
Regional Membership Plan Zones 28 and 29



“Working the Plan - Getting it to our Clubs” • July 1, 2014 - June 30, 2015

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General Overview

Zone 28/29 Regional Membership Execution Plan “Working the Plan - Getting it to our Clubs”

Situational Analysis

Rotary International Zones 28 and 29 are comprised of 28 Districts in parts of Nebraska, North Dakota, Minnesota, Wisconsin, Illinois, Iowa, New York, Pennsylvania, West Virginia, Maryland, Ohio, Michigan and Ontario.

As we enter into the third year of a three year plan to stabilize and increase membership in Zone’s 28 and 29, the following plan has been developed to focus our efforts on the sharing of knowledge at the most important level – with our clubs.

Emphasis is being placed on attracting members and engaging them and also on the development of new clubs. We’re striving for “perfect engagement” (retention) where members are treated as our customers and we work to help them appreciate the benefits of membership.

While this plan is funded until June 30, 2015, it is understood that this is a “living” document that will continue into the 2015/2016 Rotary year and beyond and will be amended as best practices and successes are achieved.

Research tells us that when non-Rotarians are asked “What is Rotary?” – four in ten have never heard of us, four in ten have heard of the name only and only two have some familiarity of what we do. Clearly there is room to increase our public image and in turn increase our membership.

When asked “why did you join” and “why do you stay” the two top responses are friendship and fellowship and to positively impact my community. Therefore our primary goal has to be focused on asking people what they want out of Rotary, engaging them in something meaningful upon their induction and creating an environment where the “Family of Rotary” flourishes. Perfect Engagement!

Membership is Rotary’s highest priority, second only to Polio Eradication.

Historical Data

Since July 1, 2007, Rotary's membership in North America has declined by more than 28,000 members (7.0%). Annually this region loses more members than are brought into Rotary.

Our paired Zones are no different as we have experienced a decline of approximately 4,500 members since 2010. As of March 31st, 2014 we had 62,888 members with a goal of 67,132 by June 30th, 2015.

As of March 31st, 2014:

Zone 28	696 Clubs	31,918 members
Zone 29	820 Clubs	30,970 members

If each club in our two Zones has a **net gain of 3** we will achieve our goal. The good news is there is improvement in many of our 28 districts – since January we have a net increase of 451 new members.

At July 1st, 2013 our total membership was 1,185,000. By December of 2013 we increased to 1,206,000. Our goal at June 30th, 2015 is set at 1,280,000.

On average, almost 44,000 new individuals join Rotary clubs in North America annually, while we lose an average of 51,000. Further, the attrition rate has increased over a four-year period from 10.77% in 2007/08 to 11.95% in 2011/12. Over this same period, annually, the number of new members who join Rotary clubs is relatively stable. Simply stated, Rotary's North American decline is the result of losing members.

The recommendation of the North American Membership Planning team is that efforts should primarily focus on increasing the retention rate, addressing the reasons why our members are leaving Rotary and increasing the vitality and performance of our clubs, while making Rotary attractive to a wider range of qualified potential members.

For over a decade, Rotary's global membership strategy has been to focus on increasing the number of new members brought into the organization. During this period, results have been inconsistent, with short-term membership spikes as longer-term sustained membership declines, leading to the conclusion that a membership strategy based primarily on acquiring new members does not produce sustained membership growth.

To produce longer-term, sustained membership growth, Rotary must primarily focus on increasing its membership retention rates, and then continue to build on our stable base of attracting new members.

To **increase retention**, this plan recommends:

1. Defining Rotary International's "customer" as current Rotarians, and creating messages, leadership best practices, training and administrative and planning processes to focus club, district and zone activities on this single concept.
2. Identifying, defining and pursuing Rotary's value proposition to these customers by increasing the focus on the exclusive and significant benefits of membership in Rotary.
3. Training club leadership and providing usable resources to assess club practices, as well as developing and implementing changes to build and maintain strong, vibrant clubs.
4. Helping clubs recognize that increased customer satisfaction will create increased interest and demand among qualified potential customers to join Rotary and continue with Rotary.

Although the primary focus of this plan is to increase retention, we must also provide increased resources, information and motivation to the clubs and districts to improve the attractiveness of Rotary clubs to potential customers, and to recognize new opportunities to increase the number of new members who join Rotary. In addition, clubs must become vibrant, active and inviting to current and potential members.

A final element of this plan is the creation of new clubs. Currently, only 46.7% of the North America districts charter a Rotary club annually. Special focus needs to be given to looking at areas for growth including alternative meeting days and times, meeting formats, and demographics where growth is possible (taking into account diversity, younger members, women, etc.).

Definition of Teams

The Leadership Training Team is defined as the Director, Project Lead, Assistant Project Lead, Rotary Coordinators (RC) and Assistant Rotary Coordinators (ARC). Other will be added as necessitated.

The District Membership Team is defined as the District Governor (DG, DGE, DGN), District Membership Chair (DMC), Assistant Governor (AG), Club Presidents.

The Rotary Coordinator (RC) Team is defined as the Zone 28 and 29 Rotary Coordinators (RC) and their Assistants (ARCs).

Important Attributes of the Zone 28/29 Membership Plan

- Member Attraction (formerly recruitment)
- Member Engagement (formerly retention)
- Development of new clubs
- Strengthening Clubs - Improve Awareness of Rotary Clubs in Community
- Club Assessment and Strategic Planning
- Diversity
- Attract & Engage Members < Age 40 and young retirees
- Improve Gender Balance within Clubs & Districts
- Improve Ethnic & Vocational Diversity in Clubs
- Build Dedicated District & Club Membership Teams
- Utilize & Understand Rotary Club Central & Other Rotary Resources

Rotary Club Central is a key tool to reach our goals. Every club should be creating goals, tracking membership and entering the data that will help them to measure their success. The historical perspective will permit Club leaders to properly build a strategic plan and increase its chance of success. All members can see club goals, but only club officers can edit goals. District leadership, primarily Assistant Governors, can assist clubs in reporting goals. To access Rotary Club Central, log into Member Access.

Leadership Training Team

RI Director 2013-2015
Mary Beth Growney Selene
mbgrowneyselene@ryansigns.net

Project Lead
Jennifer Jones
jjones@mediastreet.ca

Assistant Project Lead
Pam Harkema
pdgpam@gmail.com

Zone 28

Rotary Coordinator
Tamie Koop
tkoop@wi.rr.com

Assistant Rotary Coordinators:

Rich Rowland
Nebraska, Iowa, Illinois
rartir@cox.net

Districts of Responsibility

5650, 5970, 6000, 6420

Carlos Frum
Wisconsin, Illinois, Upper Michigan
carlos@frum.com

6220, 6270, 6440, 6450

Katie Ehlis,
Canada, N Dakota, Minnesota and Wisconsin
katie.ehlis@gmail.com

5580, 5950, 5960, 6250

Zone 29

Rotary Coordinator
Mary Berge
drberge@hotmail.com

Assistant Rotary Coordinators:

Dale Lepovetsky
Pennsylvania
lepovetsky@hotmail.com

Districts of Responsibility

7280, 7300, 7330, 7360

Bob Vincent
Ohio
rvincen@bgsu.edu

6600, 6630, 6650

Norma Madayag-Reilley
New York
leonora@frontiernet.net

7120, 7150, 7170, 7190

Kathleen Tosco
Michigan
ktosco@ntelos.net

6290, 6310, 6360, 6380, 6400

Tools and Tactics

Key Dates for 2014-2015 Plan Implementation

June	July/August	September	October	October/ November
Leadership Team Training	Regional Success Seminars	DMCs at Institute	District Membership Summits	District Seminars – PI/TRF/ Membership

January	February	March	April	April/May/June
Mid Year Webinar to Review Progress and YTD Results	District Team Training Seminar (DTTS)	President Elect Training Seminar (PETS)	District Assemblies	District Conferences

Leadership Training Team Training

June 23rd, 2014

In attendance are all members of the leadership training team. The one-day meeting is being held in Evanston at Rotary headquarters.

This is a “train the trainer” session where we will teach the facilitation techniques necessary for them to train the District Membership Teams.

The training curriculum includes:

- Review of Plan and Goals and Objectives
- Input, Feedback and Finalization of the 2014/2015 Plan
- Facilitation and Coaching Techniques
- Voice and Body Language
- Leadership Discussion/Communication Techniques
- Practice Facilitation
- Review of the Tool Kit

Regional Success Seminars

June/July/August 2014

This is the first time the RCs and ARCs will have to share this year’s implementation plan with those in attendance.

The training curriculum (with regard to Membership) includes:

- Launch of the 2014/2015 Plan
- Introduction of the District Membership Action Summit concept
- Review of Goals and Objectives, Tool Kit and Metrics

District Membership Chairs at Institute

September 2014 – see appendix A

This years Institute will include the 2015/2016 District Membership Chairs.

District Membership Action Summit “Getting it to the Clubs”

October 2014 – 1 day event in each of our 28 Districts

Attendees: all District Rotarians

(This event is not intended to take the place of District Success Seminars typically held in the fall but instead to augment it with a specific focus on Membership.)

The event curriculum includes:

- Official Launch of the 2014/2015 Membership Plan - understanding the plan and how to take action
- “Working the Plan” - A review of goals and objectives, tool kit and metrics (review of Executive Summary which includes specific goals).
- “What is Rotary”? Interactive Plenary
- Panel discussion on “Perfect Engagement” – to include District Membership Chair, Governor, ARC and one additional member to be decided upon by the district – preferably a member under 40 to bring in our next generations perspective.
- Activating brand language through values and voice
- Customer Service Training
- Training on Rotary Club Central (RRC)

District Conferences

April/ May/June 2015

Awarding of the Inaugural “*Directors Award of Excellence*”. This will be awarded to each club that successfully completes the outlined goals and objectives of the membership plan. Specifically, they must have grown their club by 3% and increased their retention rate to a minimum of 2%. It will be presented by the Governor and the President’s Representative at each District Conference.

Tool Box

- Executive Summary of Membership Plan, goals and objectives
- PPT for Plan Roll Out – for use at Summer Success Seminars, DMC training, Membership Summit and club meetings.
- Membership Portal as part of our Zone website to house tools.
- Standardized Club Podium Placard.
- Standardized Creation of Summit Invitation – customizable to each District
- Zone 28/29 “Welcome to Rotary” package – including a personal letter from the Director. This is something they could access on the zone site.
- Criteria for “Directors Award of Excellence”.
- Zone 28/29 Membership Satisfaction Survey and Exit Survey.
- “What is Rotary”? – pre-packaged curriculum for use at club meetings.
- Pull up sign “Join Leaders, Exchange Idea’s, Take Action” for each DG.

Metrics

Most of our measurable results will be found through Rotary Club Central i.e.:

- How many new members in each District?
- How many lost members? Length of service (membership retention reports).

District Membership Chairs will participate quarterly (via Survey Monkey) on progress to goal.

Additionally we will track:

- Number of presentations made by the leadership team and attendance
- How many people sub-trained on message (Clubs Presidents, District Membership Chairs, etc.)
- Use of budget (is the leadership team getting into the districts?)
- How many districts are using Rotary's new visual identity tools?

Reports from Rotary Club Central will be run quarterly and shared with all clubs in Zones 28 and 29.

Appendix A - Zone “District Membership Chair” Training September 2014

Overall Learning Objectives

1. To establish the importance of making membership the DGEs #1 operational priority within the District;
2. To better comprehend the membership needs at the district and club level based on objective information, and to understand how to develop an effective membership plan;
3. To develop and implement a plan to attract and engage members more successfully;
4. To better utilize Rotary’s new voice and essence statements to attract and engage members more successfully;
5. To understand why new club development is essential to Rotary’s success and long term membership growth;
6. To establish the importance of the DGEs ACTIVE role and responsibility in membership growth.

1. Retention/Engagement Session Learning Objectives

1. To assist DGEs in learning to navigate Rotary Club Central (RCC);
2. To be able to explain and demonstrate the benefit of using RCC to the clubs, and to be able to secure objective measurements of club retention levels;
3. To share best practices regarding how to keep members;
4. To share and develop ways to use the new Rotary voice an essence statement;
5. To assist DGEs in identifying how Rotary’s core values are important and have a positive effective on keeping members.

Take Aways

- DGEs will have logged in and explored RCC in relation to their own districts, having a print out of their retention statistics
- DGEs will have completed a customer satisfaction survey during the session and will have a copy to take with them;
- DGEs will have a practical understanding of how the core values and voice/essence statements can help them to improve retention in their districts;
- DGEs will be able to assist clubs in articulating how the use of core values can increase retention.

2. Attraction Session Learning Objectives

1. To establish the importance of focusing on age, gender and diversity, and how it can impact positive membership growth;
2. To identify ways Rotary’s core values can impact attraction of new members to Rotary;

3. To develop operational strategies to objectively assess their clubs level of attractiveness to new and current members

Take Aways

- DGEs will leave with a best practice list of how various clubs and districts are exemplifying attraction strategies;
- DGEs will leave with a plan to better identify ways to improve attraction in terms of age, gender and diversity;
- DGEs will be able to assist clubs in articulating how the use of core values, voice and essence statement can increase attraction of new members;
- DGEs will be able to help clubs understand the value of assessing their attractiveness and will be able to assist them with developing objective strategies to do so.

3. New Club Development Session Learning Objectives

1. District leadership will focus on district geography and use tools to determine future club development sites;
2. Understand the structure, importance and effectiveness of a properly designed District Extension Committee;
3. Recognize that establishing new clubs does not have to be difficult
4. Implement ideas of key team members in working with established clubs and their future directional plans;
5. Provide motivation and deeper understanding as to why new club development is crucial;
6. Assist DGEs to develop and articulate an operational plan / strategy for new club development.

Take Aways

- Sharing of what has worked in other districts;
- Ideas on how to use Census data and other available resources in new club development;
- Recognition that established clubs may not change, need their engagement and support to develop Rotary in other forms and practices;
- DGEs will have sample operational plans for new club development.

4. New Generations Learning Session Objectives

1. District Leadership will identify why and how New Generations (Rotaract & Interact) are beneficial to a more engaged membership
2. District leadership will develop a framework to work specifically with the New Generation based clubs

Take Aways

- Have a take home list of ideas in attraction and engagement for New Generations clubs;

- Start development of a transition plan for New Generation Rotarians, going from Interact to Rotaract to Rotary;
- Develop a district plan to incorporate all Interact and Rotaract clubs information in directories or websites.

5. Committee Structure Session Learning Objectives

1. To establish the importance and effectiveness of having District Membership Sub-committees;
2. To provide a suggested structure for district and club membership; committees and why this structure would have a positive effect on long term membership growth;
3. To begin to develop sub-committees including objective duties and team members;
4. DGEs will identify ways the district membership sub-committees can be better involved with the clubs.

Take Aways

- DGEs will have a sample committee, sub-committee structure
- DGEs will have a list of the positive outcomes of having a functional district / club committees
- DGEs will have an objective template / process to help clubs establish membership committees.

Appendix B

Regional Membership Plan Executive Summary and Action Plan Leadership Training Team, North America, Zones 28 & 29 “Working the Plan – Getting it to our Clubs”

Profile

Region	North America
Zones	28-29
Director	Mary Beth Growney Selene
Project Lead Assistant Project Lead	Jennifer Jones Pam Harkema
Rotary Coordinators	Tamara Koop, Zone 28 Mary Berge, Zone 29
Assistant Rotary Coordinators Zone 28	Rich Rowland Nebraska, Iowa, Illinois 5650, 5970, 6000, 6420 Carlos Frum Wisconsin, Illinois, Upper Michigan 6220, 6270, 6440, 6450 Katie Ehlis - Canada, N Dakota, Minnesota and Wisconsin 5580, 5950, 5960, 6250
Assistant Rotary Coordinators Zone 29	Dale Lepovetsky, Pennsylvania 7280, 7300, 7330, 7360 Bob Vincent, Ohio 6600, 6630, 6650 Norma Madayag-Reilley, New York 7120, 7150, 7170, 7190 Kathleen Tosco, Michigan 6290, 6310, 6360, 6380, 6400

Executive Summary

Goals/Objectives	Key Performance Indicators and Metrics
A. Member Engagement	<ul style="list-style-type: none"> • Target a minimum retention rate of 2% (maintaining 98%).
B. Member Attraction	<ul style="list-style-type: none"> • Attain a net 3% gain in membership. • 1 new club per district.
C. Strengthen Clubs Club Assessment and Strategic Planning Diversity <ul style="list-style-type: none"> • Attract and Engage Members < Age 40 • Improve Gender Balance within Clubs and Districts • Improve ethnic and vocational diversity in clubs Improve Awareness of Rotary Clubs in Communities	<ul style="list-style-type: none"> • Focus communication on “Working the Plan – Getting it to our Clubs” to every club in Zones 28 and 29. • Concentrate on “Perfect Engagement” This means a customer service focus on “Attraction” and “Engagement” vs “Recruitment” and “Retention”. • Create a membership tool-kit for clubs. • Strive for 100% compliance of Rotary’s Strengthened Brand on Club and District Websites. • Promote Visioning, Strategic Planning and Vibrant Club Initiatives.
D. Build Dedicated District and Club Membership Teams	<ul style="list-style-type: none"> • Establish a year-long training calendar with metrics. • DMCs to attend DMC training at Zone Institute in September 2014. • More actively engage the ARCs to work directly with their districts and their clubs and measure the interaction.
E. Utilize and Understand Rotary Club Central and other Rotary Resources	<ul style="list-style-type: none"> • Ensure that the leadership team is fully trained on Rotary Club Central. Establish how many have been certified for Club Visioning and increase this by 30%.

Zones 28 & 29 Action Plan

	Goal	Responsibility	Target Completion Date
A. Member Engagement			
A.1	Survey members to determine levels of satisfaction among club members; educate DGNs, DGEs, DGs and Presidents to assess and implement actions that can improve member satisfaction.	DMC, DG/DGE/DGN, AGs, RC Team	June 2015
A.2	Monitor districts with greatest percentage of increase and decrease; Solicit best practices from districts with strong retention and provide them to districts with weaker retention.	DMC, DG/DGE/DGN, AGs, RC Team	June 2015
B. Member Attraction			
B.1	Add at least 1 Club per district per year	Club Presidents, RC Team, DMC	June 2015
B.2	Identify areas of opportunity within districts that are appropriate for development of new clubs, including: A. alternative meeting days and times: weekend, Saturday afternoon meetings/ socials B. meeting formats (e-clubs, satellite clubs, no mandatory meal and associated costs) • Clubs targeted at specific demographics (younger members, culturally diverse clubs, etc.)	District Training Team Club Presidents, DMC, DG/DGE/DGN, AGs, RC Team	June 2015
B.3	Add new members to existing clubs (New member attraction per engagement of every Club member).		

	Goal	Responsibility	Target Completion Date
	C. Strengthen Clubs		
C.1	Encourage each club to do Club Visioning/ Assessment to develop a written multi-year strategy and structure to build and maintain attractive and inviting clubs for current and prospective members Completed by clubs on their own or with the help of a Club Visioning Facilitator.	DG, DGE, DGN, Club Presidents, RC Team	June 2015
C.2	Implement district programs on: <ul style="list-style-type: none"> • Club Leadership Plan/Be A Vibrant Rotary Club • Retention Strategies and Best Practices. • Strategic Planning 	DG, DGE, DGN, Club Presidents, RC Team	June 2015
C.3	Charter new Rotary clubs where younger groups may feel more comfortable.	Director, DG, DGE, DGN, RC Team, RRFC, RPIC	June 2015
C.4	Host one large project to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc.	RC Team , RPICs, Project Leads, DGs, Club Presidents, Membership Chair	June 2015
C.5	Engage female community/business leaders.	DG Membership Chairs	Ongoing
C.6	Teach clubs to implement Strengthening Rotary Initiative	District PR Chair	June 2015
C.7	Assist clubs and Rotarians at creating their Rotary story.	RC Team , RPICs, DGs, Club Presidents, Membership Chair	Ongoing
	Goal	Responsibility	Target Completion Date
	D. Build Dedicated District and Club Membership Teams		
D.1	Develop a large, trained membership team to support your clubs. (RC Team will help train); Provide templates and job descriptions for various Membership positions within District and Clubs (Member Attraction, Member Engagement & Member Retention).	RC Team, DMC, DG, DGE, DGN	June 2015

D.2	Train club leadership at District Assembly (RC Team to help)	DMC, RC Team	June 2015
D.3	Share best practices, resources and innovative ideas with district and club leaders in support of membership and RI strategic priorities.	RC Team and others designated	June 2015
D.4	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development.	RC Team and others designated (DG, DGE, DMC, Project Leads)	June 2015

	Goal	Responsibility	Target Completion Date
	E. Utilize and Understand Rotary Club Central and other Rotary Resources		
E.1	Submit updated membership information at least monthly on Rotary Club Central to include: member date of birth, sponsorship information, gender, etc. Increase use of Rotary Club Central for goal setting, day-to-day decision making, accountability and reporting for 100% clubs with full membership data entered and used.	Clubs with assistance from DG and RC Team	June 2015
E.2	Provide Rotary Club Central instruction for all DGEs at GETS; Club Presidents-elect at PETS; Secretaries-elect at District Training Assembly.	RC Team	Ongoing/ June 2015
E.3	Share information and district successes through strategic communication	RC Team	Ongoing
E.4	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute.	RCs	Quarterly Through June 2015
E.5	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark.	DMC, DG, DGE, DGN, RC Team, Project Lead	Quarterly Through June 2015
		TOTAL AMOUNT REQUESTED:	\$55,000