2015-16 Regional Membership Plan Executive Summary and Action Plan
Region: North America (Rocky Mountain) – Zones 21B & 27

Profile

Region	North America (Rocky Mountain)
Zones	21B & 27
Director	Greg E. Podd
Project Lead	PDG Lynne Baker
Rotary Coordinators	RC David Norris, Zones 21B & Part of 27 RC Dick Jones, Part of Zone 27

Executive Summary

Goals/Objectives	Key Performance Indicators
A. Strengthen Clubs • **Build Dedicated District and Club Membership Teams** • **Utilize and Understand Rotary Club Central and other Rotary Resources** • **Club Assessment and Strategic Planning** • **Improve Awareness of Rotary Clubs in Communities**	• 100% of districts have a designated District Membership Committee Chair • Ensure 30% of clubs set and track at least 15 goals in Rotary Club Central.
B. Member Attraction • **Club Growth** • **Age/Gender/Ethnic Diversity**	• Each district will charter at least one new Rotary club. • Improve the gender diversity rate of our members by at least 2 percentage points. • Improve the age diversity rate of our members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points.
C. Member Engagement • **Member Satisfaction** • **Retention**	• Increase new member sponsors by at least 1 percentage point. • Improve the member retention rate by at least 1 percentage point • Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered.

2015-16 Action Plan

	Goals & Tactics	Responsibility	Target Attainment Date	Targets
	A. Strengthen Clubs			
A.1	Ensure districts have a designated District Membership Committee Chair • Update DMC list by July 1, 2015 and present to Director	Director, RC	1 July	100% of districts have a designated District Membership Committee Chair
A.2	Develop a trained membership committee to support clubs; Provide templates and job descriptions for various Membership positions within district and clubs • Develop a Membership development ToolBox for the DMCs that provide resources and presentations for Club and District Membership Development Committees, keep updated by posting latest resource material on Zone website • Provide training at regional training events for District Membership Committees	RC RC & ARC	8/1/2015 8/1/2015	100% District Membership Chairs have received ToolBox. 80% of District are represented and at regional zone events
A.3	Assist clubs in setting and tracking goals in Rotary Club Central • Provide training on RCC at regional training events and support use of RCC throughout the year with webinars	RC & ARC	June 30, 2016	30% of Clubs set and track at least 15 goals in Rotary Club Central
A.4	Support clubs in updating website, social media and public image assets. • Utilize RPIC to work with Governors, Governors-elect, DMCs, and clubs to provide best practices for social media.	RC, RPIC & DMC	June 30, 2016	30% of all clubs will have rejuvenated website, social media and public image assets.
A.5	Supports clubs in conducting Club Assessments and developing a written multi-year membership strategy • Membership Development Cadre will work with District Membership Chairs and Project Lead to schedule club trainings on club assessment and strategic planning.	RC, ARC, Cadre, Project Lead, DMC	December 31, 2015	30% of clubs will have conducted a Club Assessment and developed a written multi-year membership strategy
A.6	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development • Set annual training schedule to include regional events, zone institute, monthly conference calls and webinars to discuss challenges to membership development, present best practices and share membership development strategies •	RC, ARC, Project Lead	July 1, 2015	50% of DMC and Cadre will participate in conference calls and webinars

A.7	Support "One Rotary" as we "Come Together and Work Together" to emphasize the interrelationship between membership development, foundation giving, public image and training in Zones 21b/27 at the 2015 Zone Institute. Zones 21b/27 has been successfully working this approach for over a year with demonstrated positive results. • Attendance of 22 District Membership Chairs • Attendance of 22 District Foundations Chairs • Attendance of 22 District Public Image Chairs • Attendance of 22 District Trainers	Director, RC, ARC, DMC, DFC, DPIC, DT		Attendance of District Chairs at the Zone Institute to build support of and inclusion of the Membership Development message in their programs and presentations.

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	B. Member Attraction			
B.1	Survey club members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction • Provide Club & District leadership survey and assessment tools to determine level of member satisfaction in clubs	RC, DMC, DGN, DGE	Dec. 31, 2015	60% of clubs complete survey
B.2	Encourage and support districts to charter new Rotary clubs • Work with District Governors to identify areas of potential for expansion.	RC, ARC, DMC & DG	June 30, 2016	Each district will charter at least one new Rotary club
B.3	Improve the gender diversity rate of club members • Provide training on the benefits of gender diversity to clubs • Utilize the latest tools and technologies to identify area of improvement and opportunities	RC, ARC, DMC, District & Club leadership	June 30, 2016	Improve the gender diversity rate of club members by at least 2 percentage points
B.4	Improve the age diversity rate of club members • Provide training on the benefits of age diversity to clubs • Utilize the latest tools and technologies to identify area of improvement and opportunities	RC, ARC, DMC, District & Club leadership	June 30, 2016	Improve the age diversity rate of club members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points
B.5	Improve the racial/ethnic diversity rate of our members • Provide training on the benefits of racial/ethnic diversity to clubs • Utilize the latest tools and technologies to identify area of improvement and opportunities	RC, ARC, DMC, District & Club leadership	June 30, 2016	Improve the racial/ethnic diversity rate of our members by at least 2 percentage points.
B.6	Host one large project/event to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc. • Host 2nd Annual Presidential Membership Summit	RC	Jan 31, 2016	Event will be attended by representatives from 22 District with average attendance of 10/District

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	C. Member Engagement			
C.1	Increase new member sponsors • Recognize Club members who sponsor a new member • Collect success stories of most productive sponsors	Director, RC, DG & Club Presidents		Increase new member sponsors by at least 1 percentage point
C.2	Improve the member retention rate in each district • Stress the importance of membership retention in all regional training events, zone institute, conference calls and webinars • Develop resource material for Clubs to use to address retention problems	RC, ARC, DMC, DG & Club Presidents	Ongoing June 30, 2015	Improve the member retention rate by at least 1 percentage point
C.3	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute • Provide membership achievement and retention information on a regular schedule using Zone website, e-mail notification and monthly webinars	RC, ARC	Monthly	Demonstrated results of goals and tactics
C.4	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark • Review the Club Viability Report monthly with DMC and develop action plan with DMCs to work with District Leadership	RC, ARC, DMCs, DG	Ongoing	Provide monthly reports to Zone & District Leadership
C.5	Increase My Rotary registration and usage • Work with District Membership Chairs, District Membership Committee and Club Leadership to understand the value of My Rotary and Rotary Club Central	RC, ARC, DMC & District/Club Leadership	June 30, 2016	Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered
C.6	Assist clubs and Rotarians at creating their Rotary story • Seek out and identify Rotarians who can share their Rotary stories during regional/zone events and during conference calls and webinars. • Present information and examples on the basics of great story telling	All Zone Rotarians	June 30, 2016	Include the sharing of Rotary stories at regional training events and webinars

2015-16 Regional Membership Plan Executive Summary and Action Plan
Region: North America (Northeast & Canada) – Zones 24 & 32

Profile

Region	North America (Northeast & Canada)
Zones	24 & 32
Director	Julia D. Phelps
Project Lead	RPIC Sean Hogan
Rotary Coordinators	RC Lynda Ryder, Zone 24 East (in plain type) RC Jacqueline Hobal, Zone 24 West **(in bold)** RC Karien Ziegler, Zone 32 *(in italic)*

Executive Summary

Goals/Objectives	Key Performance Indicators
A. Strengthen Clubs • **Build Dedicated District and Club Membership Teams** • **Utilize and Understand Rotary Club Central and other Rotary Resources** • **Club Assessment and Strategic Planning** • **Improve Awareness of Rotary Clubs in Communities**	• 100% of districts have a designated District Membership Committee Chair • Ensure 30% of clubs set and track at least 15 goals in Rotary Club Central.
B. Member Attraction • **Club Growth** • **Age/Gender/Ethnic Diversity**	• Each district will charter at least one new Rotary club. • Improve the gender diversity rate of our members by at least 2 percentage points. • Improve the age diversity rate of our members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points.
C. Member Engagement • **Member Satisfaction** • **Retention**	• Increase new member sponsors by at least 1 percentage point. • Improve the member retention rate by at least 1 percentage point • Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered.

2015-16 Action Plan

	Goals & Tactics	Responsibility	Target Attainment Date	Targets
	D. Strengthen Clubs			
A.1	Ensure districts have a designated District Membership Committee Chair Zone 24E: • Develop and design 3 regional success seminars(Ontario, Quebec & East Coast) which will include Chairs and members of District Membership Committees – Training in Visioning & Facilitation will take place • During our calls initial call to each DG in July 2015, we will identify chairs for each district **Zone 24W** • **Develop District Membership profile for each District to be reviewed monthly** • **Contact lists for Districts completed – membership chair identified – relationships established** • **Encourage district trainer and membership chair to work together with AGs** • **Promote services and support from RC team – communicate "menu"** • **Schedule monthly meetings with DG,DGE, DGN membership chair** • **Determine schedule for membership development workshops – host minimum of 2 per district** • **Review "Presidential Citation" – applies to all tactics below** *Zone 32:* • *RCs and ARCs call each DGE to determine whether a District Membership Chair is in place. If there is not, then encourage that district to put a chair and a committee in place for the year.* • *ARCs will contact respective districts for contact information for extant District Membership & Extension Chairs* *Create Zone 32 distribution list of Membership Chairs and Committees.*	Director, RC Zone 24E RC & ARC's & Trainers RC& ARCs **Zone 24W RC, ARCs** *Zone 32: Director, RC/ARC*	1 July Zone 24E: February 2016 September 2015 **Zone 24W 1 July** **Monthly** **December** **May** *Zone 32: 1 July*	100% of districts have a designated District Membership Committee Chair
A.2	Develop a trained membership committee to support clubs; Provide templates and job descriptions for various Membership positions within district and clubs Zone 24E: • This will be provided with a facilitation/visioning	Zone 24E: ARC's	Zone 24E: Continuous	Zone 24E: Inform and include

	training • Emails and spot newsletters to membership chairs • Develop and customize job descriptions from our RI Website **Zone 24W**: • **Training needs determined by monthly meetings with District Leadership Team** • **Promote on social media, emails membership resources and training – face to face and via GTM/GTW** • **Encourage District membership chairs to attend Institutes** *Zone 32:* • *Templates can be provided for this from, for example, Great Ideas to Share.* • *Job descriptions can be part of the ARCs conversations with the DGEs as well as opportunity to discuss the makeup of their Membership Committee.* • *Create resource for Membership Chairs Direct all parties to MEMBERSHIP page on RI Website.*	**Zone 24W: RC, ARCs** *Zone 32: RC,ARCs*	**Zone 24W: Monthly** *Zone 32: July 1 through 1st quarter*	Membership Chairs as a valued district team player
A.3	Assist clubs in setting and tracking goals in Rotary Club Central Zone 24E: • Send out monthly reports via our newsletter • Call District Governors & Membership Chairs when a problem arises • Develop strategies for individual districts in noticeable problem areas • Initiate special trainings for working with RCC **Zone 24W** • **Develop and publish monthly progress on membership, service projects and Foundation** • **Review monthly with District Leadership team and schedule training/support** • **Training for District Leadership Team including AGs** • **GETS pre-assignments will require DGEs to be familiar and know district profile of club utilization – action plan** *Zone 32:* • *Develop training webinars and/or use ones*	Zone 24E: ARC's and RC **Zone 24W: RC** **RC, ARCs** *Zone 32: RCs, ARCs*	Zone 24E: Monthly **Zone 24W: Monthly** **Ongoing**	30% of Clubs set and track at least 15 goals in Rotary Club Central *Zone 32: 40% of Club set and track at least 15 goals in Rotary Club Central*

	developed by RI. Encourage DGs to get the links out to their presidents, AGs and Membership Chairs. • *Develop a membership training seminar and encourage districts to use it for their membership seminars.* • *Work to have a Membership breakout session at the Zones Multi District PETS* • *Develop a membership speaker's bureau and get the information out to the districts.* *Promote and market what RCs and ARCs do. Be proactive*			
A.4	Support clubs in updating website, social media and public image assets. Zone 24E: • Develop with our RPIC a trainings and newsletters • Find an expertise in our zone for assisting with this goal **Zone 24W:** • **Assist and include RPIC in District meetings – promote One Rotary** • **Promote resources from RI and best practices posted in www.greatideastoshare.com website** • **Publish and share best practices via social media and newsletters** *Zone 32:* • *Seek RPIC technical assistance to work with specific districts to upgrade their website and enlarge their social media network.*	Zone 24E: ARC's, RPIC, District social media and Public Image Persons, DG. DGN & DGE **Zone 24W: RC, ARCs, RPIC** *Zone 32: RPICs, ARCs/RC*	**Zone 24W: Ongoing** *Zone 32: Ongoing throughout the year*	30% of all cubs will have rejuvenated website, social media and public image assets.
A.5	Supports clubs in conducting Club Assessments and developing a written multi-year membership strategy Zone 24E: • Develop a survey to DG, DGE & DGN to assess need • Analyze and develop an action plan for conducting Club Assessments – Visioning/Facilitation etc. • Develop a Strategic Plan for this area	Zone 24E: ARC's – computer expertise is required **Zone 24W: RC, ARCs**	**Zone 24W: October**	30% of clubs will have conducted a Club Assessment and developed a written multi-year membership strategy

	Zone 24W: • **GETS training and Pre Assignment focus** • **Monthly follow up with District Leadership Team** • **Webinar on strategic planning – train the District trainer, AGs** • **Promote resources from RI and Zone 24-32 blog www.greatideastoshare.com** *Zone 32:* • *ARCs share District Profiles with their respective district DG, Membership Chair/Committee.* • *Discuss /Distribute Membership Satisfaction manual to DGEs* • *Introduce Membership Satisfaction Survey as a tool for understanding where your club is and what needs exist to be addressed.*	*Zone 32: ARCs, RC*	**February** **Ongoing** *Zone 32: End of 1st quarter*	
A.6	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development Zone 24E: • In concert with Zone 32 and Zone 24 West we will invest in 10 webinars to promote at club/district level • Webinars will be concocted from RI and existing webinars **Zone 24W:** • **Working with expert webinar trainer, RI staff and Zone 24-32 leaders develop and schedule series** • **Publish and promote topics and schedules via email, Institutes, Conferences, social media, PETS…** **Customize training for individual district leaders based on need** *Zone 32:* • *ARCs will touch base with respective DGs monthly and conduct quarterly conference calls Conduct a webinar to discuss strategies obtained from Survey*	Zone 24E: Zones 24 & 32 working together with all streams of governance **Zone 24W: RC, ARCs**	**Zone 24W: September** **Ongoing**	Year end

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	E. Member Attraction			
B.1	Survey club members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction Zone 24E: • See A -5 above - We will include this question on our survey which is nearly completed • We will also have a workshop on this issue • Have Survey translated into French and have content that is relevant to Quebec **Zone 24W:** • **Promote resources from RI and Zone 24-32 blog www.greatideastoshare.com** • **Include relevant topics in GETS training for DG, DGE, DGN, Membership chairs** • **Promote webinar topics and customize leadership development for district leaders** *Zone 32:* • *Use District Profiles as guides* *Use Survey from Strengthening your Membership or use survey on Great Ideas to Share.*	Zone 24E: ARC's , RC, DG's, DGN's DGE & Presidents **Zone 24W: RC, ARCs** *Zone 32: ARCs, RC, RPIC*	Zone 24E: November 2015	
B.2	Encourage and support districts to charter new Rotary clubs Zone 24E: • Examine Gender deficiencies; cultural targets, and geographical areas • Educate members on the different types of clubs **Zone 24W:** • **Assist District Leaders assess demographics and where new clubs would be desirable/feasible Assist District Leaders develop a plan to start a new club(s) including champions and sponsor clubs** *Zone 32:* • *Assess the district to determine what areas are underserved in areas such as diversity, gender, age, and profession.* • *Look at developing satellite clubs, after work clubs, e-clubs, retired persons clubs, leaders in*	Zone 24E: RC,ARC's, DG's, DGE, DGN **Zone 24W: RC, ARCs** *Zone 32: RC, ARCs, DG, Governor track.*	Zone 24E: Year end 2016	Each district will charter at least one new Rotary club

	the community clubs, and areas of education clubs. Look at developing corporate memberships, law enforcement clubs, and fire department clubs.			
B.3	Improve the gender diversity rate of club members Zone 24E: • See B2 – We will closely examine RCC for starting data • Develop a paper on what speakers/projects would/could appeal to individual genders and al genders **Zone 24W:** • **Monthly review of RCC data – action plan including possible groups to target** • **Include success stories, bright spots from clubs successful in this area** • **Promote "Women in Rotary" events** *Zone 32:* • *Use the District profile* *Assess your projects; be sure they appeal to broad range.*	Zone 24E: RC, ARC, DG, DGN, DGE **Zone 24W: RC, ARCs**	Zone 24E: Year end 2016	Improve the gender diversity rate of club members by at least 2 percentage points
B.4	Improve the age diversity rate of club members Zone 24E: • Encourage clubs to enter ages of members in RCC our research has shown that clubs put these ages in Club Runner and have NOT made any transitions to RCC • Look at programs that appeal to each age and encourage feedback from District Governors **Zone 24W:** • **Monthly review of RCC data – develop action plan and follow up (set targets)** • **Support New generations clubs –** • **Follow up with Alumni from New Generations, Youth Exchange** • **Promote and publish bright spots and best**	Zone 24E: RC, ARC, DG, DGN, DGE **Zone 24W: RC, ARCs**	Zone 24E: Year end 2016	Improve the age diversity rate of club members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points

	practices **Strategic planning at District level** *Zone 32:* • *Encourage someone you are considering asking to join to bring a friend who might also like to join. Inducting at least two similar members does make a difference.* *Sponsor a Young Professional event.*	*Zone 32: DG, RC, ARCs, Membership Chairs*		
B.5	Improve the racial/ethnic diversity rate of our members Zone 24E: • Assess our current "face of Rotary" – currently it is white male • Our Rotaract clubs reflect racial/ethnic diversity. • Encourage Rotaract Clubs to join Rotary Clubs • Rotaract clubs to use rotary clubs as mentors and vice versa **Zone 24W:** • **Monthly review of RCC data – develop action plan and follow up** • **Include success stories, bright spots from clubs successful in this area** • **Identify possible cultural groups/associations** **Strategic planning at District level** *Zone 32:* • *Use the District Profile or check out the census at your library and then contact the various ethnic groups through their organizations, different associations, religious organizations, fire, police, etc.* *Consider a multi-club International event as a service project.*	Zone 24E: RC, ARC, DG, DGN, DGE **Zone 24W: RC, ARCs** *Zone 32: RC, Presidents, DG, DGEs*	Zone 24E: Year end 2016	Improve the racial/ethnic diversity rate of our members by at least 2 percentage points.
B.6	Host one large project/event to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc. Zone 24E: • Support a walk for Polio/AIDS/Breast Cancer for all members of our community **Zone 24W:** • **D5040 Rotary Day of Dialogue – Vancouver – target Young Professionals and Alumni** • **D5360/5370/5550 – Young Professional's Forum** • **Encourage and support "Women in Rotary" events** • **Encourage district reps to attend above events** *Zone 32:*	Zone 24E: RC, ARC, **Zone24W: RC, ARC District Leaders** *Zone 32: RC, ARCs,*	**Zone 24W: November 21** **TBA Ongoing**	

	• *Survey for a community project with wide appeal and potential great publicity. Outline the skills needed, publicize the project with description of volunteers needed, time needed and input on the viability of the project,* *Follow up with all who asked questions but not available at the time but interested.*	*DGs, Membership*		

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	F. Member Engagement			
C.1	Increase new member sponsors Zone 24E: • With the assistance of DG's, identify the persons with "Membership Passion" and involve them in our quest **Zone 24W:** • **Encourage districts to find "champions" at each club** • **Identify and recognize new sponsors** • **Encourage best Practices – e.g. DG write an acknowledgement to member sponsor** • **Promote - Be a Vibrant Club – all tactics below** • **Share across zones D5040 Membership Task Force for Great Vancouver clubs** *Zone 32:* • *Collect data on member sponsors. Publish in Zone and district newsletters. Immediately recognize the sponsor in some way and on their yearly anniversary. Make it special for sponsor and member.* • *Spotlight successful sponsor and have them share what they are doing that is working.* • *ARCs will sponsor one new member.* *RC in Zone 32 will sponsor one new members*	Zone 24E: RC, ARC's, DG, DGE, DGN **Zone 24W:** **RC, ARCs District Leaders** *Zone 32:* *ARC/RC*	*Zone 32:* *Throughout the year*	Increase new member sponsors by at least 1 percentage point
C.2	Improve the member retention rate in each district Zone 24E: • Involvement in special projects • Follow up with new members • Follow up – why members leave? **Zone 24W:** • **Review and monitor RCC engagement indicators with DG, DGE, DGN** • **Develop plans, plan training, awards and recognition for clubs with high retention** • **Develop strategies – training, coaching, mentoring with low retention clubs** *Zone 32:* • *Part of the ARCs monthly DG call.* *Engage each Rotarian in a job of his/her choosing*	Zone 24E: RC, ARC's, DG, DGE, DGN **Zone 24W:** **RC, ARCs District Leaders** *Zone 32:*		Improve the member retention rate by at least 1 percentage point

	and one that instills pride in the job.	*ARCs*		
C.3	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute Zone 24E: • Each RC will send membership and retention numbers to Marty Helman. We have decided to have each of us take a quarter • Figures will be available for Zone institute using Rotary Club Central **Zone 24W:** • **RCs work together to develop monthly updates and reports for Beyond Borders newsletter and Zone Institute** *Zone 32:* • *Zone 32 is responsible for quarterly reporting of membership numbers to the Newsletter.* • *ARCs encourage their respective Membership districts to share their membership/retention numbers*	Zone 24E: RC **Zone 24W:** **RC** *Zone 32:* *Director, RC, ARCs*	Zone 24E: Monthly **Zone 24W:** **Monthly**	Zone 24E: Monthly figures to Marty Helman
C.4	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark Zone 24E: • See C3 – Once clubs are identified we will communicate with DG's **Zone 24W:** • **Identify clubs below benchmark** • **Develop strategies for strengthening clubs at risk here** *Zone 32:* • *Part of the ARC monthly communications with DG Distribute Report to DGE,DGs and track, and RPIC*	Zone 24E: RC, ARC's, DG, DGE, DGN, Club Presidents **Zone 24W:** **RC, ARCs** **District Leaders** *Zone 32:*	**Zone 24W:** **Quarterly**	
C.5	Increase My Rotary registration and usage Zone 24E:	Zone 24E:		Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club

	• During our trainings at assemblies, conferences, we will include the "how to" of My Rotary and its value to each individual **Zone 24W:** • **Monitor and discuss with DG** • **AGs are key here for working with clubs – offer training for AGs** • **Promote My Rotary - member access** *Zone 32:* • *ARC monitor monthly registration for their respective districts and report/discuss results with DG* *Stress "what's" in it for clubs to register and maintain RCC.*	RC, ARC's DG, DGN, DGE, Club Presidents, District Trainers **Zone 24W: RC, ARCs District Leaders** *Zone 32: RC, ARCs, DGE*	**Zone 24W: Ongoing**	members registered
C.6	Assist clubs and Rotarians at creating their Rotary story Zone 24E: • Include a session on the creation of all clubs and Rotarians in the "how to" of their Rotary Store **Zone 24W:** • **Goal is to publish 5 stories from each District in Zone 24W** • **Educate Districts and clubs on "where" and "how to"** • **Collaborate with RPIC, RRFC – One Rotary** *Zone 32:* • *Encourage club presidents, stress the value/benefit.* • *Develop an outline for club members to complete and create their own stories. Share those stories throughout their district. Review and revise as the year progresses.* *Coordinate with RPIC to record Rotary stories before and at District Conferences to show at district conference and post on website and all districtwide events.*	Zone 24E: RC, ARC, DG, DGN, DGE, Club Presidents, District Trainers, individual club members **Zone 24W: RC, ARCs, RPIC, RRFC District Leaders** *Zone 32: RPIC ARC, RC*	**Zone 24W: May 2015**	

2015-16 Regional Membership Plan Executive Summary and Action Plan
Region: North America (West Coast) – Zones 25 & 26

Profile

Region	North America (West Coast)
Zones	25 & 26
Director	Bradford R Howard
Project Lead	PDG Steve Lingenbrink
Rotary Coordinators	RC Stephen Lemmon, Zone 25 RC Rod Belton, Zone 26

Executive Summary

Goals/Objectives	Key Performance Indicators
A. Strengthen Clubs • **Build Dedicated District and Club Membership Teams** • **Utilize and Understand Rotary Club Central and other Rotary Resources** • **Club Assessment and Strategic Planning** • **Improve Awareness of Rotary Clubs in Communities**	• 100% of districts have a designated District Membership Committee Chair • Ensure 30% of clubs set and track at least 15 goals in Rotary Club Central.
B. Member Attraction • **Club Growth** • **Age/Gender/Ethnic Diversity**	• 75% of the Districts will provide multi-year club extension plan • Establish 20 new clubs in paired zones and 14 new satellite clubs • Improve the gender diversity rate of our members by at least 2 percentage points. • Improve the age diversity rate of our members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points.
C. Member Engagement • **Member Satisfaction** • **Retention**	• Improve the member retention rate by at least 1 percentage point • Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered.

2015-16 Action Plan

	Goals & Tactics	Responsibility	Target Attainment Date	Targets
	G. Strengthen Clubs			
A.1	Ensure districts have a designated District Membership Committee, Public Image (PI) and The Rotary Foundation (TRF) Chairs • All 23 Districts are offered New Focus Presentation • All 23 Districts are offered the TRF and PI Tracks	Director, RC, RPIC, RRFC, Project Lead, ARCs	15 November 2015	100% of districts have a designated District Membership Committee, Public Image (PI) and The Rotary Foundation (TRF) Chairs
A.2	Develop a trained district membership committee to support clubs; Provide templates and job descriptions for various Membership positions within district and clubs • Continue to refine and evolve The New Focus Presentation • Follow up with Districts on Now, 30 & 90 day action plan • Continue training New Focus Presenters / Facilitators • Print materials to support New Focus (Workbook) • Develop and include parallel Public Image and Rotary Foundation training track that engage membership	RC	30 June 2016	Take presentation to 100% of the districts Make presentations to at least 5,000 Rotarians, up 2% versus 2014-15.
A.3	Assist clubs in setting and tracking goals in Rotary Club Central	DG	30 June 2016	30% of Clubs set and track at least 15 goals in Rotary Club Central
A.4	Support clubs in updating website, social media and public image assets. • Create 3 videos (1-2, 3-4 and 5-6 minutes) with a working title of "The 'New' Voice of Rotary!" to be shown at TBD times in conjunction with the New Focus presentation. • Provide financially sustainable and consistent video with new voice to districts and clubs on "why" and "how" to update. • Provide free outward facing landing page templates and inform clubs of new templates for DACdb and Club Runner. • Video series to be shown at Zone presentations, Institutes, District Training Assemblies, Pre-PETS, PETS, District Conferences, and PE retreats. Also made digitally accessible to all districts and clubs	RPIC, District PI Chair	30 June 2016	30% of all cubs will have contemporized website, social media and public image assets.

	via the Zones 25/26 website.			
A.5	Supports clubs in conducting Club Assessments and developing a written multi-year membership strategy • Logistical Support to take Club Assessment process to districts and clubs	RC	30 June 2016	30% of clubs will have conducted a Club Assessment and developed a written multi-year membership strategy
A.6	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development • RCC Webinars • Follow up on New Focus Presentations	RC, RPIC	30 June 2016	By 1-January-2016 50% of clubs have set at least 15 goals in Rotary Club Central.

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	H. Member Attraction			
B.1	Survey club members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction • Join with other U.S. zones to use a survey, in conjunction with PETS to help club Presidents elect measure member satisfaction and help to determine how to strengthen it	Director, RC	30 June 2016	To be used in conjunction with 2016 PETS programs.
B.2	Encourage and support districts to charter new Rotary clubs • Implement new club extension software too. • Train District Membership team in use of the clue extension software. See B.5	DG + RC	30 June 2016	75% of the districts will establish multi-year club extension goals. 20 new clubs will be established, and 14 new satellite clubs
B.3	Improve the gender diversity rate of club members • See B.5	RC/Diversity Consultancy	30 June 2016	Improve the gender diversity rate of club members by at least 2 percentage points
B.4	Improve the age diversity rate of club members • See B.5	RC/Diversity Consultancy	30 June 2016	Improve the age diversity rate of club members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points
B.5	Improve the racial/ethnic diversity rate of our members • Update 2015-16 Census track data for club extension software • Create team of Zone leaders to act as a consulting group and advise districts and clubs on how to measure diversity, assess the opportunity for membership growth and construct a multi-year plan to achieve greater age, gender and ethnic diversity. • For logistical and travel support of the diversity consultancy to get into a third of all districts in both zones	RC/Diversity Consultancy	30 June 2016	Improve the racial/ethnic diversity rate of our members by at least 2 percentage points.
B.6	A three day Summit that will engage two to three Young Professionals and two to three	Director, RC, ARCs , Project	30 June 2016	To have at least 75% of the Districts participate

	district/membership leaders from each of the 23 district to develop a collaborative plan and program to engage young professionals over the next 2 years. • Young Professionals Summit – Held at University of California's Haas School of Business with Haas Professors facilitating the Summit • Track the engagement and success of the Young Professionals following the summit.	Lead, RPICs, DGs, Club Presidents, Membership Chairs		with 100 total attendees – three Young Professionals and three district Rotary leaders. For the attendees to walk away with a Young Professional Engagement Plan for each attending districts.

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	I. Member Engagement			
C.1	Increase new member sponsors	N/A		
C.2	Improve the member retention rate in each district • Supported by the New Focus Program	DG	30 June 2016	Improve the member retention rate by at least 1 percentage point
C.3	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute • Supported by Membership Metric Manager (C.4)	See C.4	30 June 2016	
C.4	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark • Generate additional statistics for the club leadership to help them recognize retention issues, improve goal setting, and track achievement of goals	Project Lead, Membership Metric Manager (MMM)	30 June 2016	Monthly membership reports to districts Better data generation to be used for training, business assessment and goal setting/attainment.
C.5	Increase My Rotary registration and usage	DG	30 June 2016	Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered
C.6	Assist clubs and Rotarians at creating their Rotary story	N/A	30 June 2016	
C.7	Training RI Membership Staff person for Zone Membership familiarization to Zone 25-26	RC, Membership Lead & Director	30 June 2016	To engage the RI regional membership staff person within the zones to meet both Zone and district leadership engaged in membership effort.

2015-16 Regional Membership Plan Executive Summary and Action Plan
Region: North America (Midwest) - Zones 28 & 29

Profile

Region	North America (Midwest)
Zones	Zones 28 & 29
Director(s)	Jennifer Jones
Project Lead	PDG Pam Harkema and Assistant Project Lead Patty Meehan
Rotary Coordinators	Tamara Koop, Zone 28 Chris Etienne, Zone 29

Executive Summary

Goals/Objectives	**Key Performance Indicators**
A. Strengthen Clubs • **Build Dedicated District and Club Membership Teams** • **Utilize and Understand Rotary Club Central and other Rotary Resources** • **Club Assessment and Strategic Planning** • **Improve Awareness of Rotary Clubs in Communities**	• 100% of districts have a designated District Membership Committee Chair • Ensure 30% of clubs set and track at least 15 goals in Rotary Club Central.
B. Member Attraction • **Club Growth** • **Age/Gender/Ethnic Diversity**	• Each district will charter at least one new Rotary club. • Improve the gender diversity rate of our members by at least 2 percentage points. • Improve the age diversity rate of our members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points.
C. Member Engagement • **Member Satisfaction** • **Retention**	• Increase new member sponsors by at least 1 percentage point. • Improve the member retention rate by at least 1 percentage point • Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered.

2015-16 Action Plan

	Goals & Tactics	Responsibility	Target Attainment Date	Targets
	J. Strengthen Clubs			
A.1	Ensure districts have a designated District Membership Committee Chair	Director, RC	1 July	100% of districts have a designated District Membership Committee Chair
A.2	Develop a trained membership committee to support clubs; Provide templates and job descriptions for various Membership positions within district and clubs. • Hold webinar to train Coordinator Team on "One Rotary Summit" curriculum • Conduct "One Rotary" training at Institute with 2016/2017 District Membership Chairs, District Trainers, District Regional Foundation Chairs, Coordinators, Assistant and the DG chain • Engage all clubs and districts with understanding of the 2015-16 membership plans through strategic communication, coordinated training initiatives, and re-enforced with publications. • Create One Rotary Summit training events hosted in each Rotary district as a one day intensive training for clubs • Create and distribute a membership tool-kit for clubs • Align year-long training objectives through training calendar with metrics. • Include DMCs at Zone Institute in September 2015. • More actively engage the ARCs to work directly with their districts and their clubs and measure the interaction by including the ARCs at Zone Institute. ARCs will engage with RCs to ensure a unified message and information is shared with all attendees.	Director Elect Zone cabinet Leads RC ARC ARCs	May 2015 September 2015 October 2015 Fall 2015 Fall 2015 September 2015 Ongoing	100 DGE and DGN and Zone cabinet team 100% District Participation Rate
A.3	Assist clubs in setting and tracking goals in Rotary Club Central • Clubs submit updated membership information at least monthly on Rotary Club Central to include: member date of birth, sponsorship information, gender, etc. Increase use of Rotary Club Central for goal setting, day-to-day decision making,	DG/E, Club leaders, Club Secretaries RC Team, DG/E,	Monthly Fall 2015 &	50% of Clubs set and track at least 15 goals in Rotary Club Central

	accountability and reporting for 100% clubs with full membership data entered and used. • Provide Rotary Club Central instruction for all DGEs at GETS; Club Presidents-elect at PETS; Secretaries-elect at District Training Assembly; and other training opportunities such as webinars or One Rotary Summit • Incent clubs who increase their participation on Rotary Club Central. (Up to $500 per club if they raise their compliance of RRC by 10%) Ensure that the leadership team is fully trained on Rotary Club Central. Clubs use the incentive to participate in Zone Institute to share and engage in the One Rotary Message. Message embraced by clubs on a deeper level with this participation.	RI Staff, Zone and district trainers	Spring 2016 Fall 2015	
A.4	Support clubs in updating website, social media and public image assets. • Strengthen identity with use of Rotary branding, displaying club meeting placards, district pull up banners, adding/using branding on websites and use the Active Voice and Values. • Provide direct training to RPICs at Zone Institute to support clubs and districts as to creating the unified message through proper use of Rotary Branding.	DG/E, DMC, RPIC/DPIC	Fall 2015	30% of all clubs will have rejuvenated website, social media and public image assets. Strive for 100% compliance of Rotary's Strengthened Brand on Club and District Websites.
A.5	Supports clubs in conducting Club Assessments and developing a written multi-year membership strategy • Survey districts to create base information as to which districts and clubs that are already certified in Club Visioning and Strategic Planning. Encourage each club to conduct Club Visioning/Assessment to develop a written multi-year strategy and structure to build and maintain attractive and inviting clubs for current and prospective members. • Provide clubs with names of resources who can assist with visioning. Provide clubs with information about models for how visioning can be completed.	Zone Trainer, RC, DG/E	Fall 2015	30% of clubs will have conducted a Club Assessment and developed a written multi-year membership strategy
A.6	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development • Create Zone Communications Officer and team to coordinate the Districts report of successes to RID which are shared through newsletters, zone website, RC team, and	RID	July 2015 through June 2016	

	other strategic communications.			

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	K. Member Attraction			
B.1	Use Survey Monkey to email survey to all club members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction	Membership project leads and RCs to develop. Deployed by Zone trainers	Q1	All clubs in Zone 28/29
B.2	Encourage and support districts to charter new Rotary clubs • Establish new club development program to assist districts in how to form new clubs. All districts complete initial assessment for viability of new club development. • Identify areas (from B.1 initial assessments) of opportunity within districts that are appropriate for development of new clubs, including: ○ alternative meeting days and times: weekend, Saturday afternoon meetings/socials ○ meeting formats (e-clubs, satellite clubs, no mandatory meal and associated costs ○ Clubs targeted at specific demographics (younger members, culturally diverse clubs, etc.)	RC Team to develop. Introduce at One Rotary Summit District Membership Chairs, DG/E	Q1 Ongoing	Each district will charter at least one new Rotary club
B.3	Improve the gender diversity rate of club members • Focus on membership diversity including balance in gender. Provide specific and intentional training at Zone Institute in this critical area. Engage female community/business leaders. Pilot relationship building at the corporate level to encourage membership in Rotary as a corporate directive for every store/enterprise in a business chain. Especially focus on leadership development and skill building provided through Rotary involvement to less experienced employees and younger employees. A special youth Entrepreneur kit will be provided to the Youth Attendees created by our Honorary Chair, John Barfield. It includes a copy of his just released book called Starting from Scratch-The Humble Beginning of a Two Billion Dollar Enterprise, and a tool kit he has created for young people. Mr Barfield will be leading a session with our	DMC / DG/E, club members This specific goal is driven by the zone leadership although a local model can be implemented by districts or clubs. RID	Fall 2015	Improve the gender diversity rate of club members by at least 2 percentage points

	youth participants to show them how to use the tool kit.			
B.4	Improve the age diversity rate of club members • Provide ideas for regenerating clubs to engage younger members. Encourage districts to promote three ideas and for clubs to commit to one idea. • Engage Rotary's Young Professionals. There are four dynamic young leaders from our paired Zones that attended this event in the fall 2014. We are going to leverage their knowledge and enthusiasm and create an event that will attract attention from Rotarians, non- Rotarians, the media and the public at large. This is a BIG plan – stay tuned.	Zone Trainer, RC, Membership Leads, DG / DMC, Club leaders	Q1	Improve the age diversity rate of club members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points
B.5	Improve the racial/ethnic diversity rate of our members • Focus on membership diversity including ethnicity and religions representative of the area. Provide specific and intentional training at Zone Institute in this critical area.	DMC / DG/E, club members	September 2015	Improve the racial/ethnic diversity rate of our members by at least 2 percentage points.
B.6	Host one large project/event to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc. • Involve Interact and Rotaract students from districts. • 200 Youth Attendees at Zone Institute (Rotaract, Interact , Youth Exchange and Disadvantaged Youth from Metro Detroit) • Public Image Event at Detroit Institute. We have secured the "Spirit of Detroit", a large scale iconic statue in downtown Detroit. This is for the creation of a giant "End Polio Now" T Shirt that will clad this statue for 2 weeks. The reveal will happen with a large scale flash mob during our Institute in Detroit. We will have professional photographers capturing the event.	DG/E	September 2015	
B.7	Add new members to existing clubs (New member attraction per engagement of every Club member) • Identify alternate membership types and provide this information to Clubs including Family membership, Business membership. Provide clubs with information about RI club support contacts who can facilitate and assist with these.	DMC / club leaders	Ongoing	

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	L. Member Engagement			
C.1	Increase new member sponsors • Track membership numbers and share through communications		July through June	Increase new member sponsors by at least 1 percentage point
C.2	Improve the member retention rate in each district • Monitor districts with greatest percentage of increase and decrease; Solicit best practices from districts with strong retention and provide them to districts with weaker retention.	Membership project leads with assistance from RC team	Ongoing	Improve the member retention rate by at least 1 percentage point
C.3	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute • Create One Rotary communication	RID	Monthly	
C.4	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark • Provide training for the Leadership team to use the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark.	RC Team	Quarterly	
C.5	Increase My Rotary registration and usage • Host Webinar with focus on My Rotary use		Q1	Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered
C.6	Assist clubs and Rotarians at creating their Rotary story • Host Webinar with My Rotary Story as subject	RPIC ARPICS	ongoing	
C.7	Create monthly video training or update sessions, not more than 15-20 minutes with information from the RID or other subject matter experts. Subjects to include are My Rotary, My Rotary story and additional topics as suggested by surveys and feedback.	RID, Trainers, RC team, subject matter experts.	Monthly	

2015-16 Regional Membership Plan
Region: North America (Midsouth) - Zones 30 & 31

Profile

Region	North America
Zones	30 & 31
Director	Karen Wentz
Project Lead	PDG Gregory Yank
Rotary Coordinators	RC Glen Vanderford, Zone 30 RC Ed Hardesty, Zone 31

Executive Summary

Goals/Objectives	Key Performance Indicators
A. Strengthen Clubs • **Build Dedicated District and Club Membership Teams** • **Utilize and Understand Rotary Club Central and other Rotary Resources** • **Club Assessment and Strategic Planning** • **Improve Awareness of Rotary Clubs in Communities**	• 100% of districts have a designated District Membership Committee Chair • Ensure 30% of clubs set and track at least 15 goals in Rotary Club Central. • Membership for Zones 30-31 to be 65,000 by 6/30/16
B. Member Attraction • **Club Growth** • **Age/Gender/Ethnic Diversity**	• Each Zone will charter at least two new Rotary clubs. • Improve the gender diversity rate of our members by at least 2 percentage points. • Improve the age diversity rate of our members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points.
C. Member Engagement • **Member Satisfaction** • **Retention**	• Increase new member sponsors by at least 1 percentage point. • Improve the member retention rate by at least 1 percentage point • Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered.

2015-16 Action Plan

	Goals & Tactics	Responsibility	Target Attainment Date	Targets
	M. Strengthen Clubs			
A.1	Ensure districts have a designated District Membership Committee Chair Tactic – This will be emphasized at the summer HOA (Heart of America) leadership seminars and specifically at the **Membership Growth Opportunities (MGO)** program; follow up in August with those districts that do not and encourage them to make these appointments	Director, RC ARCs	9/15 9/15	100% of districts have a designated District Membership Committee Chair and half the districts have a New Club Development Chair
A.2	Develop a trained membership committee to support clubs; Provide templates and job descriptions for various membership positions within district and clubs Tactic – The MGO program will be rolled out" in both Zones via 8 cluster training meetings following summer HOA leadership seminars. The target audience at each cluster meeting is district and club membership chairs for 3-4 districts in each cluster	RCs, ARCs and Project Lead RCs and ARCs	9/1/15 6/30/16	3 (1 in June of 2014)new membership interactive training sessions will be "pilot tested" at Heart of America HOA leadership sessions summer 2015 on 7/10, 7/24 and 7/31 20 Rotarians in each cluster for a total of 160 exposed to this membership program
A.3	Assist clubs in setting and tracking goals in Rotary Club Central Tactic – Conduct at least 2 webinars on Rotary Club Central; discuss at the HOA leadership seminars; ARCs to work one on one with their assigned districts and at PETS on spring of 2016	ARCs	Quarterly	30% of Clubs set and track at least 15 goals in Rotary Club Central
A.4	Support clubs in updating website, social media and public image assets. Tactic – ARC/RPICS to work with each of their assigned districts after first and second quarter; RPICS to track and evaluate use of assets	RPICS/ARPICs	6/30/16	30% of all cubs will have rejuvenated website, social media and public image assets.
A.5	Supports clubs in conducting Club Assessments and developing a written multi-year membership strategy; Tactic – The MGO curriculum will include this and the trained district teams will encourage this; Tactic – The survey piece of the club visioning process contributes to this	RCs, ARCs, Project lead	6/30/16 1/1/16	30% of clubs will have conducted a Club Assessment and developed a written multi-year membership strategy;

	Tactic - Continue to encourage districts to commit to the Club Visioning process; 10 districts already doing club visioning Tactic – Follow up with those districts (6) who already have expressed interest in the Club Visioning process and secure a date to get their district team of facilitators trained Tactic – Hold a special webinar on Club Visioning for the Regional Coordinator teams (RC, ARC, RPICS, ARPICS and RRFC and their assistants Tactic - Project Lead and RCs to present at 4 PETS on membership, club planning and visioning		4/15/16	6 districts will train facilitation teams in Club Visioning with 10% of Clubs in those participating districts completing a Visioning event;
A.6	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development	RCs	ongoing	There will be at least one webinar per month covering a variety of topics to include: Rotary Club Central, Club Visioning, Membership, etc.

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	N. Member Attraction			
B.1	Survey club members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction Tactic - RCs and their teams attend all PETS and District Assemblies to educate DGEs, DGNs and club presidents Tactic – Hold 8 regional MGO cluster training sessions in the 2 Zones addresses these issues; total of 160 to be trained who then will go out and do this training with clubs in their districts. Tactic – Identify and develop a Survey Monkey on line member satisfaction survey and incorporate into the MGO program. Tactic – Get ARCs familiar through a webinar with key support documents/club assessment tools available at RI to enable them to help their districts: 1. Strengthening your Membership: Creating your Membership Development Plan 2. Be a Vibrant Club 3. Effective Public Relations for a Rotary Club 4. Connect for Good	RCs and ARCs	4/15/16 6/30/16	Attend all multi-district PETS in Zones 30 and 31 Attend District Assemblies in 50% pf districts in each Zone
B.2	Encourage and support districts to charter new Rotary clubs Tactic – New Club formation including innovative, flexible and traditional clubs will be a module in the MGO curriculum	RCs, ARCs/project lead	6/30/16	4 new clubs in each Zone including satellite clubs.
B.3	Improve the gender diversity rate of club members Tactic – ARCs make sure the districts know what their % is and monitor quarterly; 10 districts are under 25% and 3 of these are 20% or less Tactic - ARCs work with their assigned districts in particular to get them to 25% Tactic – Attracting women in Rotary will be included in the MGO curriculum Tactic – A model power point presentation for districts and clubs will be developed illustrating effective	RCs/ARCs	ongoing	Districts will have a minimum of 25% women and work toward a goal of 27% women

	strategies. Tactic – the Zones 30-31 2015 Institute in Baton Rouge will include a session on "Women in Rotary": Opportunities and Action			
B.4	Improve the age diversity rate of club members Tactic – Ensure districts and clubs know what the current % is and what the targets are; Zone 30 6.4% under 40 and Zone 31 has 6.9% under 40; 38.5% unreported. This will be part of MGO curriculum	RCs/ARCs	ongoing	Increase the percent of members under the age of 40 from 6.7% to 8%
B.5	Improve the racial/ethnic diversity rate of our members Tactic – Provide sources of information (geographic mapping, etc.)to enable districts to assess there they are with this issue. This will be included in the MGO curriculum	RCs/ARCS	ongoing	Improve the racial/ethnic diversity rate of our members by at least 2 percentage points.
B.6	Host one large project/event to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc. Tactic – Director working with Regional Coordinator teams to identify project for February 2016	Director/RCs	12/15	A Zone wide project will be encouraged and supported

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	O. Member Engagement			
C.1	Increase new member sponsors	RCS, ARCs	6/30/16	Increase new member sponsors by at least 1 percentage point
C.2	Improve the member retention rate in each district Tactic – MGO program curriculum to address this including strategies Tactic – Compile and send to districts their specific new member and existing member retention percentages; special focus to be placed on districts below 70%	RCs, ARCS and Project lead	6/30/16	Each district to achieve at least a 73.5% retention rate
C.3	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute	RCs, Project lead and Director	ongoing	Monthly reports on membership and success stories to be included in Zones 30-31 "Heart Beat" newsletter
C.4	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark Tactic – Project Lead to analyze data for use by the RCs and ARCs working with the DGs	Project Lead, RCs and ARCs		
C.5	Increase My Rotary registration and usage Tactic – Included in MGO program Tactic – Quarterly reviews by respective ARC and follow up with those districts that have not yet achieved this % with their clubs	ARCs		Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered
C.6	Assist clubs and Rotarians at creating their Rotary story Tactic – Conduct a webinar on this topic	RPICs and their teams		

2015-16 Regional Membership Plan Executive Summary and Action Plan
Region: North America (Southeast & Caribbean) – Zones 33 & 34

Profile

Region	North America (Southeast & Caribbean)
Zones	33 & 34
Director	Robert L. Hall
Project Lead	PDG Russ Miller
Rotary Coordinators	RC Paula Matthews, Zone 33 RC Arthur MacQueen, Zones 34

Executive Summary

Goals/Objectives	**Key Performance Indicators**
A. Strengthen Clubs • **Build Dedicated District and Club Membership Teams** • **Utilize and Understand Rotary Club Central and other Rotary Resources** • **Club Assessment and Strategic Planning** • **Improve Awareness of Rotary Clubs in Communities**	• 100% of districts have a designated District Membership Committee Chair • Ensure 30% of clubs set and track at least 15 goals in Rotary Club Central
B. Member Attraction • **Club Growth** • **Age/Gender/Ethnic Diversity**	• Each district charter at least one new Rotary clubs. • Improve the gender diversity rate of our members by at least 2 percentage points. • Improve the age diversity rate of our members by increasing the number of Rotarians under the age of 40 by at least 2 percentage points.
C. Member Engagement • **Member Satisfaction** • **Retention**	• Increase new member sponsors by at least 1 percentage point. • Improve the member retention rate by at least 1 percentage point • Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered.

2015-16 Action Plan

	Goals & Tactics	Responsibility	Target Attainment Date	Targets
	A. Strengthen Clubs			
A.1	Ensure districts have a designated District Membership Committee Chair • ARCs and RCs contact each District Membership Chair and obtain committee structure and members	Director, RC ARCs, RCs	1 July 1 July	100% of districts have a designated District Membership Committee Chair
A.2	Develop a trained membership committee to support clubs; Provide templates and job descriptions for various Membership positions within district and clubs • Monitor Districts to see how many clubs have entered goals • Monitor number of Districts with Strategic Plans • Monitor Districts to see how many clubs have done an assessment or strategic plan	RCs, ARCs, RPICs, ARPICs, RRFCs, ARRFCs	Ongoing throughout the year	75% of Districts participate in Zone Training Seminars. # of membership training seminars. # of Sample templates and Job Descriptions submitted to RI # of clubs using RCC to set goals # of club assessments # of Districts with Strategic plans # of Clubs with Strategic Plans
A.3	Assist clubs in setting and tracking goals in Rotary Club Central • Part of the message when making a club presentation • Support Districts at Assemblies, PETS, and seminars. Based on 14-15 invitations and feedback: ✓ Peachstate PETS ✓ Florida PETS ✓ Chesapeake PETS ✓ Carolina PETS ✓ WV PETS ✓ 6890 Assembly & Conference ✓ 6900 Assembly ✓ 6910 Assembly ✓ 6920 Assembly ✓ 6930 conference ✓ 6940 Membership Seminar ✓ 6950 leadership training ✓ 6950 conference ✓ 6960 assembly	RCs, RPICs, RRFCS, ARCs, ARPICs, ARRFCs RCs, RPICs, RRFCS, ARCs, ARPICs, ARRFCs	1 May May, June 2016 The timing for these events varies over the course of the year from August through Rotary year end	30% of Clubs set and track at least 15 goals in Rotary Club Central The goal is to not only present at these events again, but to gain access to additional events based on this past year's success in doing so. Track feedback and create a testimonial section on the zone newsletter.

	✓ 6960 conference ✓ 6970 four legged event ✓ 6980 assembly ✓ All Georgia Membership Seminar ✓ 7000 assembly ✓ 7020 PRE-PETS, PETS, Assembly, Conference ✓ 7020 Leadership Training Seminar ✓ 7030 PRE-PETS, PETS, Assembly, Conference ✓ 7530, 7550 Assembly, Conference ✓ 7570 PETS, Assembly ✓ 7600 assembly ✓ 7610 assembly ✓ 7620 assembly ✓ 7620 assembly, conference ✓ 7630 assembly, conference ✓ 7670 assembly, conference ✓ 7680 assembly, conference ✓ 7690 assembly, conference ✓ 7710 assembly, conference ✓ 7720 assembly, conference ✓ 7730 assembly, conference ✓ 7750 assembly, conference ✓ 7770 assembly, PETS ✓ Zone 33 training seminar ✓ Zone 34 training seminar ✓ Zone 33/34 team training ✓ Direct Club visits ✓ Jamaica Interclub Assembly ✓ New District Assembly and Conference opportunities			
	• Club Central session at Zone training seminar	RCs, RPICs, RRFCS, ARCs, ARPICs, ARRFCs	May, June 2016	Increase the use and understanding of RCC, helps clubs attain their goals of Presidential Citation
	• Increase postings to Rotary Showcase and participation in Rotary Discussion Groups	RCs, RPICs, RRFCS, ARCs, ARPICs, ARRFCs	May, June 2016	Ties in with the use of our website and the tools available. Increase usage. Helps clubs attain their goals of Presidential Citation

	• Promote participation in Rotary Discussion Groups	RCs, RPICs, RRFCS, ARCs, ARPICs, ARRFCs		Ties in with the use of our website and the tools available. Increase usage. Helps clubs attain their goals of Presidential Citation
A.4	Support clubs in updating website, social media and public image assets. • Identify clubs lacking in a social media presence or outdated presence • Set baseline % based on gathered information • Develop a template for helping clubs in need, and provide.	RPICS, ARPICS, RRFCs, ARRFCs RCs, ARCs RPICs, ARPICs RPICs, ARPICs	ongoing ongoing	RCs, ARCs when they identify will share the information with RPICs, ARPICs 30% of all cubs will have rejuvenated website, social media and public image assets.
A.5	Supports clubs in conducting Club Assessments and developing a written multi-year membership strategy • Assistance required from RI in refining Club Central for identification of current plans. 'Our Club Has a Strategy Plan' yes or no??? What type of plan, what time frame • Provide strategic planning workshops at 'assemblies, Pre PETS, PETS, and Zone Training Seminars ✓ Peachstate PETS ✓ Florida PETS ✓ Chesapeake PETS ✓ Carolina PETS ✓ WV PETS ✓ 6890 Assembly & Conference ✓ 6900 Assembly ✓ 6910 Assembly ✓ 6920 Assembly ✓ 6930 conference ✓ 6940 Membership Seminar ✓ 6950 leadership training ✓ 6950 conference ✓ 6960 assembly ✓ 6960 conference ✓ 6970 four legged event ✓ 6980 assembly ✓ All Georgia Membership Seminar ✓ 7000 assembly ✓ 7020 PRE-PETS, PETS, Assembly, Conference ✓ 7020 Leadership Training Seminar	RC Art will request RCs, RPICs, RRFCS, ARCs, ARPICs, ARRFCs These costs are associated to a number of bullet points throughout this plan	1 July 15 Throughout the year 1 Aug 15 to June 2016	30% of clubs will have conducted a Club Assessment and developed a written multi-year membership strategy The goal is to not only present at these events again, but to gain access to additional events based on this past year's success in doing so. Track feedback and create a testimonial section on the zone newsletter.

	✓ 7030 PRE-PETS, PETS, Assembly, Conference ✓ 7530, 7550 Assembly, Conference ✓ 7570 PETS, Assembly ✓ 7600 assembly ✓ 7610 assembly ✓ 7620 assembly ✓ 7620 assembly, conference ✓ 7630 assembly, conference ✓ 7670 assembly, conference ✓ 7680 assembly, conference ✓ 7690 assembly, conference ✓ 7710 assembly, conference ✓ 7720 assembly, conference ✓ 7730 assembly, conference ✓ 7750 assembly, conference ✓ 7770 assembly, PETS ✓ Zone 33 training seminar ✓ Zone 34 training seminar ✓ Zone 33/34 team training ✓ Direct Club visits ✓ Jamaica Interclub Assembly ✓ New District Assembly and Conference opportunities • Train the trainers for visioning			Working on timing now with visioning team in order our coordinator teams can provide clubs with greater tools for self assessment and improvement
A.6	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development • Continuing our webinar series from 14-15 and expanding it from zone 33 to 34 as well. Six webinars will be conducted during 15-16 • Expand the invitation list to the webinar series • Maintain existing and new webinars in Zone 34 Membership Dropbox for any member review or download	RCs, ARCs ARCs RCs, ARCs	4 by 1 Dec 2 by 1 May Ongoing Ongoing	Initial goal of 50+ attendees with the desired outcome to max out the bridge capacity of 100 making this a must do and must sign up early, benefit to our membership

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	B. Member Attraction			
B.1	Survey club members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction • This will not occur in GA, FL, parts of the Caribbean this year as it happened 2014-15. Survey fatigue will impact participation. • Continue to implement club improvements, club visioning and planning based on the 14-15 surveys in Z34 • Club surveys at the club level are a different discussion and will be encouraged as they are part of any strategic planning process	RPICS, ARPICS, RRFCs, ARRFCs RCs, ARCs, DGs, DGEs, DGNs, Membership Chairs, ALL	All aspects are ongoing	Increase individual club survey activity in order to increase club strategic planning
B.2	Encourage and support districts to charter new Rotary clubs • Provide District club meeting profiles based on Club Central data as to underserved, days, times for actionable club alternative meetings	RCs, ARCs support District Membership and Extension Chairs RCs, ARCs	Ongoing Aug 1	Each district will charter at least one new Rotary Club Provide guidance, direction, and assistance as it presents itself to charter new clubs. Track any ongoing efforts to create new clubs Provide to all sitting DGs and membership chairs; schedule a call to discuss if DG is receptive. New club recognition in the monthly zone newsletter
B.3	Improve the gender diversity rate of club members ▪ Keep it part of our message at every opportunity	RPICS, ARPICS, RRFCs, ARRFCs RCs, ARCs, DGs, DGEs, DGNs, Membership Chairs, ALL	Ongoing June 30, 2016	Improve the gender diversity rate of club members by at least 2 percentage points. Provide quarterly updates via the zone newsletter and new reports available from RI
B.4	Improve the age diversity rate of club members ▪ Keep it part of our message at every opportunity	RPICS, ARPICS, RRFCs, ARRFCs RCs,	Ongoing June 30, 2016	Improve the age diversity rate of club members by increasing the number of Rotarians under the age of

		ARCs, DGs, DGEs, DGNs, Membership Chairs, ALL		40 by at least 2 percentage points Provide quarterly updates via the zone newsletter
B.5	Improve the racial/ethnic diversity rate of our members ▪ Keep it part of our message at every opportunity	RPICS, ARPICS, RRFCs, ARRFCs RCs, ARCs, DGs, DGEs, DGNs, Membership Chairs, ALL	Ongoing June 30, 2016	Improve the racial/ethnic diversity rate of our members by at least 2 percentage points. Provide quarterly updates via the zone newsletter
B.6	Encourage Districts to host one large project/event to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc. • Encourage Districts and Clubs to view all events as membership attraction events and provide club and Rotary information at such events • Encourage YP Summit, Gender, diversity, in District clusters (SC, GA, NC, FL, islands in 7020, 7030) • Youth Panel Discussion will be held at zone institute. • Remind DGs and District leadership of award opportunities and deadlines for recognizing Rotaract and Interact Clubs with Presidential Citations and Zone awards when available	RPICS, ARPICS, RRFCs, ARRFCs RCs, ARCs, DGs, DGEs, DGNs, Membership Chairs, ALL Organizing committee RCs, ARCs	Ongoing June 30, 2016 Oct 2015 1 Mar 16 1 Apr 16	Always part of our message, costs nothing to encourage # of attendees at a summit Number of clubs attaining recognition for their New Gen Clubs

	Goals and Tactics	Responsibility	Target Attainment Date	Targets
	C. Member Engagement			
C.1	Increase new member sponsors • Keep it part of our message at every opportunity	RCs, ARCs, RPICS, ARPICs, RRFCs, ARFCs, DGs, DGEs, DGNs, Membership Chairs, ALL	Ongoing throughout the year	Increase new member sponsors by at least 1 percentage point Presented at every opportunity outlined in A.3
C.2	Improve the member retention rate in each district • Continue to provide clubs the tools for self evaluation and plans engaging and meeting the expectations of their members	RCs, ARCs, RPICS, ARPICs, RRFCs, ARFCs, DGs, DGEs, DGNs, Membership Chairs, ALL	Ongoing throughout the year	Improve the member retention rate by at least 1 percentage point
C.3	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute • Provide monthly membership numbers to zone newsletter editor for publication • Recognize successful Districts and Clubs in zone newsletter • Zone newsletter to be distributed to all members in Zone 33 & 34	RCs ARCs, RCs Newsletter editor	Ongoing throughout the year	Recognition drives behavior and the anticipated result is more districts striving to be recognized.
C.4	Utilize the Club Viability Report in all training to identify clubs with retention rates below The Membership Plan benchmark.	ARCs. RCs	ongoing	Increase in retention rate
C.5	Increase My Rotary registration and usage • Present the value and encourage participation at all club visits and district events when participating • Sign up and train at zone training seminar • When at PETS, Assemblies or Conferences, have a computer available and assist in sign up	RCs, ARCs, RPICS, ARPICs, RRFCs, ARFCs, DGs, DGEs, DGNs, Membership Chairs, ALL RCs, RPICs, RRFCS, ARCs, ARPICs,	Ongoing Ongoing May or June 2016 May, June 2016 The timing for these events	Increase the number of members registered in My Rotary by encouraging clubs to have 50% of their club members registered

		ARRFCs	varies over the course of the year from August through Rotary year end	
C.6	Assist clubs and Rotarians at creating their Rotary story	RPIC, ARPICs, RCs, ARCs,	Ongoing	Number of times telling you're Rotary story is included in your club and district presentations, events.