



2016-17 Regional Membership Plan Executive Summary and Action Plan

Region: North America (Midwest) – Zones 28 & 29

Profile

Region	North America
Zones	28 & 29
Director	Jennifer Jones
Project Lead	Patricia Meehan Project Lead, David Warren Assistant Lead
Rotary Coordinators	Nicki Scott Christine Etienne

Executive Summary

Goals/Objectives

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
B. Member Attraction <ul style="list-style-type: none"> Club Growth Age/Gender/Ethnic Diversity
C. Member Engagement <ul style="list-style-type: none"> Member Satisfaction Retention

Key Performance Indicators

<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 10 goals in Rotary Club Central
<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.
<ul style="list-style-type: none"> 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.

2016-17 Action Plan

	Goals & Tactics	Responsibility	Budget	Target Attainment Date	Targets
A. Strengthen Clubs					
A.1	<p>Ensure districts have a designated District Membership Committee Chair</p> <ul style="list-style-type: none"> Distribute a June Communication from Director to DGE reinforce the role of Membership Chair and the importance of that position in the District. Ask RCs and Assistant RCs to query their assigned Districts for follow up 	Director, RC		1 July	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"> Hold webinar to update the Coordinator Team on “One Rotary Summit” Curriculum changes for the year. Conduct “One Rotary Summit” training at Institute with 2017/2018 District Membership Chairs, District Trainers, District Regional Foundation Chairs, Coordinators, Assistants and DG Chain. Engage all club presidents, Districts/District Governors in the understanding of the 2016-2017 Regional Membership Plans through monthly communication and incorporate into various training and promotion events. Build upon the successful launch in 2015-2016 of “One Rotary Summit” training events hosted in each district or group of districts as one day intensive training for clubs. Districts should utilize feedback from last year’s event to improve and expand the 2016-2017 events. Survey DG/E, Membership Chairs and District Trainers to determine the job description of Membership roles in each District. Assistant Rotary Public Image Coordinators to be included in Zone Training to support Districts and clubs in understanding the Rotary Brand and help districts and clubs adopt the new Brand. 	<p>Director</p> <p>RCs, Asst. RCs, District Trainers, RPICs, Membership Lead and Assistant</p> <p>DGs, DTs</p> <p>Director ,RCs</p>	<p>28,000 for use toward the items in A2 & A4</p>	<p>May 2016</p> <p>Begin July 1</p> <p>Ongoing</p>	Conduct review of 2015-2016 and identify changes to implement for new year.
A.3	<p>Assist clubs in setting and tracking goals in Rotary Club Central</p> <ul style="list-style-type: none"> Provide Rotary Club Central Instruction for DGEs at GETS; Membership chairs, District Trainers, Foundation Coordinators at Zone Institute. 	DGEs, DGs, Club leaders, Club Secretaries		<p>October 1</p> <p>Ongoing</p>	Minimum 30% of Clubs set and track at least 10 goals in Rotary Club Central

	<ul style="list-style-type: none"> Incorporate use of Rotary Club Central in District events, One Rotary Summits, PETS, and other training opportunities 	DG/E, Zone and District Trainers, RI Staff			
A.4	<p>Support clubs in updating website, social media and public image assets.</p> <ul style="list-style-type: none"> Review websites and Facebook sites at training events to provide assistance and education on updates and gaps in use of the Strengthening of Rotary branding. As a part of the furthering of the use of the proper Rotary branding, each District Governor in the paired zones will be presented with a flag of the Rotary Masterbrand Signature, 3x5 ft., fringed and grommited, suitable for use in flag ceremonies at District Conferences and events of any kind when flags are present on the stage. Inventory clubs and Districts on the use and condition of previously distributed pull up banners and Podium cards for use and possibly replace damaged items within budget per district. Hold a Webinar on the use of the Brand Center assets by Clubs and Districts <p>Resource: Rotary Brand Center</p>	<p>DG/E, DMC RPIC/DRIC Club Presidents</p> <p>DG/E, and District Trainers, RPICS</p>	<p>The budget for A4 will be a part of the approved 28,000 in A2 which creates a simpler billing for the Coordinators and tracking.</p>	<p>July 1</p> <p>Ongoing</p> <p>July 1</p> <p>Ongoing</p>	<p>30% of all cubs will have rejuvenated website, social media and public image assets.</p> <p>Strive for 100% compliance of Rotary's strengthened Brand on Club and District Websites.</p>
A.5	<p>Supports clubs in conducting Club Assessments and developing a written multi-year membership strategy</p> <ul style="list-style-type: none"> Use the 2015-2016 DG survey results to identify the clubs and districts with plans along with Rotary Club Central data. Work with District Membership chairs to create a basic training model to be adapted to the District and clubs with Tool Kit of updated publications. Identify District experts to work with Districts and clubs to start the strategic plan process in areas where there is a gap. <p>Resources: Strengthening Your Membership: Creating Your Membership Development Plan, Membership Assessment Tools</p>	<p>DGs, Zone Communication Chair, RCs, and Assistant RCs</p>	<p>Plan support not available yet a worthwhile activity if funding available in districts</p>		<p>30% of clubs will have conducted a Club Assessment and developed a written multi-year membership strategy</p>

A.6	<p>Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development</p> <ul style="list-style-type: none"> • Develop a webinar to guide Districts and Clubs on Creating a Membership Plan • Schedule quarterly teleconferences to discuss membership progress and successes • Create a webinar plan of topics with Rotary Coordinators and Public Image 	<p>RCs, DG, District Membership chairs. RC RPICS</p>		<p>October 1</p>	
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	Goals and Tactics	Responsibility	Budget	Target Attainment Date	Targets
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"> • Provide copies of the Member satisfaction survey as part of tool kit for districts to see and use. • Survey DGs in 2Q for results of the membership satisfaction surveys <p><i>Resource: Enhancing the Club Experience: Member Satisfaction Survey</i></p>	<p>DGs DGEs</p>		<p>Q1</p>	<p>Improve member satisfaction and retention with review of changes in club meetings that need considered in each District</p>
B.2	<p>Encourage and support districts to charter new Rotary clubs</p> <ul style="list-style-type: none"> • Introduce Zone Extension Chairs for Zone 28 and 29 to DG via webinar to give Districts a contact to explore and proceed with new club potentials • Identify communities within Districts without Rotary clubs to create a Rotary event to invite the Public with idea of gaining interest. <p><i>Resource: New Rotary Club Quick Start Guide</i></p>	<p>DGs Zone Extension Chairs Foundation Team</p>	<p>DG Allocation</p>	<p>November 2016</p>	<p>Each district will charter at least one new Rotary club</p>
B.3	<p>Improve the gender diversity rate of club members</p> <ul style="list-style-type: none"> • Ask Districts to create District and club events that will attract public attention with a focus on member area that may be low. Consider working with shelters or food banks to participate in a project that allows Rotary to help and create awareness. • Create district events to highlight Foundation Centennial as an opportunity to market to new neighborhoods. • We have been selected to host a Young Professional Summit at this year's Institute in Cleveland, OH. We have created a video contest to help select 40 	<p>DGs, Club Presidents Young Professional Rotarians</p>	<p>\$9,600 (meal package funded,</p>	<p>Ongoing</p>	<p>Improve the gender diversity rate of club members by at least 2 percentage points</p>

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"> • “End Polio Now” illumination of the Terminal Tower in Cleveland, Ohio. This will take place in conjunction with the 2016 Zone Institute for our paired zones. This building is in the heart of downtown Cleveland, and a comprehensive Media event is planned for the illumination. Further, footage of this illumination will also be used by the World Polio Day Livestream as a part of that event in October. <p><i>Resource: Event Planning Guide on Rotary Brand Center</i></p>	Director	Funding of 15,000 not approved. Funds from other sources. outside the plan will fund this item.	Late September 2016	
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	Goals and Tactics	Responsibility	Budget	Target Attainment Date	Targets
	C. Member Engagement				
C.1	<p>Increase new member sponsors</p> <ul style="list-style-type: none"> • Provide copies of Proposing New Members resource in District Membership Chair tool Kit. • Walk DGs and District membership Chairs through Rotary Club Central “ Take Action “ to locate membership materials that may be downloaded <p><i>Resource: Proposing New Members</i></p>	RCs , Assistant RCs		October 5	Improve the new member process in clubs with focus on sponsors
C.2	<p>Improve the member retention rate in each district</p> <ul style="list-style-type: none"> • Ask DGs and District Membership Chairs to make the Retention assessment a part of communication to the Club Presidents. Request quarterly feedback from DGs. <p><i>Resource: Improving Your Member Retention: A Retention Assessment and Analysis</i></p>	Director DGs		Sept 30 and ongoing	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 and recognize membership achievements at Zone Institute</p> <ul style="list-style-type: none"> • Highlight best practices in districts to give struggling districts and clubs examples • Encourage clubs to follow up with members whom have stopped attending meetings. 	Director Zone Communication Chair		Ongoing	

C.4	<p>Identify clubs with retention rates below The Membership Plan benchmark</p> <ul style="list-style-type: none"> Communicate monthly reports to DGs and District Membership Chairs to aide them in supporting clubs with low retention rates District Membership Chairs create a monthly communication with DGs and clubs to help measure and reward successes in Districts <p><i>Resource: District Progress to Goal Report</i></p>	<p>DGs District membership chairs District Trainers</p>		<p>Ongoing</p>	
C.5	<p>Increase My Rotary registration and usage</p> <ul style="list-style-type: none"> Encourage Districts and Clubs to hold events with My Rotary as one of topics with access to devices to create My Rotary accounts. DGs access District progress monthly in RCC <p><i>Resource: How to Create a My Rotary Account</i></p>	<p>DGs RCs Assistant RCs CDS staff</p>		<p>Ongoing</p>	<p>Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered</p>

TOTAL BUDGET REQUEST	US\$62,600	
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