

MODULE 8

CLUB PLANNING AND MANGEMENT

Learning Outcome:

The PEs will be prepared to define their goals, objectives and plans for their clubs. They will be aware of effective management/ leadership practices.

February 15, 2021

Rotary District 7305 PETS Training Manual

Preface

In this module we will review RI's club award criteria so that PEs can consider these when finalizing their goals and plans. Similarly, District 7305 recognizes outstanding club efforts by offering a Crystal Citation Award. This provides guidance to PEs on the criteria and scoring for the award and gives PEs an opportunity to work toward these. Once the club goals are defined, an operational planning chart is provided to assist PEs and committee chairs to plan out their activities.

Accessing the Rotary's Learning Center, the District's Website and DACdb

During your review of the training material, you will be asked to access training materials, videos and power point presentations from RI's learning Center, the District's Website and DACdb (District and Club database). It is important that you have access to a computer, laptop or tablet so that you can review the online training materials when required. These three online resources require registration. If you are not registered then access each resource and register. Make sure you remember your User ID and Password. The web address for each site is:

District 7305 Website:

- Type in [Rotary District 7305](https://rotarydistrict7305.org) <<https://rotarydistrict7305.org>>
- At the top right corner click on Member login.
- You are already registered with your email address serving as your UserID. If this is the first time accessing the website you should create a new Password.
- Look for District Library along the right side of the window and identify learning resources listed in the training manual.

DACdb:

- Type in DACdb < <https://www.dacdb.com/> >
- If new register for your account. If already registered sign in with User Id and Password.
- When learning resources become available the participants will be instructed on how to access the information.

Note: Clubs need to integrate DACdb with the RI data base. The instructions are located in the District Library (District 7305 Website) as well as the Application to Integrate the data bases. See Dan Dougherty or Dennis Piper at 7305@rotarydistrict7305.org if you need assistance.

MyRotary.org

- Type in MyRotary.org < [My Rotary | My Rotary](#)>
- If new, register for your account. If already registered sign in with User Id and Password
- Scroll to bottom of page until you see the Online Tool Box.
- Look for Learning Center and click.
- Type training program name in search box.

Rotary District 7305
PETS Training Manual

Table of Contents

Preface	i
Accessing the Rotary’s Learning Center, the District’s Website and DACdb	i
Table of Contents	ii
8.1 Goal Setting	1
8.2 Planning to Meet your Goals	6

**Rotary District 7305
PETS Training Manual**

The review of the last 7 modules provides a background for selecting goals and planning your year as Club President. Module 7 Being a Club President identified a variety of matters to consider in managing your club. This generated some initial goals to be pursued. In this Module we will introduce the criteria for both RI and District 7305 Awards. These are introduced here so that President Elects can compare and select those criteria that best supports one's club.

8.1 Goal Setting

Setting goals helps to provide a focus for you as the president and for the members of the club. One's time and efforts are guided by the goals established at the beginning of the year. Club goals can be created utilizing several resources. First, RI has identified a set of club goals for consideration when Club Presidents are planning their year. Secondly, Rotary Districts can set goals for clubs as a way to emphasize a particular Rotary aspect such as membership or program development. Thirdly, presidents may wish to develop key areas of the club by setting more focused goals. The following activities illustrate the differences.

Activity 8.1a In Club Central, presidents can utilize a list of award criteria to provide guidance on club growth and development. The goals listed here apply to the *Rotary Citation* (also known as the Presidential Citation) See [Rotary Citation Goals](https://tinyurl.com/ykka85b9) (<https://tinyurl.com/ykka85b9>) in the Club President file under District Files (DACdb). Clubs who meet 13 of these goals will be recognized by the RI President. Club Presidents are able to choose which of the goals they wish to address and indicate these in the Goal Center under Club Central. **Once Presidents identify club goals in Club Central, they need to report the progress toward these goals.**

Rotary Citation

Club Membership: How many total members does your club want by the end of the Rotary year?

Service participation: How many members will participate in club service activities during the Rotary year?

New member sponsorship: How many members will sponsor a new club member during the Rotary year?

Rotary Action Group participation: How many club members will be members of at least one Rotary Action Group (RAG) during the Rotary year?

Leadership development participation: How many members will participate in leadership development programs or activities during the Rotary year?

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Rotary District 7305
PETS Training Manual

District conference attendance: How many members will attend your district conference?

Rotary Fellowship participation: How many club members will be members of a Rotary Fellowship during the Rotary year?

District training participation: How many of your club's committee chairs will attend the district training assembly?

Annual Fund contributions: How much money will be contributed to The Rotary Foundation Annual Fund by your club and its members during the Rotary year?

PolioPlus Fund contributions: How much money will be contributed to The Rotary Foundation PolioPlus Fund by your club and its members during the Rotary year?

Major gifts: How many single outright donations of US\$10,000 or more will be made by individuals associated with your club during the Rotary year?

Bequest Society members: During the Rotary year, how many individuals or couples will inform The Rotary Foundation of their plans to leave US\$10,000 or more to The Rotary Foundation through their estate?

Benefactors: During the Rotary year, how many individuals or couples will inform The Rotary Foundation of their estate plans to include the Endowment Fund as a beneficiary or will make an outright gift of US\$1,000 or more to the Endowment Fund?

Service participation: How many members will participate in club service activities during the Rotary year?

Rotaract clubs: How many new and existing Rotaract clubs will your club sponsor during the Rotary year?

Interact clubs: How many new and existing Interact clubs will your club sponsor during the Rotary year?

Inbound Youth Exchange students: How many Rotary Youth Exchange students will your club host during the Rotary year?

Outbound Youth Exchange students: How many Rotary Youth Exchange students will your club sponsor during the Rotary year?

RYLA participation: How many individuals will your club sponsor to participate in Rotary Youth Leadership Awards (RYLA) events during the Rotary year?

Activity 8.1c Based on the information and programs presented in Modules 1 through 6, are there any additional goals you wish to pursue? Possible other goals to be considered are listed below under the Action Plans identified in the RI Strategic Plan.

Action Plan 1: Increase our impact:

In Activity 8.2a and b, Rotaract, Interact, RYLA and Youth Exchanges are identified as existing or potential programs to support. Module 5 asks to consider sponsoring candidates for the:

- World Affairs Institute, and
- Leadership and Ethics Symposium.

Action Plan 2: Expand our reach

- Raise awareness of club activities in The Connector, The Bulletin and the District 7305 Website.
- Support The Buzz in local elementary schools.
- Support Youth + Peace in Action Program for Interact Clubs and local high schools.
- Support Covid 19 relief efforts.
- Prepare a District Grant for a local or international project.
- Prepare a Global Grant for an international project.
- Sponsor a Global Grant scholar either inbound or outbound.
- Sponsor a Peace Fellow.
- Consider projects that address at least one of the seven areas of focus.
- Consider contributing to The District 7300 Foundation as a way to tap into a 501 (c) 3 charitable organization to support a club's community service projects.

Action Plan 3: Enhance participant engagement

- Encourage members to participate in the Rotary Leadership Institute.
- Recommend a candidate for the Emerging Leaders program.
- Consider using DACdb to store club information: newsletters, meeting minutes, photos, etc.

Action Plan 4: Increase our ability to adapt

To promote membership

- Explore different meeting types to attract new members
- Explore different club structures, for example cause-based, passport, or satellite clubs
- Address diversity, equity and inclusiveness in recruiting new members.

Questions:

1. List any additional goals for consideration for your year as president.

8.2 Planning to Meet your Goals

Having identified your club goals, the next phase is to prepare operational plans to meet these goals. In Module 7, President Elects were encouraged to identify committee chairs and to delegate responsibilities. Together you can prepare the operational plans for each goal. The following activity provides one approach to preparing your operational plans.

Activity 8.2 The following chart offers one option to organize plans and monitor progress to meet the desired goal. The first line in the table identifies the goal and then subsequent lines introduce the key tasks to achieve the goal. Additional information includes identifying the person responsible for the task, a timeframe to complete a task, identifying any special needs, technical support needed, an extra space as needed and a column for the outcome of the goal. An example is provided to illustrate how the chart can be used for planning. One can develop their own table or copy and paste this one. Note that the number of rows for the tasks will vary based on the goal. One can insert additional rows as needed.

**Rotary District 7305
PETS Training Manual**

Rotary Club Planning Chart

Goal: Conduct a fundraiser: Saturday morning "all you can eat pancakes"						
Key Tasks	Who is Responsible	Timeline	Special needs	Tech needed	???	Outcome
Determine location	Mary	2 weeks				
Set date	Committee	1 week				
Arrange for supplies	John	2 months				
Advertise	Jean	1 month				
Conduct event	Committee	2.5 months	Music	Microphone & speakers		200 meals \$3000 raised
Goal:						
Key Tasks	Who is Responsible	Timeline	Special needs	Tech needed	???	Outcome
Goal:						
Key Tasks	Who is Responsible	Timeline	Special needs	Tech needed	???	Outcome

**Rotary District 7305
PETS Training Manual**

The President Elect and committee chairs can complete one chart for each goal identified in Activity 8.1

Questions:

1. Do you have another planning tool that will assist in preparing your operational plans?

 2. Do you consider this approach workable for planning? Can you adapt it for your particular needs?
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Final Thoughts

This module concludes the PETS training program. We have traveled quite a distance from the RI Overview in Module 1 through the District focused Modules 2 to 6 and these final two club-focused Modules 7 and 8. By establishing this pre-PETS approach the PETS Committee trusts that you have learned about the different programs that Rotary provides and the level of support available at the District level. Since the training materials are new, there may be sections that were not well developed or could be improved. Your comments on the modules will be appreciated

During PETS we will have two District breakout sessions scheduled for March 2 and 4 from 6:30 PM to 8:00 PM. The preference is to complete our discussions within an hour, however if PEs prefer to spend more time in discussion, we will have the extra time available. On March 2 we will have breakout sessions for PEs to discuss their club goals and plans, share ideas and to problem solve. We will also explore the creation of a **President's Forum**. This would be a monthly/quarterly virtual meeting for Club Presidents to share success stories, seek advice on a particular issue, problem solve and innovate. During the March 4th meeting, we will discuss the official DG visit and try to develop tentative meetings for groups of clubs in different areas of Southwestern PA. We will also explore virtual and hybrid meeting formats depending on the Covid 19 situation.

Thank you for your participation and your willingness to serve as President of your Rotary Club!

The PETS Committee 2021
