebuilding funding, and membership recruitment.

Goals suggested by respondents were: (a) being part of efforts to build a more vibrant University District. (b) Having a longer-term strategy for our ongoing support to support homeless youth through ROOTS. (c) Building our relationships/partnerships with the UDP and U District, yielding higher club visibility with the business community and people who are about the District AND leveraging all our funding.

* Take some immediate steps to provide hands-on opportunities in the U-District and NE Seattle. *These would be part of an overall strategy described on prior page.* Adopt a park clean up as well as participating in Magnuson Park cleanups *(They have such a program, for small number of folks)*; collaborate with University Sunrise club in their community hands on; Identify volunteer opportunities with NE YMCA.
* Support the Membership Committee’s recruitment effort targeted on professional and businesspeople on the AVE and NE Seattle.

**B. Increase the transparency of the Board**

* Publish short board meeting minutes in club bulletin

1. **Retain zoom as a tool for members who work or who cannot attend in-person meetings (a hybrid club meeting or committee meetings).**

16 respondents wanted to retain the hybrid (in-person & zoom) option. That is almost ¼ of the respondents---a significant percentage. It is also a real mix of membership.

These members re both newer and seasoned (6 newer & 9 seasoned). They are also working (7) and retired (8). The reasons for preferring a virtual option were many: (a) Working professionals are still working at home virtually several days a week. It is a way of doing business (b) some members are experiencing issues with their own health and avoid in-person situations (c) Some members have health challenges with and immune suppressed family members and, thus, avoid in-person meetings (d) some members live/work on islands-so travel can challenge.

Only 1 or 2 respondents were strongly opposed to retaining the zoom option and felt that members should be expected to attend in person.

*Quotes:*

*A retired member said “There is great pressure on people who are in the early or in the middle part of building their careers to focus intently on their work. Taking time to leave work, drive to a lunch, attend the lunch/meeting and then return to work, takes 2-3 hours out of the workday. For some, that is just too much. Having Zoom attendance allows them to tune in for 60-90 minutes during their lunch hour and participate without jeopardizing their work situation”*

Recommendations:

* Retain professional help to restructure/re-engineer the technological approach currently being used by club to manage members on Zoom. IF there are additional one-time costs to implement these changes, divide the costs among all members (ala an “assessment” as occurs with other organizations or businesses).
* Encourage members to attend at least 1 meeting or hands-on project a month in person (if possible health wise).
* Address an emerging conflict or bad/hurt feelings on the part of Zoomers. Two respondents referenced the emergence of “us vs them”. That Zoomers coming to lunch meetings heard critical comments to or about people who attended on zoom or who only came to in-person meetings occasionally.

**RECOMMENDATIONS REGARDING CLUB COMMITTEES Extracted** from the March 2022 member Survey-Question #3

1. **Clarify and document the purpose of each Club Committee**

Recommendations

* Each Committee chair to document what their committee does, when it does it, and how a member can join. This information to be used in orienting new members and getting them connected to committees.

1. **Regular committee meetings and oversight of projects**

Positive comments about the fact that club committees continued to meet and make decisions during COVID (using zoom). Members were participating in committee meetings even if they were not present at the Friday lunches. Reminder that participation in a committee meeting is “attendance” or better said “engagement”.

Recommendations:

* Committees to meet regularly or on a known schedule (in person or on Zoom).
* Each committee chair to document the committee’s final decisions. A document describing each project, club and overall funding, impact and project sponsor to be sent to the Club President & Board. It will also be published in the bulletin. *This is critical for subsequent fundraising and communication.*
* Committees (through project sponsors) to track success of the funded projects (capturing photos, stories, and #’s of persons served). This information to be used for stories in bulletin and in other communications.

1. **Increase transparency re the workings of each committee**

Recommendations:

* Set expectation that all committees will keep minutes of their meetings and their decisions.
* Committee Chairs to provide brief meeting minutes and decisions to the Club Board
* Committee chairs to have project sponsors write articles for bulletin about funded and completed projects (including photos, outcomes, # served).
* Periodic presentations at Club meetings to present the beneficial impact of projects.

1. **Improve the understanding re definitions and relative roles between the club committees and the Service Fund (501c3)**

Survey responses indicate a lack of understanding—and some conflict—between the Service Fund Board and some Committee chairs, committees, and project sponsors. It includes the stewardship responsibility of the Service Fund 501c3 for donations to the club, the sustainability definition applied by the Service Fund, stewardship expectations, and processes & paperwork,

Note: The Service Fund is University Rotary’s 501c3. The funds raised at fundraising events are received and managed by the Service fund. Donations to the Service fund are tax deductible. The Service Fund is responsible for the stewardship of these monies. IRS rulings provide guidance as to the use of 501c3 Foundation monies.

Committees make recommendations for project funding and request funds from the Service Fund. These include International Service, Community Service, PeaceBuilding.

The Service Fund also disburses funds from the Permanent Fund for scholarships, at the request of the Scholarship Committee.

Recommendations

* Annually, Committee leadership meet with the Service Fund Board leadership to understand how to work with the Service Fund and how to provide guidance to Committee members developing projects.

* The issues here seem to be numerous:
  + - Lack of clarity of what sustainable means and when there are exceptions,
    - Expectations re outcomes and quantifiable results.
    - The paperwork/processes to request funding disbursal from the Service Fund.

1. **Connection with District Committees**

* Committee Chairs might find value connecting with similar District Committees (i.e., International Services, Environmental, Peacebuilding) to make collaborative connections and get ideas.

**RECOMMENDATIONS TO THE SERVICE FUND BOARD Extracted** from the March 2022 member Survey-Question #3

Survey responses indicate a lack of understanding—and some conflict between the Service Fund Board and some Club Committees/committee members. It includes processes and paperwork, the sustainability definition applied by the Service Funds, and stewardship expectation.

1. **Initiate communication with Committees and their (chair) to educate & achieve the Committees’ understanding of Service Fund responsibility, definitions of sustainability, processes and paperwork, and Committee/project sponsor stewardship responsibilities.**

The recommendation is that the Service Fund leadership make this communication and education happen annually.

*See the notes and recommendations to the Club Committees.*

1. **Improve transparency of Service Club decision making**

Recommendations

* Summary minutes of Service Fund Board decisions/status to Club Board and published in bulletin