

# 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 Taree on Manning Rotary year of office: 2007

Name of president: Maurie Stack

Mailing address: PO Box 1252, Taree NSW 2430

Telephone: 02 6592 6511 Fax: 02 6592 6635 E-mail: maurie@stacklaw.com.au

## MEMBERSHIP

### Current State

Current number of members: 26

Number of members as of 30 June last year: 26 30 June five years ago: 24

Number of male members: 14 Number of female members: 12

Average age of members: 57

Number of Rotarians who have been members for 1-3 years: 3 3-5 years: 5 5-10 years: 8

Number of members who have proposed a new member in the previous two years: 3

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

Profession  Age  Gender  Ethnicity

Our classification survey was updated on N/A and contains      classifications, of which      are unfilled.  
(number) (date) (number)

Describe club's current new member orientation program:

Club within a Club

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

Attendance at District convention; visits by DG and ADG

Visits by DG, ADG, and District Chairmen

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:

FAME;RAWKS

What makes this club attractive to new members?

- Lunch Meeting
- Fun group of people
- Networking opportunities
- Community services

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

- Lunch meetings
- Cost
- Time Commitment

### **Future State**

Membership goal for the upcoming Rotary year: 10 new members by 30 June 2008 (total 36)  
(number) (year)

Our club has identified the following sources of potential members within the community:

- Former members of our club and rotoract
- Young business people

### **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): Club within a club

Develop supporters group

### **Action steps:**

- Create a written plan
- Create a brochure
- Get members to complete a list of prospects
- Invite to Friday night drinks

- Grab every opportunity for publicity

## **SERVICE PROJECTS**

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### **Current State**

Number of Rotary Youth Exchange students:    Hosted 1            Sponsored 1

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

Number of RYLA (Rotary Youth Leadership Awards) activities: 1

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

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

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

Number of other current club service projects:

- Medical Centre on Nias
- Trent Newman - Rotary Peace Scholar
- Proposed major project
- RYAG; NYSF; Honeywells Engineering Summer School; Siemens Science Experience; RYPEN; RYLA, MUNA?; Dorothea MacKellar?; Public Speaking
- Youth Exchange
- Red Shield Appeal
- Bowel Scan
- Australia Day Breakfast

## Future State

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

For our local community:

- Manning River? Project
- Manning River Discovery Day
- Gambling Night
- Proposed Manning River Usage Program
- Business House Relay to Support Surf Clubs

For communities in other countries:

- Complete Medical Centre on Nias
- Buy 1 Shelter Box
- Support Rotary Foundation (\$100 per member)

### 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 Medan/Jakarta
- 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):

Work with three other Rotary Clubs in Taree/Wingham on JT project - hopefully Manning River Usage Program

### Action steps:

- Approach other Rotary Clubs re music in the Gardens/ Bob Dixen and Music Group
- meet with Robert Baker, GTCC, re River Usage Program
- Continue to supervise Nias
- Determine how to raise

## 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 1 Selected 1 Hosted \_\_\_\_\_

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

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

Current year's contributions to Annual Programs Fund: nil

Current year's contributions to Permanent Fund: nil

Number of club members who are

Paul Harris Fellows: 5 Benefactors: Nil Major Donors: Nil

Rotary Foundation Sustaining Members: nil Bequest Society Members: nil

Number of Foundation alumni tracked by your club: nil

### 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 2.

Our club's Permanent Fund contribution goal is \$100/member.

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 once per year, especially in November, Rotary Foundation Month
- Include a brief story about The Rotary Foundation in every club program
- Schedule a presentation 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:

- |                                                          |                                                                         |
|----------------------------------------------------------|-------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Group Study Exchange | <input type="checkbox"/> PolioPlus/PolioPlus Partners                   |
| <input type="checkbox"/> Matching Grants                 | <input type="checkbox"/> Host/Sponsor Ambassadorial Scholar(s)          |
| <input type="checkbox"/> District Simplified Grants      | <input checked="" type="checkbox"/> Sponsor a Rotary World Peace Fellow |
| <input type="checkbox"/> 3-H Grants                      | <input type="checkbox"/> Sponsor a University Teacher                   |
| <input type="checkbox"/> Volunteer Service Grants        | <input type="checkbox"/> Sponsor a Rotary Conflict Studies Fellow       |
- Invite Foundation program participants and alumni to be part of club programs and activities
- Other (please describe): Aim to induct one or two Paul Harris Fellows at Changover 2008 either from within club or from wider community.

**Action steps:**

## LEADERSHIP DEVELOPMENT

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### Current State

Number of club leaders who attended

District assembly: Nil

District Rotary Foundation seminar: nil

District membership seminar: nil

District leadership seminar: 2

District conference: 13

Number of club members involved at the district level: 6

Number of visits from the assistant governor this past Rotary year: 2

### 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): Attract new young business people to Club

#### 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.):

- Business House Relay - all of above
- Music in Gardens - to be replaced by Manning River Discovery Days
- Gambling Night - all of above

### Future State

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

- To be seen as an exciting and energetic Club
- To promote our service goals

#### 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:**

Liaise with former member John Bulmer of Manning River Times.

**CLUB ADMINISTRATION**

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**Current State**

How often and when does the club board meet? Monthly

When are club assemblies held? Quarterly

How is the club budget prepared? BD Is it independently reviewed by a qualified accountant? No

Does the club have a long-range plan in place? No

Has the club developed a system for continuity of leadership on its board, committees, etc.? Yes - President Elect

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

Does the club use Member Access on www.rotary.org to update its membership list? Yes

How often is the club's bulletin published? Nil 2007/2008 Rotary Bulletin on Website

Describe how weekly club programs are organized:

How often is the club's Web site updated? Monthly in 2007/2008

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

How often does your club conduct fellowship activities? 2/3 times per year

How does the club involve the families of Rotarians? Fellowship activities

**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 created.
- 4 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 10 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 continuously throughout the 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 7th 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 30 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:**

Call on as required

**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



<b>Other goal</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(506)