



2015-16 Regional Membership Plan Executive Summary and Action Plan

Region: North America (Northeast & Canada) – Zones 24 & 32

Profile

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| Region | North America (Northeast & Canada) |
| Zones | 24 & 32 |
| Director | Julia D. Phelps |
| Project Lead | |
| Rotary Coordinators | RC Lynda Ryder, Zone 24 East RC Jacqueline Hobal, Zone 24 West RC Karien Ziegler, Zone 32 |

Executive Summary

Goals/Objectives

Key Performance Indicators

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| A. Strengthen Clubs <ul style="list-style-type: none"> Build Dedicated District and Club Membership Teams Utilize and Understand Rotary Club Central and other Rotary Resources Club Assessment and Strategic Planning Improve Awareness of Rotary Clubs in Communities | <ul style="list-style-type: none"> 100% of districts have a designated District Membership Committee Chair Ensure 30% of clubs set and track at least 15 goals in Rotary Club Central. |
| B. Member Attraction <ul style="list-style-type: none"> Club Growth Age/Gender/Ethnic Diversity | <ul style="list-style-type: none"> Each district will charter at least one new Rotary club. Improve the gender diversity rate of our members by at least 2 percentage points. Improve the age diversity rate of our members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points. |
| C. Member Engagement <ul style="list-style-type: none"> Member Satisfaction Retention | <ul style="list-style-type: none"> Increase new member sponsors by at least 1 percentage point. Improve the member retention rate by at least 1 percentage point Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered. |

2015-16 Action Plan

| | Goals & Tactics | Responsibility | Budget | Target Attainment Date | Targets |
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| A. Strengthen Clubs | | | | | |
| A.1 | <p>Ensure districts have a designated District Membership Committee Chair</p> <ul style="list-style-type: none"> Develop and design 3 regional success seminars(Ontario, Quebec & East Coast) which will include Chairs and members of District Membership Committees – Training in Visioning & Facilitation will take place During our calls initial call to each DG in July 2015, we will identify chairs for each district | <p>Director, RC</p> <p>Zone 24 East RC & ARC's & Trainers</p> <p>Zone 24 East RC& ARCs</p> | 6,000 | <p>1 July</p> <p>February 2016</p> <p>September - 2015</p> | 100% of districts have a designated District Membership Committee Chair |
| A.2 | <p>Develop a trained membership committee to support clubs; Provide templates and job descriptions for various Membership positions within district and clubs</p> <ul style="list-style-type: none"> This will be provided with a facilitation/visioning training Emails and spot newsletters to membership chairs Develop and customize job descriptions from our RI Website | Zone 24 East ARC's | \$2,000 | Continuous | Inform and include Membership Chairs as a valued district team player |
| A.3 | <p>Assist clubs in setting and tracking goals in Rotary Club Central</p> <ul style="list-style-type: none"> Send out monthly reports via our newsletter Call District Governors & Membership Chairs when a problem arises Develop strategies for individual districts in noticeable problem areas Initiate special trainings for working with RCC | Zone 24 East ARC's and RC | | Monthly | 30% of Clubs set and track at least 15 goals in Rotary Club Central |
| A.4 | <p>Support clubs in updating website, social media and public image assets.</p> <ul style="list-style-type: none"> Develop with our RPIC a trainings and newsletters Find an expertise in our zone for assisting with this goal | Zone 24 East ARC's, RPIC, District social media and Public Image Persons, DG. DGN & DGE | | | 30% of all cubs will have rejuvenated website, social media and public image assets. |

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| A.5 | Supports clubs in conducting Club Assessments and developing a written multi-year membership strategy <ul style="list-style-type: none"> • Develop a survey to DG, DGE & DGN to assess need • Analyze and develop an action plan for conducting Club Assessments – Visioning/Facilitation etc. • Develop a Strategic Plan for this area • | Zone 24 East ARC's – computer expertise is required | | | 30% of clubs will have conducted a Club Assessment and developed a written multi-year membership strategy |
| A.6 | Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development <ul style="list-style-type: none"> • In concert with Zone 32 and Zone 24 West we will invest in 10 webinars to promote at club/district level • Webinars will be concocted from RI and existing webinars | Zones 24 & 32 working together with all streams of governance | \$2,000 | | Year end |

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| | B. Member Attraction | | | | |
| B.1 | <p>Survey club members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction</p> <ul style="list-style-type: none"> • See A -5 above - We will include this question on our survey which is nearly completed • We will also have a workshop on this issue • Have Survey translated into French and have content that is relevant to Quebec • | ARC's , RC, DG's, DGN's DGE & Presidents | 1,000 | November 2015 | |
| B.2 | <p>Encourage and support districts to charter new Rotary clubs</p> <ul style="list-style-type: none"> • Examine Gender deficiencies; cultural targets, and geographical areas • Educate members on the different types of clubs | RC,ARC's, DG's, DGE, DGN | DG Allocation | Year end 2016 | Each district will charter at least one new Rotary club |
| B.3 | <p>Improve the gender diversity rate of club members</p> <ul style="list-style-type: none"> • See B2 – We will closely examine RCC for starting data • Develop a paper on what speakers/projects would/could appeal to individual genders and al genders • | RC, ARC, DG, DGN, DGE | | Year end 2016 | Improve the gender diversity rate of club members by at least 2 percentage points |
| B.4 | <p>Improve the age diversity rate of club members</p> <ul style="list-style-type: none"> • Encourage clubs to enter ages of members in RCC our research has shown that clubs put these ages in Club Runner and have NOT made any transitions to RCC • Look at programmes that appeal to each age and encourage feedback from District Governors | RC, ARC, DG, DGN, DGE | | Year end 2016 | Improve the age diversity rate of club members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points |
| B.5 | <p>Improve the racial/ethnic diversity rate of our members</p> <ul style="list-style-type: none"> • Assess our current “face of Rotary” – currently it is white male • Our Rotaract clubs reflect racial/ethnic diversity. • Encourage Rotaract Clubs to join Rotary Clubs • Rotaract clubs to use rotary clubs as mentors and vice versa | RC, ARC, DG, DGN, DGE | | Year end 2016 | Improve the racial/ethnic diversity rate of our members by at least 2 percentage points. |

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| B.6 | <p>Host one large project/event to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc.</p> <ul style="list-style-type: none"> • Support a walk for Polio/AIDS/Breast Cancer for all members of our community • | RC, ARC, | \$2,000 | | |
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| | C. Member Engagement | | | | |
| C.1 | <p>Increase new member sponsors</p> <ul style="list-style-type: none"> With the assistance of DG's identify the persons with "Membership Passion" and involve them in our quest | RC, ARC's, DG, DGE, DGN | | | Increase new member sponsors by at least 1 percentage point |
| C.2 | <p>Improve the member retention rate in each district</p> <ul style="list-style-type: none"> Involvement in special projects Follow up with new members Follow up – why members leave? | RC, ARC's, DG, DGE, DGN | | | Improve the member retention rate by at least 1 percentage point |
| C.3 | <p>Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute</p> <ul style="list-style-type: none"> Each RC will send membership and retention numbers to Marty Helman. We have decided to have each of us take a quarter Figures will be available for Zone institute using Rotary Club Central | RC | | Monthly | Monthly figures to Marty Helman |
| C.4 | <p>Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark</p> <ul style="list-style-type: none"> See C3 – Once clubs are identified we will communicate with DG's | RC, ARC's, DG, DGE, DGN, Club Presidents | | | |
| C.5 | <p>Increase My Rotary registration and usage</p> <ul style="list-style-type: none"> During our trainings at assemblies, conferences, we will include the "how to" of My Rotary and its value to each individual | RC, ARC's DG, DGN, DGE, Club Presidents, District Trainers | | | Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered |
| C.6 | <p>Assist clubs and Rotarians at creating their Rotary story</p> <ul style="list-style-type: none"> Include a session on the creation of all clubs and Rotarians in the "how to" of their Rotary Store | RC, ARC, DG, DGN, DGE, Club Presidents, | | | |

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| | • | District Trainers, individual club members | | | |
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| TOTAL BUDGET REQUEST | | US\$ 13,000 | |
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