



FROM IDEAS TO ACTION!

District 5340



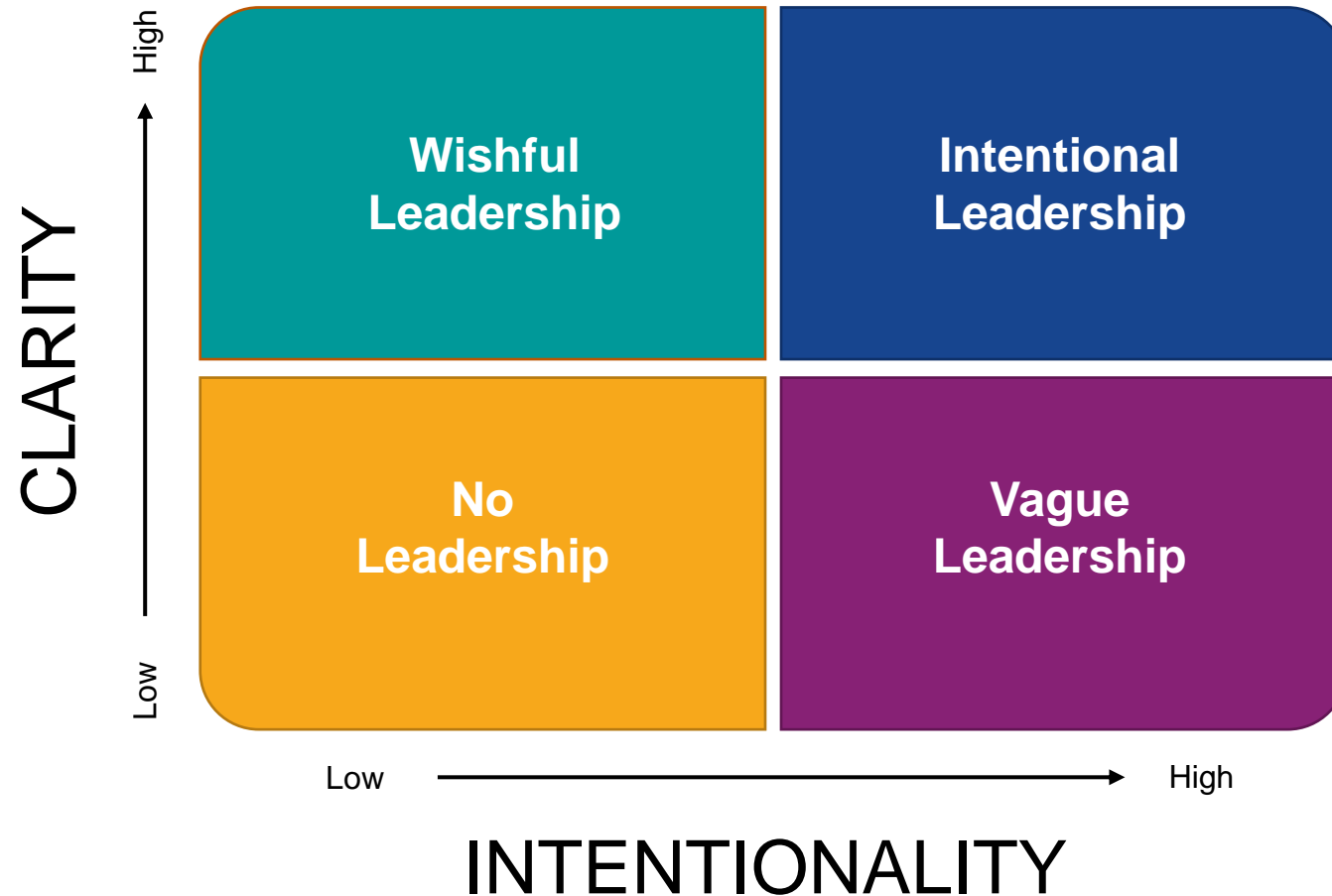


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Why a Club Action Plan?

INTENTIONAL LEADERSHIP



ACTION PLAN

Four Step Process

Process

1. Utilize meaningful data to inform action plan goals and development.
2. Survey club members to determine needs and wants.
3. Develop a plan with clear priorities, owners, timelines and measurables.
4. Monitor and Manage Regular Quarterly Priorities

Club Example #1

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

Annual **Attrition Rate** (3-year average): 9.3%

Annual **Attraction Rate** (3-year average): 8.0%

Annual **Net Growth Rate**: - %

The problem we need to solve is:

- Low Retention** -- Our Attrition Rate Exceeds 15%
- Insufficient New Member Attraction** - Our Attraction Rate is less than 5% above our Attrition Rate
- Neither** - We need to build on our current membership growth culture and strategies

Success Targets

Attraction less than 15%
(July 1 membership x .15)
Attraction 5% greater than Attrition

Club Example #2

This worksheet will help you set your membership growth goals and calculate the number of **new members needed** to reach your goal. Actual data for your club is in the table below

Annual **Attrition Rate** (3-year average): 22.4%

Annual **Attraction Rate** (3-year average): 10.2%

Annual **Net Growth Rate**: - %

The problem we need to solve is:

- Low Retention** -- Our Attrition Rate Exceeds 15%
- Insufficient New Member Attraction** - Our Attraction Rate is less than 5% above our Attrition Rate
- Neither** - We need to build on our current membership growth culture and strategies

Success Targets

Attrition less than 15%
(July 1 membership x .15)
Attraction 5% greater than Attrition

STEP ONE | MEANINGFUL DATA

1. Review your club's Attrition/Attraction Data.
2. Verify against Club Membership Profile Report from Rotary Club Central.
3. Determine Agreed Upon Average Annual Attrition Number.

TIP: Club Membership Profile report can be found in Rotary Club Central.

- My Rotary
- Rotary Club Central
- Reports
- Club Membership Profile Report



STEP TWO | SURVEY MEMBERS

1. Members need to have a voice in the process for buy-in.
2. Utilize Rotary Tools in Discovery Process
 - a) [Rotary Club Health Check](#)
 - b) [Membership Assessment Tools](#)

Example:

July 1 Membership = 95
 Membership Goal = 100 (Net gain of 5)
 Average Annual Attrition = 15
 New Members Needed to Meet Goal = 20

Current Membership	
Membership Goal	
Average Annual Attrition	
New Members Needed to Meet Goal	

$$\text{Membership Goal} - \text{Current Membership} + \text{Attrition} = \text{New Members Needed to Meet Goal}$$

Attracting New Members		
Tactic	Responsible	Date
Onboard New Members		
Tactic	Responsible	Date
Engage and Retain Existing Members		
Tactic	Responsible	Date

STEP THREE | DEVELOP A PLAN

1. Utilize data to set current year membership growth goal.
2. Identify primary areas of focus.
3. Develop tactics to increase efficacy in each area.

TIP: there are many resources in the [Rotary Learning Center](#) to help form ideas.



STEP FOUR | MONITOR AND MANAGE

1. Launch action plan.
2. Assess progress monthly.
3. Adapt, refine, respond.

TIP: *People tend to lose focus on annual goals. Break them down into quarterly priorities.*



QUESTIONS

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