Termination Profile

In order to fully understand a club's retention strengths and weaknesses, it is important to know how long members remain in the club before termination. The instructions on pages 2-5 walk you through the process of creating a Termination Profile for your club. The profile displays the amount of time members spend in your club before being terminated. Knowing these trends can help you tailor your club's retention strategies.

The Termination Profile divides terminated members into "tenure groups" depending on how long they remained in the club before termination. These tenure groups are then plotted on a chart, providing a look at where the majority of the club's terminations are occurring.

Because each tenure group in a club has different needs, each also requires slightly different retention strategies. By identifying how many terminated members fall into each group, a club can focus its retention strategies on the needs of the members in the tenure group that has experienced the most terminated members.

For example, if you discover that the majority of your terminated members leave within the first two years, your club will want to focus more of its efforts on the members that have been in your club for less than two years. These strategies could include more comprehensive preinduction education, new member orientation, and early involvement of members in club programs and projects.

The key, of course, is to retain members in all tenure groups. The Termination Profile is simply a tool for identifying any tenure group that might be especially vulnerable in a club.

Follow the instructions on pages 2-5 to create your club's profile, and then use the information provided on pages 6-9 to evaluate your club's profile.

Creating Your Termination Profile

Note: We highly recommend that this analysis be completed by someone with a strong working knowledge of Microsoft Excel.

Retrieve your membership information.

1) Have the club president or secretary log in to the **Member Access** section of the RI Web site. *Unregistered club president/secretary:* To register for Member Access, go to www.rotary.org and click on **Member Access** on the main navigation bar. From the Member Access page, click the **Register Now** link and enter your district ID, club ID, member ID, and e-mail address into the appropriate fields.

   Please report any problems with Member Access to your Club and District Administration representative. Go to www.rotary.org/support/CDAreps to identify the representative for your club.

2) Click **Update Membership Data** on the left toolbar.

3) Click **Terminated Members** (next to **View**) to view a list of your former club members.

4) Place the cursor to the left of the statement **The following are terminated members.** Click and drag down to the bottom right corner of the page, highlighting all of the entries in all of the columns.

5) Copy this highlighted information to the clipboard.

6) Open a blank Microsoft Excel spreadsheet.

7) Paste the highlighted information from Member Access into the blank spreadsheet. *Note: You may want to resize the columns in order to view all of the information.*

8) Delete the row labeled **The following are terminated members** (at the top of the list).

9) Delete column A (labeled **View**). To ease viewing, remove the shading on the page.

Confirm the information.

Your list might contain duplicate entries of the same member. These duplicate entries may be created in a number of ways, including a slowly refreshing confirmation page in Member Access, a new member reported via both fax and mail, or an error in data entry. Because of current database constraints, duplicate entries cannot be deleted from the system. However, any duplicate entries in your club data have been identified as such by adding the word *duplicate* within the Name column. Before analysis, be sure to **delete any duplicate member entries from the list of members.**

Occasionally, RI Data Services staff has difficulty deciphering handwriting on mailed or faxed Membership Data Forms. As a result, a member may be entered into the wrong club. Because of system constraints, such incorrect entries cannot be deleted from the system. However, any members incorrectly added to your club data have been given negative or zero tenure. Before analysis, be sure to compare each member's induction and termination dates, and **delete any entries in which the termination date occurs on or before the induction date**.

Look carefully over the remaining club data to confirm its accuracy. If you notice any other incorrect data, please contact the Data Services Division at RI Headquarters (e-mail: *datacorrections@rotaryintl.org* or phone: +1 847-866-3000) to resolve the inaccuracies before proceeding with the Termination Profile.

Complete your Termination Profile.

1) Between the columns labeled **Terminated** and **Member Type,** insert a new column and label it **Days in Rotary.** Be sure that the cells in this column are formatted as numbers, not dates. In this column, create a calculation that subtracts the admission date from the termination date (= *[Termination Date] – [Admission Date]*). This calculation will show you the number of days each member spent in the club before termination. The spreadsheet should look similar to the following:

	D2	▼	**=**	=C2-B2			
	A	B	C	D	E	F	G
1	Name	Admitted	Terminated	Days in Rotary	Member Type	Member Status	
2	Doe, John	02-Jan-01	19-Apr-04	1203	Active	Terminated - Attendance	
3	Smith, Jane	01-Feb-95	30-Jun-01	2341	Active	Terminated - Moved	

2) Next to the **Days in Rotary** column, insert a new column and label it **Years in Rotary.** Be sure that the cells in this column are formatted as numbers, not dates, and show at least one decimal place. In this column, create a calculation that divides the **Days in Rotary** number by 365 (= *[Days in Rotary] / 365*). This calculation will show the number of years each member spent in the club before termination. The spreadsheet should look similar to the following:
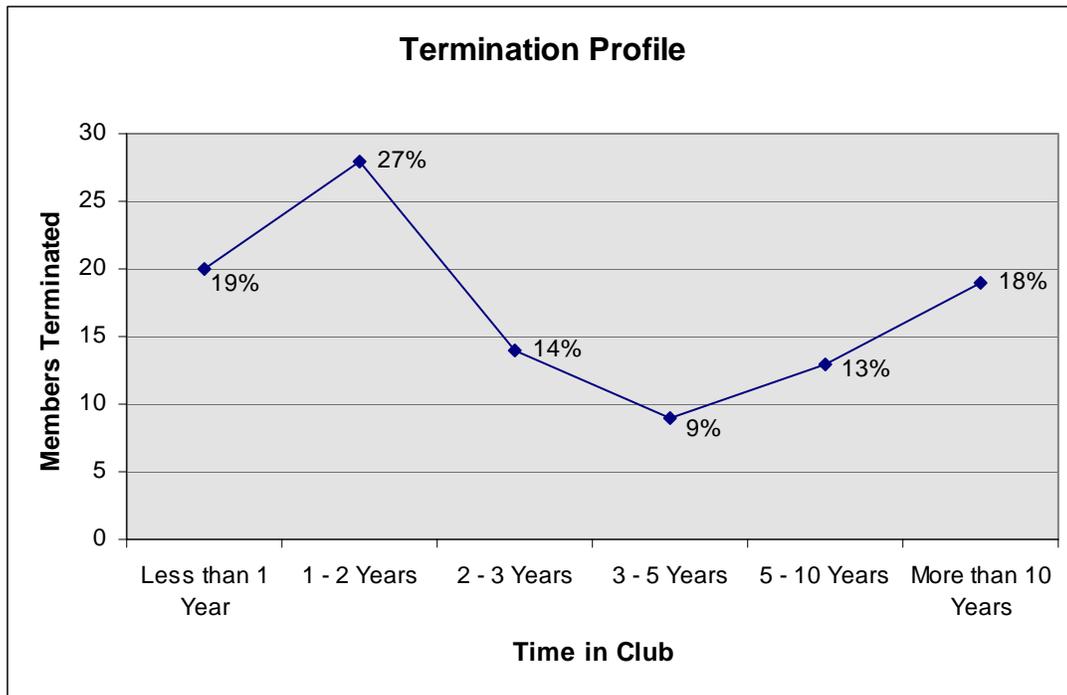
	E2	▼	**=**	=D2/365			
	A	B	C	D	E	F	G
1	Name	Admitted	Terminated	Days in Rotary	Years in Rotary	Member Type	Member Status
2	Doe, John	02-Jan-01	19-Apr-04	1203	3.3	Active	Terminated - Attendance
3	Smith, Jane	01-Feb-95	30-Jun-01	2341	6.2	Active	Terminated - Moved

3) Sort the membership roster by the **Years in Rotary** column. *Be sure to highlight all information before sorting, so as to not cross-thread the data.*

4) Add a new worksheet in the Excel workbook, and label the tab at the bottom **Summary.** On this sheet, create the following column headings for the amount of time members spent in the club before termination: **Less than 1 Year, 1-2 Years, 2-3 Years, 3-5 Years, 5-10 Years,** and **More than 10 Years.**

5) Go back to the club roster and count the number of members who were in the club for less than one year. Enter this number in the **Less than 1 Year** column in the **Summary** table.

6) Count the number of members who were in the club for 1-2 years, 2-3 years, 3-5 years, 5-10 years, and more than 10 years, and enter the numbers in the corresponding columns of the **Summary** table. The final table should look similar to this:

	A	B	C	D	E	F	G
1	Less than 1 Year	1 - 2 Years	2 - 3 Years	3 - 5 Years	5 - 10 Years	More than 10 Years	
2	20	28	14	9	13	19	

7) Highlight the column headings and corresponding values on the **Summary** table, and then either click the Chart Wizard button on the toolbar or choose *Chart* from the *Insert* menu.

8) Follow the steps that the Chart Wizard leads you through.
Note: Selecting the line graph option is recommended.

9) When the preferred chart options and formats have been selected, the chart should look similar to the following (of course, the trend line for your club will be unique):

Termination Profile

Members Terminated vs Time in Club

- Less than 1 Year: 20 (19%)
- 1 - 2 Years: 28 (27%)
- 2 - 3 Years: 14 (14%)
- 3 - 5 Years: 9 (9%)
- 5 - 10 Years: 13 (13%)
- More than 10 Years: 19 (18%)

Note: The chart will not automatically show the percentages that the sample displays. Because percentages can be very helpful, it is recommended that you calculate the percent terminated in each tenure group and insert the numbers manually.

Tips for Analysis

Following the directions as listed produces a chart for the entire history of the club. You may find it helpful (especially if the club was chartered many years ago) to create a chart using only those people who have been terminated recently, for example within three to five years. Restricting the list to recent terminations allows you to distinguish a club's current termination history. To do this, after you've retrieved membership information from Member Access simply choose the time frame you wish to study, (for example, terminations from 2001 to 2004), and delete all members who were *not* terminated during that time. Then proceed with the instructions on page 3, starting at step 1 under "Complete your Termination Profile."

You may also find it helpful to compare the current Termination Profile to a profile with historical data. To do this, create one chart for the most recent complete Rotary year and a second chart for a specific Rotary year from the past for example, one chart for terminations in 2003-04 and one for terminations in 1999-2000).
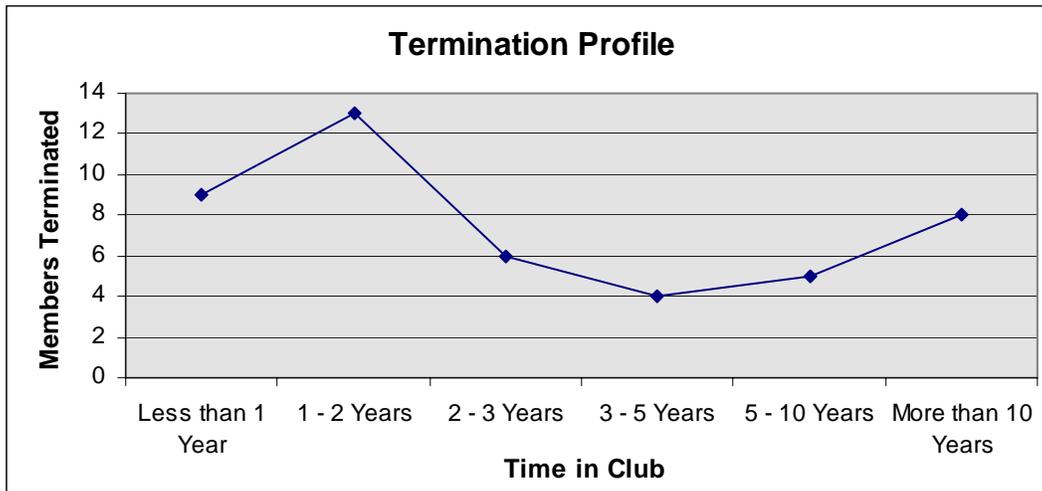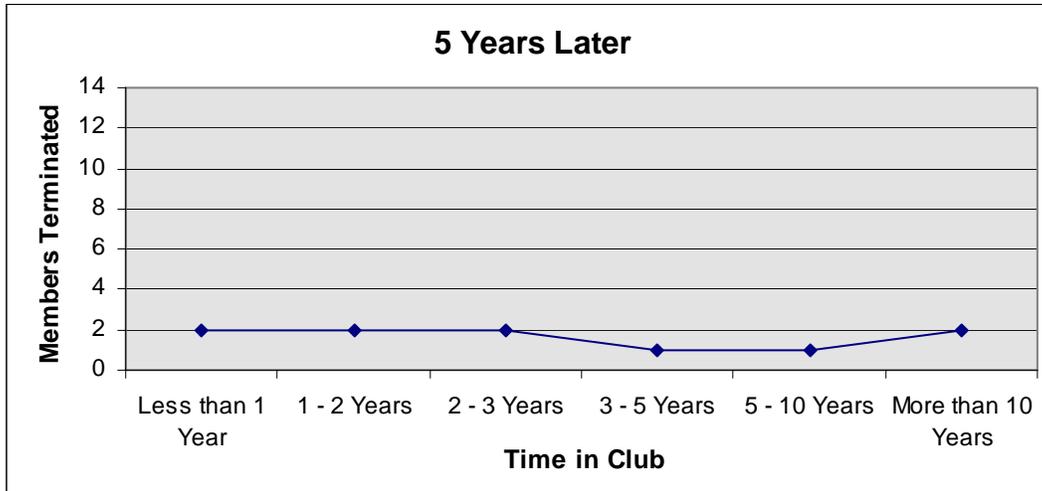
Evaluating the Termination Profile

To view a club's termination profile, look for spikes, or high points, in the chart. Any tenure group in the club where the chart spikes is a group to which extra retention efforts should be focused.

Setting Goals

Ideally, you want to lower the chart's highest peaks to the level of the chart's current valleys. The first goal is to equalize the Termination Profile to a straighter line.

Once the chart line is flattened, focus on lowering the overall chart line to reflect a reduction in members from all tenure groups terminated each year. A certain amount of loss due to external factors, such as relocation, can be expected in each tenure group; however, the goal should be to improve your club's retention in all tenure groups. The next three charts demonstrate how achieving these goals should change your Termination Profile over time:

Termination Profile

Y-axis: Members Terminated (0 to 14)
X-axis: Time in Club

Less than 1 Year	1 - 2 Years	2 - 3 Years	3 - 5 Years	5 - 10 Years	More than 10 Years
9	13	6	4	5	8

3 Years Later

Y-axis: Members Terminated (0 to 14)
X-axis: Time in Club

Less than 1 Year	1 - 2 Years	2 - 3 Years	3 - 5 Years	5 - 10 Years	More than 10 Years
6	6	5	4	4	5

5 Years Later

Stabilizing the Profile

In working to equalize and lower a club's Termination Profile, you will need to identify the reasons club members are leaving. One way to do this is to conduct a resigning member survey. Survey instructions, including a sample questionnaire, can be found in the *Membership Development Resource Guide* (417-EN). Once you've identified the reasons members of each tenure group are leaving the club, you should consider strategies to better retain members in all tenure groups.

RI has compiled a large amount of survey research data on the reasons members leave their clubs. The primary reasons for each tenure group are listed below, as well as some retention strategies to consider as your club addresses each group.

Less than 1 Year and **1-2 Years**

Many members who leave within the first two years do so because they weren't fully informed about the responsibilities of membership before joining or fully educated about Rotary after joining. Many have trouble meeting the attendance requirements and financial expectations. Still others feel unconnected to the club's activities and their networking expectations aren't being met.

If a club loses many members within the first two years, focus on preinduction education and new member orientation. Make sure prospective members are fully informed of both the responsibilities of membership and its personal and professional benefits. Establish an effective new member orientation program, and encourage new members to get involved in club activities and projects immediately. Conducting professional development events and pairing younger members with older mentors might help address new members' networking expectations.

2-3 Years

Many members who leave after spending two to three years in a club do so because they feel unconnected to the club's events and activities and their fellowship expectations aren't being met. They also have difficulty meeting the attendance requirements because of competing priorities.

Encourage members who have been in your club for two to three years to get involved in more club committees and take on more club leadership positions. By being more involved in the leadership of the club, these members will feel more control over and connection to the club's activities and will have more incentive to meet the attendance requirements and keep Rotary as a top priority. They may also have ideas for revitalizing the club's fellowship activities. Consider involving this tenure group in the club's youth programs by hosting a Youth Exchange student or serving as a liaison to your Rotaract or Interact club.

3-5 Years

Many members who leave after spending three to five years in a club do so because their fellowship expectations aren't being met and they're frustrated with the club's leadership. Others have difficulty meeting the attendance requirements because of competing priorities.

Encourage members who have been in a club for three to five years to get involved in the highest leadership levels of the club (president, secretary, committee chair). This involvement will help them feel more control over club activities and more connected to club members. Those who have already been involved in club leadership might be interested in participating in more district-level activities. Also consider focusing on continuing member education or revitalizing club activities so that members remain engaged in the club, excited about attending each week, and satisfied that their fellowship expectations are being met.

5-10 Years

Some members who leave after spending 5-10 years in a club note that their fellowship expectations weren't met and they were frustrated with the club's leadership. Others leave because of retirement and relocation.

Encourage members who have been in a club for 5-10 years to get involved in more district activities. Perhaps they would be interested in helping to plan the district conference or serving on a district committee. District involvement might help them meet more people and experience Rotary beyond the club level. These members may also be interested in joining a Rotary Fellowship to interact with other Rotarians who share their interests. If many members are leaving due to retirement, remind them that retired members are still welcome in the club. If many members are relocating, be sure to forward their contact information to the clubs in their new area or have them fill out the Rotarian Relocation form, found in the Membership section of www.rotary.org.

More than 10 Years

Many members who leave after spending more than 10 years in a club say they aren't interested in the club's current programs. Others leave because of retirement and family obligations. Many also leave because of financial constraints and health problems.

Encourage members who have been in a club for more than 10 years to take on more leadership positions at the district level (assistant governor, district governor, district committee chair). Retired club members might have more time to take on the responsibilities of a district position, which in turn may help to reignite their passion for Rotary's mission and interest in its programs. The club may also want to consider easing some of the financial expectations for the members of this tenure group who may be under financial strain because retirement or other factors. If many members are leaving because of health problems or death, consider bringing in more younger members to keep the club active.

Using this Termination Profile is one way to better understand a club's unique retention patterns. With this historical information, a club can more effectively develop and implement tailored strategies to improve member retention.