

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS

The Rotary Foundation

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.

The Rotary Foundation

CURRENT STATE			
Club qualified status <input type="checkbox"/> Qualified <input type="checkbox"/> Pending <input type="checkbox"/> Incomplete			
List the district grant activities your club is currently involved in:			
1.			
2.			
List the global grant activities your club is currently involved in:			
1.			
2.			
The club held the following educational, promotional, and fundraising projects for PolioPlus last year:			
1.			
2.			
3.			
Number of Rotary Peace Fellows the club nominated last year _____	Number of Rotary Peace Fellows that were selected by the Trustees last year _____	Amount contributed to Rotary's US\$200 Million Challenge last year _____	Amount contributed to the Annual Programs 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 _____		

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FUTURE STATE		
Date your club will be qualified _____		
Our club has established the following Rotary Foundation goals for the upcoming Rotary year:		
1.		
2.		
3.		
Our club's Annual Programs Fund contribution goal is _____	Our club's Permanent Fund contribution goal is _____	Our club's US\$200 Million Challenge goal to eradicate polio is _____
District grants		
1.		
2.		
Our club will address the following Rotary Foundation areas of focus	<input type="checkbox"/> Peace and conflict prevention/resolution <input type="checkbox"/> Disease prevention and treatment <input type="checkbox"/> Water and sanitation <input type="checkbox"/> Maternal and child health <input type="checkbox"/> Basic education and literacy <input type="checkbox"/> Economic and community development	
Global grants		
1.		
2.		
The club will plan the following educational, promotional, and fundraising projects for PolioPlus:		
1.		
2.		
3.		
Number of Rotary Peace Fellowships	Nominated _____ Selected by the Trustees _____	

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

- Ensure the club's Rotary Foundation committee understands the grants and 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 grants and 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

Action Steps

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