Goal Setting and Action Plans to Support Membership Initiatives

District Membership Chairs Education Session

Zones 25B & 29 Institute – Houston, Texas

September 9, 2021

Pat Merryweather-Arges
Director 2022-2024 25A, 25B & 29

Rotary

Pat Merryweather-Arges

Director 2022-24 Zones 25A, 25B & 29
Rotary Club of Naperville, IL

Rotary

GOAL SETTING & ACTION PLANS

SUPPORTING MEMBERSHIP INITIATIVES

Rotary

Five Strategic Goals

1. Bring in at least **1** new Rotarian & Encourage all others to participate in Each One, Bring One.

2. Encourage each Governor to establish at least **2** new Rotary clubs.

3. Achieve a membership retention rate of at least **95%** in each district by helping district leaders engage members.

4. Ensure that district leaders follow up on **100%** of membership leads.

5. Ensure each of your DMCs implements at least **3** region specific engagement and attraction strategies after they complete their Learning Center courses.

FINDING & RUNNING REPORTS

Hint: For the best experience, RI suggests using a desktop or laptop computer and the Google Chrome browser. If you do not already have Chrome, you may download it for free.

REPORT: CLUB + DISTRICT MEMBERSHIP PROFILES

PURPOSE:

Provides snapshot information from four other reports

- 1 July counts, current membership numbers
- Gender, age, alumni distribution
- Gains + losses
- Membership termination

ACCESS:

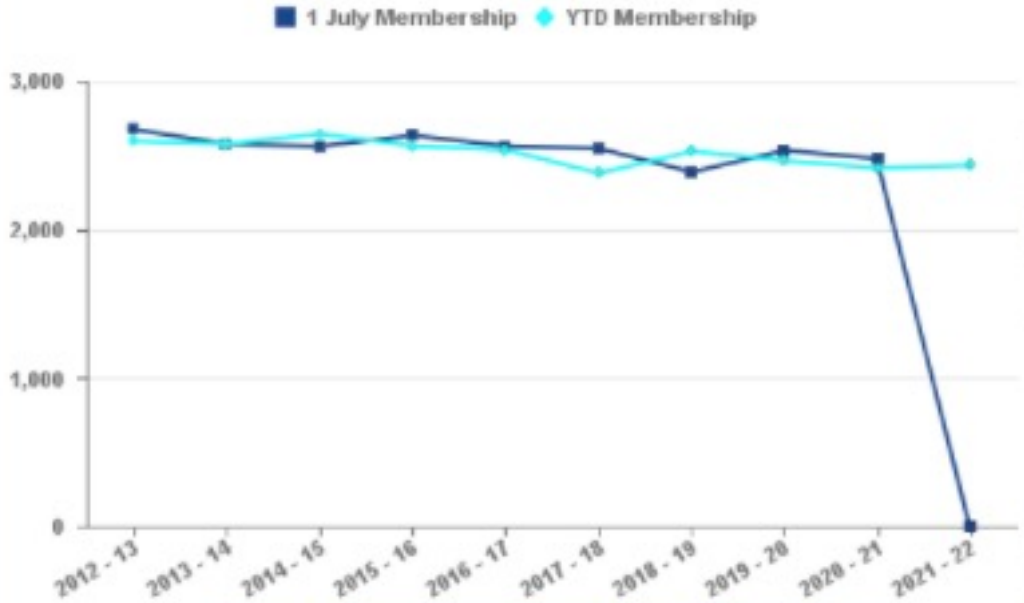
My Rotary > Manage > Club & District Administration > Rotary Club Central > District Reports

CONTACT:

Emily.Tucker@rotary.org OR Membership.Reports@rotary.org

	Clubs in District			District Membership				Alumni Membership	Female Member Distribution		Member Distribution Under Age 40			Existing Member Retention		New Member Retention	
	1 July	YTD	Clubs with Goal	Goal	1 July	YTD	Net Growth %	Active %	1 July %	YTD %	1 July	YTD	Unreported %	LFY	YTD	LFY	YTD
2021 - 22	0	62	40	1,833	0	2,432	#DIV/0	2.43%	0.00%	36.24%	0.00%	6.64%	37.13%	83.68%	99.76%	92.99%	100.00%
2020 - 21	63	62	66	2,676	2,476	2,413	-2.64%	2.46%	32.71%	36.27%	6.30%	6.61%	36.92%	86.24%	82.36%	91.24%	92.99%
2019 - 20	63	63	44	2,265	2,632	2,463	-2.73%	2.62%	32.11%	32.76%	7.70%	6.33%	37.47%	84.13%	84.66%	93.66%	91.24%
2018 - 19	61	63	47	2,361	2,386	2,626	6.83%	2.61%	30.93%	32.04%	7.21%	7.72%	36.37%	83.44%	83.83%	92.78%	93.66%
2017 - 18	61	61	43	2,260	2,644	2,378	-6.63%	2.73%	30.27%	30.91%	7.39%	7.23%	36.70%	83.97%	82.78%	91.79%	92.78%

Membership Trends



Year to Date (YTD) covers the period from July through June

Membership Gains & Losses

	1 July Count	New Admissions	New Terminations	New Readmissions	Existing Terminations	Existing Readmissions	Net Change
2021 - 22	0	24	0	0	5	0	19
2020 - 21	2,476	386	28	1	428	20	(50)
2019 - 20	2,632	331	31	2	387	23	(52)
2018 - 19	2,386	528	36	1	377	30	147
2017 - 18	2,644	277	20	0	444	30	(167)

Membership Termination by Years of Membership

	Under 1	1-2	3-5	6-10	Over 10	Total
2021 - 22	1	1	0	1	2	5
2020 - 21	53	176	52	56	110	456
2019 - 20	71	164	80	48	55	418
2018 - 19	57	150	72	55	58	412
2017 - 18	79	162	81	41	101	464

Member Termination - Reason

	Attendance	Business Obligations	Deceased	Family Obligations	Health	Personal	Joining New Club	Relocation	Misc Reasons
2021 - 22	1	0	1	0	0	1	1	1	0
2020 - 21	22	49	32	20	11	160	28	56	88
2019 - 20	24	56	8	20	12	128	17	54	99
2018 - 19	46	50	16	22	11	126	37	36	68
2017 - 18	20	57	18	24	16	147	24	62	96

REPORT: MEMBER VIABILITY + GROWTH

PURPOSE:

Calculates club and district retention rates for new and longer-term members

- Can run for one year or multiple years

ACCESS:

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	Existing Members			New Members				
# of Members @ : 1 July 2020	Terminated	Readmitted	Retention Percentage	Admitted	Terminated	Readmitted	Retention Percentage	# of Members @ : 30 June 2021
41	(7)	0	82.93%	3	(1)	0	66.67%	36
32	(5)	0	84.38%	3	0	0	100.00%	30
33	(5)	0	84.85%	9	0	0	100.00%	37
16	(11)	0	31.25%	10	(2)	0	80.00%	13
33	(10)	0	69.70%	1	0	0	100.00%	24
106	(16)	0	84.91%	13	(1)	0	92.31%	102
17	(6)	0	64.71%	3	(1)	0	66.67%	13
45	(4)	1	93.33%	4	0	0	100.00%	46
84	(8)	2	92.86%	6	0	0	100.00%	84
29	(1)	0	96.55%	0	0	0	0.00%	28
39	(6)	0	84.62%	1	0	0	100.00%	34
12	0	0	100.00%	0	0	0	0.00%	12
14	(2)	0	85.71%	4	0	0	100.00%	16
19	(3)	0	84.21%	0	0	0	0.00%	16

REPORT: DISTRICT MEMBERSHIP PROGRESS TO GOAL

PURPOSE:

WHICH CLUBS IN MY DISTRICT HAVE SET A MEMBERSHIP GOAL IN ROTARY CLUB CENTRAL FOR THIS YEAR?

ACCESS:

My Rotary > Manage > Club & District Administration > Rotary Club Central > District Reports

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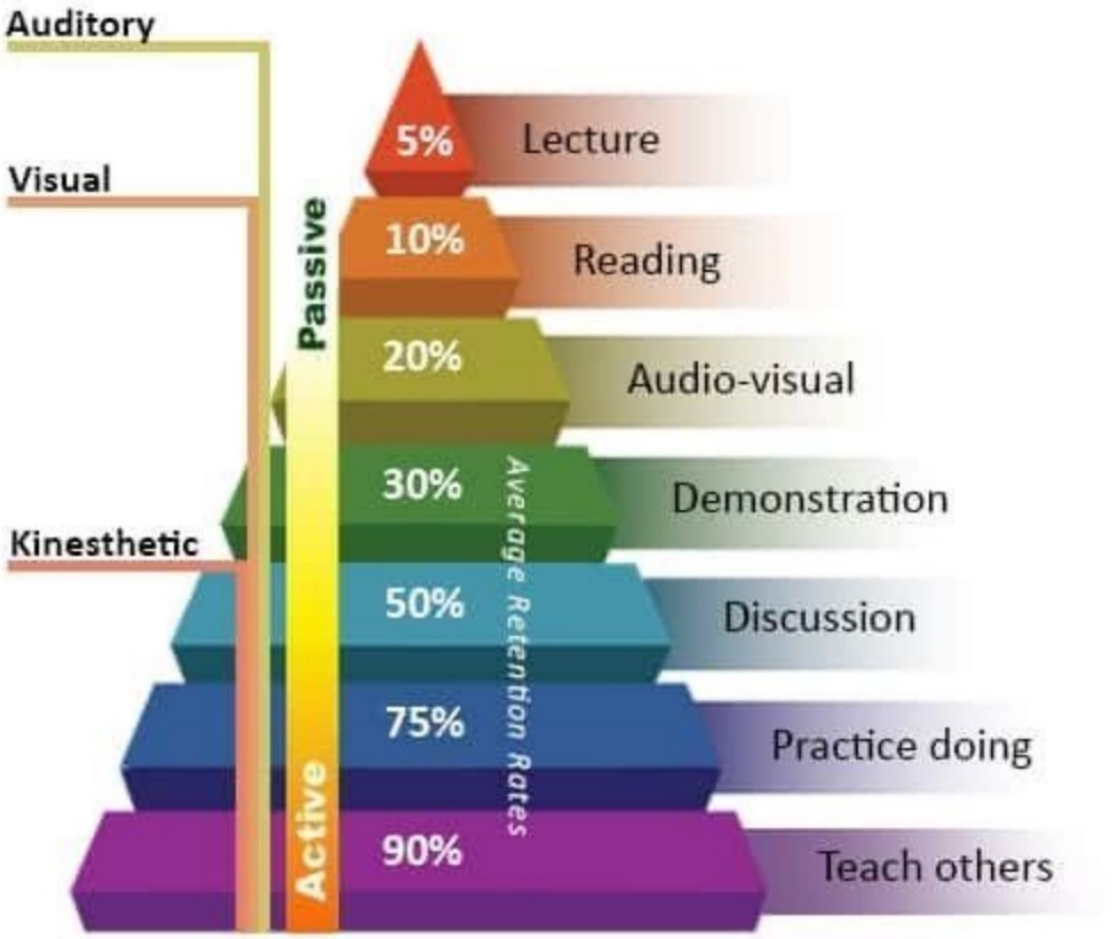
Rotary DISTRICT MEMBERSHIP PROGRESS TO GOAL

For AUGUST 2021 - 2022

												Alumni Membership		Gender Distribution		Age Distribution		Retention ***		
Zone	Zone Section	District	# Clubs Last 1 July	# Clubs Current	# Clubs with membership goal *	% Clubs with membership goal	District Membership Goal **	01 July Membership	Current Membership	Membership Net Growth (%)	Distance to Membership Goal	Active Member Count	Active Member %	1 July Female %	Current Female %	1 July <40	Current <40	Retention LFY	Retention LYTD	Retention YTD ****
29	N/A	5580	62	62	31	50.00%	1,380	2,382	2,376	-0.25%	0	47	1.98%	35.14%	35.23%	6.51%	6.31%	87.44%	98.31%	97.99%
29	N/A	5610	39	39	1	2.56%	103	1,565	1,572	0.45%	0	19	1.21%	30.35%	30.28%	5.11%	5.09%	87.95%	99.08%	98.60%
29	N/A	5630	30	30	18	60.00%	508	1,029	1,022	-0.68%	0	17	1.66%	34.31%	34.44%	8.65%	9.10%	87.32%	97.46%	97.58%
29	N/A	5650	39	39	28	71.79%	1,732	1,772	1,789	0.96%	0	28	1.57%	32.62%	32.92%	10.61%	10.73%	89.23%	99.17%	98.93%
29	N/A	5680	58	58	3	5.17%	161	2,197	2,206	0.41%	0	28	1.27%	30.72%	30.92%	7.19%	7.25%	86.12%	98.23%	98.82%
29	N/A	5710	44	44	13	29.55%	1,002	2,075	2,085	0.48%	0	36	1.73%	32.96%	33.05%	3.71%	3.55%	88.24%	98.84%	98.70%
29	N/A	5950	66	66	35	53.03%	1,671	2,665	2,617	-1.80%	0	31	1.18%	32.68%	32.10%	5.85%	5.58%	86.56%	98.01%	96.63%
29	N/A	5960	60	60	13	21.67%	700	2,427	2,445	0.74%	0	41	1.68%	34.61%	34.60%	4.04%	4.09%	87.64%	98.04%	98.68%
29	N/A	5970	50	50	50	100.00%	2,276	1,993	2,001	0.40%	275	22	1.10%	34.92%	34.78%	7.78%	7.60%	85.27%	98.23%	97.95%
29	N/A	6000	66	66	35	53.03%	2,221	3,212	3,231	0.59%	0	29	0.90%	31.41%	31.41%	4.27%	4.18%	86.89%	98.44%	99.13%
29	N/A	6220	39	39	6	15.38%	213	1,254	1,253	-0.08%	0	17	1.36%	34.45%	34.40%	9.01%	8.86%	87.41%	98.53%	98.09%
29	N/A	6250	58	58	56	96.55%	2,640	2,485	2,507	0.89%	133	39	1.56%	36.42%	36.50%	8.41%	8.50%	88.38%	98.61%	99.04%
29	N/A	6270	54	54	33	61.11%	1,916	2,416	2,422	0.25%	0	39	1.61%	31.21%	31.42%	3.77%	3.63%	86.96%	98.29%	98.39%
29	N/A	6420	44	44	41	93.18%	1,516	1,483	1,496	0.88%	20	22	1.47%	37.29%	37.10%	3.98%	3.94%	88.05%	97.81%	98.99%
29	N/A	6440	67	67	44	65.67%	1,526	1,946	1,931	-0.77%	0	32	1.66%	32.37%	32.42%	2.93%	2.85%	88.67%	97.78%	97.79%
29	N/A	6450	60	60	45	75.00%	1,482	1,609	1,594	-0.93%	0	33	2.07%	38.16%	38.02%	6.46%	6.46%	84.92%	97.37%	97.70%
Total			**836**	**836**	**452**		**21,047**	**32,510**	**32,547**	**0.11%**	**0**	**480**	**1.47%**	**33.55%**	**33.54%**	**5.92%**	**5.87%**	**87.27%**	**98.29%**	**98.34%**

Learning and Sharing…..

- Quarterly Reporting Out
  - Gather Multi-District Teams
  - Learn and share with each other
  - Report out - Share best practices at Quarterly Region 36 Learn and Share Meetings
- Sharing within District



Adapted from the NTL Institute of Applied Behavioral Science Learning Pyramid

QUESTIONS?

Thank You !

https://my.rotary.org/membership

https://rotaryregion36.org

Rotary