

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs establish goals for the coming year. The form can be used to help track general club trends in membership and club administration. The *Planning Guide for Effective Rotary Clubs* is based upon the four elements of an effective club. Effective Rotary clubs are able to:

- Sustain and grow their membership base.
- Implement successful projects that address the needs of their communities and communities in other countries.
- Support The Rotary Foundation through both program participation and financial contributions.
- Develop leaders capable of serving Rotary beyond the club level.

It should be noted that the options listed under each section reflect common ways clubs might choose to pursue goals. It is recognized that there are alternative ways clubs can achieve their goals that may not be listed.

Presidents-elect are encouraged to complete this form in cooperation with their club and submit it to their governor-elect or assistant governor by 1 July.

Please type or print legibly.

ROTARY CLUB OF _____

Name of president: _____
Rotary year of office

Mailing address: _____

Telephone _____ Fax _____ E-mail _____

DEMOGRAPHIC INFORMATION (AS OF 30 JUNE)

Current number of members: _____

Number of members as of 30 June last year: _____

Number of members five years ago: _____

Number of male members: _____

Number of female members: _____

Average age of members: _____

Number of Rotarians who have been members for:

Less than 1 year: _____

1-3 years: _____

3-5 years: _____

5-10 years: _____

10-25 years: _____

More than 25 years: _____

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

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

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

If "Yes," has your club implemented a plan to provide follow-up orientation for members of the sponsored club?

Yes No

MEMBERSHIP GROWTH (NEW MEMBERS AND RETENTION OF CURRENT MEMBERS)

Our club has established the following membership goal for the upcoming Rotary year:

Our club will strive to have _____ members by 30 June _____.
(number) (year)

We have identified the following sources of potential members within the community:

How does the club plan on achieving its membership goals? (check all that apply)

- Through a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, and fellowship activities.
- By appointing a committee of club members who have been trained in effective recruitment techniques.
- Through a recruitment plan that focuses on a true representation of the business and professional leadership in the community.
- Through a recruitment plan that clearly explains the expectations of membership to potential Rotarians.
- Through an orientation program for new members to support their successful assimilation into the club.
- Through a brochure that provides general information about Rotary as well as specific information about our club.
- By assigning an experienced Rotarian mentor for every new club member.
- By recognizing those Rotarians who sponsor new members.
- Through a public awareness program targeted at the business and professional community to increase awareness about what Rotary is and what it does.
- By participating in the Rotary International Membership Development and Retention award program.
- Other (please describe):

What makes this a good club to attract new members?

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

Points of specific action:

EFFECTIVE SERVICE PROJECTS

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

For our local community:

For communities in other countries (international service):

How does the club plan on achieving its service goals? (check all that apply)

- By appointing a committee of club members who have been trained in how to plan and conduct a successful service project.
- By reviewing the club's current and ongoing service projects to determine whether they are relevant, needed, and of interest to club members.
- By assessing the club's fundraising activities to determine if they meet the club's project funding needs.
- By involving each member of the club in some way in the club's service projects.
- By conducting or obtaining a needs assessment of our community or communities in other countries.
- By recognizing club members who participate in and provide leadership to the club's service projects.
- By identifying a partner club with which to carry out an international service project.
- By participating in:
 - World Community Service
 - Youth Exchange
 - Rotary Friendship Exchange
 - Rotary Volunteers
 - Rotary Recreational and Vocational Fellowships
- By using the resources of The Rotary Foundation to support a project identified by the club.
- By conducting **vocational service** activities for local businesses, schools, government agencies, or other organizations.
- By conducting projects regarding career development, employer-employee relations, employment training, or vocational recognition.

Other club service project plans (please describe):

Points of specific action:

THE ROTARY FOUNDATION

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

Our club will strive to achieve an annual giving goal of US\$ _____.

Our club will participate in Rotary Foundation programs by:

How does the club plan on achieving its Rotary Foundation goals? (check all that apply)

- By appointing a committee of club members who understand and can explain to other club members the programs of The Rotary Foundation and the different ways in which Rotarians can contribute.
- Through club presentations that inform members about what The Rotary Foundation is and what it does.
- By sending a representative to attend the district Rotary Foundation seminar.
- By helping club members understand the relationship between Foundation giving and Foundation programs.
- By using the resources of The Rotary Foundation to support our club's international projects.
- By recognizing club members' financial contributions to The Rotary Foundation and their participation in Foundation programs.
- By participating in:
 - Group Study Exchange
 - PolioPlus/PolioPlus Partners
 - Matching Grants
 - Hosting/Sending an Ambassadorial Scholar(s)
- By inviting Foundation program participants and alumni to participate in club programs and activities.
- Other (please describe):

Points of specific action:

DEVELOPING FUTURE ROTARY LEADERS

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

Our club will identify _____ members as potential future leaders by 30 June _____.
(number) (year)

What are your plans for building future Rotary leaders within the club? (check all that apply)

- Our club will strongly encourage its committee chairpersons to attend the district assembly.
- Our club will strongly encourage interested past presidents to attend the district leadership seminar held in conjunction with the district conference.
- Our club will utilize the expertise of our assistant governor.
- Our club will arrange for district committees to make presentations to our members.
- I will work with our governor and assistant governor to maximize the effectiveness of the Governor's Official Visit.
- Our club will encourage new members to assume positions of leadership through participation in club committees.
- Members of our club will visit other clubs to exchange ideas and will share the knowledge they gain with the rest of the club.
- Other (please describe):

Points of specific action:

GENERAL ADMINISTRATION

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

- Board meetings have been scheduled on a regular basis.
- _____ club assemblies have been scheduled.
(number)
- Club elections will be held on _____.
(date)
- Our club will send at least _____ delegates to the district conference.
(number)
- A club bulletin editor has been appointed and we have discussed what kind of information would be beneficial to club members.
- A committee of motivated club members has been appointed to develop interesting and relevant club programs.
- A committee of motivated club members has been appointed to plan a variety of fellowship events that will appeal to club members.
- Other (please describe):

Points of specific action:

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

- Establishing club goals
- Orientation of new members
- The Rotary Foundation
- Other (please describe):

What issues would you like to discuss with your governor or assistant governor during his or her visit to your club:

Club President

Rotary Year

Assistant Governor

Date

Date