

**To:** Governor Charles W. Elliot  
District 6150  
  
Assistant Governor Mark House  
District 6150

**From:** A. Kurt Grafton  
Rotary Club of Batesville

**Subject:** Planning Guide for 2013-14

**Date:** July 1, 2013

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The Batesville Rotary Club is over 70 years old and continues to be strong and active in the community. As I present the attached Planning Guide for the 2013-14 Rotary year, I also feel it is important to prepare this cover letter in an attempt to coherently draw together what I perceive to be the strengths and weaknesses of our Club and my hopes and plans for the coming year.

In essence, I found the Planning Guide to be useful for listing and detailing the current state of our club and the possibilities for the future, but it isn't really a "plan" in and of itself. This letter is meant to serve that purpose for me. Though I've had many conversations with other officers, Club Directors, and Past-Presidents that have informed me about the Club's past, present, and future, I take full responsibility for what is stated here, and any errors are mine alone.

**Major Strengths of the Batesville Rotary Club**

- A strong and ongoing commitment to several local community service projects including scholarships for local high school graduates
- A relatively stable membership count that includes a number of younger members
- Deep resources in terms of Rotary experience because of members involved at the District level and Past-Presidents who are still members
- Very good weekly meeting programs and attendance

**Major Weaknesses of the Batesville Rotary Club**

- Committees are often just a chairperson; creating and preserving continuity has not been important
- Only about half the members are truly active beyond meeting attendance and dues payment
- The Bylaws are outdated and largely unknown to members
- We have no regular budget established, making it difficult to plan fundraising to meet club goals and commitments
- Social functions and group interactions for members outside the weekly meetings are relatively lacking

Neither of the lists above is meant to be comprehensive, but I believe they are both representative of the status of the Batesville Rotary Club and therefore form the basis of my plans for the coming year. I have also had conversations with other officers, including the incoming President-Elect and Vice President, so that what I'm planning will lay the groundwork necessary to move our club forward. I would like to say that we could do a strategic plan, but at this point we're not ready for that. If I can accomplish the goals laid out below, perhaps we will be.

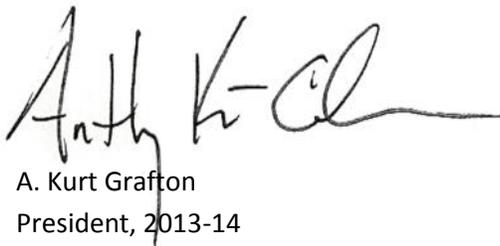
### **Goals for the 2013-14 Year**

- The Club will maintain its current strengths.
- The Club will adopt a revised set of Bylaws.
- The Club will establish and follow through with a budget planning cycle.
- Virtually every member of the Club will be a member of a committee and our committees will meet and report regularly on progress towards Club goals.
- Succession planning will be implemented for officers and committee chairs.
- The Club web page will be updated regularly.
- The Club will host at least two social events for Club members outside regular meeting times.
- Virtually every member of the Club will contribute to the Rotary Foundation.
- The Club will raise money for and contribute to PolioPlus.

I have been involved in enough leadership positions to know that no one ever accomplishes all the goals he might desire. I will do the best that I can. Our Club is fortunate to have a strong and experienced group of officers and committee chairs that are both involved and supportive, and with their help our Club will certainly move forward in a positive way.

I look forward to discussing the strengths, weaknesses, and goals that I laid out above, and I certainly welcome your advice and appreciate your support and service.

Most Sincerely,

A handwritten signature in black ink, appearing to read "A. Kurt Grafton". The signature is fluid and cursive, with a long horizontal stroke at the end.

A. Kurt Grafton  
President, 2013-14  
Rotary Club of Batesville

# PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



April 2012

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 that clubs might choose to pursue goals, but clubs are encouraged to develop alternative strategies when appropriate. Presidents-elect should complete this form in cooperation with their club and submit a copy to their assistant governor by 1 July.

Download a Word version at [www.rotary.org](http://www.rotary.org).

Rotary Club of Batesville, Arkansas Rotary year of office: 2013-14  
Name of president: Anthony Kurt Grafton  
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## MEMBERSHIP

### Current State

Current number of members: 64

Number of members as of 30 June last year: 66 As of 30 June five years ago: \_\_\_\_\_

Number of male members: 50 Number of female members: 14

Average age of members: 50+ Number of Rotary alumni members: unk.

Number of alumni or program participants tracked by your club: unk.

Number of Rotarians who have been members for 1-3 years: 11 3-5 years: 8

5-10 years: 9

Number of members who have proposed a new member in the previous two years: 4-6

Aspects of your community's diversity reflected in your club membership:

Professional  Age  Gender  Ethnicity

Club's classification survey was updated on unk. and contains unk. classifications, of which unk. are unfilled. (date)

Describe the club's new-member orientation program.

Prospective members generally attend meetings several times before becoming a member. New members are inducted at a club meeting with a short history of the club and expectations.

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

Has your club sponsored a new club within the last 24 months?  Yes  No

Number of Rotary Fellowships and Rotarian Action Groups that club members participate in:

0

What makes your club attractive to new members?

Community involvement, strong business ethical goals, fellowship and networking

What aspects of your club could be a barrier to attracting new members?

Membership cost/weekly meal costs, mandatory meeting times

#### **Future State**

Membership goal for the coming Rotary year: 68 members by 30 June 2014

What sources of potential members has your club identified within the community?

High school students, new community leaders moving to the area

#### **What strategies does the club plan use 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 that 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 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 (will consider an Interact club at local high school)
- Other (please describe):

#### **Action steps:**

### **SERVICE PROJECTS**

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#### **Current State**

Number of Rotary Youth Exchange students:      Hosted: 1 (2013-14)      Sponsored: 1 (2009-10)

Number of sponsored    Interact clubs: 0      Rotaract clubs: 0      Rotary Community Corps: 0

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

Number of Rotary Friendship Exchanges: 0

Number of other current club service projects: ~7

## Future State

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

For our community:

Continuing involvement in and support of (1) Best Foot Forward, (2) Scholarships for local high school graduates, (3) lunch for Boy Scouts during their canoe race, (4) the local county fair by collecting tickets, (5) roadside cleanup, (6) placement of memorial benches in local parks, (7) the local Christian Health Clinic, (8) Coats for Kids, (9) Dictionaries for school children.

For communities in other countries:

### What strategies does the club plan use to achieve its service goals? (Check all that apply.)

- Ensure that the service projects committee knows 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 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 club to partner with on an international service project.
- Participate in:
  - Interact (consideration)       Rotary Friendship Exchange
  - Rotaract       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 [www.rotary.org](http://www.rotary.org).
- Other (please describe):

### Action steps:

## THE ROTARY FOUNDATION

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### Current State (for nonpilot clubs in 2012-13)

Number of grants awarded:

District Simplified Grants: 5      Matching Grants: 5

Number of Ambassadorial Scholars:      Nominated: 0      Selected: 0      Hosted: 0

Number of Group Study Exchange team members:      Nominated: 0      Selected: 0      Hosted: 0 (in 2012-13)

Number of Rotary Peace Fellows:      Nominated: 0      Selected: 0      Hosted: 0

Amount contributed this year to PolioPlus activities: \_\_\_\_\_

Amount contributed this year to Annual Fund: \_\_\_\_\_

Amount contributed this year to Permanent Fund: \_\_\_\_\_

Number of club members who are

Paul Harris Fellows: 19 Benefactors: 0 Major Donors: 0

Rotary Foundation Sustaining Members: 15 Bequest Society members: 0

**Current State (for pilot clubs in 2012-13)**

Club qualified status:  Qualified  Pending  Incomplete

District grant activities your club is currently involved in:

1. Best Foot Forward
2. Dictionaries for local school children
3. Support of the local Christian Health Clinic
4. Coats for Kids
5. Support for a local Community Breakfast

All total about \$2500 of grant support

Global grant activities your club is currently involved in:

- 1.
- 2.

Educational, promotional, and fundraising projects held by your club for PolioPlus last year:

- 1.
- 2.
- 3.

Number of Rotary Peace Fellows:

Nominated last year: \_\_\_\_\_

Selected by the Trustees last year: \_\_\_\_\_

Amount contributed to the Annual 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: \_\_\_\_\_

**Future State (for all clubs in 2013-14)**

Date your club will be qualified: ?

Club's Rotary Foundation goals for the coming Rotary year:

1. **To get every member to contribute something to the Foundation**
- 2.
- 3.

Club's Annual Fund contribution goal: \$6400 for the Rotary Foundation (\$100/member average)

Club's Permanent Fund contribution goal:

Club's goal to eradicate polio: Some amount above zero, TBD

District grants:

1. We expect to request support for the same projects as before (see previous page)
- 2.

Club will address the following Rotary Foundation area(s) of focus:

- |   |   |
|---|---|
| <input type="checkbox"/> Peace and conflict prevention/resolution | <input type="checkbox"/> Maternal and child health          |
| <input type="checkbox"/> Disease prevention and treatment         | <input type="checkbox"/> Basic education and literacy       |
| <input type="checkbox"/> Water and sanitation                     | <input type="checkbox"/> Economic and community development |

Global grants:

- 1.
- 2.

Educational, promotional, and fundraising projects held by the club for PolioPlus last year:

- 1.
- 2.
- 3.

Number of Rotary Peace Fellowships:

Nominated: \_\_\_\_\_

Selected by the Trustees: \_\_\_\_\_

**What strategies does the club plan to use to achieve its Rotary Foundation goals? (Check all that apply.)**

- Ensure that the club's Rotary Foundation committee understands Foundation grants and programs and is committed to promoting financial support for the Foundation.
- Help club members understand the relationship between Foundation giving and Foundation programs.
- Plan a club program about the Foundation every quarter, especially for Rotary Foundation Month in November.
- Include a brief story about the Foundation in every club program.
- Schedule presentations that inform club members about the Foundation.
- Ensure that 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 Foundation and their participation in Foundation programs.

**Action steps:**

## LEADERSHIP DEVELOPMENT

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### Current State

Number of club leaders who attended

District assembly: 4

District Rotary Foundation seminar: 6-8

District membership seminar: 2

District leadership seminar: 2

District conference: 4

Number of club members involved at the district level: 2

Number of visits from the assistant governor this Rotary year: he's a member of our club, so he's there often.

### Future State

Club goals for developing Rotary leaders for the coming Rotary year:

Working to grow committees and ensure continuity.

**What strategies does the club plan to use to develop Rotary leaders? (Check all that apply.)**

- Have the president-elect attend the presidents-elect training seminar and the district assembly.
- Have all committee chairs attend the district assembly.
- Encourage past presidents to attend the district leadership seminar.
- Appoint a club trainer to develop club members' knowledge and skills.
- Conduct a leadership development program.
- Tap the expertise of the 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 fellow members.
- Other (please describe):

**Action steps:**

## PUBLIC RELATIONS

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### Current State

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

Service projects and programs are normally covered through local news media contacts

### Future State

Club public relations goals for the coming Rotary year:

Working to ensure that programs are scheduled far enough in advance that appropriate notice can be given to media outlets.

**What strategies does the club plan to use to achieve its public relations goals? (Check all that apply.)**

- X Ensure that the public relations committee is trained in conducting a multimedia campaign.
- X Plan public relations efforts around all service projects.
- X Conduct a public awareness program aimed at the business and professional community that explains what Rotary is and what Rotary does.
- X Arrange for a public service announcement on a local television channel or local radio station, or in a local newspaper or magazine.
- X Other (please describe): Need to establish a PR \*committee\* rather than a single person. Need to consider having scholarships done in time for school awards night recognitions.

**Action steps:**

**CLUB ADMINISTRATION**

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**Current State**

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

How often and when does the club's board meet? monthly

When are club assemblies held? Irregularly/quarterly at most

How is the club budget prepared? \_\_\_\_\_

Is the budget independently reviewed by a qualified accountant? X Yes  No

Does the club have a strategic plan in place?  Yes X No

Has the club developed a system for ensuring continuity of leadership on its board, committees, etc.?

X Yes  No (but it is spotty, especially on committees)

Has the club developed a system for keeping all members involved?  Yes X No

Does the club use Member Access at [www.rotary.org](http://www.rotary.org) to update its membership list? X Yes  No (?)

How often is the club's bulletin published? Weekly Cog distributed at meetings

How are weekly club programs organized? Monthly program chairs

Does the club have its own website? X Yes  No If yes, how often is the site updated? Not often

Does the club observe the special months designated on the Rotary calendar?  Yes X No

How often does your club conduct fellowship activities? Irregularly/not often enough/working on that

How does the club involve the families of Rotarians? Some come to lunch meetings as guests; planning a family-friendly social event for the early fall after cancelling one due to weather in late spring.

**Future State**

**How will the club carry out administrative tasks? (Check all that apply)**

- X Regular board meetings are 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: \_\_\_\_\_
- X 1 club assemblies are scheduled on the following dates: August 26, 2013 (District Governor's visit).  
Others TBA
- The club has either adopted the latest version of the Recommended Rotary Club Bylaws or revised its own bylaws.
- Club elections will be held on \_\_\_\_\_.
- At least \_\_\_\_\_ delegates will be sent to the district conference.
- X A club bulletin will be produced for members.
- X The club's website will be updated several times per year.
- X A plan has been developed to ensure that weekly club programs are interesting and relevant.
- Monthly attendance figures will be reported to the district leadership by the \_\_\_\_\_ day of the following month.
- X Member Access will be used to maintain club records by 1 June and 1 December to ensure accurate semiannual reports.
- X Membership changes will be reported to RI within 30 days.
- Reports to RI, including the semiannual report, will be completed on time.
- X The following fellowship activities for all club members are planned for the year: a family-friendly social in late summer, others TBA
- Other (please describe): \_\_\_\_\_

**Action steps:**

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

Ideas for re-involving long-time members who are mostly just meeting-attenders.

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

  
\_\_\_\_\_  
President's signature

2013-14  
Rotary year

\_\_\_\_\_  
Assistant governor's signature

July 1, 2013  
Date

\_\_\_\_\_  
Date

**SUMMARY OF GOALS FOR ROTARY CLUB OF Batesville ROTARY YEAR 2013-14**

For each goal your club has identified for the coming 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.

	Club Service	Vocational Service	Community Service	International Service	New Generations Service
<b>Membership goal</b> <u>68</u> members by 30 June <u>2014</u>	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Service goals</b> For our community: Continue our commitment to the several community service projects we do. Continue support for scholarships for local students. For communities in other countries: Contribute to PolioPlus	<input type="checkbox"/>   <input type="checkbox"/>	<input type="checkbox"/>   <input type="checkbox"/>	X   <input type="checkbox"/>	<input type="checkbox"/>   X	X   <input type="checkbox"/>
<b>Rotary Foundation goals</b> PolioPlus contribution goal: <u>non-zero!</u> Annual Fund contribution goal: <u>\$6400</u> Permanent Fund contribution goal: _____ Our club will participate in the following Rotary Foundation programs:	<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 type="checkbox"/> X <input type="checkbox"/> <input type="checkbox"/>	X <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Leadership development goals</b> Succession planning for officers and committee chairs	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Public relations goals</b> Continue PR of strong weekly programs and service projects; update web site.	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Club administration goals</b> Revise Bylaws; adopt a budget process	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Other goal</b> Increased social events for members outside regular meetings.	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other goal</b> Successfully host an exchange student for 2013-14.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X