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.

Rotary Club of ________________________________  Rotary year of office: ________
Name of president: ____________________________________________________________
Mailing address: __________________________________________________________________
Phone: ___________________  Fax: ________________  Email: ________________

MEMBERSHIP

Current State

Current number of members: ______

Number of members as of 30 June last year: ______  As of 30 June five years ago: ______
Number of male members: ______  Number of female members: ______
Average age of members: ______  Number of Rotary alumni members: ______

Number of alumni or program participants tracked by your club: ______

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: ______

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

☐ Professional  ☐ Age  ☐ Gender  ☐ Ethnicity

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

Describe the club’s new-member orientation program.

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:
What makes your club attractive to new members?

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

**Future State**

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

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

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.
- Other (please describe):

**Action steps:**

**SERVICE PROJECTS**

**Current State**

Number of Rotary Youth Exchange students: Hosted: _____  Sponsored: _____

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

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

Number of Rotary Friendship Exchanges: _____

Number of other current club service projects: _____
Future State

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

For our community:

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
  ☐ Rotaract
  ☐ Rotary Community Corps
  ☐ Rotary Youth Exchange
  ☐ 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.
☐ Other (please describe):

Action steps:

THE ROTARY FOUNDATION

Current State (for nonpilot clubs in 2012-13)

Number of grants awarded:

  District Simplified Grants: _____  Matching Grants: _____

Number of Ambassadorial Scholars:  Nominated: _____  Selected: _____  Hosted: _____
Number of Group Study Exchange team members:  Nominated: _____  Selected: _____  Hosted: _____
Number of Rotary Peace Fellows:  Nominated: _____  Selected: _____  Hosted: _____
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: ____  Benefactors: ____  Major Donors: ____
Rotary Foundation Sustaining Members: ____  Bequest Society members: ____

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

Club qualified status:  ☐ Qualified  ☐ Pending  ☐ Incomplete

District grant activities your club is currently involved in:

1. 
2. 

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. 
2. 
3. 

Club’s Annual Fund contribution goal:

Club’s Permanent Fund contribution goal:

Club’s goal to eradicate polio:
District grants:
1. 
2. 

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

- Peace and conflict prevention/resolution
- Maternal and child health
- Disease prevention and treatment
- Basic education and literacy
- Water and sanitation
- 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

Current State
Number of club leaders who attended

<table>
<thead>
<tr>
<th>Event</th>
<th>Nominated</th>
<th>Attended</th>
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<tbody>
<tr>
<td>District assembly</td>
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<td>_____</td>
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<tr>
<td>District Rotary Foundation seminar</td>
<td>_____</td>
<td>_____</td>
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<tr>
<td>District membership seminar</td>
<td>_____</td>
<td>_____</td>
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<tr>
<td>District leadership seminar</td>
<td>_____</td>
<td>_____</td>
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</tbody>
</table>
District conference: _____
Number of club members involved at the district level: _____
Number of visits from the assistant governor this Rotary year: _____

**Future State**

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

**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:**

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**PUBLIC RELATIONS**

**Current State**

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

**Future State**

Club public relations goals for the coming Rotary year:

**What strategies does the club plan to use to achieve its public relations goals? (Check all that apply.)**
- [ ] Ensure that the public relations committee is trained in conducting a multimedia campaign.
- [ ] Plan public relations efforts around all service projects.
- [ ] Conduct a public awareness program aimed at the business and professional community that explains what Rotary is and what Rotary does.
- [ ] Arrange for a public service announcement on a local television channel or local radio station, or in a local newspaper or magazine.
- [ ] Other (please describe):
Action steps:

CLUB ADMINISTRATION

Current State
Is your club operating under the Club Leadership Plan? □ Yes □ No
How often and when does the club’s board meet? _____
When are club assemblies held? _____
How is the club budget prepared? _____
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? _____
How are weekly club programs organized? _____
Does the club have its own website? □ Yes □ No If yes, how often is the site updated? _____
Does the club observe the special months designated on the Rotary calendar? □ Yes □ No
How often does your club conduct fellowship activities? _____
How does the club involve the families of Rotarians? _____

Future State
How will the club carry out administrative tasks? (Check all that apply)
□ 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: _____
□ _____ club assemblies are scheduled on the following dates: _____
□ 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.
□ A club bulletin will be produced for members.
□ The club’s website will be updated _____ times per year.
□ 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.

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.

Reports to RI, including the semiannual report, will be completed on time.

The following fellowship activities for all club members are planned for the year: _____

Other (please describe): _____

Action steps:

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

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

President’s signature   Rotary year   Assistant governor’s signature

_____ Date  _____ Date
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.

<table>
<thead>
<tr>
<th>Membership goal</th>
<th>Club Service</th>
<th>Vocational Service</th>
<th>Community Service</th>
<th>International Service</th>
<th>New Generations Service</th>
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<tbody>
<tr>
<td>___ members by 30 June ___</td>
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<td>For our community:</td>
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<td>For communities in other countries:</td>
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<td>PolioPlus contribution goal: ___</td>
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<td>Permanent Fund contribution goal: ___</td>
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<tr>
<td>Our club will participate in the following Rotary Foundation programs:</td>
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