



Club Success Plan

Introduction

The Club Success Plan is the first step towards delivering club excellence. Properly developing and executing the plan enables and supports member achievement, which in turn promotes engagement, retention, and club growth. The purpose of this session is to assist club officers to identify and address common barriers surrounding planning, critically look at the Club Success Plans, and facilitate the use of planning best practices.

Overview

First, you will work in a group to analyze and edit excerpts of a completed Club Success Plan. Then, you will analyze a club scenario and write selected parts of the Club Success Plan. Finally, you will review sample answers and discuss as a group.

In this session, facilitators discuss the following topics:

- Improving the Plan
- Club Success Plan Simulation

Objectives

After completing this session, you will be able to do the following:

- Recognize the advantages to good planning
- Assess and revise planning documents to improve effectiveness
- Develop planning documents to effectively target goals

By meeting these objectives, you will be able to support your clubs in critically reviewing your Club Success Plan and implementing best planning practices.

Improving Plans

Breakout Room Activity: Making the Plan Right (20 minutes)

Each scenario below includes the month in which the scenario takes place, some key information from the dashboard, and information from the Club Success Plan. In your group, review the scenarios and correct the excerpts of the provided Club Success Plan.

Scenario 1:

Scenario Month – December

From the Dashboard

Membership	
Base	To Date
12	10
Required	
17	
20 members or a net growth of 5 new members	

Club Success Plan Excerpt

STARTING POINT

What is your club's membership base?

Qualifying Requirement

To be considered for recognition, your club must have either 20 members or a net growth of at least five new members as of June 30.

How many members does your club aim to have as of June 30?

How much net growth does your club aim to have as of June 30?

How many of the 10 goals does your club aim to achieve?

MEMBERSHIP: GOALS 7 AND 8

7. Four new, dual, or reinstating members

8. Four more new, dual, or reinstating members

Situation Analysis

Review the current situation in your club regarding membership.

What is the current membership situation? On average, how many new members join your club each year?

What are your club's current obstacles in achieving its membership goals?

Additional notes:

Membership Action Plan

Membership Action 1

Describe how your club will gain four new, dual, or reinstating members. Specifically, what action will be taken? Refer to this action as Membership Action 1.

Resources for Membership Action 1

What equipment, materials, funding, or people—individuals or committees—can be used to help accomplish Membership Action 1?

Assignment for Membership Action 1

Who is responsible for Membership Action 1? If it is a committee, who are the members of the committee and what is each person's specific responsibility?

Timetable for Membership Action 1

When will Membership Action 1 begin?

When will Membership Action 1 be complete?

How will progress be tracked?

What planning mistakes did this leadership team make?

- Inability to plan or inadequate planning
- Focusing on the present at the expense of the future
- Lack of commitment to the planning process
- Inferior information
- Concentration on controllable variables

Scenario 2:

Scenario Month – March

From the Dashboard

Goals to Achieve			Goal	To Date	Status
Education					
1	Level 1 awards	<i>All Pathways education awards must be submitted in both Base Camp and Club Central.</i>	4	1	4 Level 1s needed
2	Level 2 awards	<i>All Pathways education awards must be submitted in both Base Camp and Club Central.</i>	2	1	2 Level 2s needed
3	More Level 2 awards	<i>All Pathways education awards must be submitted in both Base Camp and Club Central.</i>	2	0	2 Level 2s needed
4	Level 3 awards	<i>All Pathways education awards must be submitted in both Base Camp and Club Central.</i>	2	0	2 Level 3s needed
5	Level 4, Level 5, or DTM award	<i>All Pathways education awards must be submitted in both Base Camp and Club Central.</i>	1	0	1 Level 4, Level 5, or DTM needed
6	One more Level 4, Level 5, or DTM award	<i>All Pathways education awards must be submitted in both Base Camp and Club Central.</i>	1	0	1 more Level 4, Level 5, or DTM needed

Club Success Plan Excerpt

EDUCATION: GOALS 1 THROUGH 6

1. Four Level 1 awards achieved
2. Two Level 2 awards achieved
3. Two more Level 2 awards achieved
4. Two Level 3 awards achieved
5. One Level 4, Level 5, or DTM award achieved
6. One more Level 4, Level 5, or DTM award achieved

Situation Analysis

The purpose of a situation analysis is to assess the state of your club right now. Only once your club identifies where it is can you plan where it is going.

Review the current situation in your club regarding educational goals.

What is the current status of club members in the education program? Who is due to earn an education award?

How motivated are members to progress through the education program?

What obstacles keep members from completing projects?

How familiar are members with the education program?

How does your club promote the education program?

Additional notes:

Education Action Plan

Identify the actions your club will take to meet the needs identified in the situation analysis.

Education Action 1

Describe how to help members complete Levels 1 and 2 in Pathways. Specifically, what action will be taken? Refer to this action as Education Action 1.

Resources for Education Action 1

Your club has many resources at its disposal—equipment, materials, people, and potential funding. Committees can be formed to carry out specific goals, especially when certain members are interested or have skills in a given field.

What equipment, materials, funding, or people—individuals or committees—can be used to help accomplish Education Action 1?

Assignment for Education Action 1

In creating a plan, it is important to assign an individual or a group to each action. This way, the responsible party is held accountable for the completion of the assigned action.

Who is responsible for Education Action 1? If it is a committee, who are the members of the committee and what is each person's specific responsibility?

Timetable for Education Action 1

Determining a timetable allows the Club Executive Committee to track progress toward each goal. Once the timetable is defined, the committee should review it periodically to determine whether your club is on track to complete each action or if adjustments must be made to reach the goal.

When will Education Action 1 begin?

When will Education Action 1 be complete?

How will progress be tracked?

What planning mistakes did this leadership team make?

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Scenario 3:

Scenario Month – June

From the Dashboard

Administration				
10	Membership-renewal dues on time	Y	0	On-time dues-renewal Achieved
	Club officer list on time	Y	0	On-time officer list needed

Club Success Plan Excerpt

ADMINISTRATION: GOAL 10

10. On-time payment of membership dues accompanied by the names of eight members (at least three of whom must be renewing members) for one period and on-time submission of one club officer list

Situation Analysis

Review the current situation in your club regarding administration.

What are your club's current obstacles in achieving its administration goals?

Additional notes:

Administration Action Plan

Administration Action 1

Describe how your club will ensure that membership dues accompanied by the names of eight members (at least three of whom must be renewing members) are received by World Headquarters for the current dues period (on or before **October 1** or **April 1**).

Specifically, what action will be taken? Refer to this action as Administration Action 1.

Resources for Administration Action 1

What equipment, materials, funding, or people—individuals or committees—can be used to help accomplish Administration Action 1?

Assignment for Administration Action 1

Who is responsible for Administration Action 1? If it is a committee, who are the members of the committee and what is each person's specific responsibility?

Timetable for Administration Action 1

When will Administration Action 1 begin?

When will Administration Action 1 be complete?

How will progress be tracked?

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Club Success Plan Simulation

Breakout Room Activity: Club Success Plan Simulation (20 minutes)

Each simulation below includes information about the club’s situation, some key information from the dashboard, and relevant sections of the Club Success Plan. In your group, read each simulation and fill out the Club Success Plan using planning best practices.

Simulation 1:

- Our club is looking to grow 10% beyond the requirements.
- We traditionally struggle with converting leads to members. We are a club that is known for giving aggressive feedback to help member growth. We think this turns visitor off from joining our club.
- Our club struggles with getting guests information and following up with information.
- We currently rely on word-of-mouth marketing, but we need to look beyond that now.
- We are a club with primarily retired or soon to be retired members. A lot of the people who contact us are from local colleges and universities. They don’t usually choose to join.

From the Dashboard

7	New members	4	2	2 New Members needed
8	More new members	4	0	4 New Members needed

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Simulation 2:

- Members get through the education but very slowly. They seem more focused on participation in meetings than completing their path.
- Members give great speeches but focus their speeches on subjects that are not within their path and often do not address their chosen path at all.
- Dual members have a habit of giving awards to their other club(s) instead assigning them here.
- The most active members take up most of the spots for roles and there are not many opportunities for other members to volunteer.
- We have a few long-time members who do not want to work in Pathways.
- Members do not seem excited about achieving awards.

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Resources

Club Experience

[Build a Great Leadership team](#)

[Surveys Speak Volumes](#)

Other Resources

[Moments of Truth](#)

[Distinguished Club Program and Club Success Plan](#)

[Leading the Club to Success](#)

[Building on Achievement for Continued Success](#)

[Club Officer Tools](#)

Conclusion

Key Takeaways

What is one idea from this session that you plan to adopt in your club?

What are some other key takeaways from this session that will help you be successful?