This document should be considered a template and in no way should be considered a “MUST DO”. It is a word document and can be edited or cut & pasted as needed. Choose only those goals and tasks that are appropriate for your club and will have the commitment of your members.

1. GOAL: Create a Club Membership Committee of \_\_\_ members by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Date)

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Get suggestions from the club president for the members of your membership committee. or
2. TASK: Identify three club members that recognize the importance of membership growth and retention and ask them to be part of the membership team. Or
3. TASK: create an additional appropriate task
4. GOAL: Hold a monthly Club Membership Committee Meeting to discuss the progress of club growth and retention during the previous month.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On the (1st) \_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Day) of each month I will hold a club membership meeting. or
2. TASK: On every monthly club business meeting I will have the club membership committee report on the progress of the membership development goal.
3. TASK: create an additional appropriate task.
4. GOAL: Achieve a net gain in membership. Clubs with up to 50 members should consider at least one more member listed in Rotary’s records on 1 July 2018 than they did on 1 July 2017; clubs with 51 or more members should consider at least two more members listed in Rotary’s records. Net gain = \_\_\_\_\_

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Prior to \_\_\_\_\_\_\_(Date), I will use my club membership roster to identify \_\_\_\_\_club members willing to assist me in achieving this goal. or
2. TASK: Prior to \_\_\_\_\_(Date) I will have those identified club members provide a report to the club regarding their progress toward the goal. Or
3. TASK: create an additional appropriate task.
4. GOAL: Achieve a net gain in membership. At the end of this Rotary year year, the club will have achieved a net gain in membership over the previous year. Net gain =\_\_\_\_\_\_\_\_.

THE PLAN: (Series of tasks to perform to achieve the goal). o

1. TASK: Prior to \_\_\_\_\_\_\_(Date), I will use my club membership roster to identify \_\_\_\_\_club members willing to assist me in achieving this goal or
2. TASK: Prior to \_\_\_\_\_(Date) I will have those identified club members provide a report to the club regarding their progress toward the goal.
3. TASK: create an additional appropriate task.
4. GOAL: Achieve a zero gain in membership. At the end of this Rotary year, the Club will neither gain nor lose membership.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Prior to \_\_\_\_\_\_\_(Date), I will use my club membership roster to identify \_\_\_\_\_club members willing to assist me in achieving this goal. or
2. TASK: Prior to \_\_\_\_\_(Date) I will have those identified club members provide a report to the club regarding their progress toward the goal. Or
3. TASK: create an additional appropriate task.
4. GOAL: Achieve a net gain in female members. Clubs with up to 50 members gain at least one female member; clubs with 51 or more members gain at least two female members more than listed in Rotary’s records on July 1, of the current Rotary year before July 1, of the next Rotary year.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Prior to \_\_\_\_\_\_\_(Date), I will use my club membership roster to identify \_\_\_\_\_club members willing to assist me in achieving this goal. or
2. TASK: Prior to \_\_\_\_\_(Date) I will have those identified club members provide a report to the club regarding their progress toward the goal. Or
3. TASK: create an additional appropriate task.
4. GOAL: Achieve a net gain in members under age 40. Members who were born after 1 July 1978 and join between July 1, of the current Rotary year before July 1, of the next Rotary year.
5. count. Clubs with up to 50 members gain at least one member under age 40; clubs with 51 or more members gain at least two members under age 40

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Prior to \_\_\_\_\_\_\_(Date), I will use my club membership roster to identify \_\_\_\_\_club members willing to assist me in achieving this goal. or
2. TASK: Prior to \_\_\_\_\_(Date) I will have those identified club members provide a report to the club regarding their progress toward the goal. or
3. TASK: create an additional appropriate task.
4. GOAL: Identify \_\_\_\_ club members open to establishing a satellite club.

 THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Prior to \_\_\_\_\_\_\_(Date, I will use my club membership roster to identify \_\_\_\_\_club members willing to assist me in achieving this goal. or
2. TASK: Prior to \_\_\_\_\_(Date) I will have those identified club members provide a report to the club regarding their progress toward the goal. Or
3. TASK: create an additional appropriate task.
4. GOAL: Using the data in the Membership Vitality and Growth report found inn Rotary Club Central; review the engagement rate for my club. I will challenge my club to improve the retention rate during this Rotary year.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Prior to \_\_\_\_\_\_\_(Date), I will use my club membership roster to identify \_\_\_\_\_club members willing to assist me in achieving this goal. or
2. TASK: Prior to \_\_\_\_\_(Date) I will have those identified club members provide a report to the club regarding their progress toward the goal. Or
3. TASK: create an additional appropriate task.
4. GOAL: Create a specific plan to improve engagement in my club.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Establish a procedure for the membership process in my club. This will include steps from the first introduction of a guest through the induction of the new member. Or
2. TASK: Have a member of my committee hold an exit interview with departing members in person or online to determine problems of my club. or
3. TASK: Insure that every member of my club is engaged in some way.
4. TASK: create an additional appropriate task.
5. GOAL: Identify \_\_\_ members in my club who would be willing to visit two businesses a month in the community and invite those businesses to attend a weekly Rotary meeting and report back whether they visited the club and the results of their visit.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ I will, based on my familiarity with the members of my club, identify the members who may be willing to take on this challenge. The members I have identified are:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

1. TASK: I will contact each of the identified club members on or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and I will ask them if they’re willing to accept the challenge.

1. TASK: On \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month I will contact the club members and ask them how many businesses were visited during the month, how many of those businesses attended a Rotary meeting during the month, and if any of the businesses joined Rotary.
2. GOAL Identify \_\_\_ members in my club who would be willing to invite guests each week to our Rotary meeting and keep records on who joins because of the invitation and report back the results to our club members.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ I will, based on my familiarity with the members of my club, identify the members who may be willing to take on this challenge. The members I have identified are:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

1. TASK: I will contact each of the identified club members on or before \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and I will ask them if they’re willing to accept the challenge.

1. TASK: On \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month I will contact the club members and ask them how many businesses were visited during the month, how many of those businesses attended a Rotary meeting during the month, and if any of the businesses joined Rotary.
2. TASK: create an additional appropriate task
3. GOAL: Identify \_\_\_ members in my club who would be willing to use the classification system to determine individuals of professions not represented in our club and invite them to our Rotary meeting and keep records on who joins because of the invitation and report back the results to our club members.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ I will, based on my familiarity with the members of my club, identify the members who may be willing to take on this challenge. The members I have identified are:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

1. TASK: I will contact each of the identified club members on or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and I will ask them if they’re willing to accept the challenge.

1. TASK: On \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month I will contact the club members and ask them how many businesses were visited during the month, how many of those businesses attended a Rotary meeting during the month, and if any of the businesses joined Rotary.
2. TASK: create an additional appropriate task
3. GOAL: Identify \_\_\_ members in my club who would be willing to invite members of the community to participate with our club on a service project and keep records on who joins because of the invitation and report back the results to our club members.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ I will, based on my familiarity with the members of my club, identify the members who may be willing to take on this challenge. The members I have identified are:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

1. TASK: I will contact each of the identified club members on or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and I will ask them if they’re willing to accept the challenge.

1. TASK: On \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month I will contact the club members and ask them how many businesses were visited during the month, how many of those businesses attended a Rotary meeting during the month, and if any of the businesses joined Rotary.
2. TASK: create an additional appropriate task.
3. GOAL: Identify \_\_\_ members in my club who would be willing to invite members of the community to a club social event and keep records on who joins because of the invitation and report back the results to club members.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ I will, based on my familiarity with the members of my club, identify the members who may be willing to take on this challenge. The members I have identified are:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

1. TASK: I will contact each of the identified club members on or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and I will ask them if they’re willing to accept the challenge.

1. TASK: On \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month I will contact the club members and ask them how many businesses were visited during the month, how many of those businesses attended a Rotary meeting during the month, and if any of the businesses joined Rotary
2. TASK: create an additional appropriate task
3. GOAL: Divide my club into groups of with each group having the task of recruiting one new member. Have the groups report back monthly on the results.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ I will, based on my familiarity with the members of my club, divide the club members into \_\_\_\_\_\_groups.

1. TASK: I will contact each of the identified groups on or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_and I will ask them if they’re willing to accept the challenge.

1. TASK: On \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month I will contact the club members and ask them how many businesses were visited during the month, how many of those businesses attended a Rotary meeting during the month, and if any of the businesses joined Rotary.
2. TASK: create an additional appropriate task
3. GOAL: Identify \_\_\_ members in my club who would be willing to ask one person to join Rotary during the 2018-2019 year and keep records.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ I will, based on my familiarity with the members of my club, identify the members who may be willing to take on this challenge. The members I have identified are:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

1. TASK: I will contact each of the identified club members on or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and I will ask them if they’re willing to accept the challenge.

1. TASK: On \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month I will contact the club members and ask them how many businesses were visited during the month, how many of those businesses attended a Rotary meeting during the month, and if any of the businesses joined Rotary
2. create an additional appropriate task
3. GOAL: Identify \_\_\_ members in my club who would be willing to check the RI Membership Leads for our club weekly during the 2018-2019 year and keep records.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ I will, based on my familiarity with the members of my club, identify the members who may be willing to take on this challenge. The members I have identified are:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member

1. TASK: I will contact each of the identified club members on or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and I will ask them if they’re willing to accept the challenge.

1. TASK: On \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month I will contact the club members and ask them how many leads were shown during the month, how many of those leads attended a Rotary meeting during the month, and if any of the leads joined Rotary.
2. TASK: create an additional appropriate task
3. GOAL: Develop a system to follow up on all membership leads assigned to my club in a time-effective manner.

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: Using my membership committee, I or my Club Membership Referral lead will immediately follow up on all RI membership and extend an invitation to the prospective member.
2. TASK: Within one week after receiving the referral the Club Membership Referral lead will provide the DMC with a report regarding the status of the referral.
3. TASK: Every week thereafter, the Club Membership Referral lead will provide the DMC with a status report on the referral until the lead has been resolved (i.e. inducted into my club, referred to another club, or decides not to join Rotary, etc.)
4. TASK: The Club Membership Referral lead shall design a tracking list to track all referrals for the 2018-2019 Rotary year and their outcomes.
5. TASK: create an additional appropriate task
6. GOAL: Intentionally left open for an additional goal you wish to implement for the club!

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: or
2. TASK: or
3. TASK:
4. GOAL: Intentionally left open for an additional goal you wish to implement for the club!

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: or
2. TASK: or
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4. GOAL: Intentionally left open for an additional goal you wish to implement for the club!

THE PLAN (Series of tasks to perform to achieve the goal).

1. TASK: or
2. TASK: or
3. TASK: