

“The growth and development of people is the highest calling of leadership.”

- Harvey S. Firestone

MEMBERSHIP RETENTION MANUAL



WELCOME

CONGRATULATIONS!

You have successfully recruited new members to your Sertoma club. What do you plan to do to keep those new members?

While many clubs feel that bringing in new members is the most important part of a membership growth plan, the addition of new members is actually just the beginning. Retention is the lifeblood of a sustainable organization, and the most successful clubs recognize that retention efforts begin on a new member's first day in Sertoma.

Ensuring that all members are engaged in club activities and are satisfied with their opportunities to serve should always be a priority. Retention efforts must be proactive and ongoing. Clubs need to find out who members are, understand their expectations, and make every effort to serve them well throughout the year. New members will continue their membership and pay their dues only if they feel their Sertoma experience is meeting their expectations, and that they are receiving value for their time and money.

We have designed the Membership Retention Manual to help you with these efforts. Your success helps Sertoma grow strong, dynamic clubs that create change for the betterment of all.

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STEP#1: ORIENTATION

The first year is the most crucial in a new Sertoman's membership. It is essentially a trial period during which the new member decides whether or not to continue to be a part of the organization. The welcome that a member receives, how quickly they learn about the club's impact on the community, and how soon they become involved in club activities and sponsorships will determine their satisfaction with their Sertoma experience. Clubs need to ensure that new members immediately feel they are part of a dynamic group to which they can actively contribute.

WELCOMING MEMBERS

New members should be introduced and inducted to the club at the beginning of their first meeting. This induction can be as simple as preparing a brief but meaningful welcome message, sharing some club history and presenting the member pin and name badge. The pin and badge are sent to clubs upon receipt of Form 115: Membership Information Form (available at sertoma.org).

Welcoming new members to your club in this manner can take the place of holding a more formal induction ceremony. Formal induction ceremonies may seem too strict or conventional for some new members, possibly making them uncomfortable. While traditions of the club should be respected, the feelings and preferences of the new members being welcomed into the club need to be taken into account as well.

You can download a sample new member induction script at sertoma.org.

Other ways to welcome new members:

- Create a Club Welcome Kit that includes a brief history of your club's impact on the community, a programs overview, and a copy of the club roster.
- Hold a dinner where new members are the guests of honor and the focus is on getting to know each other – not club business.
- Include a profile and photo of each new member in the club newsletter.
- Designate a greeter to welcome attendees at meetings and to direct new members, ensuring that they immediately feel welcomed and included.
- Use assigned seating to encourage current members to sit with new members. Think about including an introduction or icebreaker opportunity to incite additional interaction.
- Send a press release to local media about new members.

The most important thing to remember when welcoming new members is to be authentic and creative. How a member is welcomed is entirely at the club's discretion. Whether it is a formal dinner or a casual icebreaker at a regular club meeting, make the welcome unique to your club and memorable for both new and current members.

Educating Members

Educating new members about the club's history, projects and activities helps them understand the opportunities available to them so they can hit the ground running and feel like they are making a difference right away.

Learning about Sertoma's mission activities also helps familiarize new members with what is happening in the national organization and makes them feel more connected to Sertoma.

In any relationship, having a mutual understanding of expectations is crucial to establishing trust. The new member's relationship with the club is no different. Members must begin their experience with a realistic view of what they may be asked to do and the time commitment involved.

There are many ways to empower members with the resources they need to become active participants. Club leaders should clearly communicate goals and objectives so everyone understands the current activities and direction of the club. Dissatisfaction and conflicts can often be attributed to gaps in expectations that are never realized or discussed.

One great place to address this with new members is during orientation. Be sure to provide new members with the information necessary to cover the basic volunteer, financial and administrative aspects of the club.

Discussing expectations and opportunities is also essential when matching new members with volunteer or leadership activities. When engaging the new member in a specific task, the required skills should not only match those possessed by the new member, but should also fall into their areas of interest.

Tips for volunteer matching:

- Ask new members to share why they joined and what they specifically hope to get out of their membership experience. The reasons for joining Sertoma are as diverse as the number of members in a club. Learning why a member joined is essential to knowing how to keep that member in the organization.
- Provide an overview of volunteer opportunities so members can find the experience that best fits their available time and skills sets. Some members will prefer serving on short-term task forces; some will choose to take on year-long commitments; and others will just want to show up for an hour or two. The key is to get members involved at their own level.
- Distribute a calendar of events and a list of committees and their descriptions (if applicable).

Clubs should revisit member expectations and responsibilities each year. Ask ALL members what their expectations are for the year and make sure they understand what is expected of them. This ensures that everyone has a voice and is on the same page.

STEP #2: ENGAGE

Members who actively participate in club activities are more likely to stay members. Clubs should provide varied opportunities for new members to utilize their talents and abilities so they feel that they are a valued member of the team. Engaging the new member offers the club new thoughts, ideas and creativity, and increases the member's commitment to the club. Members need to find a home in the club and an ongoing reason to belong. If you do not help them find that, you will lose them!

The majority of members join Sertoma to make a difference in their community. Sertoma's programs are designed to motivate members and to give them the tools necessary to make that difference. Keep in mind, most members join to do hands-on, life-changing volunteer activities. Participating in these activities within the club quickly demonstrates the impact of their service and provides an immediate sense of accomplishment and fulfillment.

Tips for engaging members:

- Most members join because they are asked. Similarly, most members will engage if asked. Don't always wait for members to volunteer for projects. When an opportunity arises, be proactive and personally ask a member who you think would be a good fit.
- Remember to ask, not assign. A member who is assigned a task and then told about it after the fact will likely be less invested in getting the job done.
- When asking new members to get involved, keep in mind that although they may be new to the club, it is likely that they are business professionals and are not new to leading and managing. They are often able to jump right in and plan and implement new projects on their own. Do not underestimate the talent and ability of new members simply because they are new to Sertoma.
- For those new members who seem hesitant, make getting involved less intimidating by asking them to work as a group on a specific project with an experienced member as a mentor. This engages the seasoned member and helps members of different experience levels get to know each other.
- Make sure all members are aware of the Sertoma Mentor Award, which matches new and seasoned members so they can learn from each other's experiences.

Hold Convenient and Productive Meetings

One of the most critical steps a club can take to retain members is to make meetings as convenient and productive as possible. Meetings serve different purposes, from managing club business to coordinating events to providing social time. Flexibility is a must to meet the needs of a diverse membership, so keeping meetings focused on a single purpose helps clubs stay on track and allows for the necessary in-depth discussions. Set specific goals for the meeting, include them on the agenda, and recap at the end of the meeting to reinforce what was accomplished.

Clubs should make every attempt to accommodate busy schedules and to run meetings efficiently so members do not feel their time is being wasted. Choose meeting dates and times that appeal to the majority of members. Meetings should begin and end on time.

Communicate!

Consistent and effective communication is essential to keeping members informed about club, regional and national Sertoma activities. It is also a great opportunity to highlight successes and inspire members. Take advantage of email to communicate regularly with members on club activities, accomplishments and the benefits they are getting as a Sertoman.

Your communications strategy will likely begin with a club newsletter that highlights club projects and accomplishments. Whether it is printed or electronic, it should include important updates and reminders. It doesn't have to be professionally produced, but the content should still be informative and appropriate. Avoid offensive humor and irrelevant personal updates.

Sertoma Headquarters communicates with members through print publications, digital newsletters, sertoma.org and social media. These tools may serve as a great place to get supplemental information to share with your club members.

Tips for effective and engaging member communications:

- Keep up-to-date membership records. Incorrect contact information limits a club's ability to reach members. This means members do not receive important information from the club or from Sertoma Headquarters. Ask members to review their contact information at least annually. Encourage members to submit updates online through the Member Center at sertoma.org.
- Request that members provide an email address. Make sure to update your contact list when you get bounced messages.
- Ask a member with website development experience to design and maintain a club website. Social media is also a great place to engage and update members.
- Email notes or minutes for meetings to all members or post them on the club website so members not in attendance are kept in the loop.
- Consider establishing a telephone tree for urgent or last-minute reminders and announcements.

Ask for Feedback

Requesting feedback engages members in the management of the club and reinforces that all members have a voice in its success. Providing opportunities for members to share their thoughts and ideas helps clubs review and adjust goals. Effective ways to get feedback include roundtable discussions, club assessments and surveys.

In the process of soliciting feedback, whether it is during a conversation or through a formal assessment, do not ignore complaints and try hard not to be defensive. Remember that "complaining" members are usually caring members who believe their input will make a difference. No matter what they tell you, ask for more feedback rather than simply explaining why something is the way it is. Ask problem-solving questions such as, "How can we improve this situation?" Give these members an outlet both to keep them engaged and to prevent their words and attitudes from infecting other members and draining the energy out of the club.

Roundtable Discussions

It's a myth that leaders are always the smartest, most knowledgeable people in the room. Many views and ideas on a specific challenge will find more solutions when you have more than just club leaders' input. Hold open roundtable discussions on a regular basis to allow members to think together as a group and foster relationships. Roundtable discussions allow members to learn from each other, find support, create solutions and discover new capabilities.

Effective roundtables will incorporate both creativity and realistic expectations. Led by a moderator, they allow for discussions that incorporate all viewpoints so that issues can be addressed in an open forum rather than with gossip. Moderators should watch for negative phrases like "We've tried that before" or "It will never work because..." Instead, they should guide the conversation back to solution-based discussion and try to begin and end on a high note.

Club Assessment Surveys

Conduct the Club Assessment Survey annually to collect feedback. Ask a club member who is not on the board or in a leadership position to lead the initiative and make sure all members are included. Assure members that all information is confidential and/or anonymous unless they choose for it not to be. Encourage them to be honest and direct and to submit additional ideas.

New Member Surveys

Ask new members to complete a new member survey after their first few months of membership. This will show the club how effective and quickly it engages new members. You may also consider inviting new members to meet casually with club officers and other leaders after the first three months of their membership to offer their perspectives.

Membership Exit Surveys

Contact members who choose to end their Sertoma membership. Try to find out why they no longer wish to be a part of the Sertoma family. They may have simply forgotten to renew and will end up rejoining. They may also take the opportunity to talk about issues that caused them to lapse their membership. The reasons for leaving a club are as diverse as those for joining it, and some are out of the club's control. Talking to former members may help to identify issues or concerns that the club can do something about.

Sharing Results It is very important that you share the results of the surveys with fellow club members. If you don't share the results, members will feel that their time and effort was of no value and probably won't participate the next time their input is requested.

Just acknowledging that problems or issues exist goes a long way in establishing credibility with members and ensuring them that the club is committed to making necessary changes. Members don't expect the club to be perfect but do expect their leaders to care. That's why it is so important to have a plan of action in place and be prepared to act on it.

STEP #3: RECOGNIZE AND REWARD

Members join Sertoma promising to share their time, talents and enthusiasm. Their primary motivation is to make a difference by helping others, but they become more bonded to the organization when they get something back in return. Whether it is a “job well done,” a mention in the local newspaper, a posting on Facebook or a mention about how their efforts are making a difference in the community, everyone appreciates having their efforts recognized.

Make it personal. Customizing recognition makes it even more meaningful and memorable for the recipient. Some of your club members may enjoy sharing success with friends and family at an award function or social event. Other Sertomans might prefer a handwritten note from the president of the board or a letter sent to their employer detailing their accomplishments. Still others like being recognized publicly through the media. Taking the time to find out what will make a member feel good demonstrates that the club values that member’s individual efforts and accomplishments.

Make it ongoing. Recognition does not always have to occur after a project is completed or a goal obtained. In fact, ongoing appreciation while members are in the midst of working on a complicated or time-intensive project can go a long way in keeping them motivated. Break projects down into stages and try to identify when lags in enthusiasm might occur. Once identified, these struggles are easier to anticipate and address. Small gestures can then be used to inspire members to ensure a strong finish.

Make it fun. Humor has been proven to stimulate creative thinking, prevent burnout, generate loyalty, and increase productivity. When fun is part of your club’s culture, members look forward to attending meetings and participating in projects. Consider establishing a “fun” committee that gives out not-so-serious awards, organizes holiday and birthday celebrations and puts together other morale-building activities that aren’t related to club business. Celebrate the completion of all projects and share photos so that everyone can join in on the fun.

The greatest reward for most Sertomans is knowing that the time and energy they invest is making a difference in their community. Make it a point to revisit accomplishments on a regular basis, using examples of the impact of the club’s work whenever possible. Interacting with the individuals who have benefited from their efforts is a personal and powerful reminder to members of how their involvement in Sertoma is changing lives.

STEP #4: KEEP IT SIMPLE

Making the Sertoma membership renewal process as convenient as possible is important. Clubs are billed by Sertoma headquarters on the first business day of each quarter. Club dues should be collected in a similar manner, invoicing each member each quarter. The club treasurer should mail invoices directly to members that outline all dues owed. Include a letter that highlights the club's successes and benefits so that members are reminded what they'll miss if they lapse.

When it comes to working with lapsed members, many who say they do not want to continue membership aren't saying "no," they are saying "not now." Perhaps family, work or financial pressures are causing hesitation about committing to another year. Make sure the member knows that the club wants them to return and is appreciative of whatever time they can give, even if it is not at the same level as the previous year. Circumstances change and the member needs to know that the club's expectations can change too.

Instances may also arise where it is appropriate to help members find a new Sertoma home. If members are unable attend your meetings due to time or location, help them see if there is another club that might be a more convenient fit. If a member is moving, clubs should try to help them transfer their membership to a new club.

Note: If the office of treasurer is transitioning, make sure the outgoing treasurer provides all the information necessary to the incoming treasurer so that the billing process is not interrupted or stalled.

CONCLUSION

It is frustrating to continually recruit new members into the club only to see them leave after a year or two. To keep these members, clubs must offer a variety of activities that includes hands-on work, learning opportunities, fundraising and social gatherings.

Clubs must also commit to creating a culture of flexibility and inclusion. Members join and leave volunteer organizations because of the relationships formed there. Clubs should be respectful of differences and make it a practice to explore them as they often lead to new opportunities and ways of doing things. Diverse clubs are well-rounded clubs whose ability to adapt and adjust, positions them for continued success.

The majority of members say the reason they joined Sertoma is because they believe in the club's mission and they want to make a positive impact on their community. Provide the opportunities and tools they are looking for and members will be on the path to becoming lifelong Sertomans.