



## **Membership Development Plan**

**Australia, New Zealand and South Pacific Islands  
(Zones 7b & 8)**

**2012 - 2015**

**August 2012**

## **Introduction**

The future of Rotary depends on a thriving and dynamic membership. It is only through the time and talents of our volunteers that we are able to make a difference in communities worldwide.

Recognising the importance of membership development, the Board of Rotary International has set a goal to increase membership globally by 3% in each of the next three years. It has also recognised that conditions for membership vary considerably, and so has endorsed the development of regional membership plans to support this plan for growth.

In Australia, New Zealand and South Pacific Islands, Rotarians share this commitment to membership development. There is great goodwill to build on our strengths in service, to reverse recent declines in membership, and to welcome in a new period of growth.

This membership development plan for Australia, New Zealand and South Pacific Islands provides a roadmap to growth over the 2012-2015 period. It suggests that there are five important areas of focus: (i) membership diversity, (ii) informed and skilled Rotarians, (iii) innovative and flexible clubs, (iv) strategic partnerships, and a (v) well recognised, understood and trusted Rotary brand.

Yet a plan is simply that – a plan. Its success will depend on the commitment and efforts of Rotarians as they steer the course to membership development and growth.

## **Membership: Where are we now?**

Rotary membership in Australia, New Zealand and South Pacific Islands tells an interesting story. Without a doubt we are achieving great outcomes in our communities and beyond. Through our humanitarian projects and service opportunities we are reaching out to assist an ever increasing number of people. The friendships we make through service ensure our membership is rewarding.

However, we achieve these outcomes in the face of a slowly declining membership. On average, our clubs are getting smaller, our membership is aging, and we are losing as many members as we attract. These membership facts represent our challenge for the future.

To ensure Rotary continues to make a difference in our communities, we need to reverse this declining membership and welcome in a new period of growth. This regional membership development plan for Australia, New Zealand and South Pacific Islands 2012-2015 is designed to do just that.

## **What do we have to work with?**

We have many things to be proud of in Rotary. We have a brand that is trusted throughout the world. We have skilled and talented members, with a varied vocational background and an amazing ability to mobilise resources to address a range of needs. The humanitarian projects and service opportunities we deliver through Rotary are as diverse as our members, while our autonomous club

structure makes us responsive to our local communities. The opportunities for friendship and fun through Rotary are countless. These are our greatest assets, and our best springboard for growth.

## Our vision for the future

Our vision for Rotary in the future encapsulates a dynamic, vibrant and thriving service club organisation – where members are proud to join and keen to stay. It is a service club organisation characterised by:

- Diversity
- Informed and skilled Rotarians
- Innovative and flexible clubs
- Strategic partnerships, with a
- Well recognised, understood and trusted brand.

It is this vision for the future of Rotary in Australia, New Zealand and South Pacific Islands which underpins our Membership Development Plan. The characteristics we identify represent our strategic goals for the next three years.



## How will we get there?

To achieve our vision for Rotary in the future, we need a clear and focused plan. Equally importantly, we need buy-in and support from Rotarians to make this plan a reality.

The **Australia, New Zealand and South Pacific Islands Membership Development plan** sets out our strategic goals for the 2012 -2015 period. It identifies the actions we will take, and the resources we will need, to achieve our goal of membership development and growth.

## How will we know if we have succeeded?

Like all good plans, ours contains a set of indicators to help us measure progress along our path to growth. We plan to monitor our progress regularly, and communicate our progress to members. However, the real measure of success will be in our dynamic and increasing membership in Australia, New Zealand and South Pacific Islands and our impact in communities worldwide.

## The plan

To achieve sustained membership development and growth over the next three years, we will focus on five strategic priorities. We will:

1. Increase membership diversity
2. Develop informed and skilled Rotarians
3. Support innovative and flexible clubs
4. Create strategic partnerships, and
5. Enhance brand recognition, understanding and growth

To enable us to achieve these strategic priorities, we have identified a number of more specific three-year goals. We have also identified some simple measures to help us monitor our progress towards our goals. To provide further support, we have also recommended actions to help Districts, clubs and individual members achieve these goals. However, it is important to note that these actions are recommendations only: Districts, clubs and individual members may find even more effective ways to achieve our membership development priorities and goals.

**Table 1 Strategic Priorities and goals**

Strategic Priorities	Goals
<b>Increase membership diversity</b>	<ul style="list-style-type: none"> <li>• Develop clubs which are more reflective of the local community</li> <li>• Identify and act on opportunities to increase diversity</li> <li>• Provide additional opportunities for non-Rotarians to participate in club activities and projects</li> <li>• Investigate innovative membership types, club structures and operations</li> <li>• Promote inter-club support within Districts or regions</li> </ul>
<b>Develop skilled and informed Rotarians</b>	<ul style="list-style-type: none"> <li>• Develop effective training teams at District and club level</li> <li>• Assess and increase members' knowledge of Rotary</li> <li>• Encourage participation in events and programs which enhance Rotary awareness</li> <li>• Enhance Rotary information sharing within clubs</li> <li>• Encourage and support new members to learn more about Rotary</li> <li>• Provide additional resources to clubs and districts to increase members' knowledge</li> </ul>
<b>Support innovative and flexible clubs</b>	<ul style="list-style-type: none"> <li>• Conduct regular club forums to review club health</li> <li>• Adopt a three year management planning process</li> </ul>
<b>Create strategic partnerships</b>	<ul style="list-style-type: none"> <li>• Provide resources and support to clubs and districts to enable development of partnerships</li> <li>• Develop strategic partnerships at national, district and club level and Districts/clubs</li> </ul>
<b>Enhance brand recognition, understanding and growth</b>	<ul style="list-style-type: none"> <li>• Develop an Ambassador's Club to promote membership of Rotary</li> <li>• Promote Rotary Week and Rotary achievements</li> <li>• Rejuvenate website, social media and public image assets</li> <li>• Establish and publicise "Whole of Club" projects</li> <li>• Support non-Rotarians to attend District Conferences</li> </ul>

## Strategic Priority 1      Increase membership Diversity

Strategic Goal	Recommended actions	Key performance indicators
<b>Develop clubs which reflect the local community environment</b>	<ul style="list-style-type: none"> <li>• Clubs to self-assess present status and establish possible opportunities for development and extension</li> <li>• Clubs to set diversity goals based upon the community they represent.</li> </ul>	<ul style="list-style-type: none"> <li>• Club membership more accurately reflects demographic diversity in local community</li> </ul>
<b>Identify and act on opportunities to increase diversity within clubs</b>	<ul style="list-style-type: none"> <li>• Identify key target groups for recruitment, and plan a suitable approach, e.g:               <ul style="list-style-type: none"> <li>○ Invite to a special meeting with a key focus speaker from that particular target group</li> <li>○ Go out to them as a Rotary group and engage with them in their cultural environment</li> <li>○ Invite their participation as part of a club project</li> <li>○ Establish needs of particular target group</li> <li>○ Publicise the networking, professional development and mentoring opportunities for professionals and young people</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Improved awareness and community engagement</li> <li>• New clubs are established to cater for particular target groups</li> <li>• More people are aware of the networking opportunities of membership</li> </ul>
<b>Provide additional opportunities for involvement of non-members</b>	<ul style="list-style-type: none"> <li>• Develop a broader volunteer base to enhance a club's ability to undertake or resource effective service in the community, e.g:               <ul style="list-style-type: none"> <li>○ Form a 'Friends of Rotary' group connected to the club</li> <li>○ Establish a Community Corp of volunteers interested in occasional 'hands on projects' or activities</li> <li>○ Establish the club specific opportunity related to differing needs of a rural, suburban or metropolitan locations</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Increased opportunities for periodic involvement in club activities and projects.</li> </ul>
<b>Investigate innovative options for membership, club structure and operations</b>	<ul style="list-style-type: none"> <li>• Encourage family friendly clubs</li> <li>• Investigate possibility for different membership types, e.g. corporate, satellite, associate, supportive, family membership</li> <li>• Investigate different meeting times, venues, costs etc.</li> </ul>	<ul style="list-style-type: none"> <li>• New membership-based initiatives are introduced in clubs</li> </ul>
<b>Promote inter-club support within Districts or regions</b>	<ul style="list-style-type: none"> <li>• District to carry out needs analysis</li> <li>• Implement new initiatives which enable stronger clubs to support weaker clubs</li> </ul>	<ul style="list-style-type: none"> <li>• New club partnering arrangements are in place</li> </ul>

## Strategic Priority 2      Develop skilled and informed Rotarians

Strategic goal	Recommended actions	Key performance indicators
<b>Develop effective training teams at District and club level</b>	<ul style="list-style-type: none"> <li>• Develop strong well-resourced and professional training teams in the district</li> <li>• Encourage clubs to establish a trainer role in each club</li> <li>• District training team to train and support club trainers</li> </ul>	<ul style="list-style-type: none"> <li>• District training team (DTT) is established</li> <li>• role of team and team members is clear</li> <li>• DTT deliver on other key actions as noted</li> </ul>
<b>Assess and increase members' knowledge of Rotary</b>	<ul style="list-style-type: none"> <li>• Conduct survey to establish the level of knowledge amongst Rotarians in the district</li> <li>• Develop relevant learning modules to educate Rotarians, using a mix of delivery methods</li> <li>• Establish a District 'faculty' of informed Rotarians who are available as the 'go to' Rotarians in the district</li> <li>• Actively encourage members to participate in Rotary activities at District level and beyond</li> </ul>	<ul style="list-style-type: none"> <li>• Members demonstrate increased level of Rotary knowledge</li> <li>• Increased participation in seminars, webinars, on line learning events</li> <li>• A faculty group is established and promoted, and clubs and members use the group</li> <li>• Increase number of Rotarians participating in District and Zone level activities</li> </ul>
<b>Encourage participation in events and programs which enhance Rotary awareness</b>	<ul style="list-style-type: none"> <li>• Members are encouraged and supported to attend Rotary events (Conventions, Assembly and Conferences)</li> <li>• Members are encouraged to participate in structured Rotary leadership programs, e.g. Rotary Leadership Institute/PRLS</li> <li>• Where possible link Rotary awareness programs to accredited training qualifications</li> </ul>	<ul style="list-style-type: none"> <li>• Increased attendance at Rotary events</li> <li>• Increased frequency of structured leadership courses</li> <li>• Increased participation by Rotarians</li> <li>• More courses are formally recognised</li> </ul>
<b>Enhance Rotary information sharing within clubs</b>	<ul style="list-style-type: none"> <li>• Clubs are encouraged to have informative and appealing bulletins, facebook pages etc. that include relevant Rotary information at club, district and international level</li> <li>• Clubs' speakers' programmes includes Rotary speakers on a regular basis</li> </ul>	<ul style="list-style-type: none"> <li>• Increased amount and quality of Rotary information</li> <li>• Increased adoption of social media by clubs, districts</li> </ul>
<b>Encourage and support new members to learn more about Rotary</b>	<ul style="list-style-type: none"> <li>• Provide additional Rotary information sessions and events for new members during first 12 months of membership</li> <li>• Actively support new members to participate in these opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Increased number of events for new members</li> <li>• Increased participation of new members in Rotary events</li> </ul>

<p><b>Provide additional resources to clubs and districts to increase members' knowledge</b></p>	<ul style="list-style-type: none"> <li>• Districts and clubs are resourced and supported to ensure that their websites, Facebook pages, LinkedIn groups etc are informative, up to date, easy to access etc</li> </ul>
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### Strategic Priority 3      Support innovative and flexible clubs

Strategic goal	Recommended actions	Key performance indicators
<p><b>Conduct regular club forums to review club health</b></p>	<ul style="list-style-type: none"> <li>• Clubs develop and/or adopt an approved Club Assessment Tool, e.g. 'Club Health Checklist' which examines all aspects of club structure, operations and activities</li> <li>• Clubs use the assessment tool to review club effectiveness on a regular basis</li> <li>• Clubs adopt a structured program of innovative club information and forum sessions</li> </ul>	<p>Clubs conduct regular assessment to determine club health</p>
<p><b>Adopt a three year management planning process</b></p>	<ul style="list-style-type: none"> <li>• Clubs undertake strategic planning, utilising Club Visioning or similar program</li> </ul>	<p>All clubs develop a three year management plan</p>

## Strategic priority 4      Create strategic partnerships

Strategic goal	Recommended actions	Key performance measures
<b>Provide resources and support to clubs and districts to enable development of partnerships</b>	Develop a resource kit for districts and clubs which promotes benefits of strategic partnerships, and model approach Promote and hold training seminars/webinars for District and Club officers charged with the responsibility of making such approaches and securing partners Promote benefits of existing strategic partnerships, e.g. Australian Rotary Health Maintain regular contact with national, local and community leaders	New partnerships are created Increased funding and membership flows from partnerships
<b>Develop strategic partnerships at national, district and club level and Districts/clubs</b>	Identify suitable partnering organisations Employ a professional facilitator to assist Districts and clubs in making the right approaches – possibly on a success fee basis Approach news media organisations for partnerships at national, district and club level.	One new major national partnership is developed annually



## Strategic Priority 5

## Enhance brand recognition, understanding and trust

Strategic goal	Recommended actions	Key performance measures
<b>Develop an Ambassador’s Club to promote membership of Rotary</b>	<ul style="list-style-type: none"> <li>• Disegno, a brand agency, to prepare a sponsored media plan.</li> <li>• Establish an “Ambassadors’ Club”</li> <li>• Establish a database of additional high profile non-Rotarians and invite them to join a nearby Club</li> <li>• Discuss and promote project at District events, functions and Zone Institute</li> <li>• Promote project via Rotary Down Under’s ‘National Speakers’ Bank</li> <li>• Encourage Clubs &amp; Districts to form a speakers’ bank that funnels into the RDU National Speakers’ Bank</li> </ul>	<ul style="list-style-type: none"> <li>• Plan to be implemented</li> <li>• “Ambassadors’ Club” established</li> <li>• One person per District identified in the first year</li> <li>• 50% of Districts on board in the first year.</li> <li>• Monthly articles in RDU</li> <li>• Yr 1: 1/3 of Districts involved</li> <li>• Yr 2: 25% of Clubs &amp; 2/3 Districts involved</li> <li>• Yr 3: Majority of Clubs &amp; Districts involved</li> </ul>
<b>Promote Rotary Week and Rotary achievements</b>	<ul style="list-style-type: none"> <li>• Promote Rotary week (23rd February) each year</li> <li>• Encourage Clubs to promote their own activities</li> <li>• Provide regular feedback to Rotarians, public and community partners</li> <li>• Discuss and promote project at District events, functions and Zone Institute</li> </ul>	<ul style="list-style-type: none"> <li>• Consistent social media presence nationally                             <ul style="list-style-type: none"> <li>○ Yr 1: 25% of Clubs involved</li> <li>○ Yr 2: 40% of Clubs involved</li> <li>○ Yr 3: majority of Clubs involved</li> </ul> </li> <li>• Yr1: 25% of Clubs have monthly local media exposure</li> <li>• Yr 2: 40% of clubs have monthly local media exposure</li> <li>• Yr 3: majority of Clubs have monthly local media exposure</li> <li>• 50% of Districts on board in the first year</li> </ul>
<b>Rejuvenate website, social media and public image assets</b>	<ul style="list-style-type: none"> <li>• Implement an audit of all assets &amp; assess suitability</li> <li>• Rejuvenate assets deemed below par immediately</li> <li>• Discuss and promote project at Zone Institute to get buy-in of DGs and DGsE with the assistance of Zone Director</li> </ul>	<ul style="list-style-type: none"> <li>• Yr 1: 10% of Clubs</li> <li>• Yr 2: 25% of Clubs</li> <li>• Yr 3: Majority of Clubs</li> <li>• In place by end of November to be implemented by Rotary’s birthday.</li> <li>• 50% of Districts on board in the first year</li> </ul>

<p><b>Establish and publicise “Whole of Club” projects</b></p>	<ul style="list-style-type: none"> <li>• Clubs invite the local community to nominate a major initiative, need or project.</li> <li>• Establish a partnership with a national brand agency that will develop a “how to” kit for Clubs and obtain a national corporate sponsorship to help fund the initiative.</li> <li>• Discuss and promote this at District events, functions and Zone Institute.</li> </ul>	<ul style="list-style-type: none"> <li>• Of participating Districts: <ul style="list-style-type: none"> <li>○ Yr 1: 5% of attendees are members of the public.</li> <li>○ Yr 2: 7% of attendees are members of the public.</li> <li>○ Yr 3: 10% of attendees are members of the public.</li> </ul> </li> <li>• 50% of Districts on board within two years.</li> </ul>
<p><b>Support non-Rotarians to attend District Conferences</b></p>	<ul style="list-style-type: none"> <li>• Conference Program and Key Note Speakers’ details are promoted through social media and local press.</li> <li>• Share the D9800 Age Newspaper and social media promotion of their 2012 Conference with DGs and DGsE at this year’s Institute.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased number of non-Rotarians attending District conferences</li> </ul>

## Implementing and resourcing the plan

The Committee formed to develop the Membership Development Plan for Australia, New Zealand and the South Pacific Islands was made up of 22 people broadly representing all countries. This group consisted of Past District Governors, Rotarians and two past Rotaractors who have joined Rotary in the last six months. The group also had two RI staff in attendance from the RI office in Parramatta.

This draft plan will go to the October RI Board meeting for approval in principle. Meanwhile it will be circulated to the District Governors, District Governors Elect and District Governors Nominee groups in our Zones 8 and 7B for discussion and subsequent acceptance at the respective Zone Institutes in Australia in November and New Zealand in October. The Australian group commence the Australian Zone Institute one day early to discuss the plan with the intention of accepting and working together to make the plan a success. Wide consultation across the three District Leadership groups may however result in minor amendments to the draft plan subsequent to the Zone Institutes. The implementation process will begin when we have approval by the RI Board.

## Implementing the plan

The proposed time frame for the implementation is as follows:

**October 2012** - Approval in principle by RI Board

**November 2012:** Discussion, acceptance and adoption of the plan at the two GETS and Institutes. Responsibility: RI Director John Boag with assistance from Rotary Coordinators Rob Crabtree & Noel Trevaskis.

**February 2013:** Training Seminar for presenters (Assistant Rotary Coordinators, selected personnel from Membership Development Plan Committee) of the plan – conducted by RI Director John Boag and Rotary Coordinators – locations Canberra, Australia and Christchurch New Zealand

**February - March 2013:** Seminars for Governors, Governors Elect, Governors Nominee and District Membership Chairs for Australia, New Zealand and South Pacific Islands.

**February – May 2013:** Presentations at Presidents Elect Training & District Assemblies

**July 2013:** Directors briefing weekend for Governors Elect – update on the plan.

**November 2013:** Discussion and update on the plan and how we are performing, Governors, Governors Elect, Governors Nominee, in conjunction with Rotary Coordinator group.

**February 2014:** Seminars for Governors, Governors Elect & Governors Nominee and District Membership Chairs in both Australia and New Zealand.

**February – May 2014:** Presentations at Presidents Elect Training & District Assemblies

**May 2014:** Sydney International Convention – report to Rotary Down Under breakfast on our achievements and successes.

## Resourcing the plan

The budget has taken into account the wide distances and remoteness of some of the districts of Zone 7B and Zone 8. For the plan to be successful a number of seminars will be required with the Governors, Governors Elect, Governors Nominee and District Membership Chairs to successfully develop the intended implementation at District and Club level. These will be held on a regional basis so as to make them as cost efficient as possible and encourage maximum opportunity for District participation. It is proposed that RI Director John Boag, Rotary Coordinators and Assistant Rotary Coordinators plus members of the Membership Development Planning Committee will be utilised in these strategic meetings.

Districts will be encouraged to allow in their respective budgets for Membership Development training of Assistant Governors in association with regional seminars, to encourage maximum understanding, support and engagement of clubs in the aspects of the plan implementation.

### **NEW ZEALAND & SOUTH PACIFIC ISLANDS**

**February 2013** – Training of presenters Christchurch

**US\$ 1,850.00**

**February – March 2013:** Seminars in Christchurch and Auckland – travel, meals and resources – Governors, Governors Elect, Governors Nominee & District Membership / Development Chairs

**US\$ 7,790.00**

**March – April 2013:** Presentations Multi District PETS & District Assemblies – travel, meals

**US\$ 2,100**

**February 2014:** Seminars in Christchurch and Auckland – travel, meals – Governors, Governors Elect, Governors Nominee & District Membership Chairs

**US\$ 6,600.00**

**March – April 2014:** Presentations Multi District PETS & District Assemblies – travel, meals

**US\$ 2,100**

**TOTAL BUDGET FOR NEW ZEALAND** US\$20,440.00

**AUSTRALIA**

**February 2013**– Training of presenters Canberra

**US\$3,800**

**February - March 2013:** Seminars in Adelaide, Melbourne, Sydney and Brisbane – travel, meals  
Governors, Governors Elect, Governors Nominee & District Membership Chairs

**US\$9,550**

**March – April 2013:** Presentation PETS & District Assemblies – travel meals

**US\$3,200.00**

**February 2014:** Seminars in Adelaide, Melbourne, Sydney and Brisbane– travel, meals Governors,  
Governors Elect, Governors Nominee & District Membership Chairs

**US\$9,550.00**

**March – April 2014:** Presentation PETS & District Assemblies – travel meals

**US\$2,600.00**

**TOTAL BUDGET FOR AUSTRALIA US\$28,100.00**

**TOTAL BUDGET FOR NEW ZEALAND US\$20,440.00**

**TOTAL BUDGET FOR AUSTRALIA US\$28,100.00**

**RESOURCES** – printing of support materials- stationery supplies for presenters

**US\$3,350.00**

**TOTAL BUDGET 2012-2014 US\$51,890.00**