

# Rotary

## District 5180



# Membership Strategic Planning Workbook

Club: \_\_\_\_\_

Attendee: \_\_\_\_\_

# Today's Agenda

8:30 Registration/Continental Breakfast

9:00 Welcome – Barbara Tracy

9:05 Building a Strategy – Ray Ward

9:50 Passport's Successful Planning Process – Mike Reinero

10:15 Break

10:25 Alternative Meeting Options to Consider – Bill Wittich

10:55 Considering Your Current Members – Ruth Burgess

11:25 Creating Your Strategic Plan – Ray Ward

11:55 Thanks – Barbara Tracy

Session 1  
Building a Strategy

Club: \_\_\_\_\_

Membership Committee Members: \_\_\_\_\_

\_\_\_\_\_

**Internal Data:**

Total Number of Members: \_\_\_\_\_

Men: \_\_\_\_\_ Women: \_\_\_\_\_

Under 35: \_\_\_\_\_ 35-49: \_\_\_\_\_ 50-64: \_\_\_\_\_ 65-79: \_\_\_\_\_

80 +: \_\_\_\_\_ Unknown: \_\_\_\_\_

Years of Service <1: \_\_\_\_\_ 1-5 : \_\_\_\_\_ 5-10: \_\_\_\_\_

10-20: \_\_\_\_\_ >20: \_\_\_\_\_ Rule of 85: \_\_\_\_\_

Meeting: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Socials: \_\_\_\_\_

\_\_\_\_\_

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Projects Local: \_\_\_\_\_

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Projects Int'l: \_\_\_\_\_

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Networking: \_\_\_\_\_

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Learning: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Other: \_\_\_\_\_

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\_\_\_\_\_

**External Data:**

Men: \_\_\_\_\_

Women: \_\_\_\_\_

Under 40: \_\_\_\_\_

40-50: \_\_\_\_\_

50-60: \_\_\_\_\_

60-70: \_\_\_\_\_

71 +: \_\_\_\_\_

Community Concerns: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Projects Wanted: \_\_\_\_\_

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Meetings: \_\_\_\_\_

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Networking: \_\_\_\_\_

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Classifications: \_\_\_\_\_

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Developmental: \_\_\_\_\_

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Competition: \_\_\_\_\_

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Other: \_\_\_\_\_

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**Public Image/Marketing:**

Opportunities: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Website: \_\_\_\_\_ Social Media: \_\_\_\_\_

Brochure: \_\_\_\_\_ Price Sheet: \_\_\_\_\_ Handbook: \_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Goal**

Membership Goal: \_\_\_\_\_

Current Membership: \_\_\_\_\_

Increase: \_\_\_\_\_

Goal-Current

Prospects Needed: \_\_\_\_\_

X 3

Opportunities Needed: \_\_\_\_\_

X 5

## Session 2

### Planning

1

2

3

4

5

6

7

8

Session 3  
Alternative Meeting Events

**Networking** Frequency Implementation

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**Social** Frequency Implementation

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**Learning** Frequency Implementation

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**Fun** Frequency Implementation

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**Service** Frequency Implementation

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Session 4

Considering Your Current Members

STRATEGIZE:

Membership Team (10% of membership)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

New Options/alternative meeting plans, activities (try 3 or 4)

_____
_____
_____

How might these new options affect older members, long-time members?

_____
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How can you maintain personal contact and connections?

_____
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What might be financial impact on club and individuals?

_____
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ASK –

- ❖ Questions formatted for easy tallying
- ❖ Method of soliciting members' responses
- ❖ Communicate with club members

Personal contact with members: \_\_\_\_\_

_____
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Committee members' assignment to current members: \_\_\_\_\_

STRATEGY:

Implementation of new options based upon member responses

COMMUNICATION:

- ❖ How \_\_\_\_\_
- ❖ When \_\_\_\_\_
- ❖ Who \_\_\_\_\_
- ❖ Audience \_\_\_\_\_
- ❖ Follow-up \_\_\_\_\_

TRACK:

Level of participation at new events/activities/gatherings/meetings \_\_\_\_\_

Compare with prior participation \_\_\_\_\_

Members' comments/responses (anecdotal)

COMMUNICATE:

- ❖ Report on recent activities/events/gatherings, etc.
- ❖ Member testimonies

ASSESS:

- ❖ Degree of success
- ❖ Evaluate (need changing?)
- ❖ Update strategy

Session 5  
Creating Your Strategic Plan

Club: \_\_\_\_\_

**Goal**

Membership Goal: \_\_\_\_\_

Current Membership: \_\_\_\_\_

Increase: \_\_\_\_\_

Goal-Current

Prospects Needed: \_\_\_\_\_

X 3

Opportunities Needed: \_\_\_\_\_

X 5

What Does The Community Need(s): \_\_\_\_\_

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What Projects fill those Need(s): \_\_\_\_\_

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When/How Do They Want It: \_\_\_\_\_

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What Is Your Target Prospect(s): \_\_\_\_\_

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What Is Your Target Market(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How Are You Going To Reach Them:

Marketing/Branding: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Projects: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Meetings: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Fundraisers: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Socials: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Database: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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Sales Process: \_\_\_\_\_

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Other Ideas: \_\_\_\_\_

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## Accomplishment Timelines

Strategy: \_\_\_\_\_

Leader/Team: \_\_\_\_\_

Idea/Process: \_\_\_\_\_

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Goal: \_\_\_\_\_

Start Date: \_\_\_\_\_ Frequency: \_\_\_\_\_ Review: \_\_\_\_\_

Strategy: \_\_\_\_\_

Leader/Team: \_\_\_\_\_

Idea/Process: \_\_\_\_\_

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Goal: \_\_\_\_\_

Start Date: \_\_\_\_\_ Frequency: \_\_\_\_\_ Review: \_\_\_\_\_

## Accomplishment Timelines

Strategy: \_\_\_\_\_

Leader/Team: \_\_\_\_\_

Idea/Process: \_\_\_\_\_

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Goal: \_\_\_\_\_

Start Date: \_\_\_\_\_ Frequency: \_\_\_\_\_ Review: \_\_\_\_\_

Strategy: \_\_\_\_\_

Leader/Team: \_\_\_\_\_

Idea/Process: \_\_\_\_\_

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Goal: \_\_\_\_\_

Start Date: \_\_\_\_\_ Frequency: \_\_\_\_\_ Review: \_\_\_\_\_