

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

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.

Rotary Club of Furnitureland Rotary of High Point _____ Rotary year of office: 07-08 _____

Name of president: Barbara T. Frye _____

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MEMBERSHIP

Current State

Current number of members: 60

Number of members as of 30 June last year: 56 30 June five years ago: 52

Number of male members: 55 Number of female members: 5

Average age of members: 48

Number of Rotarians who have been members for 1-3 years: 6 3-5 years: 10 5-10 years: 44

Number of members who have proposed a new member in the previous two years: 10

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

Profession Age Gender Ethnicity

Our classification survey was updated on 3/06 and contains 150 classifications, of which 90 are unfilled.
(number) (date) (number)

Describe club's current new member orientation program:

Orientation session with new member and sponsor. Includes information about Rotary International, District 7690, and Furnitureland Rotary. (see attached)

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

Programs on Four Areas of Service and Club Assemblies.

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

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

3 Phil Morris, 3 David Pruette for total of 6

What makes this club attractive to new members?

Good size club, diverse membership, great programs, wide range of activities, casual meetings with good food, and fun members.

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

Cost, time commitment, and lack of diversity.

Future State

Membership goal for the upcoming Rotary year: 5 members by 30 June 2008
(number) (year)

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

New business and non profit leaders, friends and associates of members.

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 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 for 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:

Club Service II leadership will initiate membership and retention plan development and implementation with Membership/Retention Chair.

SERVICE PROJECTS

Current State

Number of Rotary Youth Exchange students: Hosted 0 Sponsored 0

Number of sponsored Interact clubs: 1 Rotaract clubs: 0 Rotary Community Corps: 0

Number of RYLA (Rotary Youth Leadership Awards) activities: 2 - Greensboro Youth Leadership and White Water Leadership

Number of Rotary Friendship Exchanges: 1 - Phil Morris / Taiwan

Number of registered Rotary Volunteers: 0

Number of World Community Service (WCS) projects: 1 - Books to Africa

Number of other current club service projects:

Annual Furnitureland Rotary Auction

Annual Furnitureland Golf

Save the Suds

Shadowing Day

Fairview Student of Month Recognition and Shirlee Carde Scholarship

Trinity High School Student of the Month

Central High Interact Club

Kids Voting

Future State

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

For our local community:

Continue support of current projects and causes, while being open to new challenges and opportunities.

For communities in other countries:

International Service Director will form committee to look into new opportunities through Rotary District 7690 and Rotary International.

African Book Project

New Delhi Sewing Project - \$500 donation to be delivered by Rotary Scholar Rebecca Byerly

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
- Review the club's current and ongoing service projects to confirm that they meet a need and are of interest to club 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
- Conduct or obtain a needs assessment of the community or communities in other countries
- Recognize club members who participate in and provide leadership to 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
 - RYLA (Rotary Youth Leadership Awards)
- Use a grant from The Rotary Foundation to support a club project
- Other (please describe):

Action steps:

Community Service and International Service Directors will develop a membership survey that reflects current and potential interest of members in service projects. The UWGHP Vision Council's Community Needs Assessment will be shared with the membership.

THE ROTARY FOUNDATION

Current State

Number of grants awarded:

District Simplified Grants: 0

Volunteer Service Grants: 0

Matching Grants: 0

Health Hunger and Humanity (3-H) Grants: 0

Number of Ambassadorial Scholars:

Nominated 1

Selected 0

Hosted 0

Number of GSE team members: Nominated 0 Selected 0 Hosted 1 by Morris Family

Number of Rotary Grants for University Teachers: Nominated 0 Selected 0

Number of Rotary World Peace Fellows: Nominated 0 Selected 0 Hosted 0

Number of Rotary Conflict Studies Fellows: Nominated 0 Selected 0

Number of PolioPlus or PolioPlus Partners activities: 0

Current year's contributions to Annual Programs Fund: \$15,600

Current year's contributions to Permanent Fund: 0

Number of club members who are

Paul Harris Fellows: 60 Benefactors: 0 Major Donors: 2 - J. Green and K. Sedberry

Rotary Foundation Sustaining Members: 60 Bequest Society Members: ?

Number of Foundation alumni tracked by your club: 3

Future State

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

Our club's Annual Programs Fund contribution goal is 250.

Our club's Permanent Fund contribution goal is 0.

Our club will participate in the following Rotary Foundation programs:

GSE, Ambassadorial Scholars, World Peace Scholars, and RI Grants

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 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
 - Matching Grants
 - District Simplified Grants
 - 3-H Grants
 - Volunteer Service Grants
 - PolioPlus/PolioPlus Partners
 - Host/Sponsor Ambassadorial Scholar(s)
 - Sponsor a Rotary World Peace Fellow
 - Sponsor a University Teacher
 - Sponsor a Rotary Conflict Studies Fellow
- Invite Foundation program participants and alumni to be part of club programs and activities

Other (please describe):

Action steps:

International Service Director, RI Foundation Committee, John Womack, and other interested members will develop goals and plan of action to present to the club for implementation.

LEADERSHIP DEVELOPMENT

Current State

Number of club leaders who attended

District assembly: 6

District Rotary Foundation seminar: 2

District membership seminar: 1

District leadership seminar: 0

District conference: 6

Number of club members involved at the district level: 5 - Pruette, Morris, Green, Thiel, Womack

Number of visits from the assistant governor this past Rotary year: 2

Future State

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

Club will identify 4 members as potential leaders by June 30, 2008.

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

- Have the president-elect attend PETS and the district assembly
- Have all committee chairs attend the district assembly
- Encourage interested past presidents to attend the district leadership seminar
- Use the expertise of the club's assistant governor
- Encourage new members to assume positions of leadership through participation in club committees
- Ask club members to visit other clubs to exchange ideas and share what they learn with the club
- Other (please describe):

Action steps:

Furnitureland Rotary Board will secure leadership for all activities under their area of service. The board and leadership will endeavor to have every members involved in at least one committee or activity.

PUBLIC RELATIONS

Current State

List club activities covered by the media and the type of media (radio, newspaper, television, etc.):

Furnitureland Auction and Golf - paper

Club Service - paper and Club newsletter

Future State

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

Club Secretary will follow established procedures to get club news to the appropriate media outlets.

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

- Ensure that the public relations committee is trained in how to conduct media campaigns
- Conduct public relations efforts for all service projects

- Conduct a public awareness program targeted at the business and professional community about what Rotary is and what it does Arrange for a public service announcement to be broadcast on a local television channel
- Other (please describe):

Action steps:

Club Secretary will establish a Public Relations committee.

CLUB ADMINISTRATION

Current State

How often and when does the club board meet? 1st Thrusday monthly

When are club assemblies held? Spring and Fall

How is the club budget prepared? by Board Is it independently reviewed by a qualified accountant? No

Does the club have a long-range plan in place? In process - Jack Green is committee chair

Has the club developed a system for continuity of leadership on its board, committees, etc.? Yes, but can be improved

Has the club developed a system for keeping all members involved in the club? Yes, but needs to be more structured

Does the club use Member Access on www.rotary.org to update its membership list? Yes - Phil Morris

How often is the club's bulletin published? Weekly

Describe how weekly club programs are organized: Program Chair (VP) recruits 12 members to secure programs monthly. Monthly chair is notified of the "Special Months in Rotary", so they can look for appropriate speakers. Chair is also responsible for notifying Club Secretary of scheduled programs for publication in the weekly newsletter.

How often is the club's Web site updated? Weekly - Phil Morris

Does your club observe the special months of the Rotary calendar, such as Rotary Foundation Month and Magazine Month? Yes

How often does your club conduct fellowship activities? 4 yearly

How does the club involve the families of Rotarians? Special family event at club meeting in December, Club Socials, and Club Assemblies

Future State

What plans have you made to carry out the administrative tasks of the club? (check all that apply)

- Regular board meetings have been scheduled.
- The club's long-range and communication plans will be updated.
- 2 club assemblies have been scheduled on the following dates: Spring and Fall 2008
(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 December 2007.
(date)
- At least 4 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 12 times per year.
(number)
- A plan has been developed to have interesting and relevant weekly club programs.
- RI Club Administration Software (RI-CAS) or similar software will be used to assist with administration activities.
- 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:
Springfest and Fallfest
- Other (please describe): Winter Social

Action steps:

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

Please plan on being accessible!

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

Strategic Long Term Planning

Club President Signature

2007-2008
Rotary Year

Assistant Governor Signature

May 10, 2007
Date

Date

SUMMARY OF GOALS FOR 2007-2008 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 address each Avenue of Service. Most goals will address more than one avenue.

	Club Service	Vocational Service	Community Service	International Service
Membership goal <u>55</u> members by 30 June <u>2008</u> (number) (year)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service goals For our local community: For communities in other countries:	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>
The Rotary Foundation goals Our club's Annual Programs Fund contribution goal is <u>\$250</u> . Our club's Permanent Fund contribution goal is <u>0</u> . Our club will participate in the following Rotary Foundation programs:	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Leadership development goals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Public relations goals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club administration goals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal Long Term Strategic Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other goal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>