

# 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 track general club trends in membership and club administration. The *Planning Guide for Effective Rotary Clubs* is based on the concept of an effective club. An effective club is able to

- Sustain and increase its membership base
- Implement successful projects that address the needs of its community 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

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

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*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)

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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: \_\_\_\_\_

Does club membership reflect the diversity of the community?  Yes  No

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 DEVELOPMENT (Recruitment, Retention, and Organizing New Clubs)**

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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 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
- Appoint a committee of club members who have been trained in effective recruitment techniques
- Develop a recruitment plan that focuses on a true representation of the business and professional leadership in the community
- Develop a recruitment plan that focuses on a true representation of the diversity of the community
- Develop a recruitment plan that clearly explains the expectations of membership to potential Rotarians
- Implement an orientation program for new members to support their successful assimilation into the club
- 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
- Conduct a public awareness program targeted at the business and professional community to increase awareness about what Rotary is and what it does
- Encourage members to join a Rotary Fellowship to experience the internationality and friendship of RI
- Participate in the RI Membership Development award programs
- Seek opportunities to organize a new club
- Other (please describe):

What makes this a good club to attract new members?

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

#### **Action steps:**

## SERVICE PROJECTS

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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 to achieve its service goals? (check all that apply)

- Appoint a committee of club members who have been trained in how to plan and conduct a successful service project
- Review the club's current and ongoing service projects to determine whether they are relevant, needed, and 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 the club's project funding needs
- Involve each club member 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
  - Youth Exchange
  - Rotary Community Corps
  - Rotary Youth Leadership Awards
- Use the resources of The Rotary Foundation to support a project identified by the club
- Other (please describe):

### Action steps:

## THE ROTARY FOUNDATION

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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 to achieve its Rotary Foundation goals? (check all that apply)

- Appoint a committee of club members who understand the programs of The Rotary Foundation and who are committed to promoting financial support of the Foundation
- Help club members understand the relationship between Foundation giving and Foundation programs
- Schedule presentations that inform club members about the international service opportunities available through the programs of The Rotary Foundation
- Send a representative to the district Rotary Foundation seminar
- Use the resources of The Rotary Foundation 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 make a gift to the Annual Programs Fund
- Participate in:
  - Group Study Exchange
  - Matching Grants
  - District Simplified Grants
  - Individual Grants
  - PolioPlus/PolioPlus Partners
  - Host/Sponsor an Ambassadorial Scholar(s)
  - Sponsor a Rotary World Peace Scholar
  - Sponsor a University Teacher
- Invite Foundation program participants and alumni to participate in club programs and activities
- Other (please describe):

### Action steps:

## FUTURE ROTARY LEADERS

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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 and notify the district by 30 June \_\_\_\_\_.  
(number) (year)

### How does the club plan to build future Rotary leaders? (check all that apply)

- Encourage committee chairs to attend the district assembly
- Encourage interested past presidents to attend the district leadership seminar held in conjunction with the district conference
- Use the expertise of the club's assistant governor
- Arrange for district committees to make presentations to club members
- Have club leaders work with the district governor and assistant governor to maximize the effectiveness of the governor's official visit
- Encourage new members to assume positions of leadership through participation in club committees
- Have club members visit other clubs to exchange ideas and share the knowledge they gain with the rest of the club
- Other (please describe):

### Action steps:

## GENERAL ADMINISTRATION

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### 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 to provide information that is beneficial to club members.
- The club Web site will be updated \_\_\_\_\_ times per year.  
(number)
- A committee of motivated club members has been appointed to develop interesting and relevant weekly club programs.
- A committee of motivated club members has been appointed to plan a variety of fellowship events.
- Monthly attendance figures will be reported to the district leadership by the \_\_\_\_\_ day of the following month.  
(number)

- Our club will use the Rotary Business Portal to maintain RI club records.
- Membership changes will be reported to RI within \_\_\_\_\_ days.  
(number)
- Reports to RI, including the semiannual report, will be returned within \_\_\_\_\_ weeks of receipt.  
(number)
- Other (please describe):

**Action steps:**



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

**What issues would you like to discuss with your governor or assistant governor during a visit to your club?**

\_\_\_\_\_  
Club President Rotary Year

\_\_\_\_\_  
Assistant Governor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date