**BEST PRACTICES FOR ENGAGING MEMBERS**

**(45 minutes)**

## Relevance: Engaging members at all stages of their membership will help them maximize their Rotary experience and continue to find value in it.

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| **Idea exchange** R:\COMSHARE\FProd\ FOR WEB\PDFs\Leadership Dev\Leaders Guide Icons\Idea-Exchange_2.png | Best for discussing topics participants knowGuided by a trainer to keep discussions on topic and allow everyone a chance to speakFollowed by an activity for participants to apply the ideas being discussedSeating arranged in a U-shape for a maximum of 30 |

### Learning objectives

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

* Use Rotary tools and resources to understand why members leave
* Develop strategies for engaging members at different stages of their membership

**Before the session**

* Review the speaking points, discussion questions, and the activities offered and plan your session.
* Ask participants to bring these reports, which can be found under Club Reports in [My Rotary/Reports](https://www.rotary.org/myrotary/en/manage/club-district-administration/reports):
  + Member Viability and Growth report: Shows current retention rates for existing members.
  + Membership Termination Profile: Shows when people are most likely to end their membership and their reasons for doing so.
* Make copies of the [Improving Your Member Retention: Retention and Assessment Analysis](https://www.rotary.org/myrotary/en/document/improving-your-member-retention-retention-assessment-and-analysis).
* Decide whether you will use the PowerPoint template provided and develop slides, or use flip charts or a whiteboard.
* Consider any relevant district or regional issues.
* Choose an activity based on the needs and interests of your participants.
* Make sure you have the materials you need.
* Review the resources listed below.

### Resources

* [Strengthening Your Membership: Creating Your Membership Development Plan](https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan)
* [Membership Assessment Tools](https://www.rotary.org/myrotary/en/document/club-assessment-tools):
  + [Improving Your Member Retention: Retention Assessment and Analysis](https://www.rotary.org/myrotary/en/document/improving-your-member-retention-retention-assessment-and-analysis)
  + [Enhancing the Club Experience: Member Satisfaction Survey](https://www.rotary.org/myrotary/en/document/enhancing-club-experience-member-satisfaction-survey)
  + [Understanding Why Members Leave: Exit Survey](https://www.rotary.org/myrotary/en/document/understanding-why-members-resign-exit-survey)
* [Be a Vibrant Club](https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership#bevibrantclub)
* [Get More Out of Membership: Connect for Good](https://www.rotary.org/myrotary/en/document/connect-good)
* [Rotary Club Health Check](https://www.rotary.org/myrotary/en/document/rotary-club-health-check)
* [Understanding Membership Reports: Getting Started](https://www.rotary.org/myrotary/en/document/understanding-membership-reports-getting-started)
* [Rotary Club Central Reports](https://map.rotary.org/en/rcc/Pages/ClubDataDownloadReport.aspx):
  + Member Viability and Growth report
  + Membership Termination Profile
* [Strategic Planning Guide](https://www.rotary.org/myrotary/en/document/745)

**During the session**

* Welcome participants and introduce yourself.
* Review the learning objectives.
* Highlight these key messages:
  + Most members who leave do so within two years of joining.
  + Ways to learn why they leave, and strategies to engage members, include:
    - Interviewing members who leave and asking them to complete the exit survey in [Understanding Why Members Leave](https://www.rotary.org/myrotary/en/document/understanding-why-members-resign-exit-survey).
    - Use the Member Viability and Growth report in Rotary Club Central to find the retention rate for your club, then conduct the retention assessment and analysis in [Improving Your Member Retention](https://www.rotary.org/myrotary/en/document/improving-your-member-retention-retention-assessment-and-analysis).
    - Conducting the membership satisfaction survey in [Enhancing the Club Experience](https://www.rotary.org/myrotary/en/document/enhancing-club-experience-member-satisfaction-survey) to learn what your members like and dislike about the club, then developing an action plan.
    - Having a strategic plan that incorporates results from your member satisfaction survey to strengthen your club can help members feel more satisfied about their membership.
    - Finding ways to engage your members at all stages of their membership to help them maximize their Rotary experience.
    - Consider reviewing the bylaws in response to the 2016 Council on Legislation’s changes, which give clubs more flexibility in when, where, and how they meet, and what types of membership they offer.
* Use these discussion questions to spur conversation:
  + How can you involve members who avoid projects, activities, and leadership roles?
  + Do your club activities reflect the skills and interests of your members?
  + How can you engage members who are at different stages of their membership, such as:
    - Less than one year
    - 1-2 years
    - 3-5 years
    - 6-10 years
    - 10 or more years?
  + How does your club recognize members for their efforts?
  + Do you interview or survey members who leave? If so, did the resulting information lead to any actions?
  + How can you promote or change your club’s meetings to get members excited about coming?
  + Does your club have a strategic plan? How can you involve your members in developing or maintaining it?
* Lead one of the activities below.
* At the end of the session:
  + Take questions from participants.
  + Highlight key resources and where to find them.
  + Review the learning objectives to make sure they’ve been achieved.
  + Ask participants to write down one idea they’ll use from the session.

**Activities**

Choose an activity:

1. Purpose: Understand why members leave
   * Allow 20 minutes for this activity.
   * Ask members to refer to the Member Viability and Growth report and the Membership Termination Profile they brought with them.
   * Divide participants into groups of 3-4.
   * Ask each group, based on their reports, to discuss these questions, which can be posted on a flip chart, slide, or whiteboard:
     + At what membership stage do people leave your club?
     + What are the main reasons people leave?
     + Which group of members is most vulnerable to leaving?
     + How can you help keep these members?
   * Ask each group to share its responses.
2. Purpose: Engage members at different stages of membership
   * Allow 20 minutes for this activity.
   * Give copies of Improving Your Member Retention: Retention Assessment and Analysis to each participant.
   * Divide participants into five groups based on these membership stages:
     + Less than one year
     + 1-2 years
     + 3-5 years
     + 6-10 years
     + 10 or more years
   * Give flip chart paper to the groups and ask them to review the recommendations in the Retention and Assessment Analysis for their assigned membership stage. Also, ask them to discuss additional strategies for engaging these types of members in their clubs.
   * Ask groups to write their top three strategies on the chart paper.
   * Ask each group to share its responses and post its flip chart paper on a wall.
   * Discuss the activity with the overall group as time allows.