



CLUB MEMBERSHIP ACTION PLANS

District 5440 Event



INTRODUCTION



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AGENDA

Club Action Plans

Attrition

Attraction

Onboarding

Example of Success



Rotary



CLUB MEMBERSHIP ACTION PLAN

ACTION PLAN

Four Step Process

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

MEANINGFUL DATA

Step 1

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

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

CLUB EXAMPLE #1

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

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

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

Annual **Net Growth Rate**: **-1.3%**

Success Targets

Attrition less than 15%

(July 1 membership x .15)

Attraction 5% greater than Attrition

The problem we need to solve is:

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

CLUB EXAMPLE #2

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

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

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

Annual **Net Growth Rate**: - %

Success Targets

Attrition less than 15%

(July 1 membership x .15)

Attraction 5% greater than Attrition

The problem we need to solve is:

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

GOAL SETTING WORKSHEET

The problem we need to solve is:

- ☐ **Low Retention** – Our Attrition Rate Exceeds 15%
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- ☐ **Neither** - We need to build on our current membership growth culture and strategies

Membership History

Club Year	Members at start of year (July 1)
2022-2023 (Current Year)	41
2021-2022	34
2020-2021	31
2019-2020	33
2018-2019	33

Goal Setting 2023-24

Starting Membership July 1, 2022		41	
Current Membership 2/1/2023		38	
Estimated Membership July 1, 2023			(a)
Membership Goal July 1, 2024 (July 1, 2023 Start + Growth)			(b)
Net Membership Growth	5% = 3		(c=b-a)
Challenge = 5% or 5 members	10% = 5		
Average Annual Attrition to Replace (Greater of Actual or 10% = Best in Class)		6	(d)
New Members Needed (Growth + Attrition)			(c+d)

SURVEY MEMBERS

Step 2



DEVELOP A PLAN

Step 3

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

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

MEMBERSHIP ACTION PLAN EXAMPLE

$$\begin{array}{r} \text{Membership Goal} \\ - \text{Current Membership} \\ + \text{Attrition} \end{array}$$

New Members to Meet Goal

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

MEMBERSHIP ACTION PLAN EXAMPLE

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

MONITOR & MANAGE

Step 4

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

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



QUESTIONS

Rotary



ATTRACTING NEW MEMBERS

Attraction



Recruiting



Vibrant Club

THREE CLUBS



Club A

Fellowship
Diversity
Service



Club B

Service
Fellowship
Leadership



Club C

Leadership
Integrity
Service

ATTRACTION: PUBLIC IMAGE

- “You Belong Here” campaigns
- Targeted campaign to members that have left in the last 5 years
- Booths where your target demographic will be
- Public Image branding and storytelling



ATTRACTION: CLUB STRUCTURE

- Corporate membership options
- Family membership options
- Young professional membership options
- Flexibility in meetings – meeting time and ways to attend
- Young Professionals mentorship program



ATTRACTION: TOOLS

CREATING A POSITIVE EXPERIENCE FOR PROSPECTIVE MEMBERS



Whether you're a Rotarian, interested in joining Rotary, or considering a career in Rotary, this guide provides you with the tools and resources you need to create a positive experience for prospective members.

A PROSPECTIVE MEMBER'S JOURNEY



YOUR PROSPECTIVE MEMBERS

Prospective members are individuals who are interested in joining Rotary. They may be contacted through various channels, including Rotary Club websites, social media, and direct outreach.

- Identify potential members through various channels.
- Provide a positive experience for prospective members.
- Encourage prospective members to attend a Rotary Club meeting.
- Provide information about the benefits of joining Rotary.
- Encourage prospective members to become active members.

For more information, visit www.rotary.org/membership

GUIDE TO SATELLITE CLUBS



Do you want to start a satellite club? This guide provides you with the tools and resources you need to create a positive experience for prospective members.

WHAT IS A SATELLITE CLUB?

A satellite club is a club that is not affiliated with a Rotary Club. It is a club that is created by a group of individuals who are interested in joining Rotary.

WHY START A SATELLITE CLUB?

There are many reasons to start a satellite club. Some of the reasons include:

- To provide a positive experience for prospective members.
- To encourage prospective members to become active members.
- To provide information about the benefits of joining Rotary.

HOW TO START A SATELLITE CLUB

There are several steps to start a satellite club. The first step is to identify a group of individuals who are interested in joining Rotary. The second step is to create a positive experience for prospective members. The third step is to encourage prospective members to become active members.

GUIDE TO CORPORATE MEMBERSHIP



Do you want to start a corporate membership? This guide provides you with the tools and resources you need to create a positive experience for prospective members.

WHAT IS A CORPORATE MEMBERSHIP?

A corporate membership is a membership that is created by a company. It is a membership that is created by a group of individuals who are interested in joining Rotary.

WHY START A CORPORATE MEMBERSHIP?

There are many reasons to start a corporate membership. Some of the reasons include:

- To provide a positive experience for prospective members.
- To encourage prospective members to become active members.
- To provide information about the benefits of joining Rotary.

HOW TO START A CORPORATE MEMBERSHIP

There are several steps to start a corporate membership. The first step is to identify a company that is interested in joining Rotary. The second step is to create a positive experience for prospective members. The third step is to encourage prospective members to become active members.

DO MORE THAN YOU THOUGHT POSSIBLE WITH ROTARY



What Rotary can do for you is more than you think. It's a place where you can make a difference in the world.

Rotary can help you:

- Grow your business.
- Improve your leadership skills.
- Build your network.
- Make a difference in the world.

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Engaging Younger Professionals

A collage of images showing young professionals engaged in various activities, including networking, volunteering, and socializing.



Welcome to the Rotary Band Center

Why are Rotary? We are People of Action.

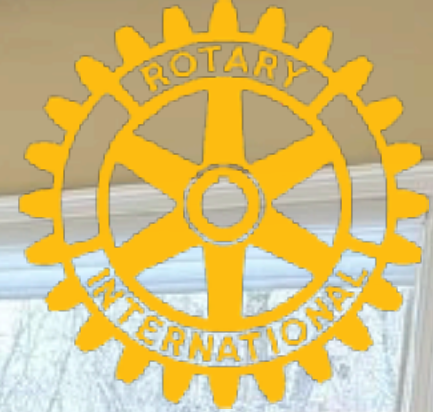
A collage of images showing people engaged in various activities, including networking, volunteering, and socializing.

ATTRACTION

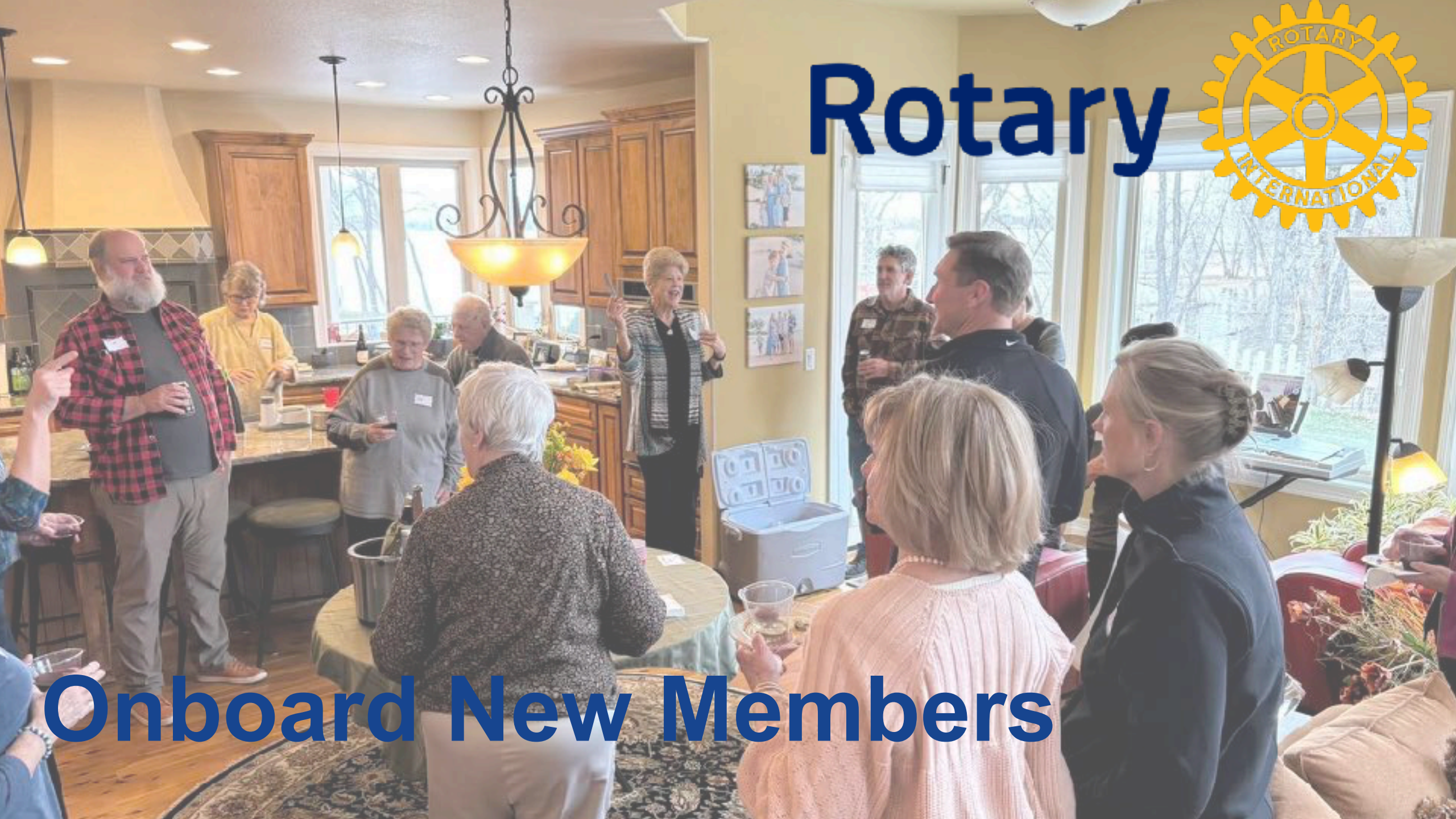
Discussion Questions

1. What tools might you utilize to make your community aware of Rotary and your club?
2. What positive examples of Club Attraction can you share?

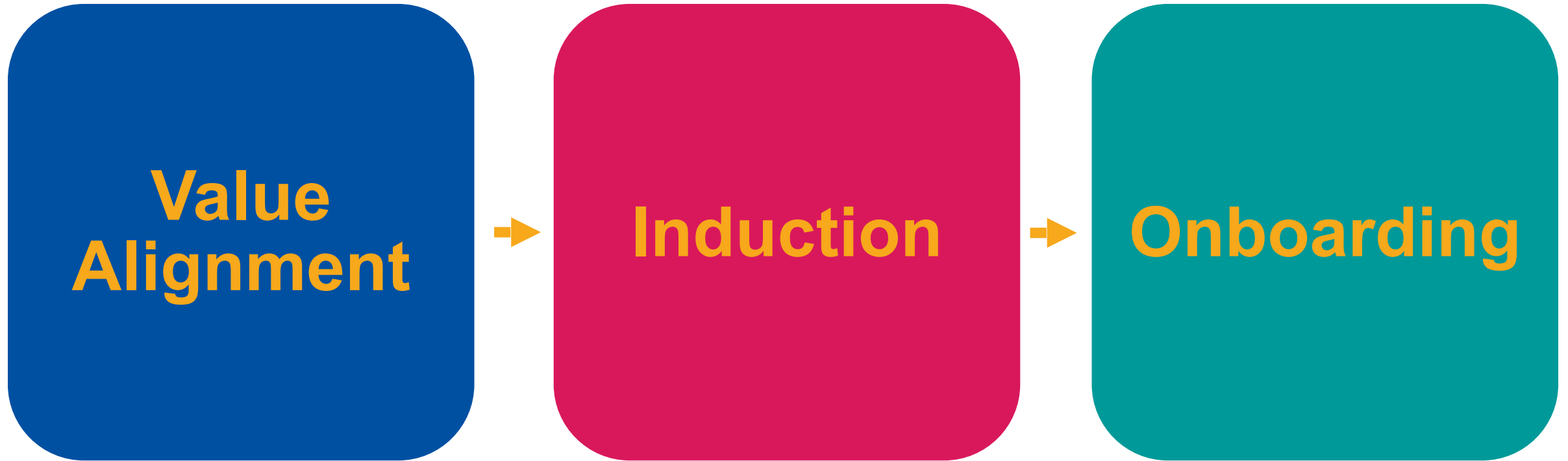
Rotary



Onboard New Members



THREE PHASES



The Value Alignment Interview



1. Tell me a little bit about yourself personally and professionally.
2. How did you find Rotary?
3. What is appealing about it?
4. What are your expectations? *What else? What else?*
5. If we ended up deciding this was the right fit, and it's one year from now, how would you describe your experience in more detail?
6. How do you think you would contribute to the club's success?
7. Manage Expectations:
 1. Is this what they really want?
 2. Money
 3. Time
 4. Talent
 5. If not us, then who?

SAMPLE VALUE ALIGNMENT QUESTIONS

The Onboarding Process

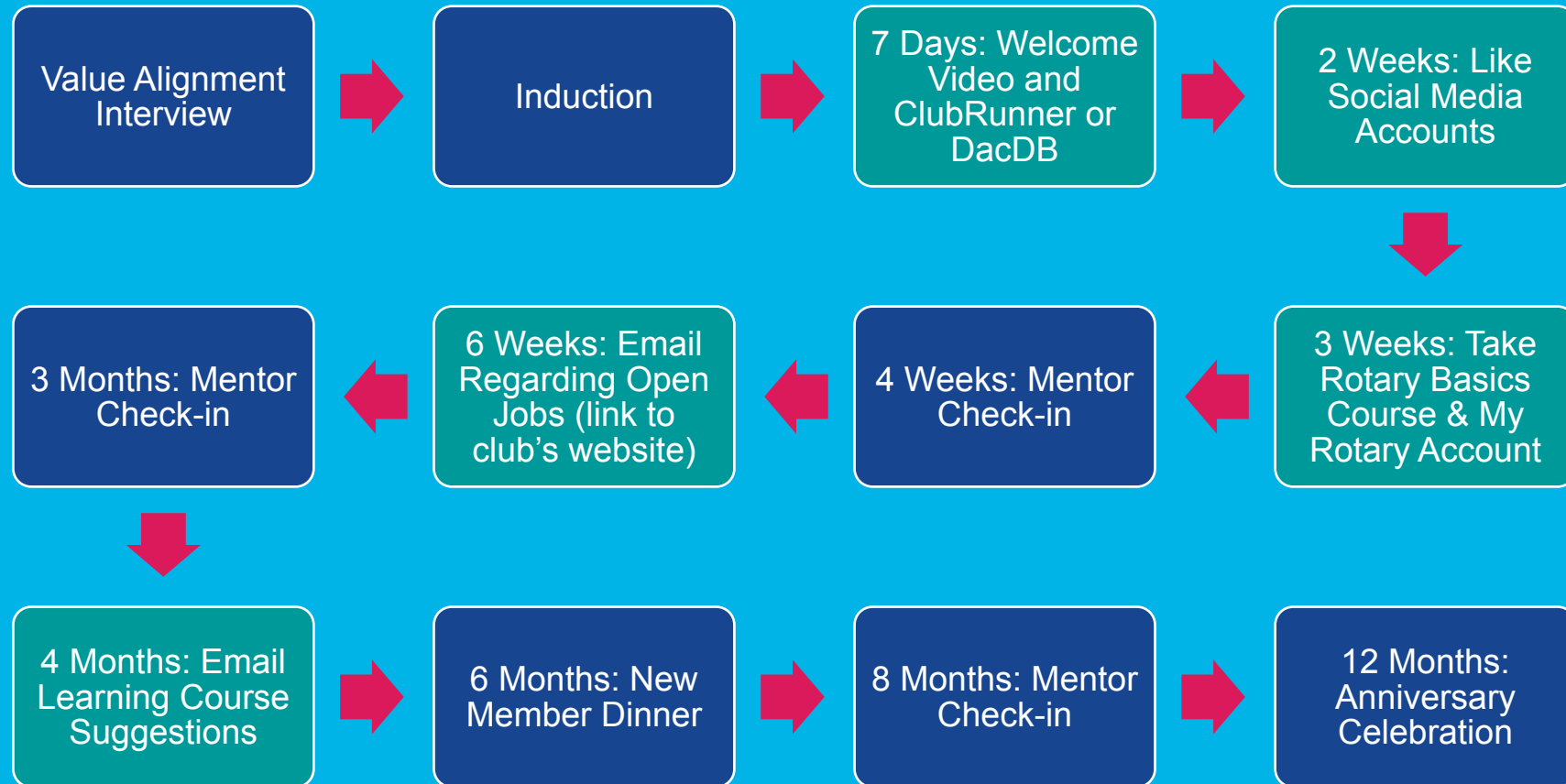
ORIENTATION

- One-time event
- Role in Rotary
- Classroom style
- Big picture
- Ready to join the club

ONBOARDING

- Ongoing
- Role in club
- "On-the-job"
- Specific to the member
- Ready to contribute

Email Drip Events



ONBOARDING GOALS



ORIENTATION



**DISCOVER
NEEDS**



**GET
CONNECTED**

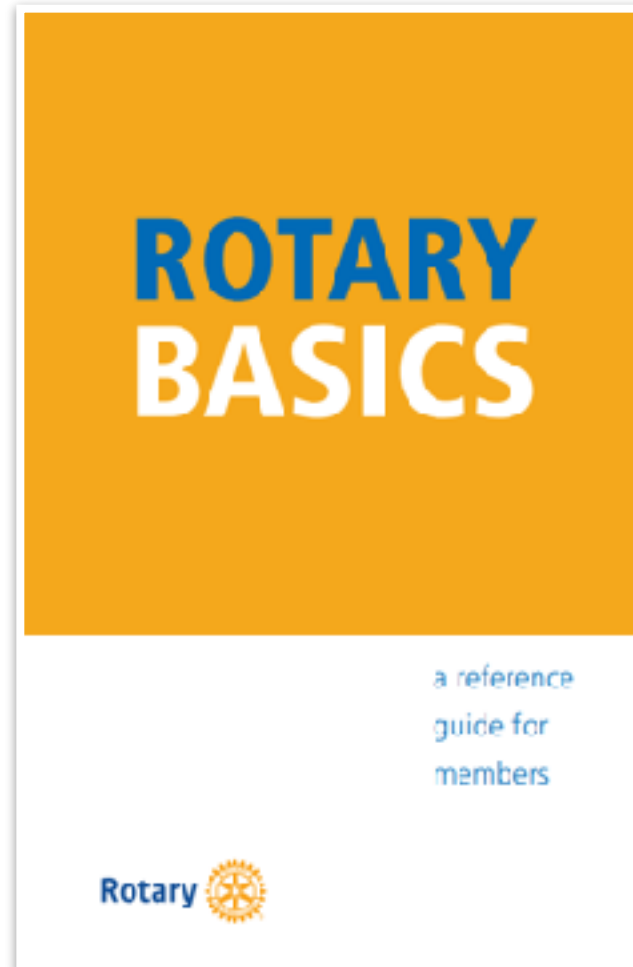


MENTOR



FRIENDSHIP

ONBOARDING: TOOLS





**SHARE
YOUR
SUCCESS**

Rotary



Example of Success



REDMOND ROTARY

**CREATE A PLAN,
WORK THE
PLAN, HAVE FUN
AND DO GOOD
THINGS.**

CREATING A PROCESS

- Members were joining and leaving the club after just a few months
- PE went to the board & asked if they could reevaluate how they approach prospective members and what they must do to retain existing members.





"Service Above Self"

Rotary

What is Rotary?

Rotary is an organization of neighbors, friends, leaders, and problem-solvers who care about where people live and take action to create lasting change – in our Rotarian community, across this globe, and in our lives.

Rotary and Rotary member projects and events include:

- Child Recovery, Cancer, Environment and Youth Center for UNH
- Boys and Girls of the World, Women Educational Center
- Annual City, State, & US Library Project
- Polio eradication campaign, ICF Police Dept, Redwood Forest Reclamation, Academy, Mike Panto Park, Recreation School Field
- Give over \$150,000 in education for high school students
- Much more to come

BECOME A MEMBER TODAY!

☐ 503.781.5381 rotarypdxmen09@gmail.com

- Membership chair phones every prospective member first & thanks them for their interest in the club.
- It is the Club's responsibility to find a need in the community that the club is involved with to FULFILL THEIR PASSION of what they would like to do. They explain that this is a **symbiotic relationship**. They tell them up front if they cannot meet their expectations than their club is not for them.

NEW COMMUNICATION STRATEGY

4-WAY FLYER

Club of Redmond

SERVICE ABOVE SELF
APRIL 13, 2022 - Volume #47
FOR MEMBERS - BY MEMBERS

ROTARY CLUB OF REDMOND DAY - APRIL 14, 2022

PRESIDENT'S MESSAGE

I hope everyone is planning to attend this week's meeting. It's not every day that a whole town celebrates our club's anniversary. But that's exactly what will happen tomorrow (Thursday), as the Redmond City Council declared April 14th to be **Rotary Club of Redmond Day** in honor of our club's formation 70 years ago. (see Proclamation last page)



Seventy years ago, gas cost 25 cents a gallon and there was an epidemic still raging. Unfortunately, polio was a headliner in 1952, disproportionately affecting children. It would be another three years before the vaccine becomes available in the US.

Besides Rotary's global fight against polio, it's amazing to think of all the good things our club has contributed locally and globally over seven decades of service. As someone who wasn't here back then (or anywhere, yet), I'd be interested in hearing about some of the events that shaped the club's early years. I bet you would be, as well.

Rumor has it that we will have a special guest or two that

WEEKLY MEETING SCHEDULE

April 14th, 2022 Weekly Gathering / Hybrid

Speaker: Damon Runberg, OED Economist
Rotary Club of Redmond Day!!

April 21st, 2022 Weekly Gathering / Hybrid

Speaker: Dr. Audrey Haugan, Redmond HS Principal

April 28th, 2022 Weekly Gathering Hybrid

Speaker: Kate Soliz, Ridgerview HS - ASPIRE/AVID

May 5th, 2022 Weekly Gathering / Hybrid

Monthly Business Meeting

Central Oregon Mastersingers

Earlier this week, club member Judy Corwin performed as part of the choral group who offered "a concert of healing" free to the public. Two concerts, to be specific. The piece presented by the group, *Brahm's Requiem*, was chosen to uplift and support all in our region who experienced particular losses or





Rotary Club of Redmond, OR

March 5 · 🌐

The Rotary Club of Redmond issues new members a **RED** nametag badge and a checklist of club activities. When the activities are achieved, the club formally recognizes each member with a presentation of their permanent **BLUE** badge. Congratulations to our club's latest "Blue Badge Rotarians":
Nick, Nicole, Linda, Walter, and Ryan.

NEW RECOGNITION STRATEGY



Rotary Club of Redmond, OR

December 16, 2021 · 🌐

The Rotary Club of Redmond is proud to present the 2021 Humanitarian Award along with a Paul Harris Fellowship Award to Ann Lankford, for her involvement and contributions towards the Rotarian scholarship project.



8

1 Share



Rotary Club of Redmond, OR

March 4 · 🌐

The Rotary Club of Redmond is proud to welcome newly inducted member Clifford Evelyn, with his wife Lynnelle.



21

2 Shares

NEW PUBLIC IMAGE STRATEGY

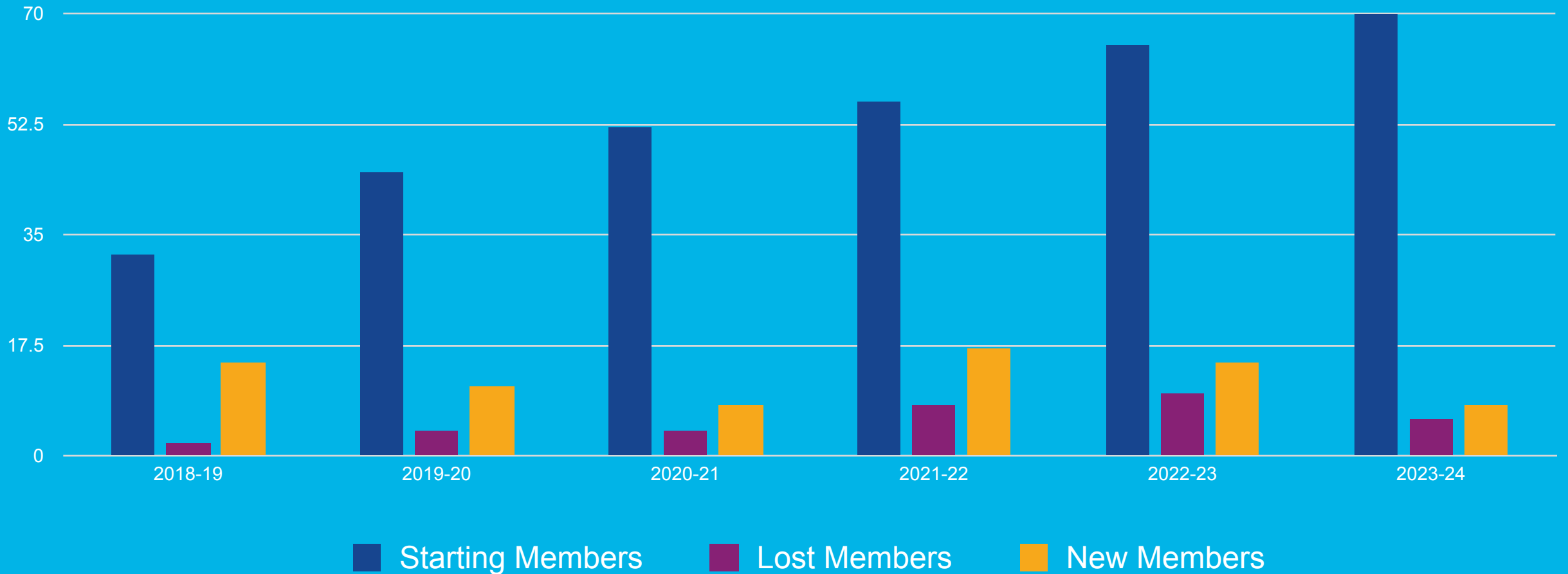


Daddy Daughter Dance - 2024



The Rotary Club of Redmond held its 10th Annual Daddy Daughter Dance on March 16, 2024. There were so many wonderful moments of Daughters dancing with Dads. Lots of appreciative comments from Dads for a very, very memorable event. It was so much fun, some say the "Best Ever". [Check out the VIDEO](#)

REDMOND ROTARY MEMBERSHIP



NEW CLUB MEMBERS

100% retention in new members brought in during Rotary years 2020-21 & 2023-24.

100%



REDMOND ROTARY
COMMUNITY FIELDS

at the David M. Jaqua Sports Complex

ACTIVE,
INTENTIONAL
MEMBER
ENGAGEMENT



DYNAMIC,
MEANINGFUL
SERVICE



EFFECTIVE
GOVERNANCE
(INTENTIONAL
LEADERSHIP)



STRONG
**PUBLIC
IMAGE**
(WELL KNOWN
IN COMMUNITY)



**GROWING
CLUBS**

ACTIVE, INTENTIONAL ENGAGEMENT

What does it look like?

- Great meetings and strong friendships
- Consistent & flexible meetings
- Engaging new members
- Saying “thank you”

DYNAMIC, MEANINGFUL SERVICE

**Signature
projects and
fundraisers**

**Include
community
members**

**Ongoing,
active
service**

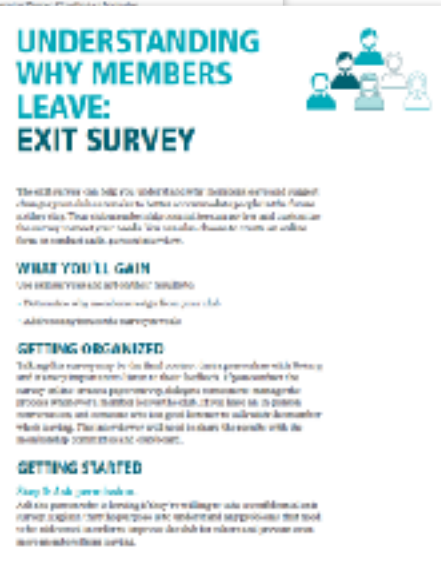
STRONG PUBLIC IMAGE

It's not just doing, it's being seen doing.



TIP: Focus on member attraction

ENGAGEMENT: TOOLS



Club flexibility FAQ

Many of the traditional rules and requirements that Rotary clubs have had historically, such as weekly meetings, attendance requirements, morning or lunch meetings, functions of dues/collections, and high costs, have limited who is able or willing to join. When we join together with different perspectives and backgrounds, professions and areas of expertise, talents and resources, we can see challenges in new ways and identify creative solutions.

Any Rotary club wishing to try a new approach can do so by amending its bylaws as permitted by the Standard Rotary Club Constitution. But clubs can also continue to follow their current requirements for meetings, attendance, structure, and categories of membership. Have a conversation with your club members to determine whether flexible options can help to address your club's membership needs.

Meeting format

- What ways are clubs changing their meeting format?
- What are the advantages of changing the meeting format?

What do you want to do?

I want to...



Membership Action Plan

ATTRACTION



ONBOARDING



ENGAGEMENT

NEXT STEPS

Rotary 
Zone 26 and 27

2024 MEMBERSHIP ACTION PLAN WORKSHOP

Join us for this interactive workshop and learn how to create and maintain a successful membership action plan.

**APRIL 20, 2024 8:00 AM - 11:30 AM
OR
MAY 9, 2024 4:00 PM - 7:30 PM**

Key Discussions & Insights

- ✓ Goal Setting
- ✓ Strategy Development
- ✓ Leadership networking
- ✓ Recruit, retain, and build members

REGISTER IN ADVANCE

 <https://us02web.zoom.us/join/register/t2EqccmRqD0jE9ESJ2jhZ609Zh0b8c002TCP>



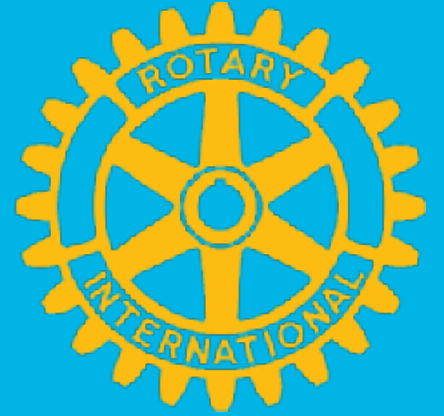
SLOW, STEADY PROGRESS

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



QUESTIONS

Rotary



THANK YOU!