



# The S.A.M. (Specific, Attainable, Measurable) & the MEMBERSHIP PLAN

**INSTRUCTIONS:** Check (  ) the number next to each task you will use to achieve your goals during the 2018-2019 Rotary year! Mark (X) on the plan you will use to reach your goal. Also, use the blank O or the blank boxes at the end of this document to establish additional GOALS or Plans.

NAME: \_\_\_\_\_

DISTRICT NUMBER: \_\_\_\_\_

DMC'S NAME: \_\_\_\_\_

0 <input checked="" type="checkbox"/>	<p><b>SAMPLE</b></p> <p><b>GOAL:</b> I will lose 2 lbs. a week and will weigh 228 lbs. by July 21, 2018, to improve my health.</p> <p><input checked="" type="checkbox"/> <b>PLAN:</b> I will eat 1800 calories a day eating six meals. Meal one, 300 calories; meal two, 300 calories; meal three, 300 calories; meal four, 300 calories; meal five, 300 calories; meal six, 300 calories;</p> <p><input type="checkbox"/> <b>PLAN:</b> I will walk 10,000 steps a day.</p> <p><input type="checkbox"/> <b>PLAN:</b> (Write your own plan here or add to the plan for the accomplishment of the goal.)</p> <p>NOTE: By checking under the number 1, this District Membership Chair (DMC) has established the goal of losing 2 lbs. a week by planning to eat 1800 calories a day. The DMC has not Xd the circle to walk 10,000 steps a day, so the DMC has NOT included that as part of their weight loss plan.</p>
1	<p>Create a District Membership Committee of ____ members by _____ (Sept. 1, 2018)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Get permission from the DG to use the AGs as the members of your membership committee.</li> <li><input type="checkbox"/> Identify the top 10 clubs who are growing in your District and solicit one or two members from each club to comprise the District Membership Committee.</li> <li><input type="checkbox"/></li> </ul>
2	<p>Hold a monthly District Membership Committee Meeting to discuss each club and their progress in the District each month.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> On the (1<sup>st</sup>) _____ (Wednesday) of each month I will hold a membership meeting.</li> <li><input type="checkbox"/></li> </ul>



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3	<p>Achieve a net gain in membership. Clubs with up to 50 members must have at least one more member listed in Rotary's records on 1 July 2018 than they did on 1 July 2019; clubs with 51 or more members must have at least two more members listed in Rotary's records. Net gain = _____</p> <ul style="list-style-type: none"><li>○ Before (Sept) _____ (15<sup>th</sup>) of 2018, I will use the monthly membership chart worksheet provided by the Zone to identify _____ clubs in the District who I believe are willing to accept this challenge.</li><li>○ Before _____(DATE) _____ I will have my committee members contact each club in the District that I have identified to get them to commit or modify the goal.</li><li>○ Before the monthly District Membership Committee meeting, each committee member will contact their clubs and provide a report during the meeting on the progress towards reaching their goal.</li></ul>
4	<p>Achieve a net gain in membership. At the end of the 2018-2019 year (June 30, 2019), the District will have achieved a net gain in membership over the previous year. Net gain = _____</p> <ul style="list-style-type: none"><li>○ Before (Sept) _____ (15<sup>th</sup>) of 2018, I will use the monthly membership chart worksheet provided by the Zone to identify _____ clubs in the District who I believe are willing to accept this challenge.</li><li>○ Before _____(DATE) _____ I will have my committee members contact each club in the District that I have identified to get them to commit or modify the goal.</li><li>○ Before the monthly District Membership Committee meeting, each committee member will contact their clubs and provide a report during the meeting on the progress towards reaching their goal.</li><li>○</li></ul>



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5	<p>Achieve a zero gain in membership. At the end of the 2018-2019 year (June 30, 2018), the District will neither gain or lose membership.</p> <ul style="list-style-type: none"> <li>○ Before (Sept) _____ (15<sup>th</sup>) of 2018, I will use the monthly membership chart worksheet provided by the Zone to identify _____ clubs in the District who I believe are willing to accept this challenge.</li> <li>○ Before _____(DATE) _____ I will have my committee members contact each club in the District that I have identified to get them to commit or modify the goal.</li> <li>○ Before the monthly District Membership Committee meeting, each committee member will contact their clubs and provide a report during the meeting on the progress towards reaching their goal.</li> <li>○</li> </ul>
6	<p>Achieve a net gain in female members. Clubs with up to 50 members must gain at least one female member; clubs with 51 or more members must gain at least two female members than listed in Rotary's records on July 1, 2018, before July 1, 2018.</p> <ul style="list-style-type: none"> <li>○ Before (Sept) _____ (15<sup>th</sup>) of 2018, I will use the monthly membership chart worksheet provided by the Zone to identify _____ clubs in the District who I believe are willing to accept this challenge.</li> <li>○ Before _____(DATE) _____ I will have my committee members contact each club in the District that I have identified to get them to commit or modify the goal.</li> </ul>

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	<ul style="list-style-type: none"> <li>○ Before the monthly District Membership Committee meeting, each committee member will contact their clubs and provide a report during the meeting on the progress towards reaching their goal.</li> <li>○</li> </ul>
7	<p>Achieve a net gain in members under age 40. Members who were born after 1 July 1977 and joined between 1 July 2018, and 1 July 2019 count. Clubs with up to 50 members must gain at least one member under age 40; clubs with 51 or more members must gain at least two members under age 40</p> <ul style="list-style-type: none"> <li>○ Before (Sept) _____ (15<sup>th</sup>) of 2018, I will use the monthly membership chart worksheet provided by the Zone to identify _____ clubs in the District who I believe are willing to accept this challenge.</li> <li>○ Before _____ (DATE) _____ I will have my committee members contact each club in the District that I have identified to get them to commit or modify the goal.</li> <li>○ Before the monthly District Membership Committee meeting, each committee member will contact their clubs and provide a report during the meeting on the progress towards reaching their goal.</li> <li>○</li> </ul>



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8	<p>Hold ___ Membership Matters Seminar (4 hours), inviting all clubs in the District, on or before November 15, 2018.</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____           <p>I will email an invitation to each club membership chair in the District to attend a Membership Matters Seminar to be held _____(DATE).</p> </li> <li>○ Each member of the District Membership Committee will call each club membership chair and personally invite them to the Membership Matters Seminar by _____(DATE)_____.</li> <li>○ On or before _____(DATE)_____           <p>I will snail-mail an invitation to each club membership chair in the District to attend a Membership Matters Seminar to be held _____(DATE).</p> </li> <li>○ On or before _____(DATE)_____ I will contact my Rotary Coordinator to either be trained to conduct the MMS or invite them to send someone to lead the seminar.</li> <li>○</li> </ul>
9	<p>Hold ___ Membership Matters Seminar (4 hours), inviting all clubs in the District, after November 15, 2018, but before April 15, 2019.</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____           <p>I will email an invitation to each club membership chair in the District to attend a Membership Matters Seminar to be held _____(DATE).</p> </li> <li>○ Each member of the District Membership Committee will call each club membership chair and personally invite them to the Membership Matters Seminar by _____(DATE)_____.</li> <li>○ On or before _____(DATE)_____</li> </ul>



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	<p>I will snail-mail an invitation to each club membership chair in the District to attend a Membership Matters Seminar to be held _____(DATE).</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will contact my Rotary Coordinator to either be trained to conduct the MMS or invite them to send someone to lead the seminar.</li> </ul>
10	<p>Distribute monthly to each club in the District the 12 Years of Membership Historical Data Chart provided by the Zone.</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will create an email address file in my mailbox so I can distribute the Monthly Membership Charts to each club president, club membership chair, the DG, DGE, DGN, and DGD, and the District Membership Committee.</li> <li>○ On or before _____(DATE)_____ I will create an email address file in my mailbox so I can distribute the Monthly Membership Charts to each club Members of the District Membership Committee so they can distribute the chart to the club president and club membership chair in each of their assigned clubs. As an agenda item on my monthly membership committee meeting with the members of the District Membership Committee, I will ask each member of the membership committee to report on whether they achieved their assignment.</li> <li>○</li> </ul>



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11	<p>Analyze the 12 Year Historical Data Charts for your District and develop a strategy for growing membership. (i.e., which clubs you think can increase membership, which clubs can maintain membership, which clubs can stop the loss of membership with a little effort, etc.)</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will analyze each club in the district (the green clubs, the yellow clubs, the red clubs) to determine which clubs have the greatest potential for increase based on the 12 year history, which clubs have the greatest potential for retention based on the previous trends, and which clubs need assistance to be offered from the district to end the membership bleeding.</li> <li>○ On or before _____(DATE)_____ I will ask each of the members of the district membership committee to analyze each of their assigned clubs (the green clubs, the yellow clubs, the red clubs) to determine which clubs have the greatest potential for increase based on the 12 year history, which clubs have the greatest potential for retention based on the previous trends, and which clubs need assistance to be offered from the district to end the membership bleeding. I will ask each member of the membership committee to report their assessment at the next scheduled monthly district membership committee meeting after the date above.</li> <li>○</li> </ul>
12	<p>Identify ____ location(s) in your district to start a new Rotary Club and develop a plan to achieve the objective of a new club(s).</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will identify, based on my understanding of the district, locations where new Rotary clubs may be established. I will then approach the nearest Rotary club to the newly proposed location and request the president (or her/his designee) to take the lead in developing a new Rotary club in that location. On _____(DATE)_____ of each month, I will follow up with the lead to access their progress.</li> <li>○ On or before _____(DATE)_____ I will identify, based on my understanding of the district, locations where new Rotary clubs may be established. I will then ask the assigned district membership committee member from that area to approach the nearest Rotary club to the newly proposed location and request the president (or her/his designee) to take the lead in developing a new Rotary club in that location. I will ask that the district membership committee member provide me a report each month by _____(DATE)_____ as to the progress being made in the development of the club.</li> <li>○</li> </ul>



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13	<p>Identify ___ club(s) open to establishing a satellite club(s).</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will identify, based on my understanding of the district, a club which may be open to the establishment of a satellite club. I will then approach that Rotary club and request the president (or her/his designee) to take the lead in developing a satellite Rotary club. On _____(DATE)_____ of each month, I will follow up with the lead to access their progress.</li> <li>○ On or before _____(DATE)_____ I will identify, based on my understanding of the district, a club which may be open to the establishment of a satellite club. I will then ask the assigned district membership committee member from that area to approach that Rotary club and request the president (or her/his designee) to take the lead in developing a satellite Rotary club I will ask that the district membership committee member provide me a report each month by _____(DATE)_____ as to the progress being made in the creation of a satellite club.</li> <li>○</li> </ul>
14	<p>Using the data in the <b>Membership Vitality and Growth report found on My Rotary, review</b> the retention rate for each club. Challenge each club to improve their retention rate during the 2018-2019 year.</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will identify, using the Membership Vitality and Growth report, the clubs with the poorest retention rates in the District. I will challenge each of these clubs to improve their retention rate over their 2014-2018 retention rate.</li> <li>○</li> </ul>





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15	<p>Achieve a net gain in members under age 40. Members who were born after 1 July 1977 and joined between 1 July 2018 and 1 July 2018 count. Clubs with up to 50 members must gain at least one member under age 40; clubs with 51 or more members must gain at least two members under age 40</p> <ul style="list-style-type: none"> <li>○ Before (Sept) _____ (15<sup>th</sup>) of 2018, I will use the monthly membership chart worksheet provided by the Zone to identify _____ clubs in the District who I believe are willing to accept this challenge.</li> <li>○ I will have my committee members before _____ (DATE) _____ contact each club in the District that I have identified to get them to commit or modify the goal.</li> <li>○ Before the monthly District Membership call, each committee member will contact their clubs and provide a report during the call on the progress towards reaching their goal.</li> </ul>
16	<p>Schedule and hold a monthly membership matter conference call (1 hour) each month for all clubs in the District to attend.</p> <ul style="list-style-type: none"> <li>○ On the (1<sup>st</sup>) _____ (DATE) (Wednesday) _____ of each month I will hold an electronic meeting in the District for all club membership chairs and presidents to attend. Each month we will focus on a specific membership topic (i.e., How to retain members, How to grow your club, What does a vibrant Rotary club look like, etc.</li> <li>○</li> </ul>
17	<p>Submit the names of all club Presidents and all club membership chairs to the RC so they can invite these individuals to the Zone Monthly Membership Matters conference calls.</p> <ul style="list-style-type: none"> <li>○ On or before _____ (DATE) _____ I will get from the RI database or, from the District Governor or District Secretary, the names of all club presidents in my District. On or before _____ (DATE) _____ I will email every President asking them for the names and contact information for their club's membership chair. Once I have the names, I will</li> </ul>

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	<p>create an email address listing in my email account, so I can distribute monthly the information to join the monthly membership matters call.</p> <p>○</p>
18	<p>Identify ___ club(s) in your district who would be willing to visit two businesses a month in the community and invite those businesses to attend a weekly Rotary meeting and report back whether they visited the club and the results of their visit.</p> <p>○ On or before _____(DATE)_____ I will, based on my familiarity with the clubs in the district, identify the clubs who may be willing to take on this challenge. The clubs I have identified are:</p> <p>_____ Rotary Club</p> <p>_____ Rotary Club</p> <p>_____ Rotary Club</p> <p>I will contact each of the club membership chairs on or before _____(DATE)_____ and will ask them if they're willing to accept the challenge. On _____(DATE)_____ of each month I will contact the club membership chair and ask them how many businesses were visited during the month, how many of those businesses attended a Rotary meeting during the month, and if any of the businesses joined Rotary.</p> <p>○</p>



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19	<p>Identify __ club(s) in your district who would be willing to invite guests each week to their Rotary meeting and keep records on who joins as a result of the invitation and report back the results to you.</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will, based on my familiarity with the clubs in the district, identify the clubs who may be willing to take on this challenge. The clubs I have identified are: <ul style="list-style-type: none"> <li>_____ Rotary Club</li> <li>_____ Rotary Club</li> <li>_____ Rotary Club</li> </ul> </li> </ul> <p>I will contact each of the club membership chairs on or before _____(DATE)_____ and will ask them if they're willing to accept the challenge. Those clubs who accept the challenge will report back to me each month via email on or before _____(DATE)_____ of each month.</p> <ul style="list-style-type: none"> <li>○</li> </ul>



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20	<p>Identify ___ club(s) willing to divide into groups of 4 with each group giving the task of recruiting one new member. Have the club report back monthly on the results of their visit.</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will, based on my familiarity with the clubs in the district, identify the clubs who may be willing to take on this challenge. The clubs I have identified are:        _____ Rotary Club        _____ Rotary Club        _____ Rotary Club</li> </ul> <p>I will contact each of the club membership chairs on or before _____(DATE)_____ and will ask them if they're willing to accept the challenge. Those clubs who accept the challenge will report back to me each month via email on or before _____(DATE)_____ of each month.</p>
21	<p>Identify ___ club(s) who would be willing to have each member of their club take the challenge of asking a person to join Rotary during the 2018-2019 year and keep records.</p> <ul style="list-style-type: none"> <li>○ On or before _____(DATE)_____ I will, based on my familiarity with the clubs in the district, identify the clubs who may be willing to take on this challenge. The clubs I have identified are:        _____ Rotary Club        _____ Rotary Club        _____ Rotary Club</li> </ul> <p>I will contact each of the club membership chairs on or before _____(DATE)_____</p>



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	and will ask them if they're willing to accept the challenge. Those clubs who accept the challenge will report back to me each month via email on or before _____(DATE)_____ of each month.



Rotary

ZONE 21B-27 MEMBERSHIP

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