



SOROPTIMIST

Best for Women

Retention Manual

July 2010

Table of Contents

Introduction.....	2
Step #1: Set the Stage	2
Step #2: Engage	5
Step #3: Recognize, Reward and Remind.....	9
Step #4: Make It Easy	10
Conclusion	11

Introduction

So you've successfully recruited several new members. Congratulations, but now what? Some might think the most important work—bringing members in and keeping numbers up—is done. In fact, the addition of new members signals the start of the most critical part of any membership plan—retention.

Many membership organizations believe that retention is a concern when dues time comes around, or that it only becomes an issue when membership numbers drop. The most successful organizations, however, recognize that retention efforts actually begin on a new member's first day in the organization, and that ensuring all members are engaged and satisfied is a priority regardless of membership numbers.

In the simplest terms, retention efforts must be proactive and ongoing. To keep members, clubs must find out who members are, understand their expectations, and make every effort to serve them well throughout the year. Members will decide to continue their membership and pay their dues only if they feel their Soroptimist experience is meeting their expectations for helping to improve the lives of women and girls, and they are receiving value for their time and money.

Please keep in mind as you read this manual that the suggestions are just that—suggestions. This manual is not intended to be a set of rules that all clubs must follow. Considering the diversity of Soroptimist clubs, it is not possible to create a “one-size-fits-all” model for retention. Additionally, although the manual is comprehensive, it is by no means exhaustive. This is a guide for retaining members to maintain and grow healthy and dynamic clubs. The steps describe four general activities that should be part of a club's overall membership plan:

Step #1: Set the Stage

The first year is the most crucial in a Soroptimist's membership. In fact, it is essentially a trial period during which a member decides whether she wants to continue to be a part of the organization. The welcome a member receives and how quickly she learns about the club's culture and gets involved all set the stage for the remainder of her 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 at the beginning of their first meeting. This introduction can be as simple as preparing a brief but meaningful welcome message and presenting the new member with a member pin, name badge and certificate. (Pins and badges are available for sale from headquarters; the new member certificate is available for download in the membership section of the members area of www.soroptimist.org.) Welcoming new members in this way can take the place of holding a traditional induction ceremony, which is not a requirement. These ceremonies may seem too formal or old-fashioned for some new members, possibly making them uncomfortable. While traditions of the club should be respected, the feelings and preferences of the women being welcomed into the club need to be taken into account as well.

Clubs that perform induction ceremonies might want to consider adapting the language and sentiment of the ceremony into an updated welcome message that is presented more informally. Using language from

Soroptimist's Live Your Dream campaign as the basis for such a message will ensure that it is fun and inspirational. For information on the Live Your Dream campaign, visit the Live Your Dream section of the members area of www.soroptimist.org. Following is sample language clubs can adapt and customize:

The members of Soroptimist International of [club name] are honored that you have accepted our invitation to join us. It is our privilege to welcome you to a worldwide organization of members who are committed to improving the lives of women and girls in local communities and throughout the world.

Our name Soroptimist is a coined Latin word meaning "best for women," and that's what our club strives to achieve. Soroptimists are women at their best working to help other women to be their best. We believe in dreams and the collective power of working together to achieve them.

Soroptimist membership celebrates the unique power of women. It's a gift that women give to themselves: the chance to help others in an atmosphere of support, friendship and fun. We look forward to helping you explore the gift of membership as you participate in club projects and activities that advance our mission.

As a token of your new membership, we present to you this Soroptimist pin. The pin represents your commitment to our mission and to empowering women and girls to live their dreams by giving them the resources to create positive change for themselves, their families, their communities and the world.

Some other ways to make new members feel welcome:

- In addition to a pin, certificate and name badge, give new members a "goodies" bag at their first meeting. Purchase Live Your Dream tote bags and fill them with Live Your Dream items, candy or snacks and other small, inexpensive gifts.
- Hold a dinner at which new members are the guests of honor and the focus is getting to know each other—not club business.
- Include a profile and photo of each new member in the club newsletter and on the club website (remember to follow SIA's website guidelines, which are available in the public awareness section of the members area of www.soroptimist.org, and be sure to protect the privacy of members).
- Do an icebreaker at the beginning of any meeting attended by new members that introduces them in a fun and memorable way while encouraging current members to break out of cliques. This may seem like overkill to current members, but the more that club members know each other, the better the chance they will be comfortable being honest with and supportive of each other.
- If there is a large group of new members joining the club, consider doing a speed networking event, during which members sit with each other for five minutes to exchange information about themselves. The structure of speed networking provides a more comfortable environment for introverted members and also allows members to keep moving so they're not stuck in one place—with one person—for too long.

More tips:

- Before meetings, offer rides to new members to make them feel more comfortable about where they are going and/or arrange to meet them outside of the meeting location so they do not have to enter the meeting alone.

- Designate a current member or members to greet attendees at the door and to direct new members to the appropriate area so they immediately feel included and are not wandering aimlessly.
- Use seating arrangements that encourage current members to sit next to new members.
- Make sure new members know their member ID number so they can access the secure sections of the SIA website. If they have not already received it via email, the number can be obtained from the club roster in the members area of www.soroptimist.org or by contacting member services at headquarters at siahq@soroptimist.org.
- Send a press release to local media about new members.

The most important thing to remember when welcoming new members is to be creative! How a member is welcomed is entirely at the club's discretion. Whether it is a formal dinner or a humorous icebreaker, 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 SIA's Renaissance Campaign early on also helps familiarize new members with what is happening at the federation level and makes them feel more connected to the international aspects of Soroptimist.

There are various ways to give new members the information they need to become productive participants. Many clubs have traditional orientation programs; however, offering a formal program is not required. In fact, obligating new members to attend a structured program that covers the administrative workings of the club and a detailed history of Soroptimist can quickly diminish their initial enthusiasm.

New members can be directed to the "New Members" section of members area of www.soroptimist.org. In addition to a welcome from the SIA President, new members can find information on programs, benefits, Soroptimist 101, FAQs, and a brief history of Soroptimist.

Another more modern and engaging way to educate members and set the stage for a rewarding membership experience is to hold an interactive "expectations and opportunities" session.

In any relationship, having a mutual understanding of expectations is crucial to establishing trust. Member-club relationships are no different. Members must begin their experience with a realistic idea of what they may be asked to do and the time commitment involved. Club leaders must clearly communicate goals and objectives so everyone understands the current activities of the club, as well as where it is headed. Dissatisfaction and conflicts can often be attributed to gaps in expectations that are never realized or discussed.

An expectations and opportunities discussion is also essential to matching members with opportunities. When asking a member to take on a specific task, the skills required should not only match those possessed by the member but should fall into her areas of interest. For example, if a member is wary of public speaking and has not expressed a desire to develop this skill, she is probably not the best candidate for presenting a self-esteem workshop for girls. Expecting a member to take on a task she is not comfortable with reveals a lack of personal understanding and is the quickest way to lose that member.

An expectations and opportunities session should be held at the beginning of the club year and as needed when a large group of new members join. Elements of the session can include:

- Asking new members to share why they joined and what they specifically hope to get out of their membership experience. The reasons for joining Soroptimist are as diverse as the number of members in a club. Learning why a member joined is essential to knowing how to keep her in the organization.
- Providing an overview of the opportunities so members can shop for 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 of satisfaction.
- Distributing information packets that include a roster, calendar of events, information about club projects, bylaws, a list of committees and their descriptions (if applicable) and a copy of “Soroptimist 101,” an overview of the organization prepared by headquarters that is available in the membership section of the members area of www.soroptimist.org.
- Personal stories and experiences shared by seasoned members will resonate more with new members than a history lesson. In addition to educating new members about the possibilities and rewards of membership, this practice reminds current members of how their personal efforts are helping to improve the lives of women and girls.

Of course, the arrival of new members should not be the only occasion on which expectations are discussed. Clubs should revisit member expectations and responsibilities each year during the planning cycle. Ask ALL members what their expectations are for the year and make sure they understand what is expected of them.

Step #2: Engage

It’s a simple concept—members who actively participate in club activities are more likely to want to continue their membership. To engage members, clubs should provide varied opportunities for them to exercise their talents, abilities, and skills and feel that they are a useful member of the team. Inclusion not only capitalizes on the creativity and competence of members, but increases their commitment and allegiance as well. Members need to find a home in the club and an ongoing reason to belong. If you do not help them find that home and that reason, you will lose them!

The majority of members join Soroptimist to improve the lives of women and girls. Our programs are what motivate them and where they want to be most active. Because members join to do hands-on, life-changing work, and because clubs are expected to participate in Soroptimist’s signature program, the Soroptimist Women’s Opportunity Awards, it makes sense to engage members by involving them in that program right away. Get them up to speed and then ask them to help promote the program, distribute materials and identify candidates. Participating in the Women’s Opportunity Awards as their first experience within the club quickly demonstrates to new members the impact of their work and provides an immediate sense of accomplishment and fulfillment.

General engagement tips:

- 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

identify a member who you think would be a good fit and ask her personally to participate. And remember to *ask*, not *assign*. A member who is assigned a task and then told about it after the fact most likely will be less invested in getting the job done.

- When asking new members to get involved, remember that although they may be new to the club, they are business and professional women and are not new to leading and managing projects and people. Often, they are 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 Soroptimist.
- 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 or guide. This also engages the seasoned member and helps members of different experience levels get to know each other.
- Consider establishing “mentoring” partnerships within the club that match new and seasoned members so they can learn from each other’s experience, how to set and reach goals, enhance coaching and leadership skills, and contribute even more to the dynamic clubs that deliver on our mission.

Convenient and productive meetings

One of the most critical steps a club can take to engage members is to make meetings as convenient and productive as possible. Flexibility is a must to meet the needs of a diverse membership. Make every attempt to accommodate busy schedules and to run meetings efficiently so members do not feel their time is being wasted. Also remember that while attendance at meetings is ideal, it does not necessarily signify that the member is contributing to the club. Stop keeping score and remove the emphasis on meeting attendance—reward participation and contributions instead.

(NOTE: Soroptimist adopted a procedure in 2006 that prohibits clubs from establishing attendance requirements. In the SIA Procedures, Section B, #4 reads “Clubs shall encourage members to attend all meetings but shall not adopt or enforce attendance requirements for meetings.” The SIA Procedures are available in the federation information section of the members area of www.soroptimist.org.)

More tips:

- Meetings must serve different purposes: managing club business, coordinating program and fundraising activities, and offering opportunities for networking and social interaction. Rather than squeezing multiple topics into one meeting, consider focusing meetings on one topic when possible. This approach helps meetings stay on track and allows for in-depth discussions that can lead to more ideas and solutions.
- Choose meeting dates and times that appeal to the majority of members. Be sure to accommodate members who work during the day or have childcare issues. Avoid holidays.
- Choose a venue that can be accessed via a variety of transportation options.
- Prepare and distribute the agenda before the meeting rather than at the meeting (although copies should be available).
- Set specific goals for the meeting and include them on the agenda so all attendees are aware of them. Revisit the goals at the end of the meeting to reinforce to attendees what was accomplished.
- Begin and end on time. Ask a member to serve as facilitator or timekeeper to keep the meeting moving.

- Ask a member to be the logistics contact responsible for room setup and temperature, food service, handout materials, etc. so that club leaders and/or speakers are not distracted.

Communicate, communicate, communicate!

Keeping in contact with members to inform them about club, region and federation activities and to encourage participation and highlight successes reinforces their connection to Soroptimist. Take advantage of the timeliness and economy of email to communicate regularly and remind members of club activities and accomplishments and the benefits they are getting for their dues. Although headquarters communicates directly with members via email, communications from club leaders have a more immediate impact.

More tips:

- Produce a club newsletter, printed and/or electronic, that highlights club projects and accomplishments and includes important updates and reminders. It doesn't have to be professionally produced—just make sure the content is informative and inspirational.
- Make sure all members are aware of headquarters news, including opportunities for leadership training, new membership benefits and opportunities available through corporate sponsorships.
- Keep up-to-date member records. Out-of-date or incorrect contact information limits a club's ability to reach members. This means members do not receive important information from the club or from headquarters. Ask members to review their contact information at least annually. A quick and easy way to do this is to encourage members to submit updates online in the members area of www.soroptimist.org.
- Require all members to provide an email address. Email is economical and is often cited as the preferred means of contact by professionals.
- Ask a member with website development experience to design and maintain a club website, using the guidelines established by the federation (available in the public awareness section of the members area of www.soroptimist.org). Look for federation designed website templates in the winter of 2010 to assist with engaging members and creating public awareness.
- Send notes or minutes for meetings to all members or post them on the club website so members not in attendance will be kept in the loop.
- Consider establishing a telephone tree for urgent or last minute reminders and announcements.
- Utilize social media. Social media is an inexpensive and accessible way to reach out to potential members as well as current members. Clubs can provide a public forum and an online platform, address questions and problems quickly, learn what concerns members have and hear their ideas, and disseminate information quickly and easily.

Ask for feedback

Requesting feedback engages members in the management of the club and reinforces that all members have a stake in the club's success, not just club leaders. Providing opportunities for members to share their thoughts and ideas helps clubs to review, readjust and retain. Effective ways to get feedback include discussion forums, assessments and surveys.

Discussion forums: It's a myth that leaders are always the smartest, most knowledgeable people in the room. Many eyes on a specific challenge will find more solutions than just having club leaders' input. Hold open discussion forums on a regular basis (not just once a year) to allow members to think together

as a group and foster relationships. This ensures the formation of new bonds. Forums allow members to learn from each other, find support, create solutions, and discover new capabilities.

More tips:

- Assign a moderator, establish ground rules and begin and end on a high note.
- Be idealistic: think of what could be no matter how unrealistic or impractical it may sound.
- Listen for what is not said. Appoint a “devil’s advocate” so contentious issues are raised and addressed during the forum rather than gossiped about afterwards.
- Outlaw club-killing phrases like “We’ve tried that before but,” “It will never work because” and “We’ve always done it this way.”

Club assessments: Club assessments should be conducted annually to collect feedback. (A sample club assessment is available in the membership section of the members area of www.soroptimist.org.) 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 survey: Develop a survey and ask new members to complete it after their first three months of membership. (A sample new member survey is available in the membership section of the members area of www.soroptimist.org.) This will show the club how effective and quickly it engages new members. Consider inviting new members to meet casually with club officers and other leaders after the first three months of their membership to offer fresh perspectives.

Resigning member survey: Contact all members who choose not to renew to find out why. They may have simply forgotten and will end up rejoining, or they may take the opportunity to talk about issues that caused them not to renew. 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 helps to identify the reasons that the club can do something about. If former members are not comfortable speaking one-on-one, ask them if they would be willing to complete an anonymous resigning member questionnaire. (A sample resigning member survey is available in the membership section of the members area of www.soroptimist.org.)

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 as 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 also to prevent their words and attitudes from infecting other members and draining the energy right out of the club.

The final—and most important—step when gathering feedback is to close the “loop.” Track and share the results of your forums and assessments—and act on them. If you don’t share, members won’t care, and probably won’t participate the next time their input is requested. And, there is no point to asking what members think and want if there are no plans for the club to follow through on the findings. Even 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.

To prevent member burnout, remember that clubs do not have to participate in every Soroptimist program. The saying “When you try to be all things to all people, you generally end up being nothing to many” holds true. Discuss and vote as a club on the projects club members are interested in and can handle. This could mean focusing on one long-term project that involves all members, organizing multiple short-term projects that involve only a few members, or a combination of both. The key is to find the workload that does not overextend the time and energy of club members.

Step #3: Recognize, Reward and Remind

Members join Soroptimist promising to share their time, talents, and enthusiasm. Their primary motivation is to make a difference by helping others, but they can 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, or a real-life reminder about how their efforts are changing the lives of women and girls, everyone appreciates when their efforts are recognized and rewarded.

Make it personal

Customizing recognition makes it even more meaningful and memorable for the recipient. Some members enjoy sharing success with friends and family members at an award function or other social event, others prefer a handwritten note from the president of the board or a letter sent to their employer detailing their accomplishments, and still others like being recognized publicly through media recognition. 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.

Personal rewards also resonate with members. In addition to a certificate or plaque, find out what a member’s favorite restaurant or store is and present her with a gift card. If a member has expressed interest in Soroptimist leadership opportunities, use club funds for her to attend a region- or federation-level leadership program. Paying the member’s expenses rewards past contributions while positioning her for even greater success in the club.

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.

The first step in maintaining enthusiasm is to identify the “enthusiasm cycle” of each long-term project. This means breaking projects down into stages and, based on previous experience, identifying when lags in enthusiasm might occur. Once identified, these lags are easier to anticipate and address. When morale is dipping, consider sending a humorous postcard or scheduling an outing during which talk of the project is forbidden. Small gestures made at different stages of a project can motivate members to finish strong.

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 activities and projects. Consider establishing a “fun” committee that gives out not-so-

serious awards and organizes holiday and birthday celebrations and other morale-building activities that aren't related to club business. Celebrate the completion of all projects by holding a "wrap" party at which photos taken throughout the project are shown.

Remind

Perhaps the greatest reward for Soroptimist members is knowing that the time and energy they put in is improving the lives of women and girls every day. Make it a point to revisit accomplishments on a regular basis, using real-world examples of the impact of the club's work whenever possible. Invite past award recipients to talk about what they are doing now. Throw a party to celebrate the anniversary of a successful project, such as the renovation of a domestic violence shelter, and invite the beneficiaries of that project. Interacting with the women and girls who have benefited from their efforts is a personal and powerful reminder to members of how their involvement in Soroptimist is changing lives.

Step #4: Make It Easy

Making the renewal process as convenient as possible is just as important as convincing members why they should renew. Nothing is worse than a member who wants to continue her membership but who decides not to because the process is too difficult or complicated.

Dues are payable to headquarters on July 1 of each year. The dues roster and invoice are mailed to the club treasurer in May of each year. Have the club treasurer make several announcements before dues payments are due, and provide invoices to members that outline all dues owed. Include a letter highlighting the club's successes over the past year and other membership benefits. If the office of treasurer is transitioning during these months, make sure the outgoing treasurer provides all of the information necessary to the incoming treasurer so this process is not interrupted or stalled. Members with questions about the process should not hesitate to contact headquarters at siahq@soroptimist.org.

More tips:

- Many times members who say they do not want to renew 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 her to return and is appreciative of whatever time she can give, even if it may not be at the same level as the previous year. Circumstances change and the member needs to know that the club's expectations can change too.
- Consider using club funds to subsidize payment plans for members who for whatever reason cannot pay the full dues amount. Fronting this money is worth it to keep a dedicated member who has contributed throughout the year.
- Assist with transferring members to new clubs. Investigate the presence of a club in the city to which the member will be transferred and complete the 5010 form (available in the membership section of the members area of www.soroptimist.org) so the new club can accept and welcome the new member.
- Thank members for renewing! Present a small gift to returning members at the first meeting of the club year.

Conclusion

It is frustrating to continually recruit new members into the club only to see them leave after a year or two. To keep the members they've worked so hard to bring into Soroptimist, clubs must offer a menu of engagement choices that includes hands-on work, learning opportunities, fundraising activities and social gatherings. Clubs also 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 not only be respectful of differences but should make it a practice to explore them to discover new opportunities and ways of doing things. Diverse clubs are well-rounded clubs whose ability to adapt and adjust positions them for sustained success.

Perhaps the best way to retain members is to be the organization Soroptimist says it is. Few things can drive new members away quicker than presenting one image to them during the recruitment process and then not backing it up with activities that are true to the Soroptimist mission. The majority of members say the reason they join Soroptimist is because the mission resonates with them and they want to give back to women and girls in their community and throughout the world. Provide the opportunities they are looking for to support and further the goals of the organization, and members will stay.