

# Rotary

## Midwest PETS



# YOUR MEMBERS, YOUR CULTURE

Creating And Belonging Engagement



Sarah Diller Etim  
Regional Membership  
Development Officer  
Sarah.Diller@rotary.org



Carla Escobar  
Regional Membership Officer  
Carla.Escobar@rotary.org

# Ground Rules

01

Listen respectfully

02

Be clear, concise, and brief

03

Raise your hand

04

Silence phones

05

Plan to participate

06

Be inclusive

# LEARNING OBJECTIVES

- Understanding your Club's Culture
- Identify strategies for attracting and engaging members on an ongoing basis
- Learn about resources to strengthen your membership
- Set and track Membership Goals



# WHY IS OUR CLUB EXPERIENCE IMPORTANT?

## It's how people:

- See
- Feel
- Experience
- Utilize
- Interact with **Rotary**



# MEMBER SATISFACTION

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Factors that can influence member satisfaction:

1. Comfort with other club members
2. Club's positive impact in the community
3. Confidence in club leadership
4. Enjoying club meetings

# MEMBER RETENTION

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Factors that can influence member retention:

1. Comfort with other club members
2. Enjoying club meetings

**ROTARY CLUBS ENGAGE MULTIPLE GENERATIONS OF PEOPLE WHO SHARE THE IDEALS OF SERVICE, LEADERSHIP, DIVERSITY, INTEGRITY, AND FRIENDSHIP. THEY WANT TO MAKE CONNECTIONS WHILE CREATING LASTING CHANGE. PEOPLE JOIN TO:**



**Develop meaningful friendships**



**Serve their local community**



**Create professional connections**



# WHY MEMBERS LEAVE



CLUB ENVIRONMENT  
AND CULTURE



UNMET  
EXPECTATIONS



TIME AND FINANCIAL  
OBLIGATIONS



PERSONAL  
CIRCUMSTANCES

# UNDERSTANDING YOUR CLUB CULTURE

People of Action

Strong public image

Leadership Development

Professional Development

Social Events

Networking



Connecting for good

Engaging meetings/gatherings

Enthusiasm

Service Projects

Energy

Mentoring

# CLUB FLEXIBILITY



FORMAT



FREQUENCY



MEMBERSHIP  
TYPES



CLUB  
MODELS



ATTENDANCE

# WHAT CAN WE OFFER OUR MEMBERS

Connections  
+ friendship

Service  
opportunities

Leadership  
development

Networking

Fun

Personal  
development

Professional  
development

Mentoring

# CLUB EXPERIENCE: GROUP DISCUSSION

- Leadership development
- Professional development
- Mentoring
- Networking
- Service projects
- Social events
- Member surveys (Entrance, ongoing, exit)
- New member orientation
- Fellowships
- Communication

## ENHANCING THE CLUB EXPERIENCE: MEMBER SATISFACTION SURVEY



The experience your club offers people affects how they feel about the club. By asking members for feedback regularly and then responding to it, you're showing your openness to change and empowering them to help create their ideal club experience. The Member Satisfaction Survey can help you gather feedback so you can use it to ensure that members are enjoying their experience.

### WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

- Identify what your members like and dislike about their club experience
- Develop an action plan that builds on what people enjoy and that ends or changes what they don't

### GETTING ORGANIZED

You'll need a dedicated group of people to conduct the Member Satisfaction Survey. It can be your club's membership committee or a few interested volunteers. You can devote time during a club meeting to discuss how satisfied people are and have them take the survey. You could also hand out the survey or email it to members so they can have more time to complete it. Or you could hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.

# THE CLUB EXPERIENCE IS POSITIVE WHEN:



- Members have confidence in club leaders and direction of the club
- Members enjoy meetings
- Service opportunities make a difference
- Members are comfortable with one another
- Members develop meaningful friendships



# HOW DO WE ENSURE A POSITIVE EXPERIENCE?

## ENHANCING THE CLUB EXPERIENCE: MEMBER SATISFACTION SURVEY



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Survey Members

Review trends

Identify who's missing

Get non-member feedback

Check culture

Utilize Rotary's Membership Assessment tools

# MEMBERSHIP ASSESSMENT TOOLS BROCHURE



**GETTING TO KNOW PROSPECTIVE AND NEW MEMBERS: MEMBER INTEREST SURVEY**



**ENGAGING AND KEEPING MEMBERS: A RETENTION ASSESSMENT AND ANALYSIS**



**UNDERSTANDING HOW YOUR CLUB REPRESENTS YOUR COMMUNITY: A DIVERSITY ASSESSMENT**



**ENHANCING THE CLUB EXPERIENCE: MEMBER SATISFACTION SURVEY**



**FINDING PEOPLE TO INVITE: A PROSPECTIVE MEMBER EXERCISE**



**UNDERSTANDING WHY MEMBERS LEAVE: EXIT SURVEY**





# ASSESSMENT AND PLANNING

## STRATEGIC PLANNING GUIDE



## ROTARY CLUB HEALTH CHECK

Identify your club's problem areas and make changes to help it stay relevant for members and the community.

- Club Experience
- Service and Socials
- Members
- Image
- Business and Operations

# CREATE AN INCLUSIVE CLUB CULTURE

## DIVERSITY



## EQUITY



## INCLUSION



We believe that all people have qualities that make them unique. We strive to create an inclusive culture where each person knows they are valued and belong.

**[ROTARY.ORG/DEI](https://rotary.org/dei)**

# WHAT IS HAPPENING AND WHY?

- Best-in-class technology partner
  - Salesforce
- “Club-first” strategy with guided “shopping” experience
- Leveraging marketing automation to nurture candidates and ‘nudge’ volunteer lead managers
- ~30,000+ leads per year
- 61% under 40 & 35% female
- 66% followed up by district
- 100,000 candidates still at district
- Of leads assigned to clubs, 10.6% conversion rate

# MEMBERSHIP LEADS COMMUNICATIONS PROSPECTIVE MEMBER



Confirmation of form submission (day 1)



Status update messages (day 10, if applicable)



Lead closure confirmation (if applicable)



“Nurturing campaign” (coming soon)

# MEMBERSHIP LEADS COMMUNICATIONS CLUB LEAD MANAGER



Notification of prospective member interest (day 1)



Reminder of notification #1 (after 2 days)



Reminder of notification #2 (after 7 days)



Escalation to district notification (after 12 days)

# MEMBERSHIP LEADS COMMUNICATIONS DISTRICT LEAD MANAGER

01

Notification of prospective member needing assistance (if applicable/day 12)

02

Reminder of notification #1 (day 15)

03

Reminder of notification #2 (day 17)

04

Escalation to RI notification (day 19)

# ONBOARDING AND ORIENTATION

## Onboarding:

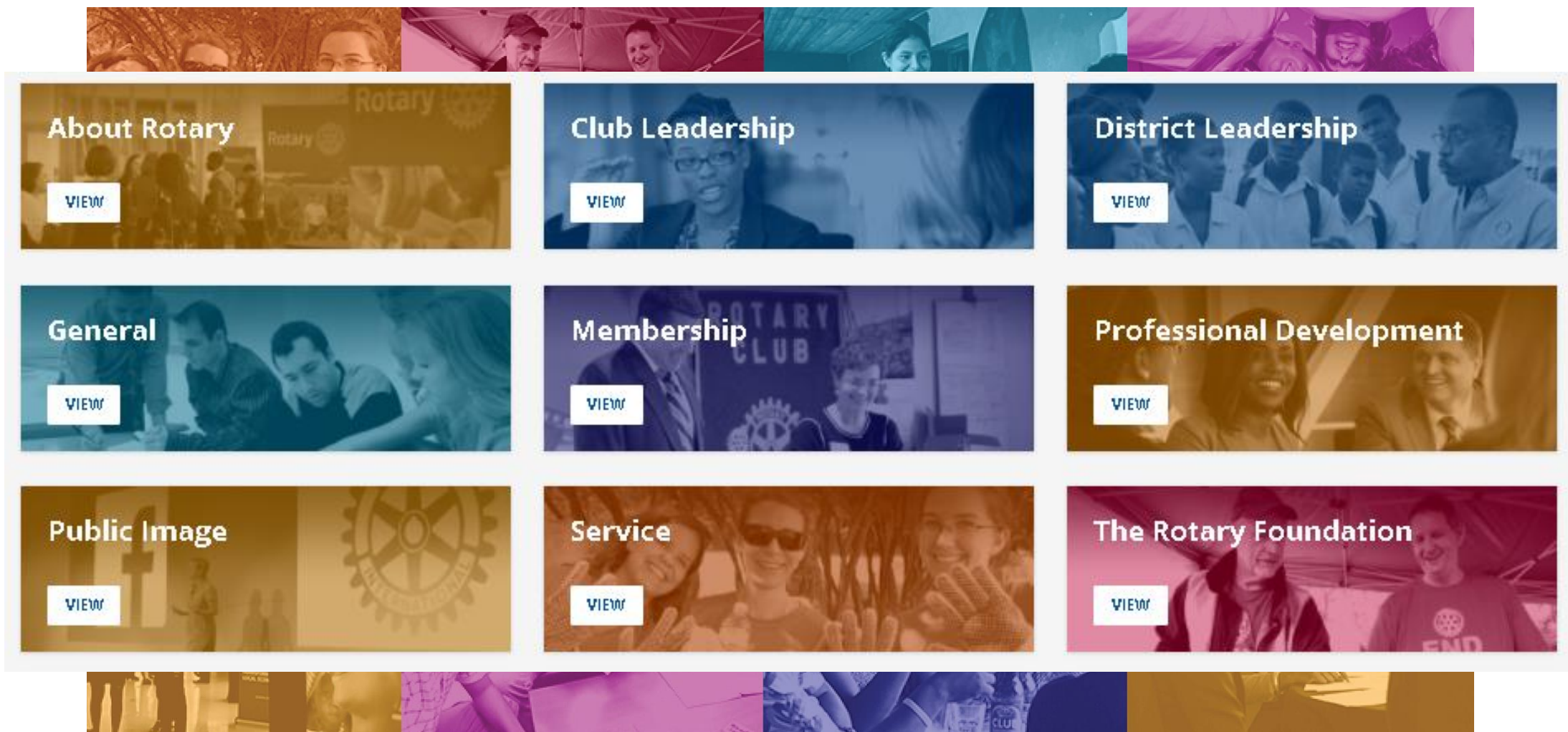
- An ongoing process from the time an individual enters the organization until they becomes established
- May last for 3 months to a year
- Enables individuals to contribute

## Orientation:

- A short-term one-time or few-day event, activity, or meeting
- Provides basic information, introductions, and tools



# YOUR LEARNING JOURNEY





# CLUB MEMBERSHIP COMMITTEE BASICS

## LEARNING PLAN

\*



Getting Started With the Learning Center  
E-learning | Duration 15m



Get Ready: Club Membership Committee  
E-learning | Duration 15m

\*



Working With Your Club Leadership Team  
E-learning | Duration 30m



Leading Effective Committees  
E-learning | Duration 15m

\*



Is Your Club Healthy?  
E-learning | Duration 1h



Creating an Inclusive Club Culture  
E-learning | Duration 15m

\*



Best Practices for Engaging Members  
E-learning | Duration 45m

\*



Strategies for Attracting New Members  
E-learning | Duration 15m

\*



Rotary Club Central Resources  
E-learning | Duration 15m

\*



Online Membership Leads  
E-learning | Duration 30m

\*



Committing to Diversity, Equity, and Inclusion  
E-learning | Duration 15m

\* In Club President Basics or Intermediate Learning Plan

# RI RESOURCES

Check out the array of guides that are available to assist clubs.



## ENHANCING THE CLUB EXPERIENCE



The power of your club lies in your members. By asking them for feedback regularly, you are demonstrating your openness to change and empowering them to help craft an ideal club experience. Use this survey to obtain member feedback about your club. Then use the information to make a plan to ensure that members are enjoying their Rotary club experience.


**OUTCOME**  
Conduct this assessment and act on its results to:


- Identify what your members like and don't like about their club experience
- Develop an action plan that builds on what your members like and discontinues or changes what your members aren't satisfied with

**GETTING ORGANIZED**  
You'll need a dedicated group of members to conduct the member satisfaction survey. It can be your club's membership committee or a few interested, unbiased members. You can either devote time during a club meeting to talking about member satisfaction and taking the survey or hand it out or email it to members and allow them more time to complete it. Alternatively, hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.

MEMBER SATISFACTION SURVEY 51

## STRATEGIC PLANNING GUIDE



Rotary 



## CLUB HEALTH CHECK

# ADDITIONAL RESOURCES



## My Rotary

- [rotary.org/membership](https://rotary.org/membership)
- [rotary.org/flexibility](https://rotary.org/flexibility)
- Learning Center
- Brand Center
- Rotary Club Central

# DISTRICT + ZONE MEMBERSHIP TEAMS

District Membership Chair

Rotary Coordinator & Assistants

- Alex Johnson
- Ade Onayemi
- Balakuntalam Sridhar

# REGIONAL MEMBERSHIP OFFICER (RMO)

**Carla Escobar**

Regional Membership Officer

[Carla.Escobar@rotary.org](mailto:Carla.Escobar@rotary.org)



# TAKE ACTION



What are your post-session action items?



What goals/ changes do you have for your Club?



Who are you going to recruit to implement your action items?



How are you going to share your vision?



**QUESTIONS**