

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.

Rotary Club of	Furnitureland	Rotary year of office:	2011-12
Name of president:	Barry S. Kitley		
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MEMBERSHIP

Current State

Current number of members: 46 Active Members

Number of members as of 30 June last year: 56 30 June five years ago: 58

Number of male members: 40 Active Number of female members: 6 Active

Average age of members: 54 years old Number of Rotary alumni members 0 members

Number of Rotarians who have been members for 1-3 years: 6 3-5 years: 8

5-10 years: 8

Number of members who have proposed a new member in the previous two years: 4

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 41 classifications, of which 212 are unfilled.
(number) (date) (number)

Describe the club's current new member orientation program.

New members are encouraged to take responsibility within the Club through the Director of Club Administration. We are currently evaluating a "Red Badge to Blue Badge" program for 2011-12.

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

Continuing education is done through Club Assemblies, District Conferences, PETS, etc.

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:

N/A

What makes this club attractive to new members?

Our Club Culture...Inviting, caring, humorous, club member (community status), meeting location, purpose

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

meeting time, cost, work/time commitment

Future State

Membership goal for the upcoming Rotary year: 5 members by 30 June 2012
(number) (year)

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

High Point Regional Health System, High Point University, biotech, biological industries

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): Brand our club in the community through activities highlighting our membership, apparel items, etc. Recognize member birthdays and anniversary dates each week. Recognize a new member's sponsor AND that sponsors (family, i.e. sponsor's sponsor, etc. etc.), Make our meetings very informative and provide nice door prizes from time to time.

Action steps:

SERVICE PROJECTS

Current State

Number of Rotary Youth Exchange students: Hosted 0 Sponsored 0

Number of sponsored Interact clubs: 1 Rotaract clubs: 1

Rotary Community Corps: 0

Number of Rotary Youth Leadership Awards (RYLA) events: 0

Number of Rotary Friendship Exchanges: 0

Number of registered Rotary Volunteers: 0

Number of World Community Service (WCS) projects: 1

Number of other current club service projects: 1

Future State

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

For our community:

Support the United Way backpack food program for school children, support Mobile Meals, support Fairview Elementary School (adopted school from Guilford County). Initiate a "Fifth Monday" program where Rotarians meet for an hour of service in lieu of the normal meeting..i.e. volunteering at Communities In Schools.

For communities in other countries:

Partner with a local faith based organization to support an endeavor already in place that adheres to the ideals of Rotary...and/or...Mercy Ships support

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

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: 2,500

Current year's contributions to Annual Programs Fund: 9,845

Current year's contributions to Permanent Fund: _____

Number of club members who are

Paul Harris Fellows: 42 Benefactors: 9 Major Donors: 2

Rotary Foundation Sustaining Members: 40 Bequest Society members: 3

Number of Foundation alumni tracked by your club: 3

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: 100% Annual Programs Fund contributions: 9,000

Major gifts: _____ Benefactors: _____

Bequest Society members: _____

Our club will participate in the following Rotary Foundation programs: PolioPlus

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: 6

District Rotary Foundation seminar: 3

District membership seminar: 3

District leadership seminar: 2

District conference: 5

Number of club members involved at the district level: 3

Number of visits from the assistant governor this Rotary year: ADG Home Club

Future State

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

Provide more opportunities for service within our club to develop leaders, i.e. Program Chair, Club Administration, Sgt At Arms, Red Badge Program, Begat program/mentorship

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): I want to create a President's Exchange for one meeting throughout the year where Presidents exchange clubs and run each other's meetings...to learn another meeting culture...exchange is District wide and not in the same Area.

Action steps:

PUBLIC RELATIONS

Current State

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

Auction, Charity Give Away, RCF Birthday, Joint Meeting Events...newspaper, Internet

Future State

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

Concentrated effort to get the Rotary brand out....to include a parade float, etc. out of the box ideas.

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? Monthly

When are club assemblies held? Quarterly

How is the club budget prepared? Presented by Treasurer

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? Weekly

Describe how weekly club programs are organized. Agenda set by President Nominee

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

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? 2-3 times per year

How does the club involve the families of Rotarians? 2-3 times per year with social activities

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 December 2011.
(date)
- At least 6 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 6 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 10th 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 30 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:
40th Birthday Party, Changing of the Guard, Fall Fest, Christmas Party, Joint Rotary Basketball Gathering, 12th Night Social, Sping Fest, Baseball Game Night
- Other (please describe):

Action steps:

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

Attending our events.

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

<u>Barry S. Kitley</u> Club President's Signature	<u>2011-12</u> Rotary Year	_____ Assistant Governor's Signature
<u>May 11, 2011</u> 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 <u>51 Active</u> members by 30 June <u>2012</u> (number) (year)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service goals For our community: Backpack Program, Fairview Kids For communities in other countries: Faith Based or Mercy Ships	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>
Rotary Foundation goals Our club's PolioPlus contribution goal is <u>100%</u> 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: RI	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" 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 checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
Leadership development goals Participation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public relations goals Branding Opportunities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Club administration goals Red Badge Program	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal: 5 th Monday Program	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal: Joint Rotary Clob Programs, President Exchange	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>