

PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



August 2009

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.

Rotary Club of Space Center Rotary year of office: 2010-2011

Name of president: David B. Coney

Mailing address: P O Box 58862
Houston, Texas 77058

Phone: 281-993-9111 Fax: 877-865-3856 E-mail: Dbconey@gmail.com

MEMBERSHIP

Current State

Current number of members: 128

Number of members as of 30 June last year: 131 Active with 11 Honorary 30 June five years ago: 133

Number of male members: 101

Number of female members: 30

Average age of members: 50

Number of Rotary alumni members

Number of Rotarians who have been members for 1-3 years: 46 3-5 years: 16

5-10 years: 32

Number of members who have proposed a new member in the previous two years: 40

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

Profession Age Gender Ethnicity

Our classification survey was updated on 5/30/99 and contains 97 classifications, of which 0 are unfilled.
(number) (date) (number)

Describe the club's current new member orientation program.

We try to integrate our club members from the very beginning as well as inform them of all of the duties and responsibilities of being a Rotarian. We have an official orientation meeting with the new members where they are informed about monetary and time commitments that Rotarians need to make as well as explanations about our culture and values and what our club accomplishments have been in the past and what we are planning to accomplish in the future with their help. The Member Orientation Manual is used during the orientation meeting (attached).

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

We are constantly learning as Rotarians. We learn from district meetings, club assemblies, trial and error with new projects, and inform our Rotarian's about what is going on with the Foundation, Polio Plus, etc. We educate our members about changes to our technology such as web page, new committees that are formed, what is going on in the planning stages for our fund raisers etc. We do club assemblies, encourage members to attend the district assembly and do have a Red Badge Check List.

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

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

We have over 40 Fellowships/Action Groups throughout the year. We do a couple of Rotary family fellowships per month as well as other fellowships such as a wine tasting group, golf group, Paul Harris Fellow/Floyd Boze Fellow Dinner, Christmas Party.

What makes this club attractive to new members?

Warm fellowship, visible in community, outstanding service projects, can do attitude, very active committees

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

Lack of "hands on" projects so everyone is involved more than the fund raisers

Future State

Membership goal for the upcoming Rotary year: 135 active members by 30 June 2011
(number) (year)

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

The Club's primary source of members is contact with Rotarians. Consequently, the sources are each member's environment.

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 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 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:

The New Member Orientation Manual is being revised, key Club members are attending District Membership Seminar, continued emphasis by the Club President, assign new members to key positions in committees such as the co-chairs especially for the fundraiser, highlight the new member and sponsor in the

weekly newsletter, assign a mentor to each new member and include the new members for special communication via of the Club Runner in a separate distribution list.

SERVICE PROJECTS

Current State

Number of Rotary Youth Exchange students: Hosted 3 Sponsored 3

Number of sponsored Interact clubs: 1 Rotaract clubs: 1

Rotary Community Corps: _____

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

Number of Rotary Friendship Exchanges: _____

Number of registered Rotary Volunteers: 40

Number of World Community Service (WCS) projects: 6

Number of other current club service projects: 25

Future State

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

For our community:

23

For communities in other countries:

6

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
- 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 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
- Recognize club members who participate and provide leadership in 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
 - Rotary Youth Leadership Awards (RYLA)
 - World Community Service
 - Rotary Youth Exchange
- Use a grant from The Rotary Foundation to support a club project
- Register a project in need of funding, goods, or volunteers on the ProjectLINK database
- Other (please describe):

Action steps:

THE ROTARY FOUNDATION

Current State

Number of grants awarded:

District Simplified Grants: 1 Matching Grants: 0

Number of Ambassadorial Scholars: Nominated _____ Selected _____ Hosted _____

Number of Group Study Exchange (GSE) team members: Nominated _____ Selected _____ Hosted _____

Number of Rotary World Peace Fellows: Nominated _____ Selected _____ Hosted _____

Current year's contributions to PolioPlus activities: \$5,080

Current year's contributions to Annual Programs Fund: \$23,809

Current year's contributions to Permanent Fund: 0

Number of club members who are

Paul Harris Fellows: 100 Benefactors: 16 Major Donors: 4
Rotary Foundation Sustaining Members: 57 Bequest Society members: 0

Number of Foundation alumni tracked by your club: 0

Future State

Our club has established the following Rotary Foundation goals (as reported on the Fund Development Club Goal Report Form) for the upcoming Rotary year:

Polio fundraising: \$2,500 Annual Programs Fund contributions: \$12,500
Major gifts: _____ Benefactors: 19
Bequest Society members: _____

Our club will participate in the following Rotary Foundation programs:

Continue to Educate the Club about TRF, sell as many Raffle Tickets as we can to aid in raising funds for the annual fund. Inform our members on where their money goes when they write a check to TRF.

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 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 Rotary Foundation and their participation in Foundation programs
- Encourage each club member to contribute to the Foundation every year
- Participate in:
 - Group Study Exchange PolioPlus
 - Matching Grants Ambassadorial Scholarships
 - District Simplified Grants Rotary World Peace Fellowships
- Invite Foundation program participants and alumni to be part of club programs and activities
- Other (please describe):

Action steps:

Promote active participation by club members in giving to Foundation and Polio Plus

Actively sell District Foundation Raffle tickets

LEADERSHIP DEVELOPMENT

Current State

Number of club leaders who attended

District assembly: _____

District Rotary Foundation seminar: 5

District membership seminar: 12

District leadership seminar: 1

District conference: 15

Number of club members involved at the district level: 4

Number of visits from the assistant governor this Rotary year: _____

Future State

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

Encourage attendance at all District training seminars, especially District Assembly

Promote individual participation in committees and assign responsible committee jobs to new members.

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

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

Action steps:

There is a 5 Step ladder program from Sgt-at-Arms to Treasurer to Secretary to President Elect to President with 9 Directors serving a 3 year term, rotating 3 members each year. Fundraiser requires about 33 active committees.

PUBLIC RELATIONS

Current State

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

The Club has an excellent relationship with local media, i.e. Mary Alys Cherry, The Bay Citizen Editor Emeritus, is a member. Received nationwide coverage for the ABC TV Extreme MakeOver Home Edition

Future State

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

Participated in the District 5890 Public Image Meeting July 19, 2010.

Participate in a national program such as Chevrolet and the GM Military Discount Program which helps U.S. troops stationed overseas call home for free. The program is involved with the collection of used cell phones.

Use the local media for advertising the fund raisers and having feature articles about the festivities after the events

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

- Ensure the public relations committee is trained in conducting a multimedia campaign
- Plan public relations efforts around all service projects
- Conduct a public awareness program targeted at the business and professional community that explains what Rotary is and what Rotary does
- Arrange for a public service announcement to be broadcast on a local television channel, aired on a local radio station, or placed in a local newspaper or magazine
- Other (please describe):

Action steps:

1. Purchase weekly ad space in local newspaper
2. Use tools provided by District Public Image Committee
3. Make better use of newspaper, website, radio,
4. Promote Shrimporee & Springoree through all media channels
5. Displays at club and district events

CLUB ADMINISTRATION

Current State

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

How often and when does the club board meet? Monthly, 3rd Tuesday, 7am

When are club assemblies held? 3 – August 30(Expectations), January 31(Progress), June 20(Accomplishments)

How is the club budget prepared? The budget is prepared using the previous year budget as a guide and adding new projects brought to the Treasurer by the President, Officers, and Directors. Final approval is by the Board.

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

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

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

Yes No

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

Does the club use Member Access at www.rotary.org to update its membership list? Yes No

How often is the club's bulletin published? Weekly

Describe how weekly club programs are organized.

1. Club agenda format is followed as prescribed in the Club's By Laws

2. Program committee identifies informative speakers in advance and the speaker and a summary of the topic are put on the Club Runner Calendar

3. President has a trivia question about one of the members.

4. President sent out survey at the beginning of year to get some insight about the Club members so he would know them better

Does the club have its own Web site? Yes No. If yes, how often is the site updated? weekly

Does the club observe the special months of the Rotary calendar, such as Rotary Foundation Month and Magazine Month? Yes No

How often does your club conduct fellowship activities? About twice a month, a Christmas party, and golf fellowship.

How does the club involve the families of Rotarians? Rotary Family Night Out about twice a month, often at places where the entire family can attend such as a Putt Putt Golf Fun House

Future State

How does the club carry out the administrative tasks of the club? (check all that apply)

- Regular board meetings have been scheduled.
- The club will review the Club Leadership Plan on the following dates: Before the Club assemblies
- The club's strategic and communication plans will be updated on the following dates: _____
- 3 club assemblies have been scheduled on the following dates: August 30, January 31, and June 20
(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 Before December 31, 2010.
(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 multiple times per week times per year.
(number)
- A plan has been developed to ensure interesting and relevant weekly club programs.
- Monthly attendance figures will be reported to the district leadership by the last 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 15 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:

- Rotary Family Night Out about twice a month, a Christmas party, golf fellowship
- Other (please describe): Continue to support and promote RNASA awards program

Action steps:

Continue to provide strong leadership, while encouraging all members to remain actively involved in all club activities, plus continue to provide financial support for our club's service projects and Rotary International Foundation.

Our club would like assistance from the governor or assistant 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's Signature

Rotary Year

Assistant Governor's Signature

Date

Date

SUMMARY OF GOALS FOR ROTARY CLUB OF _____ 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 addresses each Avenue of Service. Most goals will address more than one avenue.

	Club Service	Vocational Service	Community Service	International Service
Membership goal _____ members by 30 June _____ (number) (year)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service goals For our 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"/>
Rotary Foundation goals Our club's PolioPlus contribution goal is _____. 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"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Leadership development goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public relations goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club administration goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other goal:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>