

2014-15 Regional Membership Plan Executive Summary & Action Plan

Region: North America – Zones 21b & 27

Region	North America
Zones	21b and 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
30 June 2015 Goal	48,912

Executive Summary

Goals/Objectives

Key Performance Indicators

A. Member Attraction	Target: 3% net membership growth by implementation of multi-year strategic membership plan and training curriculum. Measure: Membership reports
B. Member Engagement	Target: Increase retention rate by 3% in Zone 21b & 27. Measure: Rotary Club Central & membership reports
C. Strengthen Clubs Club Assessment and Strategic Planning Diversity <ul style="list-style-type: none"> Attract and Engage Members < Age 40 Improve Gender Balance within Clubs and Districts Improve ethnic and vocational diversity in clubs Improve Awareness of Rotary Clubs in Communities	Target: Increase by 2% younger and underrepresented populations Measure: Membership data reports
D. Build Dedicated District and Club Membership Teams	Target: All Districts will have an opportunity to create effective District Membership Teams (DMT) by participating in Zone training events that will enable them to work directly with their clubs. Measure: Zone training enrollment and District reports
E. Utilize and Understand Rotary Club Central and other Rotary Resources	Target: District Membership teams will be provided training on Rotary Club Central and other Rotary Resources Measure: Number of clubs using Rotary Club Central.

Action Plan

	Goal	Responsibility	Target Completion Date
A. Member Attraction			
A.1	Add at least 1 Club per district per year	RC, DG, District Membership Team (DMT)	6/30/2015
A.2	Identify areas of opportunity within districts that are appropriate for development of new clubs, including: <ul style="list-style-type: none"> • 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, DG, AG, DMT	ongoing
A.3	Add new members to existing clubs	RC, DG, AG, DMT	6/30/2015

	Goal	Responsibility	Target Completion Date
B. Member Engagement			
B.1	Survey members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction	RC, DG, DMT	5/30/2015
B.2	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	RCs & Project Leads	Ongoing

	Goal	Responsibility	Target Completion Date
C. Strengthen Clubs			
C.1	Schedule each club to do 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 Completed by clubs on their own or with the help of a Club Visioning expert like Steve Wilcox.	RC, DG & DMT	6/30/2015
C.2	Implement district programs on: <ul style="list-style-type: none"> • Club leadership plan • Retention Strategies and best practices. • Strategic Planning 	DG, DMT & AG, RC	Ongoing
C.3	Charter new Rotary clubs where younger groups may feel more comfortable	Director, RC, ARC, RRFC, RPIC, DG & DMT	Ongoing
C.4	Host one large project to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc.	RC, ARCs , Project Leads, RPICs, DGs, Club Presidents,	6/30/2015

		Membership Chair	
C.5	Engage female community/business leaders	DG Membership Chairs	Ongoing
C.6	Teach clubs to implement Strengthening Rotary Initiative	District PR Chair	Ongoing
C.7	Assist clubs and Rotarians at creating their Rotary story	RC, ARCs , RPICs, DGs, Club Presidents, Membership Chair	Ongoing

	Goal	Responsibility	Target Completion Date
D. Build Dedicated District and Club Membership Teams			
D.1	Develop a large trained membership committee to support your clubs. (RC Team will help train); Provide templates and job descriptions for various Membership positions within District and Clubs	RC, ARCs	Ongoing
D.2	Train club leadership at District Assembly (RC Team to help)	Membership Committee, RCs, ARCs	6/30/2015
D.3	Share best practices, resources and innovative ideas with district and club leaders in support of membership and RI strategic priorities	RC, ARC and others designated	Ongoing
D.4	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development	RC, ARC and others designated (DG, DGE, DMC, Project Leads)	Ongoing

	Goal	Responsibility	Target Completion Date
E. Utilize and Understand Rotary Club Central and other Rotary Resources			
E.1	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, accountability and reporting for 100% clubs with full membership data entered and used	Clubs	Ongoing
E.2	Provide Rotary Club Central instruction for all DGEs at GETS; Club Presidents-elect at PETS; Secretaries-elect at District Assembly	RCs	6/30/2015
E.3	Share information and district successes through strategic communication	RCs & ARCs	Ongoing
E.4	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute.	RCs	Ongoing
E.5	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark.	RCs	Ongoing

2014-15 Regional Membership Plan Executive Summary and Action Plan

Region: North America – Zone 24 & 32

Region	North America
Zones	24 and 32
Director(s)	Julia Phelps
Project Lead	Sean R. Hogan
Rotary Coordinators	RC Lynda Ryder, Zone 24 East RC Gayle Knepper, Zone 24 West RC Karien Ziegler, Zone 32
30 June 2015 Goal	65,285

Executive Summary

Goals/Objectives	Key Performance Indicators
A. Member Attraction	Target: 3% net membership growth in districts through building strong and vibrant clubs, and implementation of a proactive, effective multi-year membership strategy. Measure: Rotary Club Central and membership reports.
B. Member Engagement	Target: Increase average retention rate by a minimum of 2% Measure: Rotary Club Central and membership retention reports
C. Strengthen Clubs <ul style="list-style-type: none"> • Club Assessment and Strategic Planning • Improve Awareness of Rotary Clubs in Communities • Diversity <ul style="list-style-type: none"> ○ Attract and Engage Members < Age 40 ○ Improve Gender Balance within Clubs and Districts ○ Improve ethnic and vocational diversity in clubs 	Target: Increase percentage of new members representing younger members or other underrepresented populations by a minimum of 10% Measure: District/Club data
D. Build Dedicated District and Club Membership Teams	Target: active Membership Committees within each District with not less than 4 members; Target: assist districts in developing a multi-year written membership plan. Measure: Reports from District Membership Chairs
E. Utilize and Understand Rotary Club Central and other Rotary Resources	Target: familiarize District Membership Committees with Rotary Club Central and other Rotary Resources Measure: Reports from District Membership Chairs regarding use within Committee and by clubs.

Action Plan

	Goal	Responsibility	Target Completion Date
F. Member Attraction			
A.1	<p>Add at least 1 Club per district per year</p> <p>Support districts in development of new clubs, in specific, assisting to identify/develop opportunities for non-traditional format and e-clubs attractive to younger or non-served member groups, and utilizing satellite clubs as an initial step to stand-alone clubs</p> <ul style="list-style-type: none"> Assist districts to create/implement a new club development plan 	<p>RCs, ARCs</p> <p>DG/District team implement</p>	1 July to 30 June
A.2	<p>Identify areas of opportunity within districts that are appropriate for development of new clubs, including:</p> <ul style="list-style-type: none"> alternative meeting days and times: weekend, Saturday afternoon meetings/socials meeting formats (e-clubs, satellite clubs, no meal) Specific demographic targets (younger members, culturally diverse clubs, etc.) Also see A1 	<p>RCs, ARC</p> <p>DG/District team implement</p>	1 July to 30 June
A.3	<p>Add new members to existing clubs participating in District and multi-club events, developing a Vibrant Club Recognition program.</p> <p>Assist districts and clubs in identifying and developing viable niche markets for member attraction from underserved populations in their communities and implementing an action plan to reach these markets and member attraction goals</p> <ul style="list-style-type: none"> Work with districts to implement membership pilot program strategies to meet the needs of their club and community Develop/Provide tools for district/club use for this purpose 	<p>RCs, ARC</p> <p>DG/District team implement</p>	1 July to 30 June

	Goal	Responsibility	Target Completion Date
G. Member Engagement			
B.1	Survey members to determine levels of satisfaction among club	RCs, ARCs	Z24E:

	<p>members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction Develop online survey template (ie Survey Monkey) for use by Districts and clubs</p> <p>Work with district and club leaders to develop/implement a multi-year engagement and retention strategy based on member satisfaction indicators.</p> <ul style="list-style-type: none"> • Provide leaders with sample district and club survey and support tools for measuring member satisfaction and affinity, and a template strategy for transforming this information into action • Presentation of data by email, webinar, face-face meetings with DG's, DGE's and Presidents 	DG/District team implement	<p>31 October</p> <p>Z24W & 32: 31 December</p>
B.2	<p>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</p> <p>Review/Analyze official membership reports monthly to assess progress and identify need for support to districts and to specific clubs.</p> <ul style="list-style-type: none"> • Communicate information to all district leaders, highlighting observations and recommending appropriate action steps • Collect best practices and tools from high-performing districts and clubs and share via the Zone 24 32 blog site, newsletter, and during in person consultations and training; feature leaders from these districts in Zone webinars. 	RCs, ARCs & Project Leads	1 July to 30 June

	Goal	Responsibility	Target Completion Date
	H. Strengthen Clubs		
C.1	<p>Schedule each club to do 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 completed by clubs on their own or with the help of a Club Visioning expert like Steve Wilcox.</p> <p>Assist leaders in districts with visioning programs to more fully utilize the process in addressing current club needs, implementing Visioning Phase II, specifically focusing on club vibrancy and membership strength</p> <ul style="list-style-type: none"> • Work with leaders in non-visioning districts to launch the program and begin Visioning I sessions at clubs • Assist leadership teams in developing/refining a multiple-year written membership strategy resulting from the visioning sessions to achieve goals in the 3 membership areas 	<p>RCs, ARCs</p> <p>DG/District team implement</p>	<p>Z24W & 32: 31 January 2015</p> <p>Z24E: 30 June 2015</p> <p>1 April 2015</p>

	<ul style="list-style-type: none"> Work with districts to assess club strength, identify at-risk and/or struggling clubs, and to develop a targeted action plan to increase vibrancy and membership strength using visioning in a turnaround strategy 		
C.2	<p>Implement district programs on:</p> <ul style="list-style-type: none"> Club leadership plan Retention Strategies and best practices. Strategic Planning <p>Work with district leaders in establishing and/or updating and actively using a relevant long-range plan² supporting the goals in the RI strategic plan</p> <ul style="list-style-type: none"> Incorporates a structured system for progress assessment and continuity. Utilizes a One Rotary approach for strengthening clubs Addresses retention, struggling clubs and a process to assist clubs with development and implementation of multi-year plans <p style="text-align: right;">² 3 years or more in length</p>	<p>RCs, ARCs and other designated</p> <p>DG/District team implement</p>	<p>1 April</p> <p>Ongoing</p>
C.3	<p>Charter new Rotary clubs where younger groups may feel more comfortable</p> <p>Support districts in development of new clubs, in specific, assisting to identify/develop opportunities for non-traditional format and e-clubs attractive to younger member groups</p> <ul style="list-style-type: none"> Assist districts to create/implement a new club development plan 	<p>RCs, ARCs</p> <p>DG, Membership Chair implements</p>	<p>1 July to 30 June</p>
C.4	<p>Host one large project to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc</p> <p>Work with districts and clubs to assess current service projects for relevancy and visibility, and to develop signature projects designed to create visibility, engage members, acquire partners and attract potential young members and others currently not served by Rotary</p> <p>Hold webinar on signature service projects, membership and One Rotary</p>	<p>RCs, ARCs, Project Leads, RPICs, ARCs</p> <p>DG/District team, Club Presidents, Membership Chair implements</p>	<p>1 July to 30 June</p>

C.5	<p>Engage female community/business leaders</p> <p>Use Rotary Club Central data to identify districts' current percent of women members and assist districts in building/implementing a strategy as part of the membership planning process</p> <ul style="list-style-type: none"> Focus on districts which have the greatest opportunity to increase percentage from current levels 	<p>RCs, ARCs, RPICs, ARCs</p> <p>DG, District Membership Chair implement</p>	<p>Ongoing</p> <p>1 July to 30 June</p>
C.6	<p>Teach clubs to implement Strengthening Rotary Initiative</p> <p>Increase leaders and Rotarians' understanding and utilization of Strengthening Rotary concepts, including use of the "New Voice," Rotary Moments/Stories to attract involvement from non-Rotarians and community partners, and using the "One Rotary" approach to strengthen clubs.</p> <ul style="list-style-type: none"> Work with district leadership teams to develop/present training which integrates Strengthening Rotary approach with membership, incorporating into all aspects of the RC team's work: webinars, in-person training, communications and support tools Present training/communications jointly with other members of the Zone coordinator team, whenever possible, to emphasize interdependence of these initiatives 	<p>RCs, ARCs, RPICs, ARPICs</p> <p>DG, Membership Chair, District PI Chair implement</p>	<p>1 July to 30 June</p>
C.7	<p>Assist clubs and Rotarians at creating their Rotary story</p> <p>Increase Rotarians' understanding of the power of Rotary Moments and Rotary Stories through incorporating in training at PETS, Assemblies, Conferences and Zone meetings, and in consultation with district and club leaders</p> <p>Develop and provide written tools to support Rotarians in developing and effective using real-life inspiring stories, especially those directed at non-Rotarians.</p> <p>Encourage districts and club leaders to video these stories and upload to YouTube and use in other public visibility venues</p> <p>Hold "contest" for Rotarians to submit their Rotary Moment for sharing in multi-district events, Zone Institutes and for publication, highlighting these Rotarians and their stories</p>	<p>RCs, ARCs, RPICs, ARPICs,</p> <p>DG, Membership Chair, District PI Chair, Club presidents implement</p>	<p>Ongoing</p> <p>1 July to 30 June</p>

	Goal	Responsibility	Target Completion Date
	I. Build Dedicated District and Club Membership Teams		
D.1	Develop a large trained membership committee to support your clubs. (RC Team will help train); Provide templates and job descriptions for various Membership positions within District and Clubs	<p>RCs, ARCs</p> <p>DG, District Team,</p>	1 October

	<p>Help districts to establish a strong active membership structure and appoint/train a qualified and dedicated (e.g., with focus only on membership) membership chair and committee with attraction, engagement and new club development functions,</p> <ul style="list-style-type: none"> Assist districts in developing a written multi-year membership plan and in working with clubs to develop similar structure and plan 	<p>Membership Chair, Club Presidents implement</p>	
D.2	<p>Train club leadership at District Assembly (RC Team to help by providing training to District Leadership Teams and Club President-Elects at PETS and/or at District Assembly)</p> <p>Provide training and training support for districts and clubs through in-person sessions and e-learning, integrating the priorities of the RI strategic plan and the needs of the district, as identified through a 2014 updated needs assessment.</p> <p>Provide in-person and/or webinar based training sessions for participation by district and club leaders</p> <p>Provide training at key district and regional events: Pre-PETS/PETS, Assembly, Vibrant Club seminars, GETS, GNATS and membership seminars</p> <p>Present training in conjunction with other Zone coordinators, whenever possible, to illustrate and the One Rotary approach for building strong districts and clubs</p>	<p>RCs, ARCs</p> <p>DG, District Team, Membership Chair, Club Presidents implement</p>	<p>1 July to 30 June</p>
D.3	<p>Share best practices, resources and innovative ideas with district and club leaders in support of membership and RI strategic priorities</p> <p>Collect best practices and tools from high-performing districts and clubs and share via the Zone 24 32 blog site, newsletter, and during in person consultations and training; feature leaders from these districts in Zone webinars.</p>	<p>RCs, ARCs, other regional coordinators based on topic</p>	

D.4	<p>Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development</p> <p>Develop/Host webinars for district leadership teams on topics to support membership and vibrant clubs; post recordings and resources online for district and club use</p> <ul style="list-style-type: none"> • Work with district leaders in presenting webinars for club leaders on membership and vibrant club topics to meet district needs 	<p>RCs, ARCs, Project Leads</p> <p>Jointly with RPICs and RRFCs based on topic emphasis</p>	1 July to 30 May

	Goal	Responsibility	Target Completion Date
	J. Utilize and Understand Rotary Club Central and other Rotary Resources		
E.1	<p>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, accountability and reporting for 100% clubs with full membership data entered and used</p> <p>Increase club use of Rotary Club Central for goal setting, day-to-day decision making, accountability and reporting</p> <ul style="list-style-type: none"> • Work with district leaders to provide training for district and club leaders, specifically focusing on DGEs, AGs, PEs, Presidents and Secretaries for the relevant year • Assist leaders in motivating clubs to increase use and provide sample “incentive” programs that could be used for this purpose • Recognize districts in Zone newsletter monthly based on overall percentage of clubs entering data 	<p>RCs, ARCs; other coordinator groups for respective areas on Club Central</p> <p>DGs, DGEs, AGs, Club presidents, implement</p>	<p>Ongoing</p> <p>1 July to 30 June</p>
E.2	Provide Rotary Club Central instruction for all DGEs at GETS; Club Presidents-elect at PETS; Secretaries-elect at District Assembly	RCs, ARCs	31 May

	Z24W: See E1		
E.3	<p>Share information and district successes through strategic communication</p> <p>Share best practices, resources, innovative ideas and other information of value with district and club leaders to support membership and other RI strategic priorities</p> <ul style="list-style-type: none"> Utilize webinars, in-person training, blog/resource site, newsletter, Zone website, RI discussion group, news blasts and individual communications with district leaders and with club leaders, based on strategy Increase use of integrated communications by coordinator groups for district leaders (email blasts, webinars, blog site) 	RCs, ARCs, other regional coordinators, based on topic	1 July to 30 June
E.4	<p>Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute.</p> <p>Develop/Provide membership reports including net growth, retention, and overall trends to district leaders monthly, and discuss in training meetings and other communications. Highlight key findings and provide recommendations on follow-up steps. Provide at training events including PETS, Assembly and Zone Institute</p> <ul style="list-style-type: none"> Publish consolidated member report statistics, together with RCs in paired Zone regions, showing comparative district membership progress and providing sources for best practices 	RCs, ARCs, newsletter editor	1 July to 30 June
E.5	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark.	RCs, ARCs	1 July to 30 June

	Utilize Club Viability report and other Rotary data monthly to identify struggling clubs and provide information to district leaders with corresponding recommendations for action and suggested support to be provided by RC team to meet these needs		

2014-15 Regional Membership Plan Executive Summary and Action Plan

Region: North America – Zones 25 & 26

Profile

Region	North America
Zones	Zones 25 & 26
Director(s)	Steven A. Snyder
Project Lead	PDG Gary R. Citti
Rotary Coordinators	RC George Chaffey, Zone 25 RC Rod Belton, Zone 26
30 June 2015 Goal	62,054

Executive Summary

Goals/Objectives

Key Performance Indicators

A. Member Attraction	1,500 net new members per year over the next three years
B. Member Engagement	Decrease attrition rate from 15% percent down to 12% percent by the end of 2015
C. Strengthen Clubs Club Assessment and Strategic Planning Diversity <ul style="list-style-type: none"> • Attract and Engage Members < Age 40 • Improve Gender Balance within Clubs and Districts • Improve ethnic and vocational diversity in clubs Improve Awareness of Rotary Clubs in Communities	Deploy business planning for Rotary clubs. Conduct a new generation's symposium. Deploy the census demographic program
D. Build Dedicated District and Club Membership Teams	Train and deploy membership/business planning cadre of trainers.
E. Utilize and Understand Rotary Club Central and other Rotary Resources	Advertise and Encourage participation in the webinars provided by the Rotary International.

Action Plan

	Goal	Responsibility	Target Completion Date
K. Member Attraction			
A.1	Add at least 1 Club per district per year	DG	June 30, 2015
A.2	Identify areas of opportunity within districts that are appropriate for development of new clubs, including: <ul style="list-style-type: none"> • 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.) 	Larry Sundram	June 30, 2015
A.3	Add new members to existing clubs	Clubs	June 30, 2015

	Goal	Responsibility	Target Completion Date
L. Member Engagement			
B.1	Survey members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction. Cost includes executive summary of all surveys.	RC's	June 30, 2015
B.2	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	RCs & Project Leads	June 30, 2015

	Goal	Responsibility	Target Completion Date
M. Strengthen Clubs			
C.1	Schedule each club to do 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 Completed by clubs on their own or with the help of a Club Visioning expert like Steve Wilcox.	Dick Elixman & Gary Citti	June 30, 2015
C.2	Implement district programs on: <ul style="list-style-type: none"> • Club leadership plan • Retention Strategies and best practices. • Strategic Planning 		
C.3	Charter new Rotary clubs where younger groups may feel more comfortable	Director, RC, ARC, RRFC, RPIC	June 30, 2015
C.4	Host one large project to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc. We will assign 3 PDGs to organize & host and Rotary Day for both Zones	RC, ARCs, Project Leads, RPICs, DGs, Club Presidents, Membership Chair	June 30, 2015
C.5	Engage female community/business leaders	DG	June 30, 2015

		Membership Chairs	
C.6	Teach clubs to implement Strengthening Rotary Initiative	District PR Chair	June 30, 2015
C.7	Assist clubs and Rotarians at creating their Rotary story	RC, ARCs , RPICs, DGs, Club Presidents, Membership Chair	June 30, 2015

	Goal	Responsibility	Target Completion Date
N. Build Dedicated District and Club Membership Teams			
D.1	Develop a large trained membership committee to support your clubs. (RC Team will help train); Provide templates and job descriptions for various Membership positions within District and Clubs	RC, ARCs, Core Zone Membership Committee and Cadre	June 30, 2015
D.2	Train club leadership at District Training	Membership Committee, RCs, ARCs	May 31, 2015
D.3	Share best practices, resources and innovative ideas with district and club leaders in support of membership and RI strategic priorities plus all travel costs	RC, ARC and others designated	June 30, 2015
D.4	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development	RC, ARC and others designated (DG, DGE, DMC, Project Leads)	June 30, 2015

	Goal	Responsibility	Target Completion Date
O. Utilize and Understand Rotary Club Central and other Rotary Resources			
E.1	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, accountability and reporting for 100% clubs with full membership data entered and used	Clubs	June 30, 2015
E.2	Provide Rotary Club Central instruction for all DGEs; Club Presidents-elect; Secretaries-elects	RCs	June 30, 2015
E.3	Share information and district successes through strategic communication	RCs & ARCs	June 30, 2015
E.4	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute.	RCs	June 30, 2015
E.5	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark.		June 30, 2015

2014-15 Regional Membership Plan Executive Summary and Action Plan

Region: North America – Zones 28 & 29

Profile

Region	North America
Zones	28 & 29
Director(s)	Mary Beth Growney Selene
Project Lead	RI Director-elect Jennifer Jones PDG Pam Harkema
Rotary Coordinators	RC Tamara Koop, Zone 28 RC Mary Berge, Zone 29
30 June 2015 Goal	63,000

Executive Summary

Goals/Objectives

Key Performance Indicators

A. Member Engagement	<ul style="list-style-type: none"> Target a minimum retention rate of 2% (maintaining 98%)
B. Member Attraction	<ul style="list-style-type: none"> Attain a net 3% gain in membership 1 new club per district
C. Strengthen Clubs: Club Assessment and Strategic Planning Diversity <ul style="list-style-type: none"> Attract and Engage Members < Age 40 Improve Gender Balance within Clubs and Districts Improve ethnic and vocational diversity in clubs Improve Awareness of Rotary Clubs in Communities	<ul style="list-style-type: none"> Focus communication on “Working the Plan – Getting it to our Clubs” to every club in Zones 28 and 29. Concentrate on “Perfect Engagement” This means a customer service focus on “Attraction” and “Engagement “ vs “Recruitment” and “Retention”. Create a membership tool-kit for clubs. Strive for 100% compliance of Rotary’s Strengthened Brand on Club and District Websites. Promote Visioning, Strategic Planning and Vibrant Club Initiatives.
D. Build Dedicated District and Club Membership Teams	<ul style="list-style-type: none"> Establish a year-long training calendar with metrics. DMCs to attend DMC training at Zone Institute in September 2014. More actively engage the ARCs to work directly with their districts and their clubs and measure the interaction.
E. Utilize and Understand Rotary Club Central and other Rotary Resources	<ul style="list-style-type: none"> Ensure that the leadership team is fully trained on Rotary Club Central. Establish how many have been certified for Club Visioning and increase this by 30%

Action Plan

	Goal	Responsibility	Target Completion Date
P. Member Engagement			
A.1	Survey members to determine levels of satisfaction among club members; educate DGNs, DGEs, DGs and Presidents to assess and implement actions that can improve member satisfaction.	DMC, DG/DGE/DGN, AGs, RC Team	June 2015
A.2	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.	DMC, DG/DGE/DGN AGs, RC Team	June 2015

	Goal	Responsibility	Target Completion Date
Q. Member Attraction			
B.1	Add at least 1 Club per district per year	Club Presidents, RC Team, DMC	June 2015
B.2	Identify areas of opportunity within districts that are appropriate for development of new clubs, including: <ul style="list-style-type: none"> A. alternative meeting days and times: weekend, Saturday afternoon meetings/socials B. meeting formats (e-clubs, satellite clubs, no mandatory meal and associated costs) <ul style="list-style-type: none"> • Clubs targeted at specific demographics (younger members, culturally diverse clubs, etc.) 	District Training Team	June 2015
B.3	Add new members to existing clubs (New member attraction per engagement of every Club member)	Club Presidents, DMC, DG/DGE/DGN AGs, RC Team	June 2015

	Goal	Responsibility	Target Completion Date
R. Strengthen Clubs: Club Assessment and Strategic Planning			
C.1	Encourage each club to do 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 <ul style="list-style-type: none"> • Completed by clubs on their own or with the help of a Club Visioning Facilitator. 	DG, DGE, DGN, Club Presidents, RC Team	June 2015
C.2	Implement district programs on: <ul style="list-style-type: none"> • Club Leadership Plan/Be A Vibrant Rotary Club • Retention Strategies and Best Practices. Strategic Planning	DG, DGE, DGN, Club Presidents, RC Team	June 2015
C.3	Charter new Rotary clubs where younger groups may feel more comfortable.	Director, DG, DGE, DGN, RC Team, RRFC, RPIC	June 2015
C.4	Host one large project to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc.	RC Team , RPICs, Project Leads, DGs, Club Presidents, Membership Chair	June 2015
C.5	Engage female community/business leaders.	DG Membership Chairs	Ongoing

C.6	Teach clubs to implement Strengthening Rotary Initiative	District PR Chair	June 2015
C.7	Assist clubs and Rotarians at creating their Rotary story.	RC Team , RPICs, DGs, Club Presidents, Membership Chair	Ongoing

	Goal	Responsibility	Target Completion Date
	S. Build Dedicated District and Club Membership Teams		
D.1	Develop a large, trained membership team to support your clubs. (RC Team will help train); Provide templates and job descriptions for various Membership positions within District and Clubs (Member Attraction, Member Engagement & Member Retention).	RC Team, DMC, DG, DGE, DGN	June 2015
D.2	Train club leadership at District Assembly (RC Team to help)	DMC, RC Team	June 2015
D.3	Share best practices, resources and innovative ideas with district and club leaders in support of membership and RI strategic priorities.	RC Team and others designated	June 2015

	Goal	Responsibility	Target Completion Date
	T. Utilize and Understand Rotary Club Central and other Rotary Resources		
E.1	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, accountability and reporting for 100% clubs with full membership data entered and used.	Clubs with assistance from DG and RC Team	June 2015
E.2	Provide Rotary Club Central instruction for all DGEs at GETS; Club Presidents-elect at PETS; Secretaries-elect at District Training Assembly.	RC Team	Ongoing/ June 2015
E.3	Share information and district successes through strategic communication	RC Team	Ongoing
E.4	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute.	RCs	Quarterly Through June 2015
E.5	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark.	DMC, DG, DGE, DGN, RC Team, Project Lead	Quarterly Through June 2015

2014-15 Regional Membership Plan Executive Summary and Action Plan

Region: North America – Zones 30 & 31

Profile

Region	North America
Zones	30 & 31
Director(s)	Larry Lunsford
Project Lead	PDG Gregory F. Yank
Rotary Coordinators	RC Glen Vanderford, Zone 30 RC Liz Skinner, Zones 31
30 June 2015 Goal	64,000

Executive Summary

Goals/Objectives

Key Performance Indicators

A. Member Attraction	<ul style="list-style-type: none"> • Zone 30: Charter 12 new clubs per year • Zone 31: Charter 14 clubs per year • 50% of districts in each zone identify areas of opportunity for new clubs • Membership goal is 68,000 members by June 30, 2015.
B. Member Engagement	<ul style="list-style-type: none"> • Achieve 92% retention rate in districts by June 30, 2015. • 90% of districts will achieve membership goals set during the fall of 2014 by June 30, 2015
C. Strengthen Clubs Club Assessment and Strategic Planning Diversity <ul style="list-style-type: none"> • Attract and Engage Members < Age 40 • Improve Gender Balance within Clubs and Districts • Improve ethnic and vocational diversity in clubs Improve Awareness of Rotary Clubs in Communities	<ul style="list-style-type: none"> • 25% of districts will train facilitation teams; 25% of clubs in those participating districts will complete a club visioning event • Increase average number of women in Rotary in each zone by 3% by June 30, 2015. • No district will be less than 25% female by June 30, 2015 • Decrease average age of Rotarians in the district by 4 years by June 30, 2015. (Note: tracking and achievement of this goal will require better data from RI than currently available.) • A zone wide project will be hosted in each zone by June 30, 2015 to encourage greater participation among various groups.
D. Build Dedicated District and Club Membership Teams	<ul style="list-style-type: none"> • A comprehensive “Toolkit” for membership committees posted on zone website by Dec 31, 2014. • All districts and 80% of clubs will have functioning membership teams by June 30, 2015.

E. Utilize and Understand Rotary Club Central and other Rotary Resources

- 80% of clubs in each zone will be using Rotary Club Central by June 30, 2014.
- Zone RC teams will be invited to participate in 80% of PETS' and District Assemblies in spring 2015.
- Complete at least 1 Webinar per month focused on Membership (4), Visioning/Strategic Planning (2), RC Central (2), Rotary Showcase(2) and Youth Services (2).

Action Plan

	Goal	Responsibility	Target Completion Date
U. Member Attraction			
A.1	Add at least 1 Club per district per year	RC, ARCs, DG, DMC	June 30 th of each year
A.2	Identify areas of opportunity within districts that are appropriate for development of new clubs, including: <ul style="list-style-type: none"> • 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.) 	ARCs and District Membership Chairs	June 30, 2015
A.2.2	Train clubs to understand and implement concept of membership value proposition	RCs, ARCs	ongoing
A.3	Add new members to existing clubs	Club and District Membership Chairs RC/ARCs	June 30 each year

	Goal	Responsibility	Target Completion Date
V. Member Engagement			
B.1	Survey members to determine levels of satisfaction among club members; educate DGNs, DGEs, and Presidents to assess and implement actions that can improve member satisfaction.	RC and ARCs DMC Club Presidents	June 30, 2015
B1.1	Funds are for Customer Satisfaction Survey support (aka "Beta Test"). Priority 1: Funds will be used to support a contractual staff person at RI to deliver the survey and analyze reports for Mid-South PETS (and other multidistrict PETS participating in the 2013 Beta Test.) Priority 2: (in the event Priority 1 does not come to pass), funds will be used to deliver surveys and analyze results using the RI Membership Division "electronic package" for the customer satisfaction survey. Surveys will be administered to selected		

	districts in both zones. Funds will also support travel and materials to train club presidents and others in their interpretation and use in building strong clubs.		
B.2	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.	RCs & Project Leads District Membership chairs	ongoing
B2.1	Provide special support to troubled districts in each zone		
B.3	Provide resource information and training to district leadership on using membership data, retention tips and best practices, engagement of membership, benefits and value of membership, and benefits of diversity and flexibility	RCs, ARCs	Ongoing

	Goal	Responsibility	Target Completion Date
	W. Strengthen Clubs		
C.1	Identify districts interested in club visioning. Train club visioning facilitation team members. Develop a written multi-year strategy and structure to build and maintain attractive and inviting clubs for current and prospective members Completed by districts on their own or with the help of a Club Visioning and Strategic Planning experts. Funds used for expert travel and expenses and materials for sessions	RC, PL, DG, DMC	June 30, 2015
C.2	Implement district programs on: <ul style="list-style-type: none"> • Club leadership plan • Retention Strategies and best practices. • Strategic Planning 	RCs/PL/ARCs/ DMC	June 30 each year
C2.1	Visit districts and regularly communicate with districts to develop relationships, support leadership, help where needed, and solicit invitations to attend training opportunities	RCs, ARCs	
C.3	Charter new Rotary clubs where younger groups may feel more comfortable	Director, RC, ARC, RRFC, RPIC	June 30, 2015
C.4	Host one large project to involve both Rotarians and non-Rotarians to appeal to young professionals like a service project, networking event, fundraiser, etc. (Suggested: Rotary service day for the Zone with all clubs participation– using social media as well as other media)	RC, ARCs , Project Leads, RPICs, DGs, Club Presidents, Membership Chair	June 30, 2015
C.4.1	Help districts set up an avenue to put videos on YouTube, Twitter and Facebook.		
C.5	Engage female community/business leaders	ARCs, DG Membership Chairs	June 30, 2015
C.6	Teach clubs to implement Strengthening Rotary Initiative	RPIC, District PR Chair	June 30, 2015
C.7	Assist clubs and Rotarians at creating their Rotary story	RC, ARCs , RPICs, DGs, Club Presidents, Membership Chair	June 30, 2015
C7.1	Encourage clubs to utilize RC Showcase. Help districts set up an avenue to put videos on YouTube.		

	Goal	Responsibility	Target Completion Date
X. Build Dedicated District and Club Membership Teams			
D.1	Develop a large trained membership committee to support your clubs. (RC Team will help train); Provide templates and job descriptions for various Membership positions within District and Clubs. Membership Summit to be held Sept 6. Key audiences to attend: DMCs, New Club Development Chairs	RC, ARCs, DGs, DMCs, RPICs	June 30, 2015
D1.1	Zone 30: Conduct 3-4 Regional Membership Summits (3-4 districts/summit; Indiana/Ohio, Kentucky/Tennessee, Alabama/Mississippi) whereas the local District Governors invite their club Presidents and club Membership Chairs to a Seminar focused on Membership and Public Image. Training and lunch provided.		
D.2	Train club leadership at District Assembly (RC Team to help)	Membership Committee, RCs, ARCs	June 30, 2015
D.3	Share best practices, resources and innovative ideas with district and club leaders in support of membership and RI strategic priorities	RC, ARC and others designated	ongoing
D.4	Schedule teleconferences, webinars, etc., to discuss strategies, challenges, and how to improve membership development.	RC, ARC and others designated (DG, DGE, DMC, Project Leads)	June 30, 2015
D4.1	Conduct at least one Webinar monthly on membership strategies and at least quarterly teleconferences with DMCs.		

	Goal	Responsibility	Target Completion Date
Y. Utilize and Understand Rotary Club Central and other Rotary Resources			
E.1	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, accountability and reporting for 100% clubs with full membership data entered and used	Clubs RCs, ARCs	Monthly review
E.2	Provide Rotary Club Central instruction for all DGEs at GETS; Club Presidents-elect at PETS; Secretaries-elect at District Assembly	RCs ARCs at PETS, DA	June 30, 2015
E.3	Share information and district successes through strategic communication	RCs & ARCs	June 30, 2015
E.4	Publish membership and retention numbers in zone newsletter and Zone Membership/Public Image Newsletter. Report membership increases at Zone Institute.	RCs	ongoing
E.5	Utilize the Club Viability Report to identify clubs with retention rates below The Membership Plan benchmark.	RC & ARC	ongoing

2014-15 Regional Membership Plan Executive Summary and Action Plan

Region: North America – Zones 33 & 34

Profile

Region	North America Zones 33 & 34
Zones	33 & 34
Director(s)	Robert Hall
Project Lead	Art MacQueen
Rotary Coordinators	RC Paula Matthews, Zone 33 RC Claudia Mertl, Zones 34
30 June 2015 Goal	67,300

Goals

<i>Criteria</i>	<i>Key performance indicators</i>
A. MEMBER ATTRACTION	339 net growth June 30, 2015, based on July 1, 2014 year end
B. MEMBER ENGAGEMENT	91.5% retention rate
C. STRENGTHEN CLUBS CLUB ASSESSMENT AND STRATEGIC PLANNING DIVERSITY <ul style="list-style-type: none"> • ATTRACT AND ENGAGE MEMBERS < AGE 40 • IMPROVE GENDER BALANCE WITHIN CLUBS AND DISTRICTS • IMPROVE ETHNIC AND VOCATIONAL DIVERSITY IN CLUBS IMPROVE AWARENESS OF ROTARY CLUBS IN COMMUNITIES	1% growth of members <40 1% growth in women 1% increase in ethnic and vocational diversity 50% of the Clubs have an assessment tool and strategic plan. 50% of Clubs receive the Public Image Citation 75% of clubs participate in Rotary Days
D. BUILD DEDICATED DISTRICT AND CLUB MEMBERSHIP TEAMS	100% districts will have a membership plan. 50% of Districts will have an expanded Membership Team.
E. UTILIZE AND UNDERSTAND ROTARY CLUB CENTRAL AND OTHER ROTARY RESOURCES	100% of Districts will receive Rotary Club Central training 50% of clubs will use Rotary Club Central to set club membership goal.

Action Plan

	Goal	Responsibility	Target Completion Date
A. Member Attraction			
A.1	Identify areas of opportunity within districts that are appropriate for development of new clubs, including: <ul style="list-style-type: none"> • 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.) • rotarydistrictplanning.org Website demography tool currently in use, District 5170, zones 25, 26 	DG, RC, ARC	June 30, 2015
A.2	Provide Member attraction Webinars, RI Resources , other Zone communications, newspaper ads, and social media ads to Districts, Clubs and non members.	RC, ARC, RPIC	

	Goal	Responsibility	Target Completion Date
B. Member Engagement			
B.1	Survey members to determine levels of satisfaction among club members; educate DGNs, DGEs, and District Membership Chairs to assess and implement actions that can improve member satisfaction. Communicate to Districts and District Membership Chairs the availability and advantages of Clubs visioning and strategic planning to determine and improve club value propositions.	RC, DG, Dist Membership Chairs, AGs	June 30, 2015
B.2	Monitor districts with greatest percentage of increase and decrease; Solicit best practices from districts with strong retention. Distribute findings in planned communication sources to District Leadership.	RCs & Project Leads	June 30, 2015

	Goal	Responsibility	Target Completion Date
C. Strengthen Clubs			

C.1	Train districts and clubs, on importance of: <ul style="list-style-type: none"> • Club leadership plan • Retention Strategies and best practices. • Strategic Planning • Implementing Strengthening Rotary Initiative • Creating their Rotary story • Achieve Public Image Citation 	RC Team, RPIC Team & RRFC Team	June 30, 2015
C.2	Encourage all Districts and Clubs to participate, partner or host a Rotary Days event. Free, fun, and appealing to the public. Publicize the results, share results with coordinator team.	Club Leadership DG, DGE, DGN RC, ARC	March 2015

	Goal	Responsibility	Target Completion Date
D. Build Dedicated District and Club Membership Teams			
D.1	Identify District Membership Structures <ul style="list-style-type: none"> • Identify and catalog District Membership Chair • Identify and catalog District Membership team structure • Identify current membership plans • Identify District Membership/Foundation/Pubic Image seminar dates for 14-15 	DGs, DGEs to RCs & ARCs	Feb. 1, 2015
D.2	Train club leadership at District Assembly (RC Team to help by providing training to District Leadership Teams and Club President-Elects at PETS and/or at District Assembly) Provide training and training support for districts and clubs through in-person sessions and e-learning, integrating the priorities of the RI strategic plan and the needs of the district, as identified through a 2014 updated needs assessment. Provide in-person and/or webinar based training sessions for participation by district and club leaders Provide training at key district and regional events: Pre-PETS/PETS, Assembly, Vibrant Club seminars, GETS, GNATS and membership seminars Present training in conjunction with other Zone coordinators, whenever possible, to illustrate and the One Rotary approach for building strong districts and clubs Provide Integrated training using RC, RPIC & RRFC teams for any District training.	RC, ARCs RC team, RPIC	Ongoing July 1 to June 30 2015
D.3	Zone Wide Seminar <ul style="list-style-type: none"> • Zone 33 seminar, Raleigh, NC, May 2015 • Zone 34 seminar, Jacksonville, FL, June 2015 	RC, ARCs	Zone 33 May 2015 Zone 34

	<ul style="list-style-type: none"> • RC team and all ARCs required for breakout sessions. • Attendance of up to 200 District and Club leaders • Four legged stool approach to all training <p>DGs, DGEs, DGNs included in pre-conference planning as to specific needs in their Districts</p>	DGs, DGEs, DGNs	June 2015
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	Goal	Responsibility	Target Completion Date
	E. Utilize and Understand Rotary Club Central and other Rotary Resources		
E.1	Train clubs to submit updated membership information on Rotary Club Central. Increase use of Rotary Club Central by districts and clubs. Use webinars and District training sessions to train members.	RC & ARCs	ongoing
E.2	Publish membership and retention numbers in zone publications. Report membership increases at Zone Institute.	RCs & ARCs	June 30, 2015
E.3	Utilize RCC reports such as the Club Viability Report to identify clubs with positive and negative rates. Promote RI resources as seen in A2.	RC & ARCs	June 30, 2015