

Hot August Insights



District 5220 Foundation & Membership Seminar

Rotary
District 5220



Tina Gong

District 5220

Training

Coordinator

Assistant

Governor Area 12



WELCOME



Mayor
and
Rotarian
Michael Nelson





Rotary's 4-Way Test

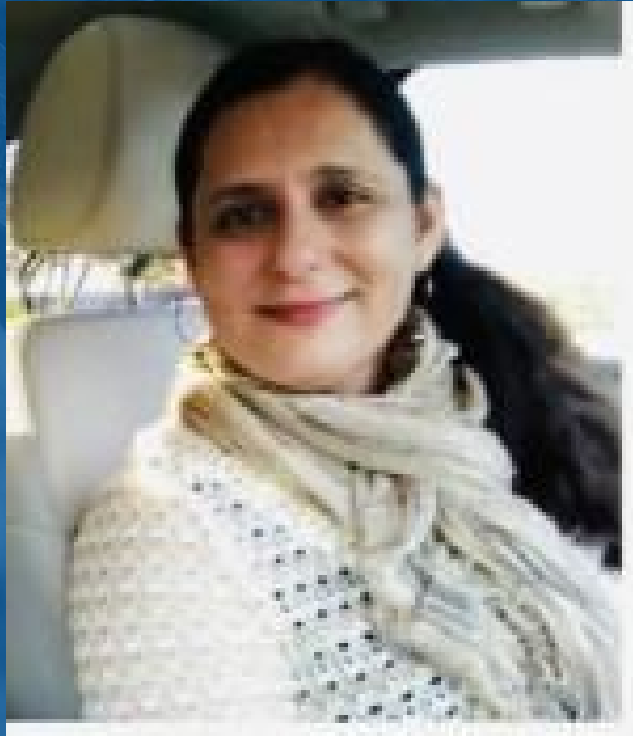


Is it the
TRUTH?

Is it **FAIR**
to all
concerned?

Will it build
GOOD WILL
and **BETTER**
FRIENDSHIPS?

Will it be
BENEFICIAL
to all concerned?



"Thought For The Day!"



Harman Ratia





GOVERNOR WAQAR RIZVI

Rotary
District 5220



CREATE HOPE
in the WORLD

5220 Rotary Foundation: Ellen Hancock

Foundation Committee Chair 2019-2025



SHARING



STORIES



SUCCESSSES



GOALS



OPPORTUNITIES



THE ROTARY FOUNDATION ... District 5220

- ☐ The race begins...
- ☐ “Spotlight” stories
 - Paul Harris Fellow, Major Donor, Bequest Society, Polio Plus
- ☐ STARS 2022-23
- ☐ Clubs + “Featured” story
- ☐ International stories
- ☐ Next steps



Cameron Bregman - President, Lodi Rotary 2023-24



New Paul Harris Fellow \$1,000 to
Annual Fund

First year as Rotarian

Cash only

Mentor Rotarian Brian Kanegawa

Major Donor, Level 1

\$10,000 cash to Annual Fund

Rotarian Spouse and Rotarian Spouse
Rotarian and Domestic Partner

PP **Carol Kennedy**, Madera Rotary

PDG **Gordon Kennedy**, Madera Sunrise

Major Donor— Annual Fund

helping people around the globe live better lives today.



Major Donor— Annual Fund

helping people around the globe live better lives today.



We had a goal!



IPDG Chris Daly's
Goal was for each
club to have a \$185
average per member
toward Paul Harris

Turlock -
\$186.41

Groveland
\$216.19

Madera -
\$23

Madera
\$205.52

Manteca -
\$186.22

\$212



Merced -
\$422.80

Lodi Tokay
- \$385.66

**Merced Sunrise
- \$692.12**

Major Donor



**Chuck Wright RC Stockton Sunrise, Co-Foundation Chair
Editor**



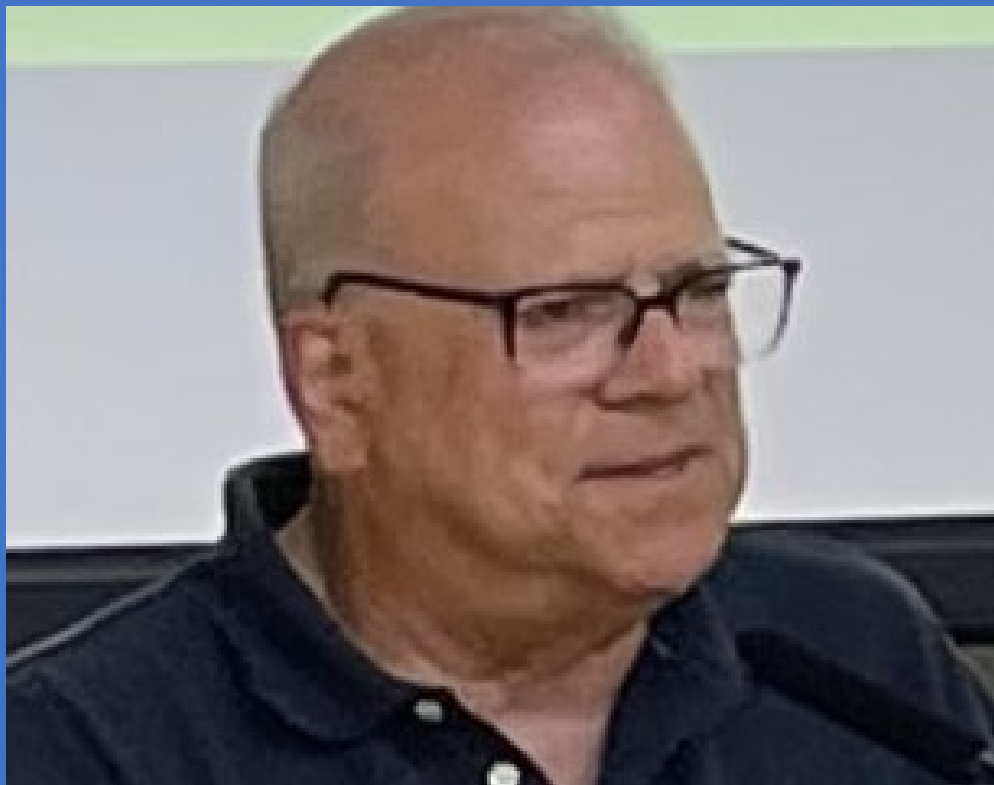








Steven Jacobs PolioPlus Society



Why Should We Care About Polio?



ENDPOLIONOW

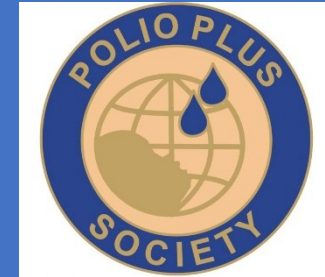
Rotary International District 5220

Proudly recognizes

Maria Divina Paccial



***As a member of the
PolioPlus Society***



***Your commitment and generous annual donation to
PolioPlus provides tangible assistance for the global
eradication of polio and advances world understanding,
goodwill and peace.***

Ellen Hancock

District 5220 Rotary Foundation Chair

Waqar Rizvi

Governor, Rotary District 5220



[About](#)[Join](#)[Resources](#)[Blog](#)



PolioPlus Society

KENNEL KLUB







Join the Klub! Join the Klub! Join the Klub!

Joining the Kennel Klub is a 2 Step process:

1. Commit to an annual donation of \$10/month or \$100/year until the world is declared Polio Free. Make sure to select the POLIO PLUS fund:

Donate Now

2. Fill out the Google Form online:

Google Form Online

**Our ordinary stories help us
make connections,
in our local and global communities.**



**We drive unique vehicles on many tracks, yet
we each make a difference on the Rotary road!**

Foundation Activities & Giving Goals

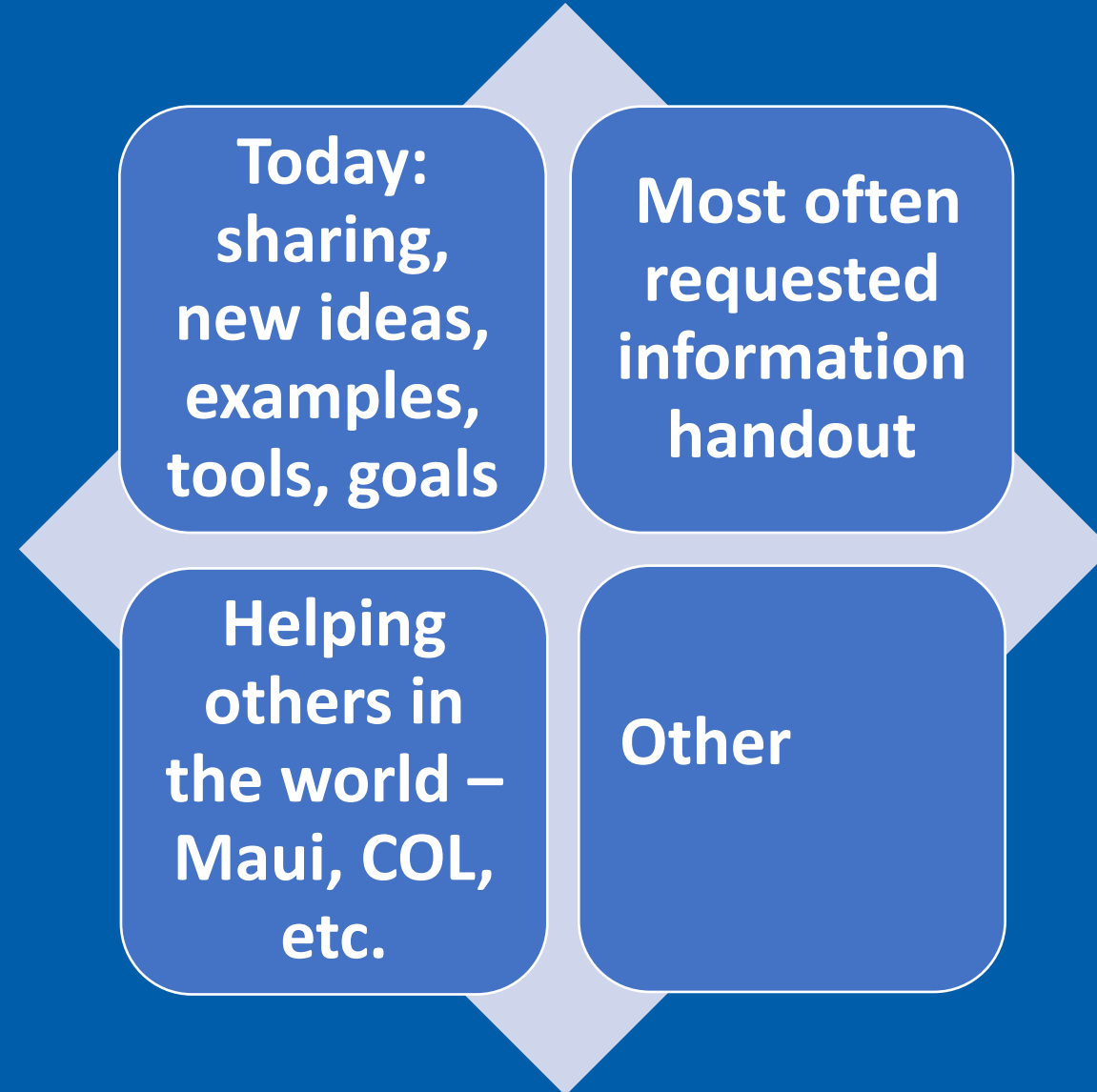


Table Topics



How am I an example/How do I encourage others?



Program ideas/speakers for projects. Grants handout.



My club's TRF plans/activities. Align with District and RI goals?



Insights?

My Next Steps?

Thank you

Your Foundation Team Members

Susan, Steve, Joe, Mary, Judy, Ellen



Let's chat at break.



15 MIN BREAK

Membership Chair

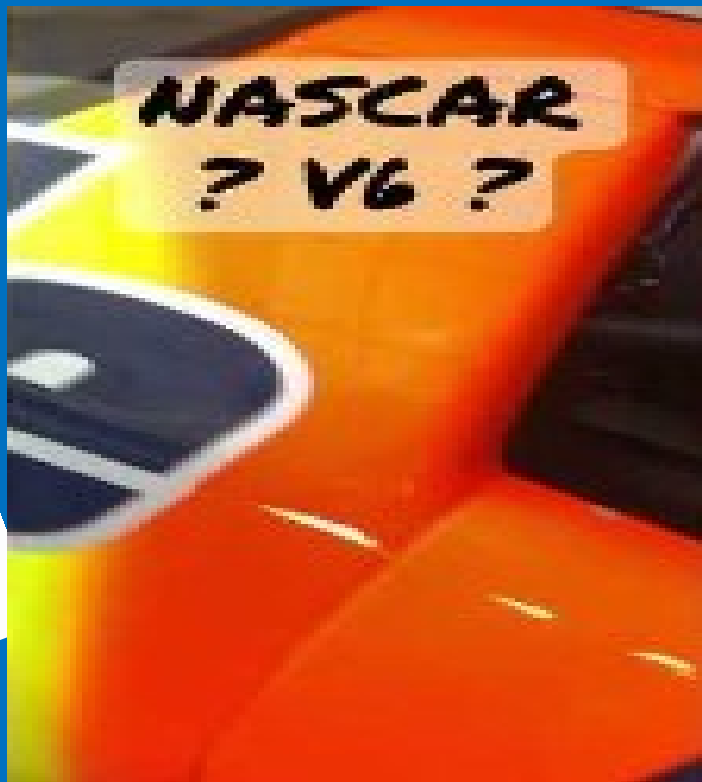
Liz Hull





This is Rotary
This is Membership

What's Under Your Rotary Club Hood?



What Does Your Club

Holiday Bell Ringing	Mystery Bus Tour	Crab Feed
Pancake Breakfast	Singing	Great Speakers
Silly Hat Day	Graffiti Removal	Feed the Homeless
Teach a class at the shelter	Reading Program	Peace Program
Sing Fun Songs	Greet each other with a smile	A Night at the Zoo



What are Your Club's Attributes?



Look at Your Club's Classifications to Get Started

- Systems Management, Local Government
 - Rizvi, Waqar Muhammad
 - Surgical Nursing Administrator
 - Winning, Jane
- Plastics Manufacturing
 - Williams, Kevin
- Owner-Arthur Murray Dance Studio
 - Sena, Madisen
- Physician/Surgeon, retired
 - Wager, Walt,
- Balloon and Party Supplies Retail
 - Johnston, Ann Active-R85
- Finance and Insurance
 - Bregman, Cameron
- Cave Tour Administration
 - Ingram, Bernard
- Real Estate Agent
 - Villapudua, Edith
- Horse Breeder/Trainer
 - Decker, Leland

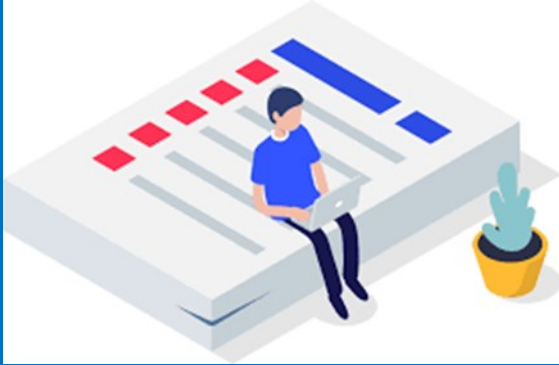
Then Put People on Your List that compliment these professions. Have a List Party

Why I Joined Rotary & What Keeps Me Coming Back

SPOTLIGHT
Cameron Bergman
Lodi

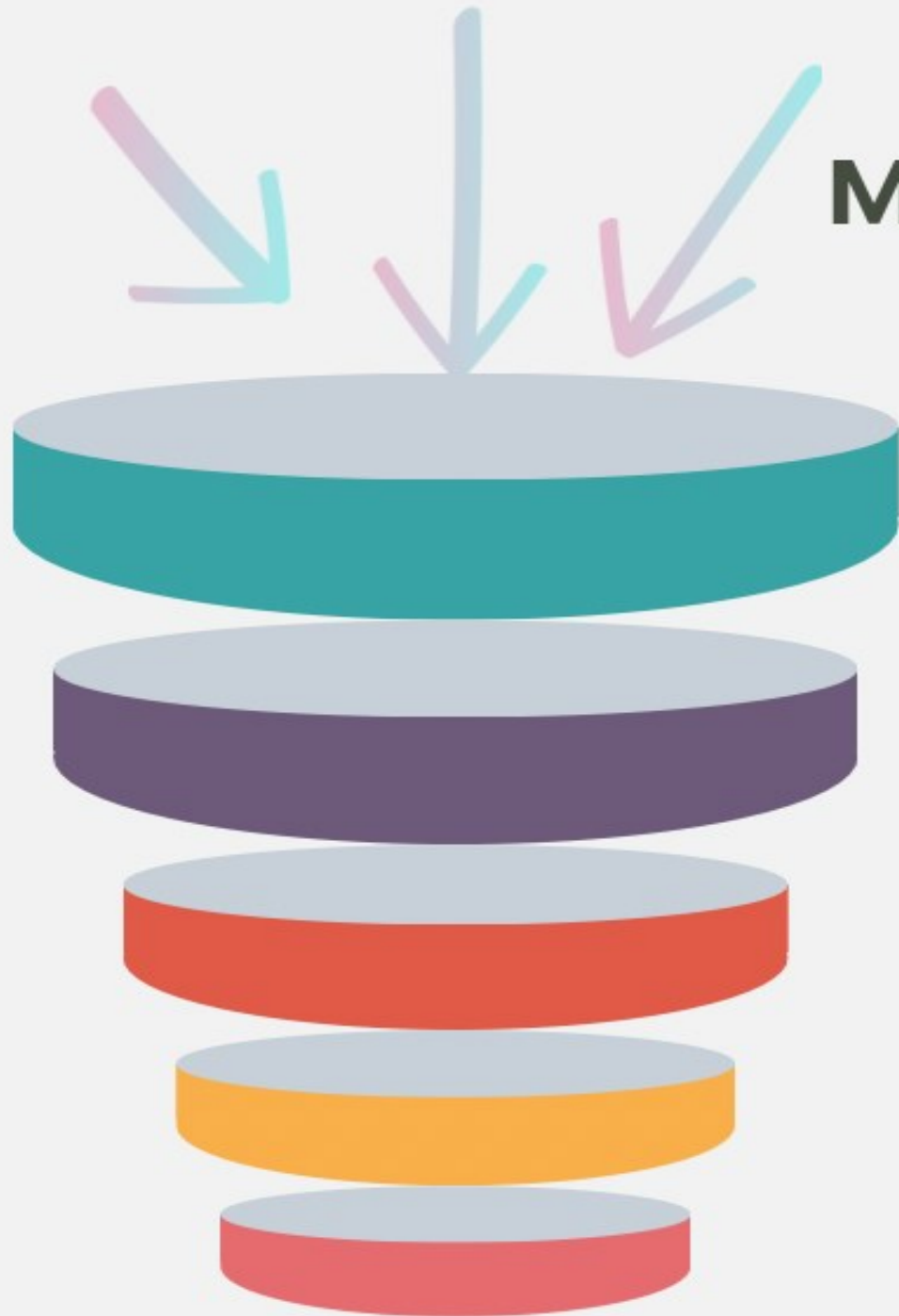


How to Make a Really Good List



Start by Listening to New Members

Marketing Funnel



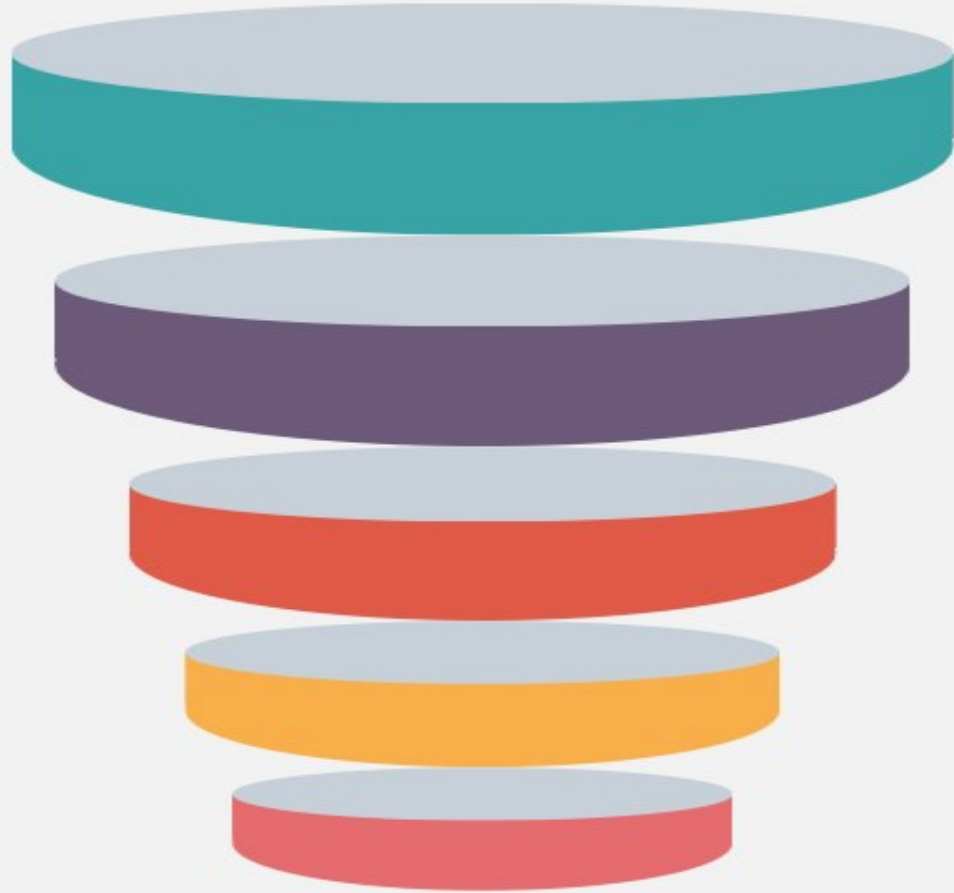
Marketing Funnel



01

The List and What your Club Has to Offer

Marketing Funnel



01

The List and What your Club Has to Offer

02

The Compliment and the Ask

Marketing Funnel



01

The List and What your Club Has to Offer

02

The Compliment and the Ask

03

Urgency and close the Ask

Marketing Funnel



01

The List and What your Club Has to Offer

02

The Compliment and the Ask

03

Urgency and close the Ask

04

Follow Up – There are member is in the follow up

Marketing Funnel



01

The List and What your Club Has to Offer

02

The Compliment and the Ask

03

Urgency and close the Ask

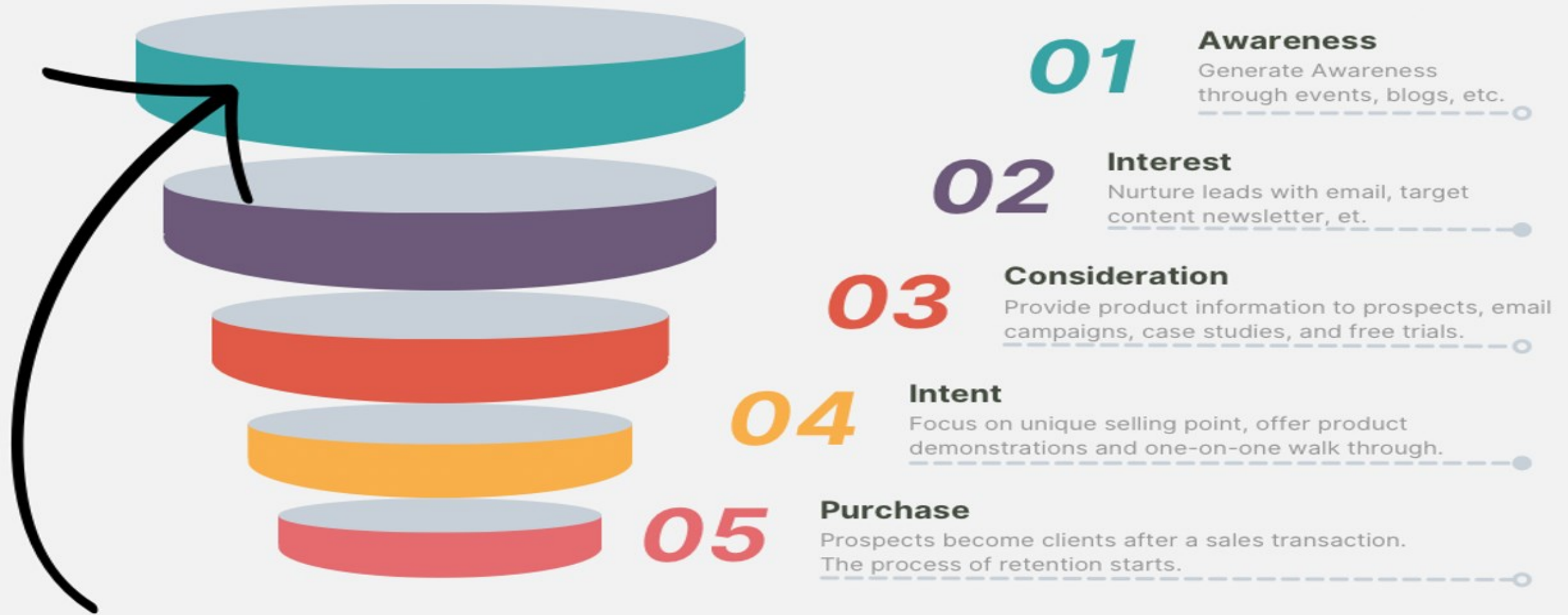
04

Follow Up – There are member is in the follow up

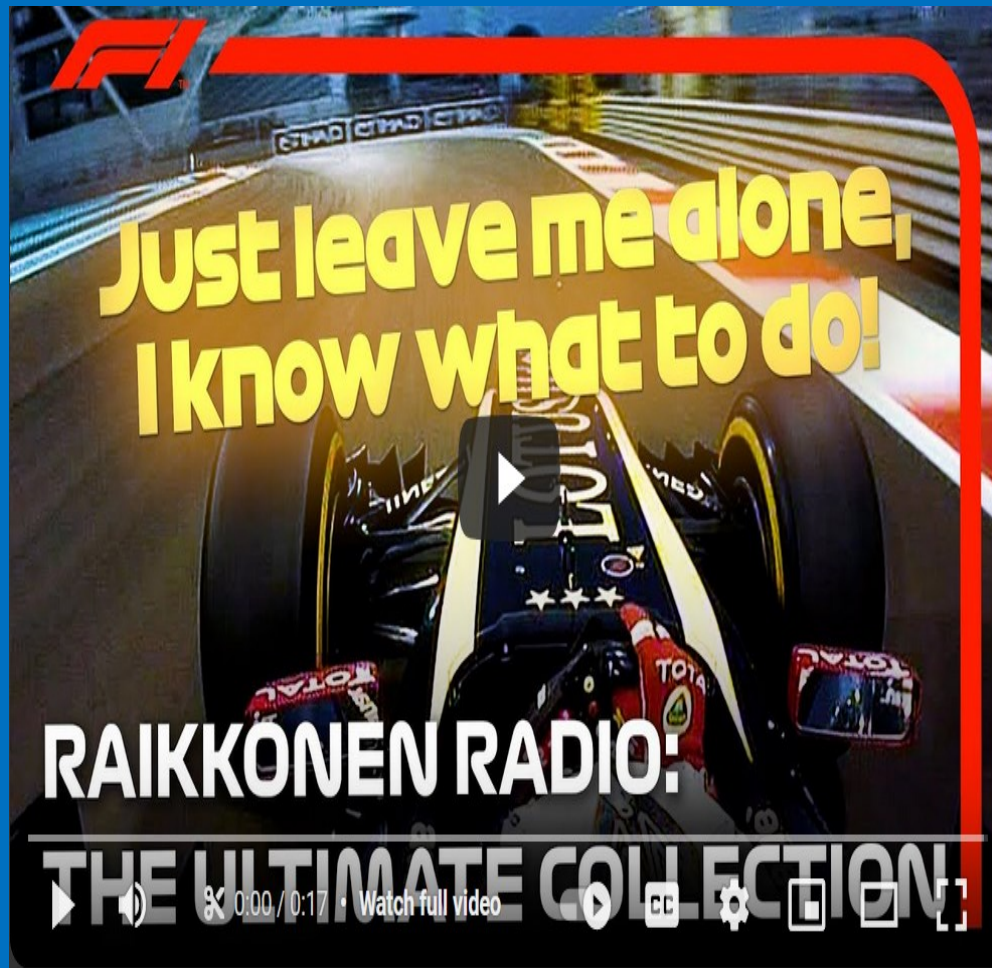
05

Running Buddies

Marketing Funnel



Our Goal is to Go From This - TO THIS





ELIZABETH MOWRY HULL

209 649-4174

Join5220Rotary@outlook.com



CLUB MEMBERSHIP

Jay Hislop, Rotary Club of Stockton

August 28, 2023



WHAT IS IMPORTANT?

Attraction

Onboarding

Engagement

Retention – The Result

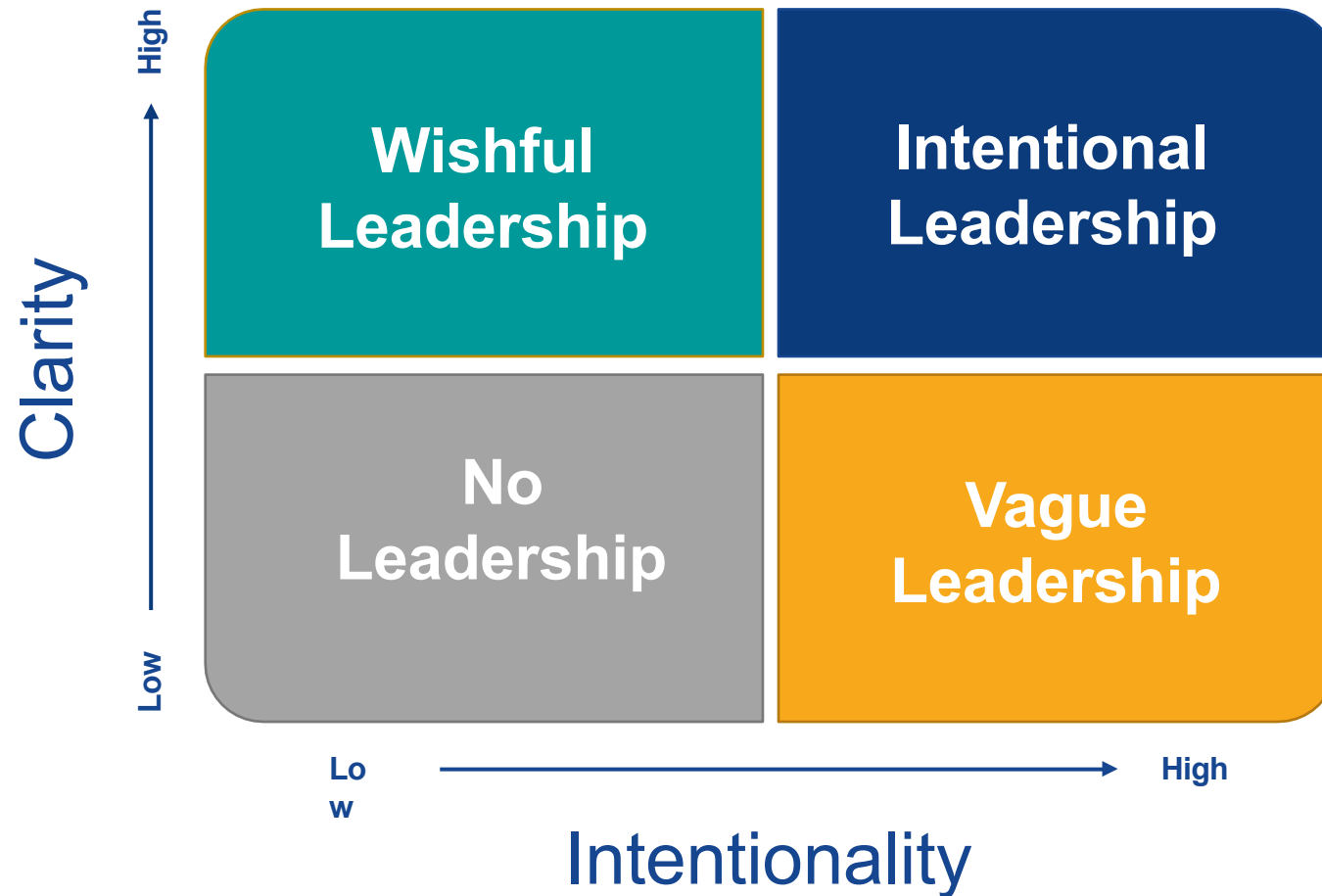


Rotary



CLUB MEMBERSHIP ACTION PLANS

INTENTIONAL LEADERSHIP



UNINTENTIONAL LEADERSHIP



ACTION PLAN

Four Step Process

1. Utilize meaningful data to inform action plan goals and development.
2. Survey club members to determine needs and wants.
3. Develop a plan with clear priorities, owners, timelines and measurables.
4. Monitor and manage priorities regularly

CLUB EXAMPLE #1

(YOUR CLUB PAGE WILL BE ON WWW.ROTARY5220.COM)

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

Annual **Attrition Rate** (3-year average): **9.3%**

Annual **Attraction Rate** (3-year average): **8.0%**

Annual **Net Growth Rate**: **- _____%**

Success Targets

Attrition less than 15%

(July 1 membership x .15)

Attraction 5% greater than Attrition

The problem we need to solve is:

- ☐ **Low Retention** -- Our Attrition Rate Exceeds 15%
- ☐ **Insufficient New Member Attraction** - Our Attraction Rate is less than 5% above our Attrition Rate
- ☐ **Neither** - We need to build on our current membership growth culture and strategies



OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

Fellowship

Integrity

Diversity

Service

Leadership

THREE CLUBS



Club A

Fellowship
Diversity
Service



Club B

Service
Fellowship
Leadership



Club C

Leadership
Integrity
Service

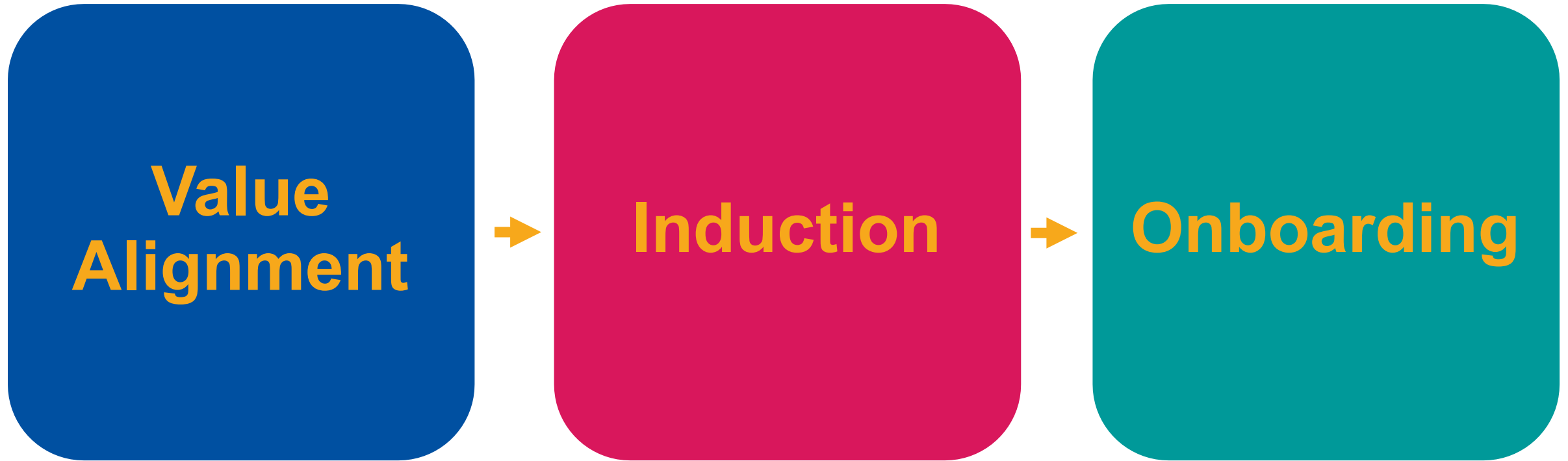
Rotary



Onboard New Members



THREE PHASES



The Value Alignment Interview

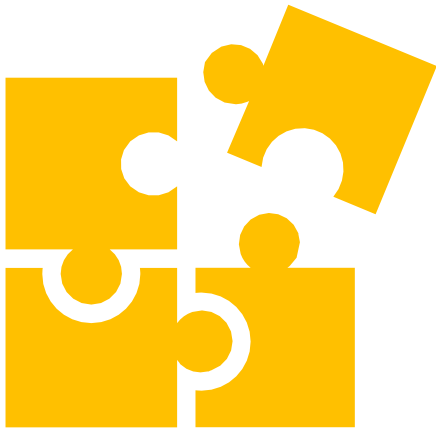


1. Tell me a little bit about yourself personally and professionally.
2. How did you find Rotary?
3. What is appealing about it?
4. What are your expectations? *What else? What else?*
5. If we ended up deciding this was the right fit, and it's one year from now, how would you describe your experience in more detail?
6. How do you think you would contribute to the club's success?
7. Manage Expectations:
 1. Is this what they really want?
 2. Money
 3. Time
 4. Talent
 5. If not us, then who?

SAMPLE VALUE ALIGNMENT QUESTIONS

The Onboarding Process

THE “STICKINESS” FACTOR



Feel of Value



Have a Friend

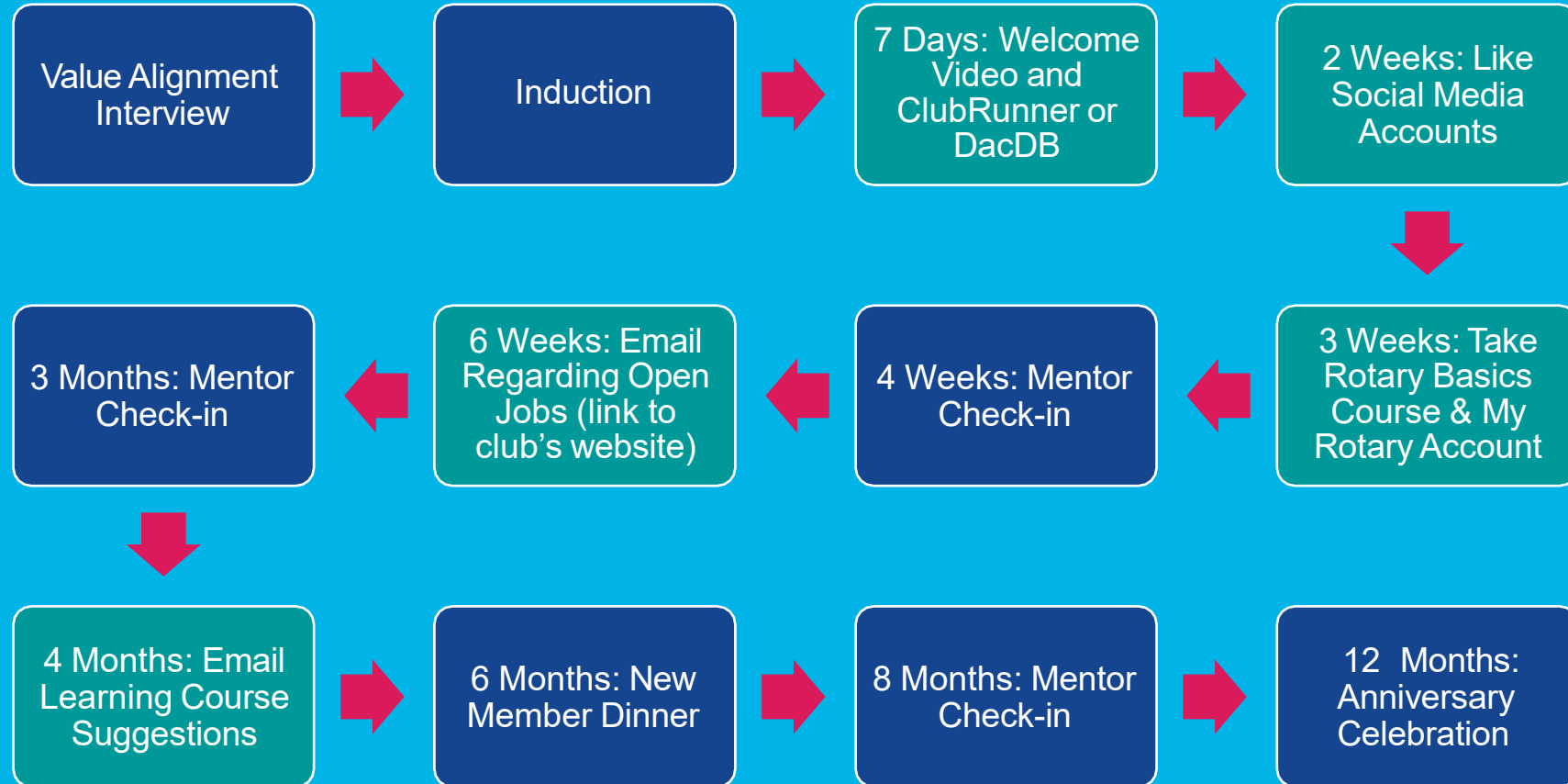
ORIENTATION

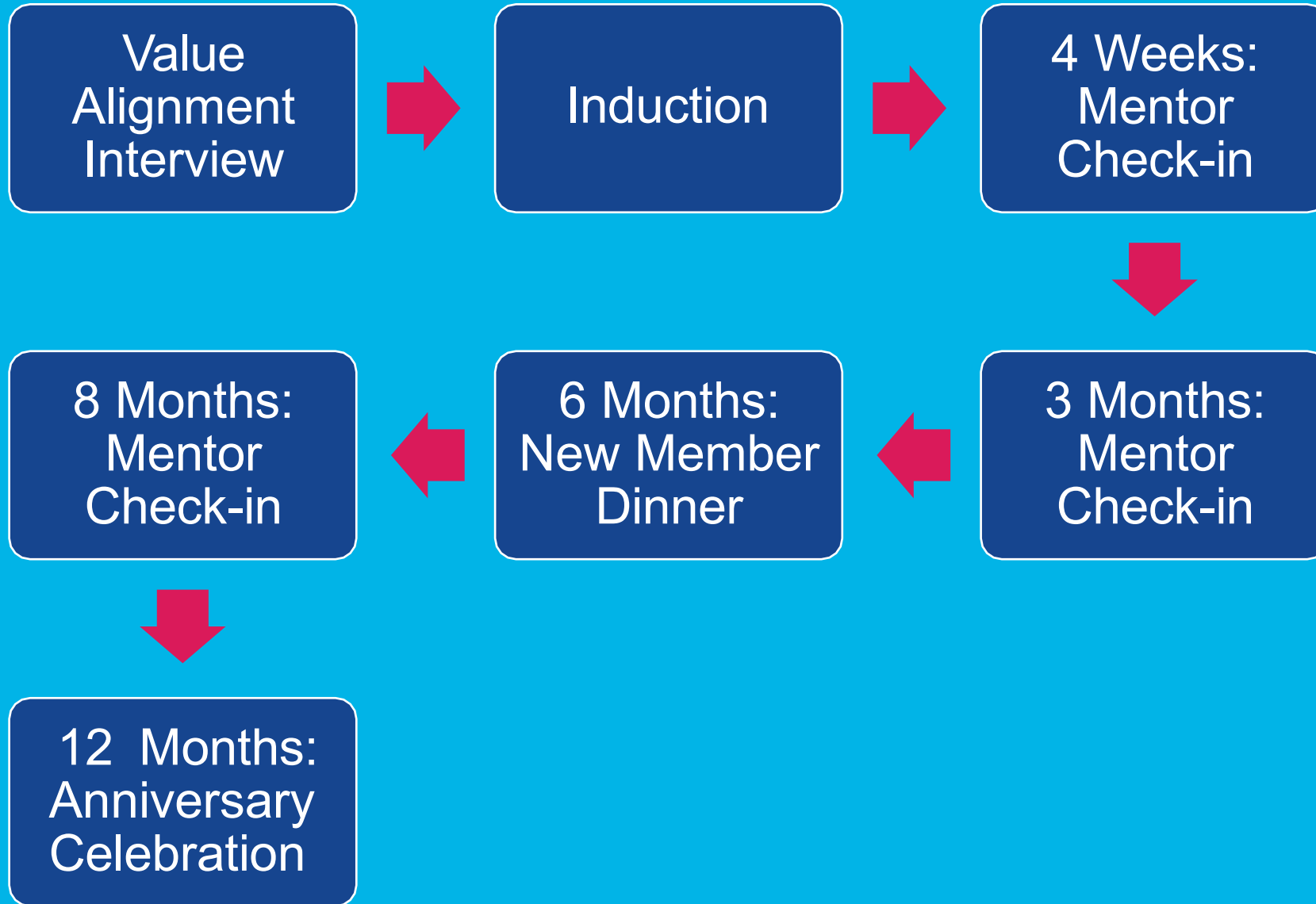
- One-time event
- Role in Rotary
- Classroom style
- Big picture
- Ready to join the club

ONBOARDING

- Ongoing
- Role in club
- "On-the-job"
- Specific to the member
- Ready to contribute

Email Drip Events





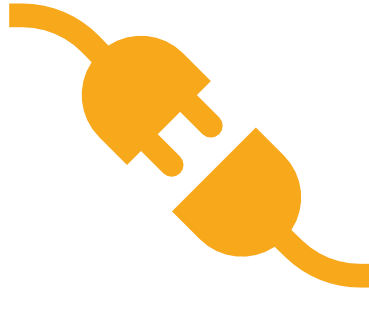
ONBOARDING GOALS



ORIENTATION



**DISCOVER
NEEDS**



**GET
CONNECTED**



MENTOR



FRIENDSHIP

2022 SURVEY OF ROTARY CLUBS IN USA AND CANADA

10+ Net members in 5 years

Growth in at least 3 of the past 5 years

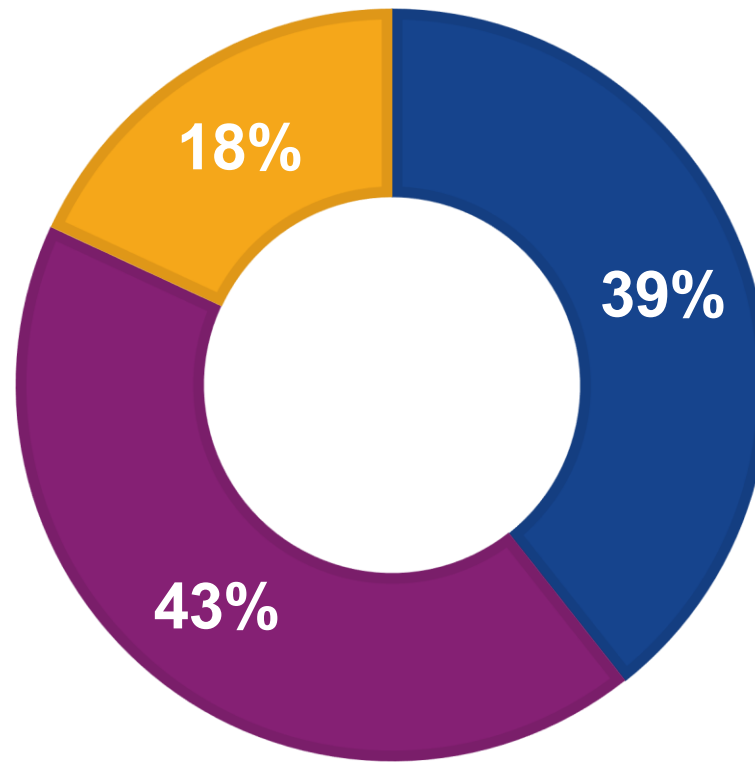


85

Clubs showed
consistent growth
from 2017-2022

**SIZE DOESN'T MATTER.
LEADERSHIP DOES.**

A DIVERSITY OF CLUB SIZES IN 2017



■ 7 to 25 ■ 26 to 50 ■ 51+

ACTIVE,
INTENTIONAL
MEMBER
ENGAGEMENT



DYNAMIC,
MEANINGFUL
SERVICE



EFFECTIVE
GOVERNANCE
(INTENTIONAL
LEADERSHIP)



STRONG
**PUBLIC
IMAGE**
(WELL KNOWN
IN COMMUNITY)



**DIVERSITY,
EQUITY &
INCLUSION**



**GROWING
CLUBS**

Why I Joined Rotary & What Keeps Me Coming Back

SPOTLIGHT
Eddie Arias
Stockton



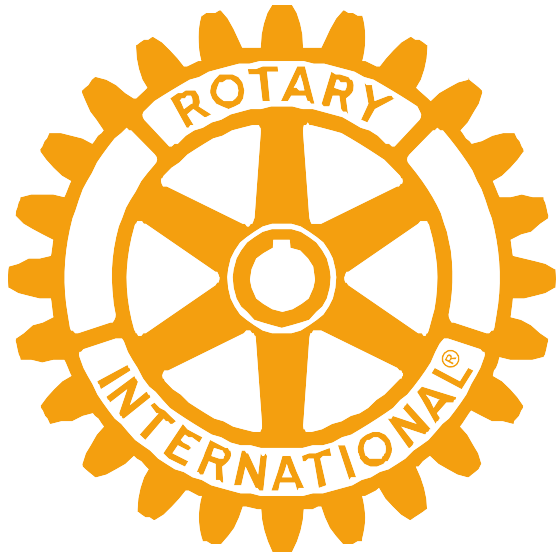
Dale Earnhardt Sr. And J r.



ACTIVE, INTENTIONAL ENGAGEMENT

What does it look like?

- Great meetings and strong friendships
- Consistent & flexible meetings
- Engaging new members
- Saying “thank you”



ACTIVE INTENTIONAL ENGAGEMENT

CONSISTENT AND FLEXIBLE MEETINGS

76%

Meet weekly in
person

65%

Use hybrid or
virtual options

29%

Created a
satellite club

ENGAGING AND THANKING

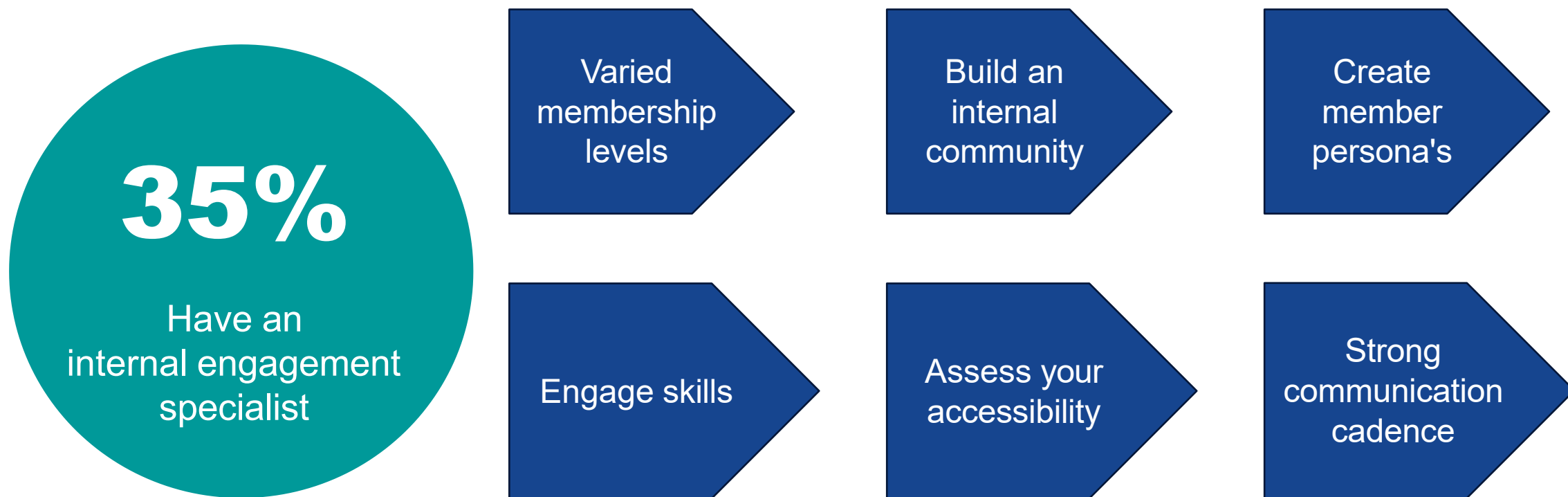
All Members

70% have a defined new member orientation process

77% annually take time to let members know the club's accomplishment

70% formally recognize members time and talent contributions

THE ART OF THE ENGAGED "THANK YOU"



Engagement is the art and science of engaging people in authentic and recognized connections to strategy, roles, performance, organization, community, relationship, other members, development, energy and happiness to leverage, sustain and transform membership into results. — David Zinger

DYNAMIC, MEANINGFUL SERVICE

**Signature
projects and
fundraisers**

**Include
community
members**

**Ongoing,
active
service**

USING PUBLIC AWARENESS TO FOCUS ON MEMBER ATTRACTION

40

67%

Hold events to attract
new members

77%

Many members
sponsor new
members

87%

Invite community
members to
projects

D.E.I. IN ROTARY

**An
intentional
focus**

**Club
reflects the
community**

**A
welcoming
environment**

Membership Action Plan

ATTRACTION

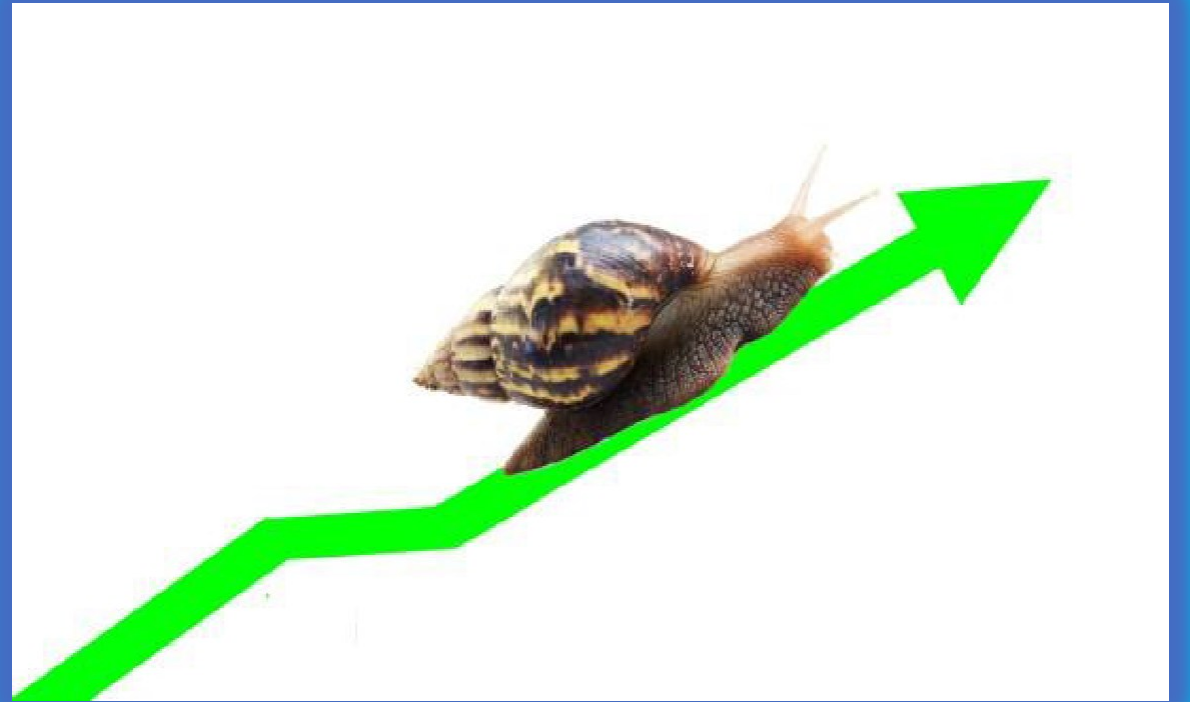


ONBOARDING



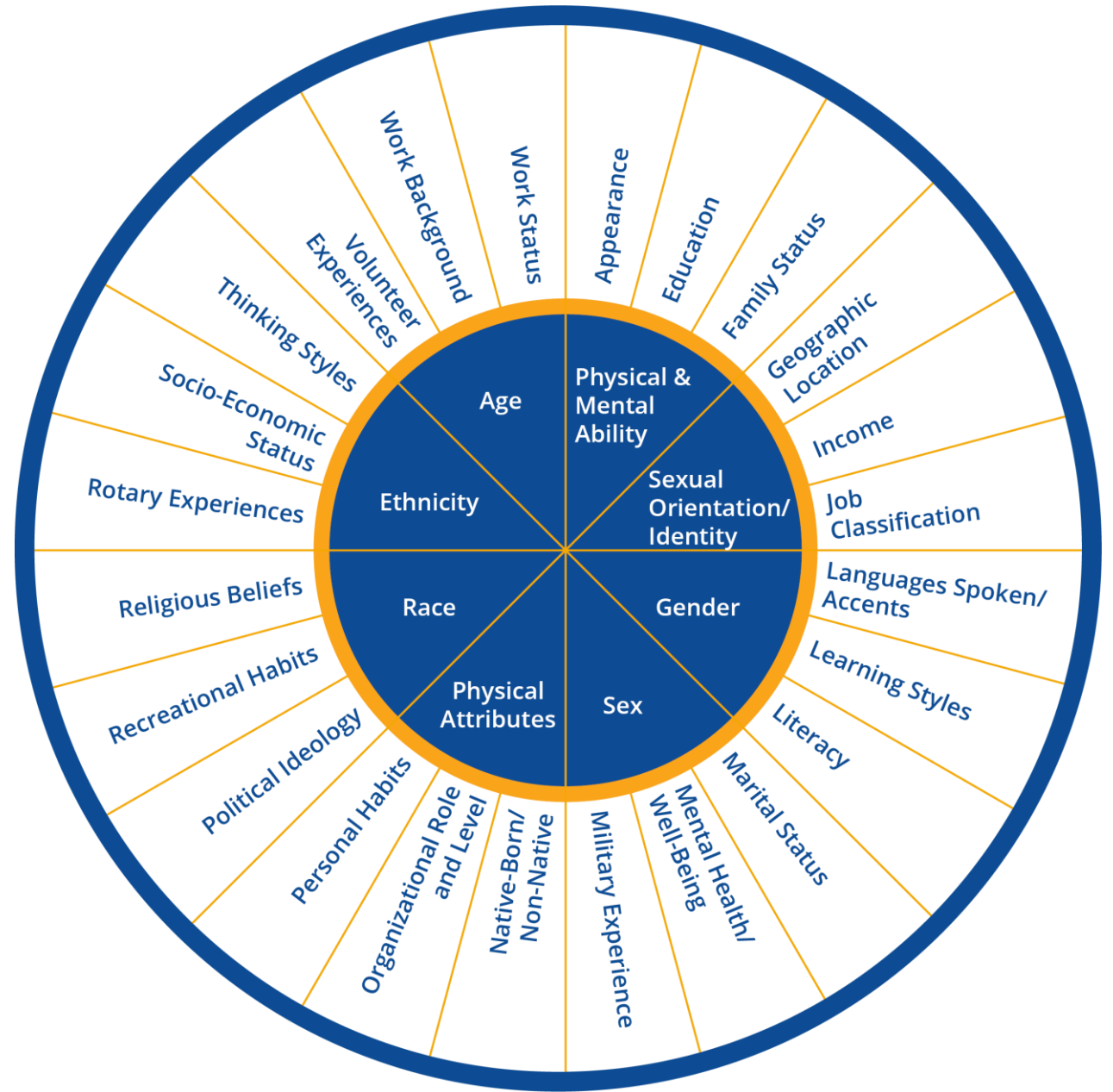
ENGAGEMENT

SLOW, STEADY PROGRESS



TIP: People tend to lose focus on annual goals. Break them down into quarterly priorities.

**The power of
Rotary is in the
strength of our
members.**



ONGOING, ACTIVE SERVICE

The secret sauce

78% Had 4 or more service projects per year

40% Held 10 or more service projects per year



INCLUDE COMMUNITY MEMBERS

The secret sauce

87% Invite community members to projects and fundraisers

67% Hold one or more events to attract new members



STRONG PUBLIC IMAGE

It's not just doing, it's being seen doing.



TIP: Focus on member attraction

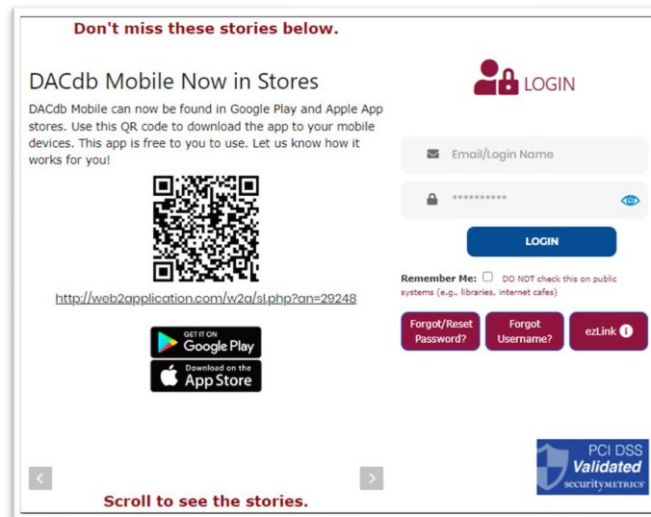
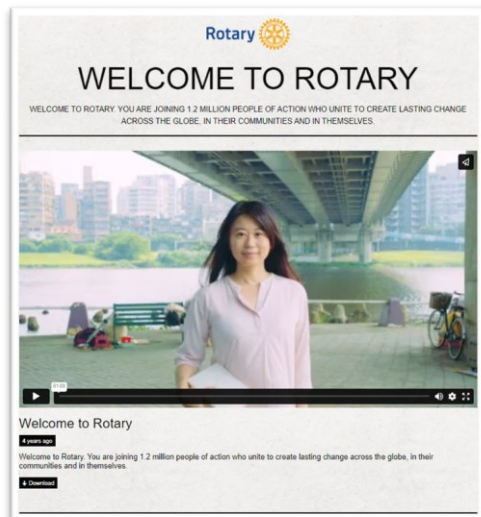
Rotary



Engage Members



ONBOARDING IDEAS





Diversity, Equity, and Inclusion

SIGNATURE SERVICE PROJECTS & FUNDRAISERS

More than 50% are involved

83% Have a repeating 'signature' fundraiser every year

86% Have a repeating 'signature' project every year



ACTIVE USE OF MEDIA TOOLS

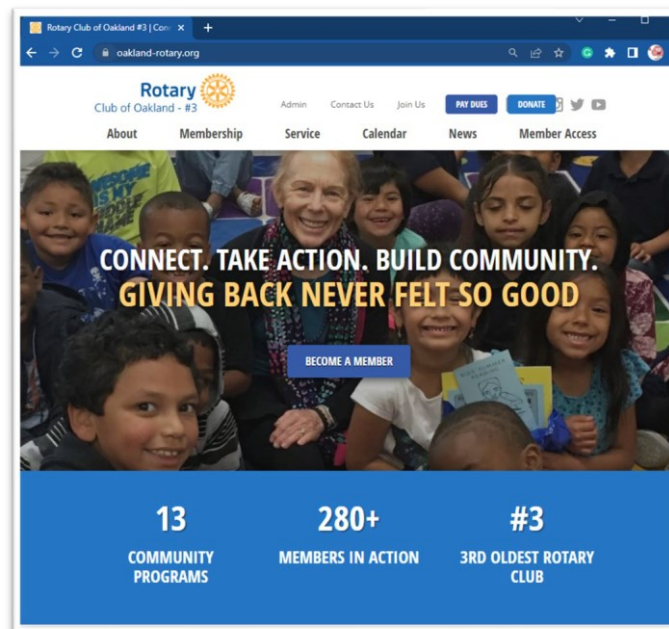


95%

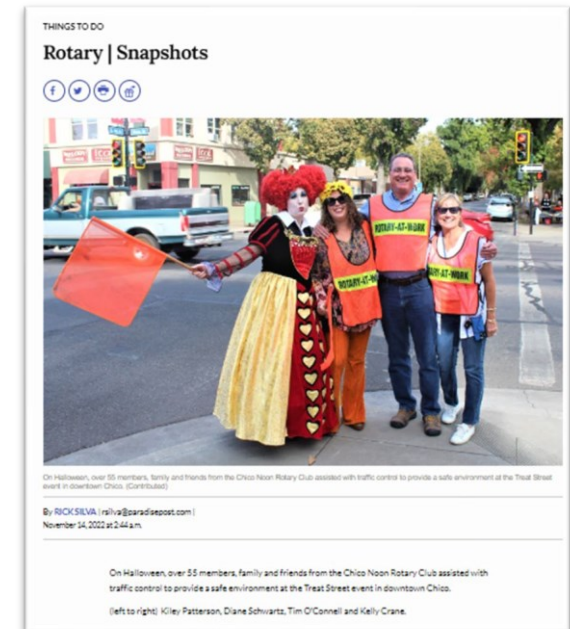


Instagram

21%



77%



55%

Rotary



Jay Hislop

DGN 5220 RY 2023-24

RotaryJay5220@icloud.com

THANK YOU!

Now Start Your Engines

MEMBERSHIP RESOURCES

Elizabeth Hull, District Membership Chair

Liz Hull	Join5220Rotary@outlook.com 209-649-4174
Cameron Bregman	Cameron@bregmanfinancial.com
Eddie Arias, Social Media	eddiearias@gemcorp.com
Jay Hislop, DGN	rotaryjay5220@icloud.com 209-406-6314
District and RI Resources	For Membership Materials: www.rotary5220.org/for-members/ training www.rotary.org/membership

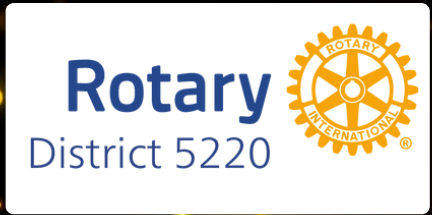


THANK YOU!

District 5220 Foundation & Membership Seminar

Rotary
District 5220





SAVE THE DATE



ROTARY FOUNDATION DINNER



QUESTIONS?

AGGIE FREEMAN, EVENT CHAIR
EMAIL: ROTARYAGGIE@GMAIL.COM
PH: 510-766-4080

SATURDAY, OCTOBER 28, 2023 AT 5:30 PM
DOUBLE TREE HOTEL & CONFERENCE CENTER
1150 9TH STREET, MODESTO, CA



EARLY BIRD RATE FOR
ROOM RESERVATIONS
BOOK NOW AT
[HTTPS://TINYURL.COM/ROTARY5220](https://tinyurl.com/rotary5220)