

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS

April 2011



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: 2012-13

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MEMBERSHIP

Current State

Current number of members: 47 Active Members

Number of members as of 30 June last year: 46 30 June five years ago: 57

Number of male members: 42 Active Number of female members: 5 Active

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

Number of Rotarians who have been members for 1-3 years: 11 3-5 years: 9

5-10 years: 6

Number of members who have proposed a new member in the previous two years: 5

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

Profession Age Gender Ethnicity

Our classification survey was updated on 2011 and contains 150 classifications, of which 109 are unfilled.
(number) (date) (number)

Describe the club's current new member orientation program.

New members are initiated by Membership Chair. Chair explains membership requirements and is available to answer questions. Sponsoring member serves a buddy to new member to provide additional ongoing support. Red Bage to Blue Badge program has been implemented.

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

Club programs focus on Rotary International, Rotary Foundation, Rotary Magazine, the 4-way test, Membership, and Rotary's six areas of focus. The President Elect and President Nominee are required to attend PETS. The club President and President Elect are asked to attend the District Conference, and the club pays the hotel and registration fee. Members are encouraged to attend Rotary Leadership

International (RLI) training, and the club will cover the registration cost. All members are encouraged to attend district meetings 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 that club members participate in:

3

What makes this club attractive to new members?

We have a friendly and casual club that is large enough to make a real difference in our community while remaining small enough for all members to get to know one another. There is a history of our club being "the fun club", and humor plays a large role in our meetings and activities. We have a mix of older, experienced members combined with an influx of younger members; however, we do not experience the problem of older members resting on their laurels and letting the younger members do all the work - as some clubs have experienced. All age groups who are equally active in the club. We provide the opportunity to network with others in our business community with a broad mix of vocation and interest. Meeting at the String & Splinter is a plus since the location is a strong hub of networking opportunities in High Point. The String has a reputation of providing a variety of good food (both hot and cold) with a very welcoming and friendly staff. Furnitureland has a very positive reputation in our community for their good deeds. The proceeds from the annual charity auction allow the club to help dozens of not-for-profits throughout our community. Our long-standing relationship with Fairview Elementary School and Mobile Meals have contributed to our positive image in the community.

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

The total cost of membership (dues, donations to the Foundation, and activities), the specific meeting day and time, and the time commitment act as barriers to attracting new members.

Future State

Membership goal for the upcoming Rotary year: 52 members by 30 June 2013
(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:

Set up a Membership Committee that focuses on defined targets for recruitment. Focus will be placed on obtaining more diversity with respect to age (younger demographic), sex (more female members) and race (African American, Latino, other ethnicities). These groups were specifically noted as target populations that we want to attract per our spring 2012 club survey results.

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: _____

Number of Rotary Youth Leadership Awards (RYLA) events: 1

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: We currently have three key projects:

1) Our Annual Charity Auction which serves dozens of not-for-profits in our community by providing thousands of dollars each year (>\$54,000 donated back to the community last year).

2) Fairview Elementary School "Students of the Month" recognition and End-of-Year awards program.

3) The Kaboom YWCA Playground initiative.

Future State

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

For our community:

Continue our support of a variety of not-for-profits with the proceeds from our annual charity auction including but not limited to Mobile Meals, Fairview Elementary School, YWCA, Boys & Girls Club, The City Project, Open Door Ministries, etc.

Identify two new "hands-on" projects that support our community. This was specifically requested from members based on our club survey.

Continue our support of the Student of the Month and End of Year Awards program with Fairview Elementary School.

For communities in other countries:

Continue to provide financial support to Mercy Ships.

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:

Complete a needs assessment and identify two service projects that are hands-on projects that fill specific needs in our community. Focus on Rotary International avenues of service.

Service Committee members, led by Committee Chair, will define the steps needed to complete the projects.

Involve all members in planning and implementation.

Publicity Chair will contact the press to relay information to the public regarding the projects.

THE ROTARY FOUNDATION

Current State

Number of grants awarded:

District Simplified Grants: 1 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: 0

Current year’s contributions to Annual Programs Fund: \$11,300.

Current year’s contributions to Permanent Fund: 0

Number of club members who are

Paul Harris Fellows: 44 Benefactors: 9 Major Donors: 3

Rotary Foundation Sustaining Members: 47 Bequest Society members: 6

Number of Foundation alumni tracked by your club: 2

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: \$1,000 Annual Programs Fund contributions: \$9,400

Major gifts: 0 Benefactors: 47

Bequest Society members: 0

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:

Plan a program that focuses on the Rotary Foundation at least one per quarter. Add programs to official program schedule.

At least 2 Rotarians will participate in the Grants Seminar.

Complete application for District Simplified Grant.

LEADERSHIP DEVELOPMENT

Current State

Number of club leaders who attended

District assembly: 8

District Rotary Foundation seminar: 4

District membership seminar: 1

District leadership seminar: _____

District conference: 5

Number of club members involved at the district level: 3

Number of visits from the assistant governor this Rotary year: 40

Future State

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

Encourage two club members to attend RLI.

Require President Elect and President Nominee to attend PETS and the District Assembly.

At least two members will attend the District Grants Seminar.

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): Ask two members of the club to attend RLI I, II and III during the year.

Action steps:

Require President Elect and President Nominee to attend PETS. The club will cover the cost of their participation.

Ask two club members to attend RLI I, II and III during the year. The club will cover the cost of their participation.

PUBLIC RELATIONS

Current State

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

Annual Giveaway Program article was published in the High Point Enterprise.

Annual Charity Auction article was published in the High Point Enterprise.

Club members appeared on local TV station to publicize Charity Auction.

SoSi Festival \$500 sponsorship was noted on all SoSi Festival of Cultures publicity including billboard, flyers, posters, and public service announcements.

Rotary brochures and an invitation to visit our club were included in each charity auction item.

Future State

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

Sponsor annual SoSi Festival of Cultures.

Sponsor the 2012 High Point Cycling Classic.

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:

Invite the media (High Point Enterprise and Fox 8) to the Annual Giveaway Program.

Invite the media to the Annual Charity Auction.

Have an article about the Annual Charity Auction be published before the event to help publicize it.

Participate in the High Point Christmas Parade sponsored by the Guilford Merchants Association.

CLUB ADMINISTRATION

Current State

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

How often and when does the club board meet? The first Thursday of each month.

When are club assemblies held? Once per quarter

How is the club budget prepared? Presented by Club Treasurer and reviewed by the Board

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. The Vice President is in charge of programs and coordinates with various members weeks and sometimes months in advance of the meetings. An annual calendar of programs with specific dates set aside to focus on established initiatives and educational presentations (i.e. Foundation, membership, club assemblies, 4-way test, Rotary Magazine, etc.) is created and updated on an ongoing basis.

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

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? 3 to 4 times per year.

How does the club involve the families of Rotarians? We sponsor a spring and fall social where entire families are invited to participate. Spouses are also invited to attend the annual holiday party, the Changing of the Guard, and the Charity Auction.

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: Quarterly
- The club's strategic and communication plans will be updated on the following dates: _____
- Three club assemblies have been scheduled on the following dates: July 16, November 19, April 8
(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 March 4, 2013.
(date)
- At least 5 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 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:
 - Birthday Party to celebrate the anniversary of the club's creation.
 - Fall Family Social
 - Holiday Party (12th Night)
 - Spring Family Social
 - Baseball Game Night (Dash or Grasshoppers)
 - Changing of the Guard
- 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:

Ideas on how other clubs keep all members engaged.

Club President's Signature

Rotary Year

Assistant Governor's Signature

Date

Date

SUMMARY OF GOALS FOR ROTARY CLUB OF Furnitureland _____ ROTARY YEAR 2012-13

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 | New Generations Service |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Membership goal <u>52</u> members by 30 June <u>2013</u> (number) (year) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| | | | | | |
|--|--|--|--|--|--|
| <p>Service goals</p> <p>For our community:</p> <p>Continue our support of a variety of not-for-profits with the proceeds from our annual charity auction</p> <p>Identify two new "hands-on" projects.</p> <p>Continue our support of Fairview Elementary School.</p> <p>For communities in other countries:</p> <p>Continue to provide financial support to Mercy Ships.</p> | | | | | |
| <p>Rotary Foundation goals</p> <p>Our club's PolioPlus contribution goal is <u>\$1,000</u></p> <p>Our club's Annual Programs Fund contribution goal is <u>\$9,400</u>.</p> <p>Our club's Permanent Fund contribution goal is <u>0</u>.</p> <p>Our club will participate in the following Rotary Foundation programs: Plan a program that focuses on the Rotary Foundation at least one per quarter.</p> <p>At least 2 Rotarians will participate in the Grants Seminar.</p> <p>Complete application for District Simplified Grant</p> | | | | | |
| <p>Leadership development goals</p> <p>Require President Elect and President Nominee to attend PETS. The club will cover the cost of their participation.</p> <p>Ask two club members to attend RLI I, II and III during the year. The club will cover the cost of their participation.</p> | | | | | |
| <p>Public relations goals</p> <p>Invite the media (High Point Enterprise and Fox 8) to the Annual Giveaway Program.</p> <p>Invite the media to the Annual Charity Auction.</p> <p>Have an article about the Annual Charity Auction be published before the event to help publicize it.</p> <p>Participate in the High Point Christmas Parade sponsored by the Guilford Merchants Association.</p> | | | | | |
| <p>Club administration goals</p> <p>Birthday Party to celebrate the club's anniversary.</p> <p style="padding-left: 20px;">Fall Family Social</p> <p style="padding-left: 20px;">Holiday Party (12th Night)</p> | | | | | |

| | | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Sping Family Social Baseball Game Night (Dash or Grasshoppers) Changing of the Guard | | | | | |
| 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"/> |