FROM: Steven A. Wright, COS/DGN

TO: Rotary District 5150

RE: Membership Task Force Report – Executive Summary

DATE: December 9, 2022

The work of our D5150 Membership Task Force is now complete, and on behalf of the 16 Rotarians that made up this effort, I present this report to our District.

The attached results deal in depth 5 key areas: Current Difficulties, Membership Attraction, Engagement and Retention. Several key items rose to the surface, and are offered as key take-aways for District and Club Leaders:

1. First impressions are key:

* Inviting prospects to projects, not just meetings, is recommended.
* Collaborate with other Clubs on projects that can introduce prospective members to the larger Rotary family
* A Club Greeter is important for both projects and meetings to make prospective members feel welcome
* The invitation to join Rotary should be methodical and transparent as to time/treasure/talent needed from the prospect.

1. A Nurture/Sunshine/Angel Team is necessary to maintain contact with all members, especially missing in action members.
2. Mentors, to include the Sponsor and a Mentor (Past President) are an important part of retention.
3. New types of membership should be explored – Corporate, Family, Partner, Student, younger member discounts.
4. Each Club needs a Membership Champion – not just the Membership Chair, but someone whose entire focus long-term is on membership.

It is also suggested by the Task Force that this report be shared with all current and future Club Presidents.

It is also suggested by the Task Force that this team be recommended to the District Membership Chair as prospects to be included on the District Membership Committee

It has been my honor to Chair this Task Force and I want to thank the 16 members that participated.

**MEMBERSHIP TASK FORCE – Fall, 2022**

It is a common theme in Rotary International that within the boundaries of the United States our membership is dropping at an alarming rate. The same is true in District 5150, where our membership has declined since July 1, 2008 with 1,992 members to 1,651 as of this date. That is a decline of 341 members, 17% of our membership.

Additionally, when a closer analysis was performed, there was a clear difference in the three counties that make up our Rotary District 5150. Marin is losing substantially more members than San Mateo and San Francisco, yet Marin had more members per capita than the other two counties. The current numbers:

Marin Total population 260,206 604 Rotarians 2.32% penetration

San Mateo Total population 737,888 650 Rotarians 0.88% penetration

San Francisco Total population 815,201 432 Rotarians 0.52% penetration

(Doesn’t include Global Action with 35 members)

If we make the assumption that many of the SF Club members work in SF, but live elsewhere, the divergence in penetration is even greater. The answer doesn’t appear to be land mass, as San Francisco is obviously a more compact geographical footprint than the other two counties. The clubs themselves tend to follow the highways when you look at where the clubs meet and where the people live.

The simple question is why? The Membership Task Force was formed to look into the situation and reached several conclusions that can help all our clubs prepare for the future. .

**CURRENT DIFFICULTIES**

In reviewing what may be the most pressing difficulties facing membership, we discovered three key areas of concern.

1. Covid. Covid has impacted a great number of clubs, with the following realities:

A) Difficulties in engagement with hybrid meetings. Some members prefer hybrid, others prefer meeting in person, and the skill level needed for effective hybrid meetings is not found in all clubs. Running an effective hybrid meeting is difficult at best, and for the smaller clubs, virtually impossible. Member engagement simply suffers.

B) Loss of meeting locales due to business closures due to Covid.

C) Increase in meal prices, forcing clubs to find now locales that are more economical for their membership.

D) We have lost some members through Covid-related death.

E) Some clubs have been forced to cancel/curtail club service projects, leading again to less member engagement and satisfaction.

2) Common problems shared include:

A) Retirement, and “cashing in”, selling and moving. This is of particular importance in the SF Bay Area. Our aging demographic factors into this reality. The RI Termination Report by reason supports this finding, listing 213 relocations as a reason for termination out of 604 terminations in the 5-year report provided. That is 35% of our membership loss.

B) Job or family commitments.

C) Loss of interest, or the ultimate failure to engage our new members.

D) Day/time of meeting now inconvenient, especially in our new “work from home” environment.

It should be noted here that the Termination Profile itself is subject to skepticism. On your way out the door, in an exit interview of sorts, how candid will a departing member be when said candor might have possible future repercussions?

3) Prior difficulties detailed by RI, to include, and while vague, we are using the definitions provided by RI.

A) “Club doesn’t represent my values.”

B) Club lack of impact.

C) Cost prohibitive to some members.

D) Personal circumstances (including death).

E) Conflicts within the club with other members.

F) Time constraints.

**MEMBERSHIP ATTRACTION**

There was a great deal of energy invested in how to attract members. Many of the following ideas came up repeatedly.

1) Many of the ideas around attraction looked at how to personally attract potential members:

A) Projects – lots of them – especially those that clearly make an impact. It was noted that inviting a prospect to work on a project is more influential in attracting new members than inviting a prospect to a club meeting.

B) Focus efforts – retired teachers/health care workers, empty nesters, established business leaders. Included in this is utilization of the classification system – what career- paths are not present within our individual clubs?

C) Invite non-Rotarians to Rotary Means Business events. Moving back to where business is a valid and valued reason to join is seen as a positive. This in particular lends itself to the classification system. What potential members might benefit from our internal “tip club”?

2) Marketing themes also rose to the surface:

A) Use of social media to broadcast service possibilities (projects). Included in this realm is an active, vibrant and CURRENT website.

B) Rotary branding – always wear, encourage casual conversations.

C) Attend other non-Rotary events, express interest in what others are doing, share possibilities of collaboration with other groups.

D) Develop “Outstanding Service” award for non-Rotarians, PHF recognition for non- Rotarians, and invite family, friends, co-workers to the presentation.

E) Have available at all events membership information.

3) Types of membership, meeting community needs, being willing to move away from traditional meeting types – these repeatedly were mentioned:

A) Corporate Memberships, discounted Family Memberships, discounted Spouse/Partner memberships, discounted Student Memberships, discounted memberships for younger members. These types of membership are currently under-utilized, if utilized at all.

B) It was noted that non-traditional clubs (Global Action, SOMA) have great value. These two clubs in particular in our district have increased their membership since chartering. Neither of these two clubs are the traditional meal/speaker type clubs, yet both are healthy and provide service opportunities to their members.

**NEW MEMBER INITIAL INVOLVEMENT/ENGAGEMENT**

Once we have the new member in Rotary, there was great interest in how to immediately get that new member engaged. The members of the task force were unanimous in recognizing the importance of the effort involved. Ideas generally fell into two separate categories:

1) Retention as it pertains to the individual member:

A) SF Greater Mission “gives” each new member $1,500 in funding for the new member to determine where to invest that amount. This is an area that is ripe for exploration.

B) Clearly defined expectations for new members (what really does it take to become a Rotarian? Clarity, transparency seen as selling points.) The concern is that there is a tendency to emphasize membership numbers over the careful selection of new members. The 4-Way Test should clarify our role in the preparation of prospects.

C) Have all new members check-off areas of interest, and assign them to the appropriate committee or project, or start a new project if there is board/club support.

D) Red Badge/Blue Badge – some clubs are using this approach with success, but the committee members indicate only about 1/3 of our clubs feel this is an appropriate method of new member orientation. This approach depends on club culture.

1) One suggestion was for the mentor to monitor the Blue Badge checklist, which might achieve the same purpose without the potential stigma that some thought the Red Badge included.

2) The second part of this section might best be described as the responsibility of the existing club members:

A) Make the new member induction ceremony special, with the DG/AG doing the honors if possible. Invite the new member’s family, friends, co-workers. Make it a big deal.

B) Each new member have not only his/her sponsor (defined as the person who initially brought the new member to Rotary) but also a Mentor that is assigned by the Club President.

1) It was suggested that the Mentor be a Past President.

C) Have new member and their sponsor or mentor attend another club’s meeting together, and both report back to the club.

D) Year-end party celebrating all new members that joined that Rotary year.

E) Dynamic speakers.

1) Suggestion was made to have the district provide a speaker’s bureau on our District website, separated by county if that was deemed appropriate.

**MEMBERSHIP RETENTION**

The common themes in discussing retention focused on communication, care, concern and attention to the fellowship that is critical to Rotary membership. This effort can be described as both club-oriented and a specific member responsibility.

1) Club oriented efforts that would positively impact retention:

A) Celebrate birthdays and anniversaries. The president should make this important.

B) Recognition by the president of specific members during the year for past efforts, current efforts – make a point of recognizing the importance of fellow Rotarians.

C) Conduct annual/periodic surveys to make sure the board/club direction meets the membership desires and needs.

1) Invite the District Visioning Team to do a Club Visioning to determine where the club wants to be in the future.

2) Efforts by a particular designee or specific committee aimed at retention included:

A) Approach new members, one-on-one, to ask what they would like to see, a guest speaker they may want to invite, a project they may wish to initiate.

B) Establish/maintain/rejuvenate your “nurture team”, your “sunshine team”, your “angel team” – that is, have a conscious effort made to contact members who start missing meetings, missing projects.

1) Create a membership binder that can be used for each member’s information and maintained by the nurture team to codify efforts made to maintain membership engagement and retention.

One suggestion was made by the newest member of Rotary that served on the Membership Task Force that was held in high esteem by the entire group. The term utilized by Matthew Glerum is the Net Promoter Score:

***Ask each member – and ask yourself: “On a scale of one to 10, with 10 being the best, how likely are you to recommend your Rotary Club to a friend, relative or co-worker? If less than 10, what one thing could we do to increase that score?***

There are two other critical realities:

1) Membership is the responsibility of every member, but not every member is capable on a personal level of actually asking a prospect to join. Each Club needs to recognize, internally, who is capable of making the ask of that prospect. Otherwise, the prospect simply flutters away.

2) Each Club needs a Champion for membership. Appointing someone as the membership chair to fill that slot, fill that club role serves no valid purpose. A Champion is always needed to make the membership efforts in a club overall be successful.

**RESULTS**

“Rotary is needed in our world, now, more than ever” in the words of our RI President Jennifer Jones. Every member of the Task Force could and would agree with that assessment. This group of individuals spent many hours discussing our difficulties in attracting, engaging and maintaining members in our district.

We determined that there are some problems that are simply there, and we have little control over them (cashing in on housing prices and moving), but that being said, we also recognize that someone is moving into the houses that our members have left. We have not – yet – reached those new potential Rotarians.

We need to attract those new people, we need to get them into our clubs and rapidly engage their talents, time and treasure, and we need to retain their membership if our organization is going to survive.

If nothing else, as initially noted by PDG Ron Gin, we now have another 15 or so members from roughly 15 clubs that are vitally involved with membership efforts going forward.

It is also hoped that many of these Task Force members will join our District Membership Committee and serve there. It is also noted that some of these Task Force members are and should be directed towards district leadership roles.