

**STRATEGIC MEMBERSHIP PLAN**

**2016-2017**

**CLUB TEMPLATE**

FORWARD

How can membership affect the success of a club? The more members, the more resources, the more and better services a club can provide locally and throughout the world.

Membership needs to be engaged to be effective. Having more members does not necessarily mean they are active members. Active members are often a reflection of who is invited to be a member and how the club involves those who have joined.

Members have to be ready to take leadership roles. Rotary is made up of leaders. The expectation of accepting membership in Rotary is that the person will at some point be asked to lead whether it is a committee, a project, or the club itself, and will accept that role.

Members are part of an international organization and need to understand that the club’s goals and activities are local, regional, national, and international. This comes through orientation and continuing education.

**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.**

**This Membership Plan Template contains suggestions on how to develop a Membership Plan for your club. It gives options for what you may want to include and resources you might want to use.**

**However, the general strategies will likely be included in any Membership Plan. They are:**

**a. Create a membership committee.**

**b. Conduct a membership assessment.**

**c. Determine membership criteria.**

**d. Set membership goals.**

**e. Determine tactics for increasing membership.**

**f. Create membership materials.**

**g. Conduct an orientation for new members.**

**h. Determine if the club infrastructure needs to be changed.**

**i. Create an evaluation section in the plan.**

**j. Present the plan to the club for consideration.**

**And if you have gone through all the trouble of creating a plan, use it, and continue the planning process for the next year’s plan.**

I. GOALS – From Long-range Plan

Your club long-range plan should have membership goals in it. Use them. The Membership Plan should be an operational part of the club’s long-range plan.

A. **Grow** Membership.

1. **Create** a 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**

Lead Your Club: Membership Committee Brochure

(4) **When** – What is the deadline?

b. **Do** – Conduct a Membership Assessment – What is the Club membership status?

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

(2) **How -** Resources

Rotary Membership Assessment Tools pamphlet.

Representing Your Community’s Professions: A Classification Assessment

Diversifying Your Club: A Member Diversity Assessment

Finding New Club Members: A Prospective Member Exercise

Improving Your Member Retention: Retention Assessment and Analysis

Enhancing the Club Experience: Member Satisfaction Survey

Understanding Why Members Leave: Exit Survey

Membership Resource Guide

Membership data on Rotary Club Central.

The Membership Chair keeps track of

membership engagement. The club

Secretary monthly inputs the information

on Rotary Club Central.

Rotary Club Health Check

Strengthening Your Membership

Be a Vibrant Club

(3) **When** – What is the deadline?

c. **Do** – Determine Membership Criteria. Who are you looking

for?

(1) **Who** – Membership Committee

(2) **What** – Expectations of Membership examples

Must commit to do service projects.

Must be willing to accept leadership roles in the

Club.

Must commit to attend club meetings.

Must commit to bringing at least one potential

member a year to a Club activity.

(3) **When** – What is the deadline?

d. **Do** – Set Membership Goals.

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

(2) **What**

Retention goal

New members

Continuing Members

Acquisition goal

Diversity goals

Minorities

Women

Young Professionals

Retirees

Underrepresented professions

(3) **How**

The goals are based on the club’s strategic planning process. 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 is to be accomplished? What size membership is needed to achieve the goals? Will you need people from specific walks of life, with specific skills?

Read Strengthening Your Membership

Membership Assessment Tools (sections on Representing Your Community’s Professions, Diversifying Your Club, and Finding New Club Members)

(4) **When** – What is the deadline?

e. **Do** – Determine Tactics for Increasing Membership

(1) **Who** – Membership Committee

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

(3) **How**

Use District Membership Tool Menu

Join rotary.org Best Practices Discussion Groups

Attend District Summer Seminar, Mid-year Check-up, District Training Assembly, District Conference

President-Elect attends PETS

Attend Zone Membership Meeting

Attend International Convention

For Small Clubs, consider using New Club Extension Techniques.

Talk to clubs that have won membership awards or have had success in their membership efforts.

Rotary research says that people join Rotary to impact their community and to have fellowship. People stay in for fellowship and to impact their community. In that order.

Rotary Club Health Check

Strengthening Your Membership brochure

Be a Vibrant Club brochure

Connect to Membership Leads and How to Manage Membership Leads brochures

Program Participants and Alumni Report in My Rotary to recruit new members

(4) **When** – What is the deadline?

f. **Do** – Create Membership Materials

(1) **Who**

Membership Committee

Public Relations Committee

(2) **What**

Expectations of club for New Members

Information about Rotary

Information about the club.

(3) **How**

Use the Rotary Brand Center

Use Impact Begins with You brochure

Discover Rotary PowerPoint

Creating a Positive Experience for Prospective Members

(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**

Expectations of club for New Members

Information about Rotary

Information about the club

(3) **How**

Use Introducing New Members to Rotary Guide

Connect for Good

(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, Meeting content, Meeting times, Should meetings be on Facebook Live or Webcast, etc.

Should Satellite Clubs be considered?

(3) **How**

Visit new club flexibility page at <https://www.rotary.org/myrotary/en/club-flexibility>;

Utilize Membership Assessment Tools (sections on Improving Member Retention and Enhancing the Club Experience)

(4) **When** – What is the deadline?

i. D**o** – Create an evaluation section 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**

Rotary Club Health Check

Membership Assessment Tools (sections on Improving Member Retention and Enhancing the Club Experience)

(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.

Make changes based on consensus.

Begin plan implementation.

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