



District Membership Committee

April 26, 2023

Membership Education Session



On Wednesday, April 26 from 7:00 – 8:00 pm, the District Membership Committee is presenting our 1st in a series of success stories regarding Membership attraction, attrition and member experience.

Our 1st presenter Rob Galloway (Fergus-Elora), has been a Rotarian since 1986. He joined while living in Chatham, became President of Burlington Central and in 2021/22 while President he helped to grow the Fergus-Elora Rotary Club from 30 to 41 members with a club-wide structured program to enhance member experience, attract new members and reduce attrition. Rob will share how the Club embraced RI theme of “Each One, Bring One” last year.

Rob has served on the Diversity, Equity & Inclusion Committee and is a multiple Paul Harris Fellow and Paul Harris Society Member. He is a major donor to The Rotary Foundation and a Polio Plus Society Member.

Click [here](#) to register for this Zoom webinar.

Clubs that Increased Membership ...

LEADERSHIP CONTINUITY

89%

Designate a
President-Elect at
least one year in
advance

49%

Designate a
President-
Nominee at
least 2 years in
advance

92%

Have a club
membership
chair

Clubs that Increased Membership ...

INTENTIONAL MEMBERSHIP FOCUS

Membership
growth top of
mind

Membership is
everyone's
responsibility

Weekly
agenda item

Clubs that Increased Membership ...

DYNAMIC, MEANINGFUL SERVICE

“SIGNATURE” PROJECTS & FUNDRAISERS

INCLUDING COMMUNITY MEMBERS

ONGOING, ACTIVE SERVICE

Clubs that Increased Membership ...

INCLUDE COMMUNITY MEMBERS

87%

Invite community members to projects and fundraisers

Quote from survey

“This is the secret sauce.”

67%

Hold one or more events to attract new members

New Member Checklist



New Member Welcome Checklist

WELCOME to Rotary Cambridge Sunset!

You have been assigned a Mentor ("buddy") from our Club to support you over your first six (6) months of your journey as a Rotarian. We want you to be able to get the most from your Rotary experience and to have someone answer your questions. You will find that you get from Rotary what you give. If you have questions, please ask. If you need assistance, please reach out. There are so many opportunities from membership – within our Club, within our District (7080) and around the globe through Rotary International. Your Mentor will help you complete the checklist. When you have completed the checklist please sign below and return this form to your Mentor. Enjoy your Rotary journey ... and welcome to Rotary Cambridge Sunset!

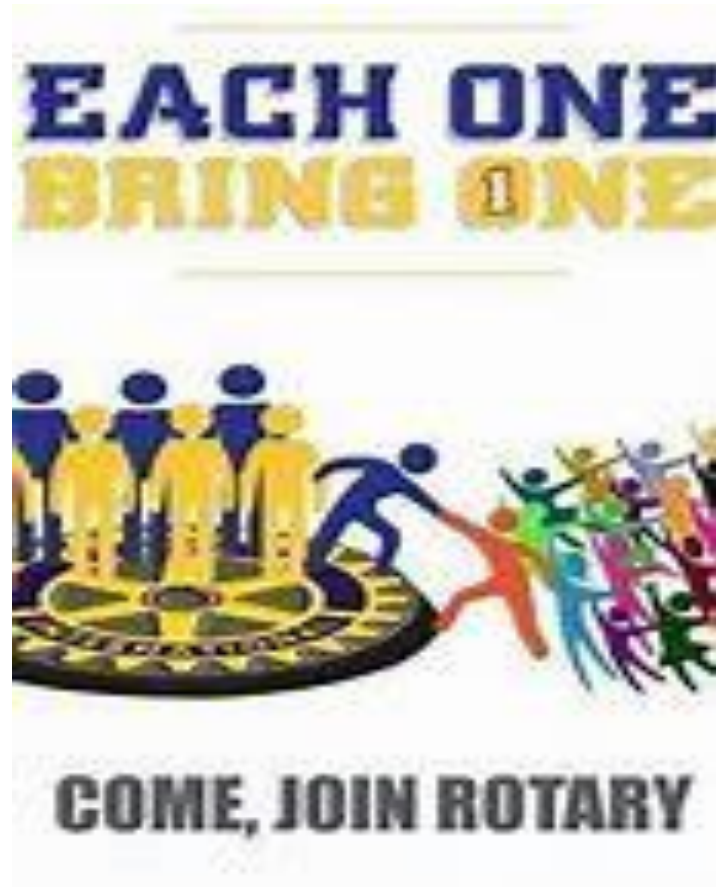
- | | |
|---|------------------|
| 1. Review Member's Application & Commitments: | Date Completed: |
| 2. Ensure Member has Nametag Ordered/Rotary Items | Date Completed: |
| 3. Membership Induction | Date Completed: |
| 4. Welcome meeting with your Mentor (Online or In Person) | Date Completed: |
| 5. Review the Four Way Test | Date Completed: |
| 6. Review Rotary Basics (booklet from RI Website) | Date Completed: |
| 7. Review the Club's website | Date Completed: |
| 8. Review Club's committee structure/roles | Date Completed: |
| 9. Review Strategic Plan (Mission, Vision & Values) | Date Completed: |
| 10. Create Your ClubRunner Login & Profile | Date Completed: |
| 11. Create Your Rotary International Login & Profile | Date Completed: |
| 12. Review New Member Resources on My Rotary –
https://my.rotary.org/en/learning-reference/learn-more/new-member | Date Completed: |
| 13. Review the New Member Resources Section | Date Completed: |
| 14. Review District Website: www.rotary7080.org | Date Completed: |
| 15. Serve as a Meeting Greeter (2) times | Dates Completed: |
| 16. Attend each Club Committee (at least once) | Committees: |
| 17. Join a Club Committee (at least 1) | Committee: |
| 18. Complete Your Classification (Bio) Talk to Club | Date Completed: |

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|--|----------------------|
| 19. Attend a Club Social Activity (at least 1) | Date Completed: |
| 20. Attend a Club Fundraising Event (at least 1) | Date Completed: |
| 21. Attend a Club Board Meeting (at least 1) | Date Completed: |
| With Mentor: ____ Without Mentor: ____ | |
| 22. Attend Meeting @ another Club (at least 1) | Club/Date Completed: |
| 23. Complete a Check-In with the Club President | Date Completed: |
| 24. Complete a 3 Month Check-In with your Mentor | Date Completed: |
| 25. Complete a 6 Month Check-In with your Mentor | Date Completed: |
| 26. Maintain Rotary Membership for 6 Months | Date Completed: |
| 27. Ensure you're current with your Rotary Dues | Treasurer Initials: |

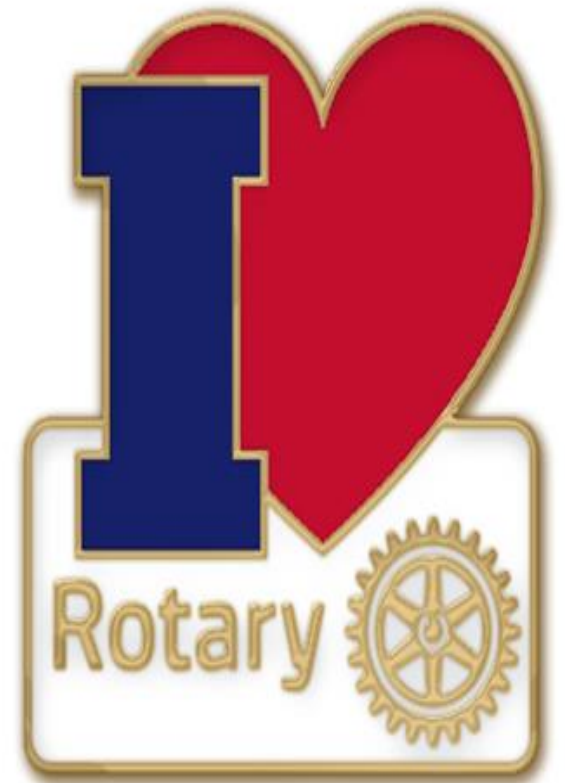
Member Name:	Member Initials:	Date:
Comments:		
Mentor Name:	Mentor Initials:	Date:
Comments:		
Membership Chair Name:	Initials	Date:
Comments:		

Rob Galloway
Past President 21/22
Past President 93/94



Membership –The Heart of your Rotary club

- Why Membership focus ?
- What's your clubs strategy ?
- New approach “What we did in Fergus-Elora”
- Our process----- it was a team effort!
- The amazing results-how is this applicable to your club !
- Next steps for your club-generate some ideas



Why a membership focus?

- It became straightforward to us what our greatest need as a club
- We understand Rotary, Serve above Self and helping our community---all with great success
- We have talent, experience, financial stability----
- Our club membership was declining----drop from 65 members to 30
- On a Positive note our club have 35% female members-serve as President and directors
- But no thought out plan---NO PLAN!!!---- or written strategy for membership growth

We discussed the overall “new member”

- diversity/equity/inclusive priority-----ROTARY IS OPEN TO ALL
 - All business types-sole proprietor, part of corporate organization
 - All community types-urban, rural, white collar/blue collar
 - Could be just retired-their time has opened up
 - Could be in their 20's
-
- Common----interest in “Service above Self” and helping others
 - I believe each club should discuss demographics-take a snap shot of where your club is with inclusion as part of the process



WHAT MEMBERS WANT



Local community service



Connecting with others



Professional & leadership
development opportunities

Lets build a membership plan for 21/22

- We decided to build a membership plan/strategy to address the simple need of attracting new members----a healthy club has new members joining your club all the time-consistently

- 1-Assessment Phase (with member and committee input)
- 2-Develop recommendations on a PROCESS on how to address the membership growth
- 3-Build the strategy with specific tactics
- 4-Prioritize-----what can we actually do, what can we afford financially
- 5-Implement the new plan
- 6-Measure the results of the plan
- 7-Follow up the plan

Assessment Phase (this is not one quick meeting)

- Start with a Committee of new members, woman members, members who have a record of proposing members
- Put a leader (chair) in place
- Document all meeting findings and ideas with minutes
- Agree on our starting point-for example 30 members as of July 1st
- Have 100 percent agreement on the goals of the committee
- Commit to meet on a monthly basis and discuss membership-ONLY MEMBERSHIP
- Communicate to our club members(updates)-this is key

Develop a PROCESS on how to build the plan

- Everyone on the committee had a say-input into the process
- We made a rule----all ideas are accepted into the initial plan
- We had agreement---no one, no individual to comment “we tried this-it did not work!”
- No initial discussion on why this idea will not work for us
- Do not cost out the idea on the initial suggestions
- TO START ---after above was agreed to- One meeting just on the BRAIN –storming ideas-----developed a spread sheet of ideas

Group similar tactics together

- We reviewed the initial ideas and in the meeting minutes tried to group similar ideas together
- Based on this we came up with a Title for similar tactics
- We all had agreement that the tactic fit with the new title
- No elimination of any idea at this point
- No prioritizing any tactic or title at this point

Build out

- So we began with the title/subject of the grouped tactics
- Now we start to “line by line” review each tactic
- We went thru each tactic and expanded the idea or after discussion eliminated the line item—WE FOCUS ON THAT ONE TACTIC
- After this step—we prioritized the tactics as best we could so #1 is the best tactic to worst-----
- So we build out 6 strategies with tactics and timelines
- We then costed each strategy
- We then voted on the priority of each 6 strategies
- Also discussion----can we do start on a variety of strategies at the same time

Our Membership Plan-prioritized

- 1-Each One Bring One
- 2-Chamber of Commerce
- 3-Market your Rotary Club
- 4-Educate/engage our current members-do not lose them
- 5-Develop a spread sheet on all prospective members
- 6-Once in the club---mentor

Review the Strategy- Each One Bring One

- Developed a membership event---special club meeting
- 3 months ahead we explained the strategy and this tactic-picked the date
- All members involved and asked to participate
- Everyone to bring a guest
- The club paid for their guest meal
- A special agenda of speakers developed—very thorough
- We asked a new club member to say why they joined Rotary
- We had a member explain the benefits of Rotary
- One speaker explained the amazing International aspect—key differential
- One speaker explained the difference Rotary has made in our local community
- The membership committee had a follow up plan for each invitee
- A membership package provided for all the guests

Review the strategy- Chamber of Commerce Partnership

- Started to attend the regular chamber meetings
- Introduced ourself as a Rotarian rather than our business
- We positioned at different table each event –goal explain Rotary
- Invited chamber prospect to attend a club meeting
- In future----have a Rotary table at a business event
- Ideas---every chamber member gets invited to your club meeting

Review the Strategy--Market your Rotary Club

- Discussed the different approach to marketing Rotary-----SOCIAL MEDIA
- Centre Wellington Advertiser—local newspaper
- With WA connected with community reporter----gave pictures and written background about our events----ie End Polio, Christmas Cheese program, Catch the Ace-----VERY PROACTIVE
- Started digital media---Elora-Fergus Today---stories about Rotary and our club
- Did Interviews on local radio---they are looking for stories (free)
- Moved our remembrance day meeting to the legion---significant coverage
- Key-developed a membership brochure as a hand out
- Enhance your website-----QUESTION—is it easy for someone to look at your first page and know where you meet and who to call about your club! IS IT EASY TO COME TO JOIN A MEETING ?
- Develop facebook and Instagram pages-----new insights every week-articles every week
- Developed a club brochure—updated with current information
- Improve the Branding in the community-utilize Rotary themes-ex World Polio Day raise a flag at city hall

Rotary

Club of Fergus-Elara



SERVE TO CHANGE LIVES



www.ferguselorarotary.com



Local Support

Big Brothers Big Sisters C/W
Child Witness Centre
Community Resource Centre
CVR Chamber of Commerce
CVR Foodbank
CVR Sportsplex
Elora House
FCV Special Needs Soccer
Friends of the Grand
Graves Hospital \$500,000 pledge
Guelph Children's Foundation
Guelph Wellington Women in Crisis
Integrated Youth Services Network
Kids Ability Centre-Wellington
Millburn St. Splash Pad
Neighborhoods Tree Legacy Program
Portage
Rails to Trails
Senior Trans
Small Business Covid 19 Response
Student Bursaries
The Memory Cafe
The Pregnancy Centre CVR
Wellington County Learning Centre
Youth Leadership Camps
Youth Adventures in Citizenship

International Service

Greeter Box - Silver Hero Level Support
Polio Plus
International Youth Exchange Sponsorship
Covid 19 International Response
Rotary School Scholarship
S.A.R.E. Agricultural Foundation
Rotary Projects in Guatemala, India, Peru
and Honduras

*"A strong and vibrant
club committed to serving
our local and global
communities while
ensuring equity, diversity
and growth for all"*



Review each strategy—Engage, Inform and Educate members

- Provide a business card to all members-name , phone, email---to carry with each member and hand out-club member donated this expense
- Made a focus each club meeting---membership minute
- Discuss what to say to prospective members-the 30 second elevator speech
- Communicate results of membership strategy
- Involve new members in the ceremony of induction---not the same group that has been doing induction ceremonies for 20 years
- Have great meetings-----fun---new speakers----try some new ideas to engage members---zoom can work-----our speaker discussing the MARS mission with NASA----has ZOOM generated fresh speaker ideas
- Club brochure---developed provided key information to members
- KEY INSIGHT-----are all your current members engaged?????

Review the strategy- Develop a club membership spread sheet

- As a club we had No system in place-no follow up for prospective members
- NOW-Every guest registered by membership on spread sheet----name, address, phone, proposer, date they came to meeting, follow up notes
- Review at board meetings
- Membership committee used to follow up with proposer
- Invite prospective to club meeting but also our social events
- Invite prospective members to join in community events---example Woodstock-Oxford has a Saturday morning food bank program a non Rotarian asked if they could help etc volunteers help with Rotary program great way to see Rotary in action
- Involved in fundraiser(even before they are members)----approached for cheese----get buy in

Review the strategy- once a new member is in the club

- Engage all new members----utilize new member checklist (Scott)
- Mentorship with directors-define what role does the proposer have?
- Follow up for helping on projects
- Follow up to see how they like Rotary
- Goal is to have fireside chats-6mth in with directors
- find out what charges them up
- Sit with the new members----don't always sit with your long time Rotarians---at club meetings/social events
- Invite to a district event or district conference—take the lead

A POSITIVE CLUB EXPERIENCE MEANS:

Members **enjoy** meetings

Members have **confidence** in club leaders and leadership

Members feel **comfortable** with each other

Service opportunities **make a difference** in the world and local community

Members make **meaningful friendships** and personal connections

[ROTARY.ORG/MEMBERSHIP](https://rotary.org/membership)

Discussion on creative ideas to add younger working/business members

- Time of Club meeting-do we need to change from lunch time to breakfast-appeal to younger members----board meetings consider in the evenings???
- If we had two meetings a month-should we do more classifications and networking at ONE meeting, more social events
- Target business/females/professionals----get younger
- Yes Rotary core values—reduce fundraising projects move towards environment or hands on projects - appeal to younger members
- Survey our community on service organization role/need-formally asked our Mayor what the greatest need of our community
- Take a hard critical look at your current membership strategy!!!

Results

- Started at 30 members-July 1,2021
- End of our Rotary year June 30, 2022----- 41 members—over 35% increase
- Membership always always needs to be a priority
- We lost two members this year due to death—natural attrition
- Does your club attend district membership zoom events?
- Should we consider at our district conference a round table discussion on membership?
- Does your club have a member on the cluster membership committee?

Next steps for your club

- Start now
- Keep the enthusiasm going from tonight
- “Membership” is the heart of the club
- Have fun with it
- Invest in this membership focus with some dollars
- Talk with your incoming President-----August is membership month
- Recommend-----EACH ONE BRING ONE as a starting point
- Rob Galloway-Proud member Fergus-Elora Rotary Club

Membership Our Greatest Asset

