

YOUR MEMBERSHIP PLAN WORKSHEET

Use this worksheet to make a membership plan for your club. After evaluating your club, focus on the particular steps that address your club’s toughest challenges. The steps will direct you to resources that can help. When you’ve completed the steps, you will have identified challenges and opportunities, developed a vision, and generated strategies for prospective, new, and established members.

During club meetings, talk to members about the steps you’re taking to strengthen membership, and encourage those members to get involved in the process.



Step 1: Evaluating Your Club

- We identified areas for improvement after using the [Rotary Club Health Check](#), and we took the course [Is Your Club Healthy?](#) in the [Learning Center](#) to review the modules that address the areas of our club that need attention. Based on what we learned, we will try the following:

Area for improvement	Remedy we plan to try
----------------------	-----------------------

_____	_____
_____	_____
_____	_____

- We found ideas or best practices in [Be a Vibrant Club](#) that we will use to make our club innovative and flexible:

- We completed the membership [diversity assessment](#), have taken the course [Building a Diverse Club](#) in the [Learning Center](#), and plan to do the following to increase and celebrate new ideas and perspectives:



- Our club completed the [classification assessment](#) and plans to do the following to better represent our community's professional diversity:

Step 2: Creating a Vision for Your Club

- Our club completed the club visioning process and developed the following vision:

In 3-5 years, our club will:

- Our club has a membership committee with a leader and at least five members to guide the implementation of our vision and membership plan.

- Long-term goals that will help us achieve our vision include:

- We reviewed our club's strategic plan to ensure that our membership plan aligns with it.

Step 3: Attracting New Members

- Our club completed the course [Strategies for Attracting New Members](#) in the [Learning Center](#) and plans to make itself more attractive to prospective members in the following ways:

- Our club completed the [Finding New Club Members exercise](#) and will take these actions to find prospective members:



- Our club selected the following membership benefits to highlight when speaking to prospective members:

- Our club took the course **Practicing Flexibility and Innovation in the Learning Center** to understand the flexible options now available to clubs, and we plan to try the following to better accommodate members:

- Our club took the **Online Membership Leads** course in the **Learning Center**, and we understand how membership leads can benefit our club.

- Our club leaders have determined who will manage membership leads assigned to our club.

- Our club has a process for following up with prospective members assigned to us through the membership leads program.

- Our club has read **Creating a Positive Experience for Prospective Members**, understands how that experience can influence prospective members' perceptions of Rotary, and has a plan to ensure we create a good experience for prospects whether or not they join.

Step 4: Engaging Your Club's Members

- Our club has asked members to complete the **member satisfaction survey** and decided to implement the following changes based on the results:



- Our membership committee members have taken the course **Kick-start Your New Member Orientation** in the [Learning Center](#), have read [Introducing New Members to Rotary](#), and are developing an orientation process that educates new members and involves them in the club. Our orientation process will include the following:

- Our club completed the [retention assessment and analysis](#), discussed the results, and will take these steps to improve our engagement and retention:

- Our club has taken the course **Best Practices for Engaging Members** in the [Learning Center](#) and will take these actions to engage our members:

- Our club has looked at the many ways members can get involved through Rotary, as outlined in [Connect for Good](#), and will encourage members to get involved in these new ways:

- Our club asked members who've left recently to complete the [exit survey](#) to better understand why members leave the club. We've discussed the results and will take these steps to engage the member groups we've identified as the most vulnerable to termination:

Member groups

Strategy



Step 5: Improving Your Public Image

- We have selected a club member to manage our social media content.
- We have selected a member to manage and update our club website using materials from Rotary's [Brand Center](#).
- We have selected a member to update our customizable club brochure using the template on Rotary's [Brand Center](#).
- We visited the [Brand Center](#) on My Rotary and will use these additional tools to promote awareness in our community:

- Our club hosted a focus group in our community. The group yielded these findings:

Step 6: Supporting New Clubs

- Our club membership committee chair has told our district governor that we're willing to serve as a sponsor club.
- Our club members have discussed the responsibilities of serving as a sponsor club and agree to commit to this relationship.
- Our club leaders are open to supporting a satellite club and consider it as an option for accommodating differing needs among members.

Step 7: Supporting Your Club: Rotary Resources and Tools

- Our club membership committee communicates regularly with our district membership committee.
- Our club leaders regularly communicate with our district governor or assistant governor and ask for help when we need it.
- Our club membership committee members have visited rotary.org/membership within the past month and know where to find Rotary materials to help our club.