

Rotary
District 7910



**2020-2021 DISTRICT MEMBERSHIP COMMITTEE
CLUB MEMBERSHIP PLAN TEMPLATE
Version 3.2 – Updated 12/30/2020**

INTRODUCTION

Building membership is Rotary's top internal priority, and every member can make a difference. When you have a strong membership base, your club is better able to serve. We need active, engaged, and enthusiastic members and club leaders who can recognize opportunities for growth and act on them.

Clubs around the world approach membership in very different ways. Recognizing and acting on the unique needs, customs, and changes in your community will enhance your ability to increase your membership.

Creating a membership plan is a way to document your club's vision, goals, and strategies for expanding your membership and keeping your members connected. Be sure to involve all of your members in the creation of your membership plan and consider everyone's ideas. Having contributions from all members will foster enthusiasm and help ensure your plan is well implemented.

Once it's created, your plan can serve as a guide to setting your membership goals and tracking your club's progress.

**In a survey conducted by Rotary:
80% of Rotarians have not asked anyone to be a Rotarian
and
the #1 reason people give for not being in Rotary
is that no one has asked them.**

CLUB MEMBERSHIP PLAN DEVELOPMENT PROCESS

This Club Membership Plan Template contains suggestions on how to develop a Membership Plan for your Rotary club. It gives you options to include and resources to use for attracting and engaging new members. Hyperlinks are embedded in the template to take you directly to online RI and District resources.

The suggested process for the development of a Club Membership Plan is:

- A. Create a membership committee.
- B. Conduct a membership assessment.
- C. Determine membership criteria.
- D. Set membership goals.
- E. Determine strategies and tactics for increasing membership.
- F. Propose new members.
- G. Conduct an orientation for new members.
- H. Determine if the club infrastructure needs to be changed.
- I. Create a progress evaluation process in the plan.
- J. Present the plan to the club for consideration.

To promote ownership and accountability in the plan, each section will ask you for the **Who, What, When, and How** needed to complete each task.

Your club's strategic plan (often created through the Club Visioning process) should have membership goals in it. Use them in the Club Membership Plan, which should be an operational part of the club's strategic plan.

“Failing to Plan is Planning to Fail.” - Benjamin Franklin

CLUB MEMBERSHIP PLAN OUTLINE

Create a Club Membership Plan – Use this guide as a resource as you complete the following steps - [Strengthening Your Membership: Creating Your Membership Plan](#)

A. **Do** - Create a Membership Committee.

1) **Who** - The President chooses a Chair.

(2) **Who** - With the consultation of the Committee Chair, the President chooses the other Members.

- President – ex officio
- The President-elect
- New member representative(s)
- Continuing Member representative(s)

- Other members selected based on the results of the Membership Assessment [See below].

(3) **How**

- [Club Membership Committee Basics](#) - Take this learning plan to learn more about your responsibilities in developing a strategic plan to engage and attract members.
- [Club Membership Committee Checklist](#) - Follow these steps to identify prospective members, introduce them to your club and Rotary, invite them in a meaningful way, and be sure to engage them and get them involved.
- [Rotary Zone 32 Membership Video Series](#) – View these short (2-3 minutes) videos for an overview of 16 membership-related topics.

(4) **When** – **What is the deadline?**

B. Do – Conduct a Membership Assessment – What is the status of Club membership?

(1) **Who** – The Membership Committee

(2) **How** – Use these resources to see if your club is meeting members' needs and reflecting the community:

- [Club Planning Assistant](#) — Answer some questions about your club and get specific advice to address your club's challenges. Then build the suggested strategies into your club's membership plan.
- [Is Your Club Healthy?](#) — View this Learning Center video to help your club improve its member experience, service and social events, public image, and club operations.
- [Rotary Club Health Check](#) — Identify your club's problem areas and make changes to help it stay relevant for members and the community.
- [Building a Diverse Club](#) — Take this Learning Center course to strengthen your membership and increase your club's capacity to serve.
- [Membership Assessment Tools](#) — Analyze your member profile to identify prospective members and diversify your membership.
 - [Representing Your Community's Professions](#) (classification assessment)
 - [Diversifying Your Club](#) (member diversity assessment)
- [Understanding Membership Reports: Getting Started](#) — Learn how to use membership data to determine where to focus your membership efforts.

(3) **When** – **What is the deadline?**

C. **Do** – Determine Membership Criteria. Who are you looking for?

(1) **Who** – Membership Committee

(2) **What** – Expectations of Members (examples) -

- Commit to do service projects.
- Willing to accept leadership roles in the Club.
- Commit to attend club meetings.
- Commit to bring at least one potential member per year to a Club activity.
- Meet financial obligations.

(3) **When** – **What is the deadline?**

D. **Do** – Set Membership Goals.

(1) **Who** – The Membership Committee

(2) **What**

- Retention goal - Continuing Members
- Acquisition goal - New members
- Diversity goals -
 - Minorities
 - Women
 - Young Professionals
 - Empty Nesters
 - Retirees
 - Underrepresented professions

(3) **How**

- The goals are based on the club's strategic planning process (i.e., Club Visioning).
- What is the club's vision statement?
- What should the club be doing to achieve the vision?
- What are the goals in the plan?
- What membership size is needed to achieve the goals?
- Will you need people from specific walks of life, with specific skills?

(4) **When** – **What is the deadline?**

E. **Do** – Determine Strategies and Tactics for Increasing Membership

(1) **Who** – Membership Committee

(2) **What** – Develop strategies and tactics for reaching each goal.

(3) **How**

- Attend [District Events](#): District Membership Committee Meetings, District Training Assembly, District Conference, PETS (for President-Elect).
- Send new and prospective members to District “Introduction to the World of Rotary” event.
- Attend [Rotary Leadership Institute \(RLI\)](#)
- Attend [Rotary International Convention](#).
- Talk to clubs that have won membership awards or have had success in their membership efforts.
- Use the strategies and tactics in these resources to engage with Current members:
 - [Best Practices for Engaging Members](#) — Take this Learning Center course to develop strategies for engaging people at all stages of membership.
 - [Enhancing the Club Experience](#) — Tailor this member satisfaction survey to get opinions on your club's future. Then act on the results and consider implementing your members' ideas.
 - [Improving Your Member Retention](#) — Learn when and why members leave your club and generate strategies to keep them engaged so they will stay.
 - [Understanding Why Members Leave](#) — Use this exit survey to address the reasons that members may be leaving your club.
 - [Club Innovation Stories](#) (audio recordings) — A series of recorded stories highlighting the innovative work being done by clubs all around the world.
- Use the strategies and tactics in these resources to connect with Prospective members:
 - [Strategies for Attracting New Members](#) - Take this Learning Center course to help draw prospective members, update your club's experience, and better highlight what it does well.
 - [Finding New Club Members: A Prospective Member Exercise](#) - Try these strategies to attract qualified members for your club.
 - [Creating a Positive Experience for Prospective Members](#) - Working with prospective members is a delicate task. Find tips and ideas to determine whether membership would match their needs as well as

your club's. Learn what you can do to ensure that prospects have a positive experience, regardless of whether they join.

- [Engaging Younger Professionals](#) — Welcoming younger professionals into Rotary is essential for us. Our digital kit will help you rethink membership and bring emerging leaders into your club.
- [Guide to Corporate Membership](#) — Learn how to engage your local businesses and offer a new membership type to a few of the business employees.

(4) **When** – **What is the deadline?**

F. **Do** – Propose New Members

(1) **Who**

- Membership Committee
- Public Relations Committee

(2) **What**

- Participation and financial expectations of club members
- Information about Rotary
- Information about the club

(3) **How**

- Use [Proposing New Members](#) as a guide and the attached [Membership Proposal Form](#) (an edible pdf document) to propose new members for your club.
- [Customizable club brochure](#) — Design your own club brochure using the template on Rotary's Brand Center. Choose images and wording to best represent your club.
- [Rotary Basics](#) — Give this comprehensive overview of Rotary to prospective and new members.
- [Discover Rotary](#) — Show this PowerPoint presentation to prospective members or at your club's public events. Add content and images specific to your club.

(4) **When**

What is the deadline for the materials?

and

When does the person receive the materials?

G. **Do** – Conduct an Orientation for New Members

(1) **Who** – Membership Committee

(2) **What**

- Participation and financial expectations of club members
- Information about Rotary
- Information about the Club

(3) **How** - Use these resources to celebrate new members, develop an orientation program, and get them involved early and often.

- [Kick-start Your New Member Orientation](#) — This Learning Center course shows how to make your club's new members feel welcome, appreciated, and valued.
- [Introducing New Members to Rotary: An Orientation Guide](#) — Find ideas for engaging new members, getting them involved, and giving them a meaningful Rotary experience.
- [Connect for Good](#) — Encourage new members to get involved in their club, community, and the Rotary world for a more meaningful experience.
- [New Member Kit](#) — Welcome new members to your club with some Rotary essentials.

(4) **When** – **What is the deadline?**

H. **Do** – Determine If Club Infrastructure Needs to Be Changed

(1) **Who** – Board, Program Committee

(2) **What**

- Dues structure, Membership types, Meeting content and times
- Should meetings be on Facetime, Zoom, etc.?

(3) **How**

- [Be a Vibrant Club](#) — Learn 10 best practices shared by vibrant clubs worldwide, along with regional versions featuring local success stories.
- [Leadership in Action](#) — Develop skills such as teamwork, communication, and innovation in your club, with the session guides and ideas in this resource.

- [Practicing Flexibility and Innovation](#) — Take this Learning Center course to help you better serve the needs of members and prospective members.
- [Club flexibility](#) — Learn about flexible membership and meeting options; view [frequently asked questions](#), [governance documents](#), and start guides for [alternative membership types](#), and [flexible meeting formats](#).

(4) **When** – **What is the deadline?**

I. **Do** – Create a Progress Evaluation Process in the Plan

(1) **Who** – Membership Committee

(2) **What**

- How do you know if you are successful?
- Quantify what you are trying to achieve and when so that it can be evaluated.
- The Committee should meet monthly to review the progress of the plan and ensure its execution.
- Based on the evaluation, the plan should be adapted and the planning process continued to develop the following year's plan.

(3) **How**

- Track your club's progress in [Rotary Club Central](#).
- Stay current with the following resources:
 - Courses in the [Learning Center](#)
 - [Videos on our Vimeo channel](#)
 - [Webinars](#) on membership topics
 - Subscribe to our [Membership Minute newsletter](#) or swap ideas on the [Membership Development Best Practices Discussion group](#).
- **Return to “Section B - Conduct a Membership Assessment” annually.**

(4) **When** – **What is the deadline?**

J. **Do** – Present the Plan to the Club for consideration.

(1) **Who** – The Membership Chair, the Board, and the Club and others as warranted.

(2) **How**

- The Membership Committee vets the plan.
- The Membership Chair and other Committee members, as warranted, present the plan to the Board.
- The Board vets the plan. The Membership Committee is informed of any changes.
- The Board Chair and Membership Chair send the plan to club members before meeting.
- Discuss the plan at a club meeting or assembly.
- Make changes based on consensus.
- Begin plan implementation.

(3) **When** – **What are the deadlines?**

-END-