D7620 VISION PAPER: RETAINING & ATTRACTING MEMBERS

Introduction

This paper is intended to provide some reflections on the possibilities and options to ensure our District and Club commitment to retaining the membership we have and to adjust to new ways of outreach for prospective members. Though the fundamentals of engagement, needs, and priorities for current and potential members has not changed due to the COVID19 Pandemic, the way we accomplish these goals and the tools we need have.

This paper is not meant to be a step-by-step instruction on retention and recruitment, but rather a discussion on possible ways to drive member recruitment and retention during Covid-19 recovery. This document is very much a work in progress. As you try out the suggestions noted below, thanks for sharing feedback with the authors as to your outcomes, lessons learned, and things you think should be done differently. The intent is to share your suggestions with D7620 Rotarians.

Retention

"The ability to maintain the current state." As an organization Rotary needs people to accomplish our goals including the provision of services to our local communities and the world. This task can be difficult in normal times and even more challenging during Covid-19 recovery. The reason people remain Rotarians will vary, but can typically be described as the engagement (e.g., meetings, social hours, community), the individual, Club and District projects we do (e.g., services and funding for community and global activities), and the impact we have (e.g., community leaders know where to turn to for reliable partners like Rotary). This will not change, but the delivery of these things to our members and the community will be different for some period of time and maybe not ever get back to what it was pre Covid-19. And we want to learn from what we do to secure 'continuous improvement' for our District and our Clubs. As we move forward, we must remember the value that Rotary provides and try and deliver that same value with the new tools described below.

Engagement

- **Social** – The way meetings are conducted and the ability to keep people involved will likely be one of the biggest changes in the near term. The recently completed District Survey indicated that 46% of the respondents wanted a combination of in-person and virtual or online meetings.
    - Clubs and the District will have to invest in virtual meeting technology. We (most of us) may not be comfortable with or fully understand the capabilities of this technology, but it looks like we will have to adapt. The expense, while not large, is still a cost. Here is what we found with the most popular applications. Go-To-Meeting runs $12 per month for up to 150 users, while WebEx runs $17.95 per month for 100 users. Both are capable platforms where you could invite speakers and control the flow of the meeting. If you end up having a part virtual and part in-person meeting you can use Facebook's Live Stream capability (this may be dependent on the venue, do they have internet, or you could a mobile hotspot to your new technology pile).

- o Keep in mind that physical distancing is not social distancing. We need to engage and reach out to our members now more than ever. The physical meetings, happy hours, and other fellowship events may be on hold, but the desire for contact with other Rotarians is still there. Consider a virtual wine tasting, happy hour, or other solely fun event. Innovation and imagination are required. Find your members with a knack for this and let them go.
- **Service** – One of the reasons our members join for the service we provide. With the physical distancing we may need to revisit our projects. Will we need to change the types and quantities of projects we undertake? Will we need to spread out our completion schedule in order to rotate the number of Rotarians and recipients on any given project. Will we need to develop and execute more direct funding projects? These are issues we will need to discuss with our clubs.
- Club Management – Virtual board meetings, dues structure, committee management and reporting, all processes that will need to be revisited. Again, we must ensure that we involve our members in these discussions. We may also have to adjust and update our bylaws and other governing documents.

Projects

- **Fund Raising** – Fund Raising is certain to change for the near term. 65% of respondents to the District Survey indicated their clubs are rethinking fundraising. The large gatherings that so many clubs count on is gone for now. We will have to emulate the online fund raising a lot of non-profits use now (Go Fund Me, Facebook's Charities, etc.) and that will leave some members feeling they are not contributing, not to mention the social aspect of seeing your "regulars". How to keep our members involved in this key need of clubs will require some out of the box thinking.
  - o Virtual – Some good ideas that have been floated for virtual fundraising include conducting an on-line auction, on-line black tie, email coordination of a food drive including contactless pick up and drop off, and coordinated social media activities to support Go-Fund-Me or related type efforts.
  - o In Person – Though traditionally one of the primary means to raise funds for our efforts we will need to consider the number of people we can have at a given fundraiser. Will a reduced attendance make the event profitable? A consideration may be to break even to maintain the visibility for the event for the future. In any case an analysis of the cost/benefit will need to be conducted.

Recruitment

"Adding new individuals to a population or subpopulation." Recruitment of late has been a challenge without the pandemic. People are busy and the many options we all have with our time makes attracting members – both old and young alike – hard. We have to adapt and use our existing recruitment processes in unique ways. We also have to use new technologies. Clubs should invest in new resources and assigning a Club member to become expert in online platforms like Go-To-Meeting, WebEx, Zoom, and others.

- Prospect Identification: The most effective means of prospect identification will continue to be referrals. Additional means for identifying prospects, which should carry over after the pandemic, could be a digital campaign on Facebook, via email, or a promotion on your website. It would also be a good idea to reach out to past prospects, speakers, and others who have interacted with your club to gauge their interest in joining at this time. For in-person meeting, keep in mind the demographic, which could be vulnerable to COVID19. Continue to have your

one-on-one interaction with consideration of physical distancing, website enhancements (e.g., links to other RI sites/elsewhere, auto email generation, usage of the DACdb CRM module, and other efforts begun prior to the pandemic. All of these activities should support our outreach and prospect generation and management.

- Needs Matching: What is the Rotary value proposition can we offer to existing and prospective members? What if any changes to the time commitment need to be taken into consideration and effectively communicated? How and why Club activities will change needs to also be effectively communicated.
- Closing: Typically, after a prospect decides to give Rotary a try, we have the 'Fireside Chat'. This is an option to ensure the expectations of both parties are clearly articulated and things such as the dues structure, committees, etc. are communicated. What changes may be required to conduct this over the phone or as an online meeting?
- Onboarding: How will member inductions change? How can we make inductions a big deal when may not be able to do this in person? How to introduce fun in a live streamed induction?

In summary, we need to rethink the ways we meet, connect with, and close the deal on new member prospects. This includes:

- The things we say in our local community advertising to attract new members.
- The need to perform internal and external surveys to identify new ways to raise Rotary brand awareness and attract new members.
- How best to exploit Rotary branding (e.g., Rotary Brand Central), Club email signature lines, virtual backgrounds on Video Conference meetings, the potential value of using additional items with the Club's logos (e.g., bags, announcements, etc.)

Conclusion

The involvement of your entire Club on these and related decisions will enhance retention and recruitment by ensuring members feel valued and engaged, and will ensure prospective members feel like they want to be a part of Rotary's winning team. Now more than ever is the time for your Clubs to be innovative and adaptive in all you do to retain and recruit new members. Think out of the box. Consider new Club investment in online meeting resources, tech training, graphics, digital marketing campaigns and enhanced Club websites. Most importantly, enhance your member engagement.

Questions/Comments
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