**YOUR MEMBERSHIP PLAN**

**(45 minutes)**

## Relevance: As educator Laurence J. Peter once said, “If you don't know where you’re going, you will probably end up somewhere else.” Having a plan helps you reach your goals.

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| **Workshop**  R:\COMSHARE\FProd\ FOR WEB\PDFs\Leadership Dev\Leaders Guide Icons\Workshop_2.png | * Best for learning practical skills or giving participants a new understanding through an interactive activity * Led by experts * Room arranged for groups to collaborate, with space for facilitator to move freely among participants |

### Learning objectives

At the end of this session, participants should be able to:

* Create or refine a vision for their club
* Develop a membership plan for their club

**Before the session**

* Review the speaking points and activity you will lead.
* Consider inviting a strategic planning expert to the workshop.
* Consider asking participants whose club has a strategic plan to bring it with them to the session, or bring your own to show as an example.
* Send participants a [regional membership plan and supplement](https://www.rotary.org/myrotary/en/membership-resources) so they can see what goals have been identified for their region.
* Ask participants to choose their top three long-term membership goals from either Rotary Club Central or their regional membership plan and bring them to the session.
* Consider any relevant district or regional issues.
* Decide whether you will use the PowerPoint template provided and develop slides, or use flip charts or a whiteboard.
* Review the resources listed below.

### Resources

* [Strengthening Your Membership: Creating Your Membership Development Plan](https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan)
* [Strategic Planning Guide](https://www.rotary.org/myrotary/en/document/745)
* [Regional membership plan and supplement](https://www.rotary.org/myrotary/en/membership-resources)
* [Be a Vibrant Club](https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership#bevibrantclub)
* [Rotary Club Central Membership Reports](https://map.rotary.org/en/rcc/Pages/ClubDataDownloadReport.aspx)
* [Understanding Membership Reports: Getting Started](https://www.rotary.org/myrotary/en/document/understanding-membership-reports-getting-started)

**During the session**

* Welcome participants and introduce yourself.
* Review learning objectives.
* Highlight these key messages:
  + A membership plan, which is part of your strategic plan, outlines your club’s goals and strategies for attracting new members and engaging current ones.
  + Consult your regional membership plan to see what challenges and opportunities have been identified for your region.
  + Visualizing where you want to be in 3-5 years can help you think of goals for your membership plan.
  + Involve all members in the process to give them a sense of responsibility in the club and motivation to achieve its goals.
  + Remind participants that yearly goals should be entered and tracked in Rotary Club Central.
  + Use the worksheet Membership Development Plan in [Strengthening Your Membership](https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan) to build your club’s plan.
* Lead the activity below.
* At the end of the session:
  + Take questions from participants.
  + Highlight key resources and where to find them.
  + Review the learning objectives to make sure they’ve been achieved.
  + Ask participants to write down one idea they’ll use from the session.

### Activity

Purpose: Create a vision and membership plan for your club

* Allow 35 minutes for this activity.
* Post several flip charts around the room for participants to write their vision statements.
* Give the worksheet Your Membership Plan, at the end of this guide, to participants.
* Ask participants to use the worksheet to:
* List five characteristics that they would like to see in their club in 3-5 years.
* Draft a one-sentence vision statement that will distinguish their club from other service clubs in their community — for example: “Our vision is to be the most internationally diverse service club in our community” or “Our vision is to be the service club most supportive of youths in our community.” Participants who already have a strategic plan may refine their vision statement if needed.
* Write the vision statements on a flip chart. The facilitator should allow time for everyone to read them and encourage editing if reading the statements sparks new ideas.
* Next, ask participants to use the three long-term membership goals they brought to the session and determine how they can support their vision. Or, have them develop three goals that support the vision statement. Have them write the goals on the worksheet.
* Ask participants to work in pairs to discuss their plans for carrying out their goals and write the plans on the worksheet. If more than one participant is from the same club, have them work together.
* Ask various participants to share their responses.
* Encourage participants to continue working on their membership plan when they return to their clubs to get opinions on each of their membership goals; also, have them determine the resources and people needed to carry out their plans.

**WORKSHEET: YOUR MEMBERSHIP PLAN**

Complete the worksheet below by listing the characteristics you would like to see in your club 3-5 years from now. Next, write your vision statement, along with your club’s top three membership goals from Rotary Club Central or your regional membership plan. Write at least one action item for each goal.

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| **Club characteristics:** |

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| **Vision statement:** |

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| --- | --- |
| **Long-term goals** | **Action items** |
| 1. |  |
| 2. |  |
| 3. | a.  b.  c. |