[Notes in brackets and **blue** text are suggested questions/strategies that you’ll want to develop as part of this plan. A planned, intentional approach that has enough bases covered in advance to ensure the team’s success. **Remove** these sections as the plan becomes more fully developed]

**The Situation:** *Expand Our Reach*

“Expand our Reach” is one pillar of Rotary’s Action Plan. Many Rotary clubs are steadily declining in membership, usually because the Club Experience they’re delivering isn’t meeting the expectations of either potential members or current members. Steady membership decline (typical loss of 1-2 members/year) leads to ever-smaller clubs with an ever-declining ability to serve their communities.

If these clubs could fix themselves, they already would have. Clubs in this situation need some outside perspective, ideas and help to break their downward trajectory.

**The Project:** *A Club Assistance Team for helping clubs improve their Club Experience*

[This section is the “What are we intending to do?” with this project statement –

* What is our Objective?
* What are our key Strategies? – What do we intend to do?
* What are the intended Outcomes? – What will Success look like?

A clear statement of purpose and outline of the intended approach is essential to ensure that team members all understand the project’s intent]

Project Overview starts here………………

**The Team:**

[This section is about “WHO is going to do this?” and “How are we going to prepare them”?

* Who is leading this team?
* What are our criteria for team selection?
  + Experience
  + Demonstrated communication/leadership skills
  + Track record of membership success
* How can we identify potential team members (how many?)
  + DG/PDG recommendations
  + Identify clubs’ growth years, and who was President those years
  + Prolific Sponsors – those who have sponsored multiple members
  + AVOID those already committed – Current Presidents, AGs those with other District responsibilities
* When? What’s our timeline for team selection
* Orientation (Learning strategy)
  + How will we ensure our team members have a consistent set of “Talking Points” with which to approach clubs? Let’s not expect them to make it up for themselves

This section is a clear vision of who we’re looking for, how we’ll select them and how we’ll prepare them for success]

Team Selection/Preparation section starts here …………

**The Process:**

[This section is about “WHAT are we doing to do?” – What are the major steps or “checklist” items? Some ideas:

* What are our criteria for selecting clubs that likely need help with membership?
  + MGI Report Red Line clubs (smaller than they were 3 years ago)
  + After October 1, clubs far off pace of new member attraction (MSC YTD Progress to Goal Report – “Ahead (Behind) New Member Pace” column)
* How will we assign clubs to team members?
  + Avoid tying team members to Areas or other rigid structure – keep your team flexible as the challenges with each club unfold.
* How will we track accountability/progress club-by-club (team member execution)
* **Engagement -- Who** in the club will we contact, and **how** will we approach them?
  + Focus on “Inspiring and Motivating” the club to succeed
  + Data – Know the club’s membership track record
    - Goal Setting Worksheet from MSC – “Here’s what we’re seeing”
    - Progress Dashboard (MSC) – Current year’s pace of new member attraction
  + Talking Points
  + Achieving “buy-in” by President
  + Meet with club leaders/Board to ensure “buy-in”. Include Assistant Governors in the conversation
  + Collateral – a “library” of material for team members <https://www.rizones33-34.org/club-membership-committee/>
* Progress Tracking/Reporting
* When to disengage – After what level of effort with no change in club culture will we suspend our efforts with a club?
* “Memo of Understanding” -- Simple statement of mutual agreement between Team and Club. **Mutual Expectations** to which both the Team and Club are committed
* Potential Strategies once engaged:
  + Member Satisfaction Survey
  + Club Visioning
  + Identify a Change Agent and help with building a Guiding Coalition
  + If Attraction is the problem, recommend a Rotary Information Hour event

The team’s operational (business) processes start here………….