

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.

Rotary Club of South Portland / Cape Elizabeth, Rotary year of 08-09
Maine, USA office: _____

Name of president: Janet McLaughlin

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MEMBERSHIP

Current State

Current number of members: 55

Number of members as of 30 June last year: 49 30 June five years ago: 57

Number of male members: 40 Number of female members: 15

Average age of members: 60

Number of Rotarians who have been members for 1-3 years: 12 3-5 years: 6 5-10 years: 8

Number of members who have proposed a new member in the previous two years: 7

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

Profession Age Gender Ethnicity

Our classification survey was updated on 1999 and contains 300 classifications, of which 260 are unfilled.
(number) (date) (number)

Describe club's current new member orientation program:

We have held a biennial meeting for new members and prospects, including presentations by about 6-8 senior members, and one or two new members, in which they share their experiences in Rotary and explain why they joined Rotary and stayed with it. We also review club goals and recent achievements at the meeting and solicit thoughts from prospects about why they are considering Rotary. We are considering implementing a new member table before some or all of our weekly meetings (but at least once per month) at which new members (and prospects) can chat with senior members to accomplish the purposes stated above and to answer questions the new members have so that they can quickly become acclimated to the club and feel comfortable. Depending on the success of the table, we may do away with the biennial meeting. We also provide our new members with an orientation packet containing the ABCs of Rotary, information about the Foundation, and other useful information. We also have begun giving

new members (as a gift from the club) a choice of a Rotary cap or visor so that they can quickly wear something that identifies them as a Rotarian, helps makes them feel like they belong, and may lead their friends and acquaintances to inquire about Rotary.

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

We do, at least monthly, Rotary information, Foundation information, and keep the club posted on district activities. We provide updates on club board decisions, especially disbursement of funds.

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:

None reported

What makes this club attractive to new members?

The choice of activities, and exposure to enthusiastic members, coupled with fun meetings and special fellowship events.

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

The meeting time is a structural barrier that will always exist, regardless of the time chosen. Attendance requirements pose a challenge because they tend to scare a fair number of prospects. Once a new member becomes acclimated and incorporates Rotary into his or her life, the attendance requirements are far less daunting. The challenge is to get prospects to take the leap of faith required to understand that the attendance requirements are minimal given the friendships they will develop and the numerous ways in which Rotary will enrich their lives.

Future State

Membership goal for the upcoming Rotary year: 58 members by 30 June 09
(number) (year)

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

- (i) Individuals active in community organizations, including Little League and other sports, parents' associations, churches, former Lions Club members.
- (ii) Local business people, including those in Knightville and around the Maine Mall.
- (iii) We also are looking at past members to see if their circumstances have changed such that they might be ready to return to the club.

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):

We hope to increase existing member interest by giving them interesting assignments.

Action steps:

We will re-develop the club website, making it interactive and attractive to prospects and members.

We also will provide periodic membership updates to the club and mention membership development at least every other week.

We will share ideas of those who successfully recruit and encourage them in their efforts.

SERVICE PROJECTS

Current State

Number of Rotary Youth Exchange students: Hosted 0 Sponsored 0

Number of sponsored Interact clubs: 2 Rotaract clubs: 1 Rotary Community Corps: 0

Number of RYLA (Rotary Youth Leadership Awards) activities: 14 attendees

Number of Rotary Friendship Exchanges: 0

Number of registered Rotary Volunteers: 1

Number of World Community Service (WCS) projects: 2

Number of other current club service projects:

7+

Future State

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

For our local community:

Continue with service projects to show appreciation for Town & City employees, financially needy senior citizens; to promote literacy by partnering with local libraries and book store; to help ease hunger by partnering with South Portland Food Cupboard and serve monthly at soup kitchen.

Also exploring one new hands on project in each community, which may include repainting Bug Light and partnering with other group on service to both communities.

The proceeds of the Car Rally for Cancer are contributed to the Maine Cancer Foundation.

For communities in other countries:

Two members will participate in a NID trip to Ethiopia, during which they would investigate potential projects to support.

Provide financial support and needs survey for orphanage in Kenya.

Provide financial support for well improvement in Honduras.

Continue supporting Wheelchairs for the World or similar organization.

One member investigating participating in NID trip to India.

Considering continuation of support for and participation in service with Sustainable Harvest.

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:

Have two club members visit Kenyan orphanage and deliver funds; develop needs assessment re orphanage; connect with Kenyan Rotary clubs in the area of the orphanage or elsewhere in Kenya to pursue collaborations re orphanage's needs.

Sponsor service trip to include high school seniors in the spring.

Revamp our interactions with local needy senior citizens to better target this specific audience's needs.

Challenge each club member to identify a local or district or international need, then either individually or with other members fund that need with money from the club president's discretionary fund.

Verify that our local literacy activities are successfully serving the stated purpose. Revamp our efforts if warranted.

THE ROTARY FOUNDATION

Current State

Number of grants awarded:

District Simplified Grants: 0

Volunteer Service Grants: 0

Matching Grants: 0

Health Hunger and Humanity (3-H) Grants: 0

Number of Ambassadorial Scholars: Nominated 0 Selected 0 Hosted 0

Number of GSE team members: Nominated 0 Selected 0 Hosted 4

Number of Rotary Grants for University Teachers: Nominated 0 Selected 0

Number of Rotary World Peace Fellows: Nominated 0 Selected 0 Hosted 0

Number of Rotary Conflict Studies Fellows: Nominated 0 Selected 0

Number of PolioPlus or PolioPlus Partners activities: 0

Current year's contributions to Annual Programs Fund: \$11,000+

Current year's contributions to Permanent Fund: \$60 as of 4/08

Number of club members who are

Paul Harris Fellows: 30 Benefactors: 8 Major Donors: 2

Rotary Foundation Sustaining Members: 18 Bequest Society Members: 2

Number of Foundation alumni tracked by your club: 1

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 \$10,000.

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

Our club will participate in the following Rotary Foundation programs: District Foundation Seminar and TRF Matching Grants; Health, Water, Microcredits, Sustainable Harvest

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 PolioPlus/PolioPlus Partners
 - Matching Grants Host/Sponsor Ambassadorial Scholar(s)
 - District Simplified Grants Sponsor a Rotary World Peace Fellow
 - 3-H Grants Sponsor a University Teacher
 - Volunteer Service Grants 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:

Have 3 members attend District Foundation training.

Co-chairs are developing action plan to achieve goal.

Club will send \$3,500 (approx. 10% of tree sale proceeds) to The Rotary Foundation.

Actively promoting sustaining Member Program and 100% participation.

LEADERSHIP DEVELOPMENT

Current State

Number of club leaders who attended

District assembly: 4

District Rotary Foundation seminar: 3

District membership seminar: 3

District leadership seminar: 1

District conference: 3

Number of club members involved at the district level: 0

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:

Continue to work with 5 year Club Leadership Plan.

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:

Give every active club member responsibility for at least one task.

Appoint committee chair positions.

Encourage District participation.

Have senior members with District and RI experience present program re the leadership experiences they have had.

New club members invited to join an activity and/or committee within one month of becoming members.

Encourage new members to participate in Leadership Institute.

Have new members partner with experienced members to co-chair activities..

PUBLIC RELATIONS

Current State

List club activities covered by the media and the type of media (radio, newspaper, television, etc.):

Tree Sale TV and Papers. PHF presentations, key speakers, major donations fundraising successes and international Rotary travel in the papers. All meetings are recorded for Public TV spots.

Future State

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

Promote better understanding by the public and Club members of the range of Rotary service.

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:

Invite members of local media to be guests at meeting.

Strive for having one new member with a media classification.

Continue recording and televising of weekly meetings.

Invite members of local media to join us in service projects.

CLUB ADMINISTRATION

Current State

How often and when does the club board meet? Monthly, 2nd Wed, 5 p.m.

When are club assemblies held? Every other month, after Board meeting.

How is the club budget prepared? By the Board; presented to club by 2nd July meeting for approval Is it independently reviewed by a qualified accountant? Yes

Does the club have a long-range plan in place? In some areas, yes; in others, in process

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

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? Weekly

Describe how weekly club programs are organized: Each member responsible for speaker once a year.

How often is the club's Web site updated? On a regular basis as the need arises

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? Quarterly

How does the club involve the families of Rotarians? Standing invitation to attend weekly meetings; invitations to Change over Night, Lobster Bake, January tree sale celebration. Families assist with service projects.

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.
- 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 12/3/08.
(date)
- At least 2 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 12 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 10th 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 10 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:
Lobster Bake, Poker Nights, cookouts, dinner dance, post tree sale bash
- Other (please describe):

Action steps:

Establish a Program Committee to revise the manner in which we determine programs.

Post weekly bulletin on web site. Invite potential members to view the public section of the club's web site.

Establish Fun and Frivolity co-chairs.

Continue to involve families in meetings, special events, service projects, fellowship activities.

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

Nothing specific at this time

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

Nothing specific at this time

Janet McLaughlin _____

Club President Signature

08-09

Rotary Year

Assistant Governor Signature

6/17/08

Date

Date

SUMMARY OF GOALS FOR 08/09 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
<p>Membership goal <u>58</u> members by 30 June <u>2009</u> (number) (year)</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Service goals For our local community: Literacy, Food Cupboard, Needy Seniors, Soup Kitchen, recognition of Town & City employees, new hands on projects For communities in other countries: Honduras well improvement, Kenyan orphanage, Wheelchairs for the World.</p>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>
<p>The Rotary Foundation goals Our club's Annual Programs Fund contribution goal is <u>\$10,000</u>. Our club's Permanent Fund contribution goal is <u>\$2000</u>. Our club will participate in the following Rotary Foundation programs: District Foundation training, sustaining member program</p>	<input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
<p>Leadership development goals 2 Attendees at Leadership Institute. Continue work on 5 year Club Leadership Plan.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Public relations goals Promote better understanding by the public and Club members of the range of Rotary service.</p>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<p>Club administration goals Have members' attention to Club web site and weekly bulletin become the norm.</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Other goal</p>	<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"/>

(506)