

# PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



August 2009

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 submit a copy of it to their assistant governor by 1 July.

Download a Microsoft Word version at [www.rotary.org](http://www.rotary.org).

Rotary Club of \_\_\_\_\_ Rotary year of office: \_\_\_\_\_

Name of president: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

## 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.  
(number) (date) (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

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?

### Future State

Membership goal for the upcoming Rotary year: \_\_\_\_\_ members by 30 June \_\_\_\_\_  
(number) (year)

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

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### 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: \_\_\_\_\_

## 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
  - Rotary Friendship Exchange
  - World Community Service
  - Rotaract
  - Rotary Volunteers
  - Rotary Youth Exchange
  - Rotary Community Corps
  - Rotary Youth Leadership Awards (RYLA)
- Use a grant from The Rotary Foundation to support a club project
- Register a project in need of funding, goods, or volunteers on the ProjectLINK database
- Other (please describe):

### Action steps:

## THE ROTARY FOUNDATION

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### 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

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### 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**

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### **Current State**

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

### **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**

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**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](http://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:**

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**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
<b>Membership goal</b> _____ members by 30 June _____ (number) (year)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Service goals</b> 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"/>
<b>Rotary Foundation goals</b> 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"/>
<b>Leadership development goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Public relations goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Club administration goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other goal:</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other goal:</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>