



PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



rev 11-2009-tp

The *Planning Guide for Effective Rotary Clubs* is a **tool** to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in each section are common ways clubs might choose to pursue goals. Clubs are encouraged to develop alternative strategies to achieve their goals when appropriate.

Presidents-elect should complete this form in cooperation with their club and are required to bring two copies to PETS, one for Loren Kuehne, Executive Secretary and one for your Assistant Governor. You retain the original.

PETS is the first weekend of March, 2010, Embassy Suites, Albuquerque (PETS begins 3 PM SHARP, Thursday March 4, 2010). The President 2010-11, Public Relations Chair, and Membership Chair are required to attend. The Club Secretary training will be an eTraining on Tuesday March 9, 2010 from 4-7 PM.

Rotary Club of _____ Rotary year of office: _____

Name of president: _____

Mailing address: _____

Phone: _____ Fax: _____ E-mail: _____

Has President attended a Rotary Institute For Leadership (circle one)? **Y or N** . President Elect? **Y or N** .
Membership Chair? **Y or N** . Public Relations Chair? **Y or N** .

MEMBERSHIP

Current State

Current number of members: _____

Number of members as of 30 June last year: _____ 30 June five years ago: _____

Number of male members: _____ Number of female members: _____

Average age of members: _____ Number of Rotary alumni members _____

Number of Rotarians who have been members for 1-3 years: _____ 3-5 years: _____

5-10 years: _____

Number of members who have proposed a new member in the previous two years: _____

Check the aspects of your community's diversity that your club membership reflects:

Profession Age Gender Ethnicity

Our classification survey was updated on _____ and contains _____ classifications, of
which _____ are unfilled. (date) (number)
(number)

Describe the club's current new member orientation program.

Describe the club's continuing education programs for both new and established members.

Our club has sponsored a new club within the last 24 months. Yes No

If your club is in a town of 50,000 population or more, would there be a need in your community for an Albuquerque Metro type of club (i.e. non traditional, night time, minimal dues, etc) Yes No

If you answered YES to the above, would your club be interested in sponsoring a new club of this type? Yes No

Number of Rotary Fellowships and Rotarian Action Groups that club members participate in:

What makes this club attractive to new members?

What aspects of this club could pose a barrier to attracting new members?

Have you had a preliminary Board Meeting with the Board and Committee Chairs that you will be serving with 2010-11? **Y or N** .

Are you going to be training your Board and Committee Chairs yourself (**Y or N circle one**) or are you going to be participating in the District Board and Committee Chair training (eAssembly) which will occur Thursday, April 22 from 4-7 PM (**Y or N circle one**)

Have you read your club constitution and bylaws? **Y or N** Do you think they need updating? **Y or N?**

Future State

Membership goal for the 2010-11 is a philosophical goal of 'Every Rotarian Brings In A New Rotarian Every Year'. Are you willing to support the District's effort to 'Hit the Target' during the 2010-11 year? **Y or N**

Our club has identified the following sources of potential members within the community:

How does the club plan to achieve its membership goals? (check all that apply)

- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Ensure the membership committee is aware of effective recruitment techniques
- Develop a recruitment plan to have the club reflect the diversity of the community
- Explain the expectations of membership to potential Rotarians
- Implement an orientation program for new members
- Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- Assign an experienced Rotarian mentor to every new club member
- Recognize those Rotarians who sponsor new members
- Encourage members to join a Rotary Fellowship or Rotarian Action Group
- Participate in the RI membership development award programs
- Sponsor a new club
- Other (please describe):

Action steps:

SERVICE PROJECTS

Current State

Number of Rotary Youth Exchange students: Hosted _____ Sponsored _____

Number of sponsored Interact clubs: _____ Rotaract clubs: _____

Rotary Community Corps: _____

Number of Rotary Youth Leadership Awards (RYLA) events: _____

Number of Rotary Friendship Exchanges: _____

Number of registered Rotary Volunteers: _____

Number of World Community Service (WCS) projects: _____

Number of other current club service projects: _____

How many man hours of service (i.e. 10 member club with each member doing 10 hours of volunteer work = 100 man hours of service) did your club perform (estimated) in 08-09 (est.)? _____ 09-10 (est.)? _____

How much money did your club raise (i.e. fundraising, this would include Every Rotarian Every Year \$100, and any other fundraising or financial accumulation outside of club dues that goes to the work of Rotary)

08-09 (est.)? _____ 09-10 (est.)? _____

Future State

Our club has established the following service goals for the upcoming Rotary year:

For our community:

For communities in other countries:

How does the club plan to achieve its service goals? (check all that apply)

- Ensure the service projects committee is aware of how to plan and conduct a service project
- Conduct a needs assessment of the community to identify possible projects
- Review current service projects to confirm that they meet a need and are of interest to members
- Identify the social issues in the community that the club wants to address through its service goals
- Assess the club's fundraising activities to determine if they meet project funding needs
- Involve all members in the club's service projects
- Recognize club members who participate and provide leadership in the club's service projects
- Identify a partner club with which to carry out an international service project
- Participate in:
 - Interact
 - Rotaract
 - Rotary Community Corps
 - Rotary Friendship Exchange
 - Rotary Volunteers
 - Rotary Youth Leadership Awards (RYLA)
 - World Community Service
 - Rotary Youth Exchange
- Use a grant from The Rotary Foundation to support a club project
- Register a project in need of funding, goods, or volunteers on the Project LINK database
- Other (please describe):

Action steps:

THE ROTARY FOUNDATION

Current State

Number of grants awarded:

District Simplified Grants: _____ Matching Grants: _____

Number of Ambassadorial Scholars: Nominated _____ Selected _____ Hosted _____

Number of Group Study Exchange (GSE) team members: Nominated _____ Selected _____ Hosted _____

Number of Rotary World Peace Fellows: Nominated _____ Selected _____ Hosted _____

Current year's contributions to PolioPlus activities: _____

Current year's contributions to Annual Programs Fund: _____

Current year's contributions to Permanent Fund: _____

Number of club members who are

Paul Harris Fellows: _____ Benefactors: _____ Major Donors: _____

Rotary Foundation Sustaining Members: _____ Bequest Society members: _____

Number of Foundation alumni tracked by your club: _____

Future State

Our club has established the following Rotary Foundation goals (as reported on the Fund Development Club Goal Report Form) for the upcoming Rotary year:

Polio fundraising: _____ Annual Programs Fund contributions: _____

Major gifts: _____ Benefactors: _____

Bequest Society members: _____

Our club will participate in the following Rotary Foundation programs:

How does the club plan to achieve its Rotary Foundation goals? (check all that apply)

- Ensure the club's Rotary Foundation committee understands the programs of The Rotary Foundation and is committed to promoting financial support of the Foundation
- Help club members understand the relationship between Foundation giving and Foundation programs
- Plan a club program about The Rotary Foundation every quarter, especially in November, Rotary Foundation Month
- Include a brief story about The Rotary Foundation in every club program
- Schedule presentations that inform club members about The Rotary Foundation
- Ensure the club's Rotary Foundation committee chair attends the district Rotary Foundation seminar
- Use Rotary Foundation grants to support the club's international projects
- Recognize club members' financial contributions to The Rotary Foundation and their participation in Foundation programs
- Encourage each club member to contribute to the Foundation every year
- Participate in:
 - Group Study Exchange
 - PolioPlus
 - Matching Grants
 - Ambassadorial Scholarships
 - District Simplified Grants
 - Rotary World Peace Fellowships

- Invite Foundation program participants and alumni to be part of club programs and activities
- Other (please describe):

Action steps:

LEADERSHIP DEVELOPMENT

Current State

Number of club leaders who attended

District assembly: _____ District Rotary Foundation seminar: _____

District membership seminar: _____ District leadership seminar: _____

District conference: _____

Number of club members involved at the district level: _____

Number of visits from the assistant governor this Rotary year: _____

Future State

Our club has established the following goals for developing Rotary leaders for the upcoming Rotary year:

How does the club plan to develop Rotary leaders? (check all that apply)

- Have the president-elect attend the presidents-elect training seminar (PETS) and the district assembly
- Have all committee chairs attend the district assembly
- Encourage interested past presidents to attend the district leadership seminar
- Appoint a club trainer to develop club members' knowledge and skills
- Conduct a leadership development program
- Use the expertise of the club's assistant governor
- Encourage new members to assume leadership positions through participation in club committees
- Ask members to visit other clubs to exchange ideas, and then share what they have learned with the club
- Other (please describe):

Action steps:

PUBLIC RELATIONS

Current State

List club activities covered by the media and the type of media (television, radio, print, Internet, etc.) involved.

As of the date of you are filling this out (date _____), do you have a PR Committee? Y or N . Do you have a PR budget line item? Y or N .

Future State

Our club has established the following public relations goals for the upcoming Rotary year:

How does the club plan to achieve its public relations goals? (check all that apply)

- Ensure the public relations committee is trained in conducting a multimedia campaign
- Plan public relations efforts around all service projects
- Conduct a public awareness program targeted at the business and professional community that explains what Rotary is and what Rotary does
- Arrange for a public service announcement to be broadcast on a local television channel, aired on a local radio station, or placed in a local newspaper or magazine
- Other (please describe):

Action steps:

CLUB ADMINISTRATION

Current State

Is your club operating under the Club Leadership Plan? Yes No

How often and when does the club board meet? _____

When are club assemblies held? _____

How is the club budget prepared? _____

Is the budget independently reviewed by a qualified accountant? Yes No

Does the club have a strategic plan in place? Yes No

Has the club developed a system for ensuring continuity of leadership on its board, committees, etc.?
 Yes No

Has the club developed a system for keeping all members involved? Yes No

Does the club use Member Access at www.rotary.org to update its membership list? Yes No

How often is the club's bulletin published? _____

Describe how weekly club programs are organized. _____

Does the club have its own Web site? Yes No If yes, how often is the site updated? _____

Does the club observe the special months of the Rotary calendar, such as Rotary Foundation Month and Magazine Month? Yes No

How often does your club conduct fellowship activities? _____

How does the club involve the families of Rotarians?

Future State

How does the club carry out the administrative tasks of the club? (check all that apply)

- Regular board meetings have been scheduled.
- The club will review the Club Leadership Plan on the following dates: _____

- The club's strategic and communication plans will be updated on the following dates: _____
- _____ club assemblies have been scheduled on the following dates: _____
(number)
- The club has either adopted the latest version of the Recommended Rotary Club Bylaws or revised its own bylaws (recommended after each Council on Legislation).
- Club elections will be held on _____.
(date)
- At least _____ delegates will be sent to the district conference.
(number)
- A club bulletin will be produced to provide information to club members.
- The club's Web site will be updated _____ times per year.
(number)
- A plan has been developed to ensure interesting and relevant weekly club programs.
- Monthly attendance figures will be reported to the district leadership by the _____ day of the following month.
(number)
- Member Access will be used to maintain club records by 1 June and 1 December to ensure accurate semiannual reports.
- Membership changes will be reported to RI within _____ days.
(number)
- Reports to RI, including the semiannual report, will be completed on a timely basis.
- The following fellowship activities for all club members are planned for the year:
- Other (please describe):

Action steps:

Our club would like assistance from the governor or assistant governor with the following:

Our club would like to discuss the following issues with the governor or assistant governor during a visit to our club:

Club President's Signature

Rotary Year

Assistant Governor's Signature

Date

Date

SUMMARY OF GOALS FOR ROTARY CLUB OF _____ ROTARY YEAR _____

For each goal your club has identified for the upcoming Rotary year, indicate which Avenue of Service it addresses. To ensure a balanced service effort, you should have at least one goal that addresses each Avenue of Service. Most goals will address more than one avenue.

	Club Service	Vocational Service	Community Service	International Service
Membership goal _____ members by 30 June _____ (number) (year)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service goals For our community: For communities in other countries:	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Rotary Foundation goals Our club's PolioPlus contribution goal is _____. Our club's Annual Programs Fund contribution goal is _____. Our club's Permanent Fund contribution goal is _____. Our club will participate in the following Rotary Foundation programs:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Leadership development goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public relations goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club administration goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>