

# PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

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.

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

Rotary Club of \_\_\_\_\_ Rotary year of office: \_\_\_\_\_

Name of president: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

## MEMBERSHIP

### Current State

Current number of members: \_\_\_\_\_

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

Number of male members: \_\_\_\_\_ Number of female members: \_\_\_\_\_

Average age of members: \_\_\_\_\_

Number of Rotarians who have been members for 1-3 years: \_\_\_\_\_ 3-5 years: \_\_\_\_\_ 5-10 years: \_\_\_\_\_

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

Check the aspects of your community's diversity that your club membership reflects:

☐ Profession ☐ Age ☐ Gender ☐ Ethnicity

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

Describe club's current new member orientation program:

Describe club's continuing education programs for both new and established members:

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

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

What makes this club attractive to new members?

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

### Future State

Membership goal for the upcoming Rotary year: \_\_\_\_ members by 30 June \_\_\_\_  
(number) (year)

Our club has 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
- ☐ 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 for every new club member
- ☐ Recognize those 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
- ☐ Other (please describe):

### Action steps:

## SERVICE PROJECTS

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### Current State

Number of Rotary Youth Exchange students:    Hosted \_\_\_\_    Sponsored \_\_\_\_

Number of sponsored Interact clubs: \_\_\_\_    Rotaract clubs: \_\_\_\_    Rotary Community Corps: \_\_\_\_

Number of RYLA (Rotary Youth Leadership Awards) activities: \_\_\_\_

Number of Rotary Friendship Exchanges: \_\_\_\_

Number of registered Rotary Volunteers: \_\_\_\_

Number of World Community Service (WCS) projects: \_\_\_\_

Number of other current club service projects:

## Future State

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

For our local community:

For communities in other countries:

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

- ☐ Ensure the service projects committee is aware of how to plan and conduct a service project
- ☐ Review the club's current and ongoing service projects to confirm that they meet a need and are 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 project funding needs
- ☐ Involve all members 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
  - ☐ Rotaract
  - ☐ Rotary Community Corps
  - ☐ Rotary Friendship Exchange
  - ☐ Rotary Volunteers
  - ☐ RYLA (Rotary Youth Leadership Awards)
  - ☐ World Community Service
  - ☐ Rotary Youth Exchange
- ☐ Use a grant from The Rotary Foundation to support a club project
- ☐ Other (please describe):

## Action steps:

## THE ROTARY FOUNDATION

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### Current State

Number of grants awarded:

District Simplified Grants: \_\_\_\_\_ Volunteer Service Grants: \_\_\_\_\_

Matching Grants: \_\_\_\_\_ Health Hunger and Humanity (3-H) Grants: \_\_\_\_\_

Number of Ambassadorial Scholars: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of GSE team members: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of Rotary Grants for University Teachers: Nominated \_\_\_\_\_ Selected \_\_\_\_\_

Number of Rotary World Peace Fellows: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of Rotary Conflict Studies Fellows: Nominated \_\_\_\_\_ Selected \_\_\_\_\_

Number of PolioPlus or PolioPlus Partners activities: \_\_\_\_\_

Current year's contributions to Annual Programs Fund: \_\_\_\_\_

Current year's contributions to Permanent Fund: \_\_\_\_\_

Number of club members who are

Paul Harris Fellows: \_\_\_\_\_ Benefactors: \_\_\_\_\_ Major Donors: \_\_\_\_\_

Rotary Foundation Sustaining Members: \_\_\_\_\_ Bequest Society Members: \_\_\_\_\_

Number of Foundation alumni tracked by your club: \_\_\_\_\_

### **Future State**

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

Our club's Annual Programs Fund contribution goal is \_\_\_\_\_.

Our club's Permanent Fund contribution goal is \_\_\_\_\_.

Our club will participate in the following Rotary Foundation programs:

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

- ☐ Ensure the club's Rotary Foundation committee understands the 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 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
- ☐ Encourage each club member to contribute to the Foundation every year
- ☐ Participate in:
  - ☐ Group Study Exchange
  - ☐ Matching Grants
  - ☐ District Simplified Grants
  - ☐ 3-H Grants
  - ☐ Volunteer Service Grants
  - ☐ PolioPlus/PolioPlus Partners
  - ☐ Host/Sponsor Ambassadorial Scholar(s)
  - ☐ Sponsor a Rotary World Peace Fellow
  - ☐ Sponsor a University Teacher
  - ☐ Sponsor a Rotary Conflict Studies Fellow
- ☐ Invite Foundation program participants and alumni to be part of club programs and activities
- ☐ Other (please describe): \_\_\_\_\_

### **Action steps:**



## LEADERSHIP DEVELOPMENT

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### Current State

Number of club leaders who attended

District assembly: \_\_\_\_\_

District Rotary Foundation seminar: \_\_\_\_\_

District membership seminar: \_\_\_\_\_ District leadership seminar: \_\_\_\_\_

District conference: \_\_\_\_\_

Number of club members involved at the district level: \_\_\_\_\_

Number of visits from the assistant governor this past Rotary year: \_\_\_\_\_

### Future State

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

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

- ☐ Have the president-elect attend PETS and the district assembly
- ☐ Have all committee chairs attend the district assembly
- ☐ Encourage interested past presidents to attend the district leadership seminar
- ☐ Use the expertise of the club's assistant governor
- ☐ Encourage new members to assume positions of leadership through participation in club committees
- ☐ Ask club members to visit other clubs to exchange ideas and share what they learn with the club
- ☐ 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 (radio, newspaper, television, etc.):

### Future State

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

#### How does the club plan to achieve its public relations goals? *(check all that apply)*

- ☐ Ensure that the public relations committee is trained in how to conduct media campaigns
- ☐ Conduct public relations efforts for all service projects
- ☐ Conduct a public awareness program targeted at the business and professional community about what Rotary is and what it does ☐ Arrange for a public service announcement to be broadcast on a local television channel

☐ Other (please describe):

**Action steps:**

**CLUB ADMINISTRATION**

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**Current State**

How often and when does the club board meet? \_\_\_\_\_

When are club assemblies held? \_\_\_\_\_

How is the club budget prepared? \_\_\_\_\_ Is it independently reviewed by a qualified accountant? \_\_\_\_\_

Does the club have a long-range plan in place? \_\_\_\_\_

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

Has the club developed a system for keeping all members involved in the club? \_\_\_\_\_

Does the club use Member Access on [www.rotary.org](http://www.rotary.org) to update its membership list? \_\_\_\_\_

How often is the club's bulletin published? \_\_\_\_\_

Describe how weekly club programs are organized:

How often is the club's Web site updated? \_\_\_\_\_

Does your club observe the special months of the Rotary calendar, such as Rotary Foundation Month and Magazine Month? \_\_\_\_\_

How often does your club conduct fellowship activities? \_\_\_\_\_

How does the club involve the families of Rotarians? \_\_\_\_\_

**Future State**

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

☐ Regular board meetings have been scheduled.

☐ The club's long-range and communication plans will be updated.

☐ \_\_\_\_\_ club assemblies have been scheduled on the following dates: \_\_\_\_\_  
(number)

☐ The club has either adopted the latest version of the Recommended Rotary Club Bylaws or revised its own bylaws (recommended after each Council on Legislation).

☐ Club elections will be held on \_\_\_\_\_.  
(date)

☐ At least \_\_\_\_\_ delegates will be sent to the district conference.  
(number)

☐ A club bulletin will be produced to provide information to club members.

- ☐ The club's Web site will be updated \_\_\_\_\_ times per year.  
(number)
- ☐ A plan has been developed to have interesting and relevant weekly club programs.
- ☐ RI Club Administration Software (RI-CAS) or similar software will be used to assist with administration activities.
- ☐ Monthly attendance figures will be reported to the district leadership by the \_\_\_\_\_ day of the following month.  
(number)
- ☐ Member Access will be used to maintain club records (by 1 June and 1 December to ensure accurate semiannual reports).
- ☐ Membership changes will be reported to RI within \_\_\_\_\_ days.  
(number)
- ☐ Reports to RI, including the semiannual report, will be completed on a timely basis.
- ☐ The following fellowship activities for all club members are planned for the year:
- ☐ Other (please describe):

**Action steps:**

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

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

\_\_\_\_\_  
Club President Signature

\_\_\_\_\_  
Rotary Year

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date



## SUMMARY OF GOALS FOR \_\_\_\_\_ ROTARY YEAR

For each goal your club has identified for the upcoming Rotary year, indicate which Avenue of Service it addresses. To ensure a balanced service effort, you should have at least one goal that address each Avenue of Service. Most goals will address more than one avenue.

	Club Service	Vocational Service	Community Service	International Service
<b>Membership goal</b> _____ members by 30 June _____ (number) (year)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Service goals</b> For our local community:  For communities in other countries:	<input type="checkbox"/>  <input type="checkbox"/>	<input type="checkbox"/>  <input type="checkbox"/>	<input type="checkbox"/>  <input type="checkbox"/>	<input type="checkbox"/>  <input type="checkbox"/>
<b>The Rotary Foundation goals</b> Our club's Annual Programs Fund contribution goal is _____. Our club's Permanent Fund contribution goal is _____. 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"/>
<b>Leadership development goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Public relations goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Club administration goals</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other goal</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other goal</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

