

Appendix 2: Planning Guide for Effective Rotary Clubs

April 2012

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 that clubs might choose to pursue goals, but clubs are encouraged to develop alternative strategies when appropriate. Presidents-elect should complete this form in cooperation with their club and submit a copy to their assistant governor by 1 July.

Download a Word version at www.rotary.org.

Rotary Club of _____ Rotary year of office: _____

Name of president: _____

Mailing address: _____

Phone: _____ Fax: _____ Email: _____

MEMBERSHIP

Current State

Current number of members: _____

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

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

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

Number of alumni or program participants tracked by your club: _____

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: _____

Aspects of your community's diversity reflected in your club membership:

Professional Age Gender Ethnicity

Club's classification survey was updated on _____ and contains _____ classifications, of which _____ are unfilled.
(date)

Describe the club's new-member orientation program.

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

Has your club 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 your club attractive to new members?

What aspects of your club could be a barrier to attracting new members?

Future State

Membership goal for the coming Rotary year: _____ members by 30 June _____

What sources of potential members has your club identified within the community?

What strategies does the club plan use 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 that 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 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 other current club service projects: _____

Future State

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

For our community:

For communities in other countries:

What strategies does the club plan use to achieve its service goals? (Check all that apply.)

- Ensure that the service projects committee knows 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 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 club to partner with on an international service project.
- Participate in:
 - Interact
 - Rotary Friendship Exchange
 - Rotaract
 - 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 www.rotary.org.
- Other (please describe):

Action steps:

THE ROTARY FOUNDATION

Current State (for nonpilot clubs in 2012-13)

Number of grants awarded:

District Simplified Grants: _____ Matching Grants: _____

Number of Ambassadorial Scholars: Nominated: _____ Selected: _____ Hosted: _____

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

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

Amount contributed this year to PolioPlus activities: _____

Amount contributed this year to Annual Fund: _____

Amount contributed this year to Permanent Fund: _____

Number of club members who are

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

Rotary Foundation Sustaining Members: _____ Bequest Society members: _____

Current State (for pilot clubs in 2012-13)

Club qualified status: Qualified Pending Incomplete

District grant activities your club is currently involved in:

- 1.
- 2.

Global grant activities your club is currently involved in:

- 1.
- 2.

Educational, promotional, and fundraising projects held by your club for PolioPlus last year:

- 1.
- 2.
- 3.

Number of Rotary Peace Fellows:

Nominated last year: _____

Selected by the Trustees last year: _____

Amount contributed to the Annual Fund last year: _____

Number of Foundation alumni tracked by your club: _____

Number of Rotarians who are:

Rotary Foundation Sustaining Members: _____ Arch C. Klumph Society members: _____

Paul Harris Fellows: _____ Benefactors: _____

Paul Harris Society members: _____ Bequest Society members: _____

Major Donors: _____

Future State (for all clubs in 2013-14)

Date your club will be qualified:

Club's Rotary Foundation goals for the coming Rotary year:

- 1.
- 2.
- 3.

Club's Annual Fund contribution goal:

Club's Permanent Fund contribution goal:

Club's goal to eradicate polio:

District grants:

- 1.
- 2.

Club will address the following Rotary Foundation area(s) of focus:

- | | |
|---|---|
| <input type="checkbox"/> Peace and conflict prevention/resolution | <input type="checkbox"/> Maternal and child health |
| <input type="checkbox"/> Disease prevention and treatment | <input type="checkbox"/> Basic education and literacy |
| <input type="checkbox"/> Water and sanitation | <input type="checkbox"/> Economic and community development |

Global grants:

- 1.
- 2.

Educational, promotional, and fundraising projects held by the club for PolioPlus last year:

- 1.
- 2.
- 3.

Number of Rotary Peace Fellowships:

Nominated: _____

Selected by the Trustees: _____

What strategies does the club plan to use to achieve its Rotary Foundation goals? (Check all that apply.)

- Ensure that the club's Rotary Foundation committee understands Foundation grants and programs and is committed to promoting financial support for the Foundation.
- Help club members understand the relationship between Foundation giving and Foundation programs.
- Plan a club program about the Foundation every quarter, especially for Rotary Foundation Month in November.
- Include a brief story about the Foundation in every club program.
- Schedule presentations that inform club members about the Foundation.
- Ensure that 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 Foundation and their participation in Foundation programs.

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

Club goals for developing Rotary leaders for the coming Rotary year:

What strategies does the club plan to use to develop Rotary leaders? (Check all that apply.)

- Have the president-elect attend the presidents-elect training seminar and the district assembly.
- Have all committee chairs attend the district assembly.
- Encourage past presidents to attend the district leadership seminar.
- Appoint a club trainer to develop club members' knowledge and skills.
- Conduct a leadership development program.
- Tap the expertise of the 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 fellow members.
- 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.

Future State

Club public relations goals for the coming Rotary year:

What strategies does the club plan to use to achieve its public relations goals? (Check all that apply.)

- Ensure that the public relations committee is trained in conducting a multimedia campaign.
- Plan public relations efforts around all service projects.
- Conduct a public awareness program aimed at the business and professional community that explains what Rotary is and what Rotary does.
- Arrange for a public service announcement on a local television channel or local radio station, or 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's 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? _____

How are weekly club programs organized? _____

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

Does the club observe the special months designated on the Rotary calendar? Yes No

How often does your club conduct fellowship activities? _____

How does the club involve the families of Rotarians? _____

Future State

How will the club carry out administrative tasks? (Check all that apply)

- Regular board meetings are 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 are scheduled on the following dates: _____

- The club has either adopted the latest version of the Recommended Rotary Club Bylaws or revised its own bylaws.
- Club elections will be held on _____.
- At least _____ delegates will be sent to the district conference.
- A club bulletin will be produced for members.
- The club's website will be updated _____ times per year.
- A plan has been developed to ensure that weekly club programs are interesting and relevant.

- Monthly attendance figures will be reported to the district leadership by the ____ day of the following month.
- 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.
- Reports to RI, including the semiannual report, will be completed on time.
- The following fellowship activities for all club members are planned for the year: ____
- Other (please describe): ____

Action steps:

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

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

	Club Service	Vocational Service	Community Service	International Service	New Generations Service
Membership goal _____ members by 30 June _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service goals For our community:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For communities in other countries:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rotary Foundation goals PolioPlus contribution goal: _____ Annual Fund contribution goal: _____ Permanent Fund contribution goal: _____ 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"/>	<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"/>	<input type="checkbox"/>
Public relations goals	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>
Other goal	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>