



Rotary International

ROTARY ZONE 24/32 MEMBERSHIP PLAN

Tactical Implementation

This tactical plan contains two components: Pages 1-2 are district-focused actions; pages 3-4 are club-focused steps. Although very similar, each component has been adapted accordingly. Please review both sections.

I. Districts

A. Needs Assessment

- Review past actual membership numbers and assess strengths and needs for specific development in the district and to support creation of goals for retention, attraction and new clubs
- Rotary Coordinators will work closely with DG and district leadership team to assist in assessment, identify needs and develop goals and plans to support achievement of those goals

B. Goals/Targets

- Zone provides a baseline goal to districts (in %) and each is asked to establish its own goals based on past performance and needs. Goals are requested to be aggressive, yet realistic.
- The district reports its goals to the Zone in 3 areas (send to RC by August 15 or sooner):
 - retention
 - attraction
 - new clubs
- Districts will be asked to work with clubs to set their own goals following same methodology

Note: For consistency, Zone provides calculation formulas as many different methods are used, especially for retention

C. Priorities/Focuses

In general, the districts will have a concentrated focus on engagement/retention in year 1, new clubs in year 2 and attraction in year 3. This assumes that districts will continue engagement and new club activity at usual levels during the other years. The annual focus does not indicate a lessening of focus in the other two areas, which will be communicated to districts.

D. Plan

- Districts will be asked to develop/use a three-year rolling written plan with dates, measures and responsibilities delineated
- Developed primarily by DG/DGE/DGN in conjunction with key district leaders and membership committee
- Dovetails with the district's long range planning process
- Progress reviewed at each district leadership meeting

- Reviewed/updated from May to June for the coming year, based on results/new information
- DG/DGE/DGN bring plan for discussion at training sessions during pre-Institute
- Zone, via Rotary Coordinators, provides sample plan and assistance with plan development

E. Committee

- District appoints a qualified membership chair and committee dedicated to membership only (not members who also have other district jobs)
- Committee includes subcommittees of attraction, engagement and new club development
- District adapts specific structure to support its own membership needs and strategy
- Committee positions should be 3 years in length and staggered terms
- Zone, via Rotary Coordinators, provides sample job description and suggested qualifications for membership chair and committee members for district and clubs

F. Reporting/Visibility

- Districts report progress toward the goals each month to RCs
- Reports are published monthly on Zone site
- RCs send reports to 3 district DGs (DG, DGE, DGN) and membership chair
- RCs assess outstanding membership initiatives, results and innovation and publish stories on Zone website and blog

G. Training

Districts provide training to:

1. District Team (offered by RC)

Options include:

- Translating the North American membership plan for district implementation
- Membership committee function and planning
- Developing a long-range membership plan
- Re-vitalizing club to support membership engagement and attraction
- Starting eClubs and New Generations clubs
- Others to be determined by district needs

2. Clubs (offered by RC or by district team)

Options include:

- Success Forum
- Assessing the membership status and needs of your club
- Membership Engagement and Retention
- Vibrant clubs for retaining and attracting members
- Membership committee function and planning
- Developing a long range membership plan
- Others to be determined by club needs

H. Recognition

- Zone level awards/recognition/challenges for outstanding districts and clubs (10 clubs per Zone, for example) in the areas of:
 - growth
 - innovation
 - new club sponsorship
- In years 2 and 3, awards span June 30/July 1 date and take into consideration a rolling 12 month membership number to reinforce long term stable growth

II. Clubs

(note: club process is very similar to district process)

A. Needs Assessment

- Review past actual membership numbers and assess strengths and needs for specific development in the club and to support creation of goals
- Rotary Coordinators will work closely with DG and district leadership team to support districts in this process, as needed.

B. Goals/Targets

- District provides baseline goal to clubs (in %) and each club is asked to establish its own goals based on past performance and needs. Goals are requested to be aggressive, yet realistic.
- The clubs reports their goals to the District in 3 areas by a date and to a person established by the district:
 - retention
 - attraction
 - new club sponsorship (if relevant)
- District reports club goals to RC

Note: For consistency, Zone formulas for calculation are provided to clubs by district.

C. Priorities/Focuses

In general, the clubs will have a concentrated focus on engagement/retention in year 1, new clubs in year 2 (as relevant) and attraction in year 3. This assumes that clubs will continue engagement and new club activity at usual levels during the other years. The annual focus does not indicate a lessening of focus in the other two areas, which will be communicated to clubs.

D. Plan

- Clubs will be asked to develop/use a three year rolling written plan with dates, measures and responsibilities delineated
- Developed by President, President Elect and President Nominee in conjunction with board of directors and membership committee
- Dovetails with the club's long range planning process
- Progress reviewed at each club board meeting and with members once/month
- Reviewed/updated from May to June for the coming year, based on results/new information
- All Presidents-elect bring plan for discussion at District Assembly and PETS
- District provides sample plan and assistance with plan development

E. Committee

- Club appoints a qualified membership committee chair and committee dedicated to membership only (not members who also have other club jobs)
- Committee includes subcommittees of attraction, engagement and new club development (if relevant)
- Club adapts specific structure to support its own membership needs and strategy
- Ideally, committee positions should be 3 years in length and staggered terms
- District provides sample job description and suggested qualifications for membership chair and committee members

F. Reporting/Visibility

- Clubs report progress toward the goals each month to a person designated by the district
- Reports are published monthly on District site and sent to club presidents and club membership chair
- District committee assesses outstanding membership initiatives, results and innovation and publish stories on District website or other communication tool

G. Training

Club provides training to members (district or club provided) and ensures member attendance

Options include:

- Membership Engagement and Retention
- Success Forum
- How to Make Your Club More Vibrant
- Membership Committee Function and Planning
- Developing a Membership Plan
- Others to be determined by club needs

H. Recognition

- District awards/recognition/challenges implemented for outstanding performance by clubs in the areas of:
 - growth
 - innovation
 - new club sponsorship
- This may include monthly recognition in newsletter or website, at district conference or in other communications or venues
- Awards span June 30/July 1 date and take into consideration a rolling 12 month membership number to reinforce long term stable growth