ENGAGING AND KEEPING MEMBERS: A RETENTION ASSESSMENT AND ANALYSIS

When members stay, it's a sign that your club's doing well. But just keeping your overall member count steady doesn't mean you don't need to be concerned about retention. If clubs are consistently losing members and inducting new ones, that indicates that they may need to change how they manage their growth or retention.

This assessment provides ways to understand your club's trends and engage people more meaningfully at different stages of membership. This increases the likelihood that they'll remain in Rotary.

WHAT YOU'LL GAIN

Conduct this assessment and act on its results to:

- Determine when and why members leave your club
- Develop strategies to keep people engaged and involved so they stay

GETTING ORGANIZED

Part of this process requires access to club membership reports in Rotary Club Central. The club president, secretary, treasurer, membership chair, and Foundation chair have this access and can delegate it to anyone at the same organizational level. It may be helpful to involve a member who has experience in data analysis.

GETTING STARTED

Step 1: Gather information.

Think about the members who have resigned from your club during the past year or two. Consider whether they were newer members or longtime members, and whether they had any reasons in common. If your club surveys exiting members, you can gain insight from that feedback. When

you terminate a member in My Rotary, it's important to list the reason they left. This information will be used in the Rotary reports that are a good source for analyzing trends.

To access these reports:

- Sign in to My Rotary
- From the MEMBER CENTER menu, choose Online tools and then Rotary Club Central
- From the options on the left, choose **Reports**
- Under **Club Reports**, choose the report you'd like to access

You can use the Member Viability and Growth report to find the retention rates for existing members. You can also search for trends in when members leave your club and their reasons by using the Membership Termination Profile report. To export reports, select the "Export" icon and choose a program or format. You can now save or print the report.

Knowing why people left and when in their Rotary membership they did so can help you recognize your club's retention strengths and weaknesses to focus your efforts.

To export reports, click or tap the "Export" icon and choose a program or format. You can now save or print the report.

Step 2: Understand when and why members leave your club.

Once you've reviewed the Member Viability and Growth and the Membership Termination Profile reports, discuss the results with the membership committee. Think about:

- Who is leaving your club? Are they longtime members, new members, or both?
- Why are members leaving?
- Are any common themes emerging from the data?

Step 3: Develop an action plan to better engage members.

Present the membership committee's findings to the club. Ask your club to consider:

- What is our club good at?
- What could our club do better?
- What keeps our active members involved?
- How can we better engage those who aren't as involved?

Lead a discussion about how to build on what you're doing well and address any challenges. Encourage members to share their ideas about how to involve people at different stages of membership.

WHY MEMBERS LEAVE AND TIPS TO RETAIN THEM

Understanding why members leave is crucial to strengthening your club. The Exit Survey we discuss elsewhere in this guide helps you gather this information on a club level. Rotary has also conducted extensive research worldwide on why people leave at various points in their membership. Here's what we've found along with tips to address various situations.

MEMBERS WHO STAY LESS THAN A YEAR

Although about three-fourths of new members who leave say they were told about the responsibilities of being a member before they joined, 40% cite the cost or time commitment as their reasons. Others lose interest, don't feel included, or find that their experience didn't meet their expectations. Some say they weren't able to engage with the club or found the club unwilling to change its traditions.

What you can do

If your club is losing members within their first year, try these strategies:

With prospective members	With new members	With your club practices
Communicate better about the personal and professional benefits that your club offers as well as the expectations that the club has for members.	Plan meaningful induction ceremonies that celebrate the occasion and include their families.	Make sure current members make new members feel welcome (such as by engaging them in conversation or inviting them to sit with you at meetings).
Ask for their impressions of the club and be willing to act on their suggestions.	Offer orientation programs that help them learn more about Rotary and how to get involved in the areas they're especially interested in.	Pair new members with mentors who can explain the club's practices and traditions, answer questions, introduce them to other people, and talk regularly with them about how they're enjoying their experience.
Tell them about the professional development opportunities available through Rotary, such as the leadership and communication courses in the Learning Center.	Involve them in ways that match their specific interests and expertise rather than in ways that fill the club's needs.	Keep club meetings fun, energetic, and entertaining without forgetting that most people join Rotary for the opportunity to engage in meaningful service.

MEMBERS WHO LEAVE AFTER 1-2 YEARS

Many members who leave after a year or two say they didn't feel involved in club events and activities, didn't get along with people in the club, or had difficulty fitting Rotary into their lives because of other commitments.

What you can do

If your club is losing members after one to two years, try these strategies:

Get them involved	Connect with them	Emphasize learning
Talk to members who are reaching this point about opportunities to join a committee or get involved in a project.	Ask these members for feedback about what they like and what they want to change. They may have ideas that can revitalize the club's social activities or service projects.	Remind them about the professional development opportunities available through Rotary, such as the leadership and communication courses in the Learning Center. New courses are added regularly, so they may have more options than when they first joined.
Ask how they want to get involved (find ideas in Connect for Good and the guide to Avenues of Service activities).	Pair members who don't have mentors with one, or suggest that they change mentors if they want a different perspective or have become interested in different aspects of Rotary.	

MEMBERS WHO LEAVE AFTER 3-5 YEARS

Members who leave after three to five years may do so because their social expectations weren't being met, they were frustrated with the club's leaders, or they had difficulty meeting the expectations for members because of other commitments.

What you can do

If your club is losing members after three to five years, try these strategies:

Innovate	Listen	Provide opportunities
Implement new activities so that people remain excited about attending meetings and other club functions.	Ask these members for feedback about what they like and what they want to change. They may have ideas that can revitalize the club's social activities or service projects.	Offer these members leadership opportunities and ensure that those who want these kinds of roles are considered for them. By taking on leadership roles, they'll feel useful, valued, and more connected with the club.
Find videos from recent Rotary events to supplement your club meetings. After you watch, ask people to discuss the topic's relevance in their club or community.	Ask them to give a presentation to the club about something that's important to them. Encourage those who are in club leadership roles to mentor newer members or participate in district activities, which puts them and others in a position to take on more challenging roles.	
Organize social activities that are different from the ones your club has held before.	Ask them what's preventing them from participating more fully, then accommodate them as much as you can.	Ask them to advise on or lead a project or activity in their specific area of expertise, and recognize them for their efforts.

MEMBERS WHO LEAVE AFTER 6-10 YEARS

Some members who leave after six to 10 years say that their social expectations weren't being met and they were frustrated with the club's leaders. Others left when they retired or needed to relocate.

What you can do

If your club is losing members after six to 10 years, try these strategies:

Understand their needs	Recognize their value	Connect them with a new club
Talk with these members about what they're looking for and how their interests have changed since they joined.	Let them know what you value about their perspective and what you look forward to doing alongside them in the future.	Forward a relocating member's contact information to clubs in their new area, refer them through My Rotary, or encourage them to let Rotary know they want to change clubs.
Ask if they're interested in mentoring newer members or getting involved in district activities, such as planning the district conference or serving on a district committee.	Thank them for their contributions, big and small.	
Ask them what they need or if you can make something easier for them that will keep the club experience relevant and accessible for them and others.	Give them an opportunity to lead in some capacity.	If several members have different interests, suggest that they start a satellite club.

MEMBERS WHO LEAVE AFTER 10 YEARS

Many members who leave after more than 10 years say they weren't interested in the club's meetings and activities. Others left because of retirement, family obligations, financial constraints, or health problems.

What you can do

If your club is losing members after more than 10 years, try these strategies:

Show them they matter	Offer new ways to get involved	Accommodate them if you can
Talk with these members to learn what they're experiencing and feeling.	Ask for their opinions on how to energize or reinvent your club meetings.	Consider easing the financial or participation obligations on these members if it's a factor that pressures them to leave.
Recognize them for their efforts over the years by nominating them for an award.	Ask if they're still interested in the club's activities or what might interest them instead.	Be aware that these members may have health concerns that they may or may not want to disclose. Ask them what they need or if you can make something easier for them that will keep the club experience relevant and accessible for them and others.
Tell them what you value about them and how much your club benefits from their perspective and expertise.	Gauge their interest in taking on a district leadership position such as assistant governor, district governor, or district committee chair.	

Use the Member Satisfaction Survey to ask everyone for feedback about the club and the Member Interest Survey to learn more about people so you can better engage with them.

Want to do other assessments?

Member Interest Survey

Diversity Assessment

A Prospective Member Exercise

Member Satisfaction Survey

Exit Survey

Use the Club Action Plan in appendix 1 to track your membership efforts.