 

ROTARY DISTRICT 5440 MEMBERSHIP PLAN FOR THE ROTARY CLUB OF \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

First Draft 9-14-17

**Rotary District 5440 Club Membership Plan**

Draft 9-14-17

This plan will be managed by the Rotary Club of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ using Specific, Attainable, Measurable Goals (S.A.M.G.) attained through commitment and accountability within our district. Clubs may select those goals which they choose to adopt and add new goals as part of their club membership plan.

[ ] **GOAL 1** (**ADMINISTRATIVE):**  Create a Club Membership Committee (CMC) of \_\_\_\_\_\_\_ members by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Date)

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

* [ ]  **TASK 1A:** Get permission from the Club President to ask \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ & \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to be on the Club Membership Committee by \_\_\_\_\_\_\_\_\_\_\_\_ (Date).
* [ ]  **TASK 1B:** Ask committee member \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to spearhead retention efforts in the club.
* [ ]  **TASK 1C:** Ask committee member \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to spearhead growth efforts in the club.
* [ ]  **TASK 1D:**

**ACCOUNTABILITY:** Each Month the following will occur during the club’s monthly assembly or Board meeting:

1. As the CMC Chair, I will report on the progress made during the month to accomplish each of the club’s goals as established in the club’s written Membership Plan.
2. The Club’s Membership Committee Member shall give a report on how the club’s plan on retention is proceeding and entertain any of the club’s ideas for adjustments that may be necessary.
3. The Club’s Membership Committee members shall give a report on how the club’s plan on growing membership is proceeding and entertain any of the club’s ideas for adjustments that may be necessary.

[ ]  **GOAL 2** (**ADMINISTRATIVE):** - Establish a monthly committee meeting of the Club Membership Committee to discuss progress toward the Club’s S.A.M.G and a Plan (a series of task to accomplish the goal).

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

* [ ]  **TASK 2A:** During the club’s monthly assembly or on the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of each month the Club Membership Committee will hold a monthly committee meeting directly following the club meeting.
* [ ]  **TASK 2B:**

**ACCOUNTABILITY:** During the monthly club assembly, the membership committee will meet during committee time and then report to the club (during reporting time) the progress the club is making towards its S.A.M.G and its Plan (series of task to accomplishes the goal).

**NOTE:** The club report should include a thorough discussion review of each goal as established by the club’s S.A.M.G and a report on the progress of all task as outlined in the Club’s Plan. The club’s Plan will be adjusted based on the discussion and the work of the committee shall be adjusted accordingly.

**GOAL 3 (RETENTION)**: Form and engage a club level “Trilogy Squad” no later than \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to promote the Trilogy Continuum at the district and club level. As part of the Rotary Club Membership plan, clubs would form a Trilogy Squad at the club level. When working together, instead of in their own silos, the Trilogy Squad generates inertia which is self‐perpetuating. When a district Rotary event is held that promotes good in the community, the District Rotary Public Image Chair goes to work to generate publicity. The publicity generated results in increased interest on the part of the public in Rotary which leads to membership. More Rotarians mean more contribution dollars flowing into the foundation. More funding for the foundation means more opportunity to do good in the community and the world. Performing more good in the world leads to opportunities to generate more publicity. As the graphic below illustrates, the work of the Trilogy Squad becomes a continuum with no beginning or no end and strengthens the three disciplines of Rotary: membership, foundation including service, and public image.

THE GOOD DONE IN THE COMMUNITY GENERATES PUBLICITY

WHICH LEADS TO INCREASED MEMBERSHIP

WHICH INCREASES FOUNDATION DOLLARS SO MORE GOOD CAN BE DONE

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

* [ ]  **TASK 3A:** Goal: The Club Membership Chair, Club Foundation Chair and the Club Public Image Chair communicate each month to discuss how the Trilogy squad can work together to strengthen each of our disciplines. Schedule a monthly meeting on the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of the month to discuss the following issues:

* What is happening in the Club this month and how can we use the event to assist the District and Club Public Image Chair to bring attention to the event, to strengthen membership, and increase foundation giving?
* [ ]  **TASK 3B:** Goal: Develop a club level bulletin that highlights club activities. Distribute this at club meetings and in the community. Membership information in Rotary can be added.
* [ ]  **TASK 3C:**

[ ]  **GOAL** **4** (**GROWTH):** - Achieve a net gain in membership. The club will gain at least one more member listed in Rotary’s records on 1 July 2018 than they did on 1 July 2017.

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

* [ ]  **TASK 4A:** As the CMC Chair,I will have the club secretary provide me monthly a list of members in the club and track monthly the gains and losses in membership. This shall be reported to the club monthly during the club assembly.
* [ ]  **TASK 4B:** On\_\_\_\_\_\_(DATE) I will propose to the club the goal as established above and take a vote of the club to support the goal.
* [ ]  **TASK 4C:**  Working with the Club Membership Committee and the President, the committee will establish by \_\_\_\_\_\_(DATE) a list of \_\_\_\_\_\_ (number) business in the club’s boundaries which ought to be involved in our Rotary Club. The \_\_\_\_\_\_ businesses identified shall be announced to the club during the monthly club’s assembly (larger clubs board meeting).
* [ ]  **TASK 4D:**  Each month by \_\_\_\_\_\_(DATE) two members of the Club Membership Committee shall set up a meeting with 2 of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ businesses identified in the task above and meet with the business for 20 minutes. At the end of the visit, depending on the reception, an invitation shall be extended for the business to join Rotary.
* [ ]  **TASK 4E:**  One member of the Club Membership Committee shall be assigned to keep records on the visits per month and the outcome of the visit. This shall be reported to the club monthly during the club assembly’s reporting time. **EXAMPLE:** Two club businesses visited, XYZ Company and ABC Company. ABC accepted the invitation to join and a new member will be inducted on \_\_\_\_\_\_(DATE). XYZ declined the invitation. **NOTE:** These records shall be used to determine the success of the Club Membership Plan.
* [ ]  **TASK 4F:**

**ACCOUNTABILITY & ASSESSMENT**

In June 2018, the club membership committee shall report the success or failure of the goal and the plan for growing membership in the club.

***SAMPLE REPORT 1***: The club made \_\_\_\_\_\_\_ visits to businesses in our community during the July 1, 2017 to June 30, 2018 Rotary year. From those visits, \_\_\_\_\_ new Rotarians join the club. \_\_\_\_\_\_\_ Rotarian members subsequently left the club before June 30, 2018. The result of the program was a growth of \_\_\_\_\_\_ net members in the club. The goal as established on July 1 of 2017 was accomplished. It is a recommendation of the membership committee that the goal of one net member and the plan of making \_\_\_\_\_\_\_ visits to businesses continue for the upcoming July 1, 2018 through the June 30, 2019 Rotary year.

[ ]  **GOAL 5** (**GROWTH):** Achieve in the club one of the following goals – either a net gain of 1 in female members or a net gain of 1 in under 40 members.

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

* [ ]  **TASK 5A:** As the CMC, **I** will have the club secretary provide me on a monthly basis a list of females or under 40 members in the club and track each month gains and losses. This shall be reported to the club monthly assembly.

* [ ]  **TASK 5B:** On\_\_\_\_\_\_(DATE) I will propose to the club the goal as established above and take a vote of the club to support the goal.
* [ ]  **TASK 5C:**  Working with the Club Membership Committee and the President, the committee will establish by \_\_\_\_\_\_(DATE) a list of \_\_\_\_ people in the club’s boundaries which ought to be involved in our Rotary Club.
* [ ]  **TASK 5D:**  Every quarter by \_\_\_\_\_\_(DATE) two members of the Club Membership Committee shall set up a meeting with 1 person identified in the task above and meet with the person for 20 minutes. At the end of the visit, depending on the reception, an invitation shall be extended for the person to join Rotary.
* [ ]  **TASK 5E:**  One member of the Club Membership Committee shall be assigned to keep records on the visits per quarter and the outcome of the visit. This shall be reported to the club monthly during the club assembly’s reporting time. **EXAMPLE:** 1 female potential member visited. \_\_\_\_\_\_\_\_\_ accepted the invitation to join and will be inducted on \_\_\_\_\_\_(DATE).
* [ ]  **TASK 5F:**

**ACCOUNTABILITY & ASSESSMENT**

In June 2018, the club membership committee shall report the success or failure of the goal and the plan for maintaining membership in the club at the current level.

***SAMPLE REPORT 1***: The club membership committee identified 12 business women in the community who the committee believed would make great Rotarians. The committee then divided up the names of the 12 business women and made personal visits to each – 3 per quarter. From those visits, \_\_\_\_\_\_\_ new Rotarians join the club. The result of the program was a growth of \_\_\_\_\_\_\_ net members in the club.

[ ]  **GOAL 6 (GROWTH)**: Consider establishing a satellite club(s) or Satellite Group(s).

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

* [ ]  **TASK 6A:** Review the District Roadmap for Establishing Satellite Groups to determine if there are members in the club who might wish to meet as a satellite group.
* [ ]  **TASK 6B:**

[ ]  **GOAL 7** (**GROWTH):** Develop a system to follow up on all membership leads from RI in a time‐effective manner.

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

* [ ]  **TASK 7A:** Using my membership committee, the DMC Chair or the District Membership Referral lead or District Secretary will immediately forward all RI membership leads to the most appropriate club(s) for follow‐up via email.
* [ ]  **TASK 7B:** Within one week after receiving the referral the District Membership Referral lead or District Secretary will provide the DMC with a report regarding the status of the referral.
* [ ]  **TASK 7C:** Every week thereafter, the District Membership Referral lead will provide the DMC with a status report on the referral until the lead has been resolved (i.e. placed in a club, decides not to join Rotary, etc.)
* [ ]  **TASK 7D:** The District Membership Referral lead shall design a tracking list to track all referrals for the 2017‐2018 Rotary year and their outcomes.
* [ ]  **TASK 7E:**

[ ]  **GOAL 8** (**TRAINING):** Hold one Jumpstart Membership Club Assembly with the club on or before \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Date).

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

* [ ]  **TASK 8A:** Agenda would include new member initiatives for the club to utilize in attracting new members such that each club member would be membership ambassador.
* [ ]  **TASK 8B:** Utilize the District Governor’s People of Action Citation as a means of attracting potential new members to club activities and meeting.
* [ ]  **TASK 8C:**

[ ]  **GOAL 9** (**TRAINING):** Club Membership Committee members and chair attend Jumpstart Membership training at one of the following venues:

* A membership webinar on \_\_\_\_\_\_\_\_\_\_\_\_\_\_.
* Club Membership Plan training at the District Training Assembly on October 7, 2017.
* Club Membership Plan training at the District Training Assembly on April 7, 2017
* A short Club Membership Plan training video will be developed with a link on the District website so those who cannot attend the training can watch the video.

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

* [ ]  **TASK 9A:** On or before October 1, 2017 CMC members will register for one of the two district training assemblies.
* [ ]  **TASK 9B**: When available CMC members will register to attend a membership webinar scheduled by District 5440.
* [ ]  **TASK 9C:** When available CMC members will register to watch a membership video developed by District 5440.

* [ ]  **TASK 9D:**

[ ]  **GOAL 10 (ANALYSIS):** Review the District the 12 Years of Membership Historical Data Chart provided by the Zone each month and available at <https://www.rotary2127.com/charts/>.

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

* [ ]  **TASK 10.A:** Use this chart as a means of measuring membership as of the date published. Ensure the club secretary verifies this chart against local club membership records to ensure local membership data matches RI membership Data. There have been times when the local records do not match. For example; a new member has not been registered with RI.
* [ ]  **TASK 10.B:**

[ ]  **GOAL 11** (**ANALYSIS):** Using the data in the Membership Vitality and Growth report found on My Rotary, review the retention rate for each club. Challenge each club to improve their retention rate during the 2017‐2018 year.

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

* [ ]  **TASK 11A:** On or before \_\_\_\_\_\_(DATE)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ the DMC Chair will identify, using the Membership Vitality and Growth report, the clubs with the poorest retention rates in the District. The DMC Chair will challenge each of these clubs to improve their retention rate over their 2014‐2017 retention rate and provide some tools to the club to help accomplish this task.
* [ ]  **TASK 11B:**