Rotary Year 2022-2023

Annual Planning Guide- Part of Club President's Tool Kit

Planning Guide for AGEs to be use at meetings with PEs / Clubs

This is a scale down version of the tool that was previously used and completed by incoming Presidents and submitted to the respective incoming Assistant Governor.

While it is a few years old, the District 7030 Training Committee believes that this tool still has value and remains relevant. We are therefore encouraging you to use this tool at the first meeting of AGEs and PEs.

This can significantly aid in several facets, including: establishing club succession planning and the seamless and smooth transition in clubs from one year to the next; encouraging the use of Rotary Club Central to set club goals; promoting leadership development using the Rotary Learning Centre; and, facilitating overall administration of clubs in a structured manner.

Please meet with your respective PEs to discuss and complete this tool before July 1st 2022 – this can be your reflective tool as you visit the club(s) in your area during the Rotary year.

Please feel free to provide any feedback in terms of what assistance the District Training Committee can further offer.

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Name of Club: …….

Name of President: …….

Email Address: …….

Mobile Number: …….

Expected date to post your Club Goals be posted on Rotary Club Central: …….

Membership

Current number of active members: (M) …… (F) …… Total: ……

Club membership goal for new active members for 2022/2023: …….

Club membership goal for members age 45 and under for 2022/2023: …….

Club membership goal for total active members for 2022/2023: …….

When was the last time your club classification survey was updated? …….

Does your club have a DEI champion?

Name: ……
Email Address: ……
Mobile #: ……

Does your club have an updated Membership Plan? ……

- Briefly describe your club's Member Attraction strategy:
- Briefly describe your club's Member Retention strategy:
- Briefly describe your club's Member Engagement strategy:
- Briefly describe your club's "New Member Orientation Program": ……
- Has the club developed a system for keeping all members involved? ……

Is your club using any of the innovative club and/or member flexibility options? …….

Has your club benefitted from the "Membership Leads" initiative? ……

What makes your club attractive to new members? ……

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Training & Development

How does your club plan to develop Rotary leaders? (Check all that apply)

- ☐ Have the President Elect & Secretary Elect attend (PETS) & District Conference
- ☐ With the assistance of your AG conduct an Onboarding exercise for all Board Members
- ☐ Tap into the expertise of interested Past Presidents & your Assistant Governor
- ☐ Appoint a Club Trainer & plan leadership development programs
- ☐ Encourage new members to assume lead roles early
- ☐ Utilize the training resources available via the Rotary Learning Centre
- ☐ Ask members to visit other clubs to exchange ideas and share them at club meetings

Please share name and contact details of your club trainer if one is in place:

Name: ……
Email Address: ……
Mobile #: ……

Committees

To enhance engagement, be sure to assign all members to a committee in a timely manner and based on their interest and skill set

Briefly describe your club's standing/core committee structure: ……

How many select/ad-hoc committees does your club have? ……

What criteria does your club use for committee chair appointments? ……

Does your club appoint any committee chairs for more than one year? ……

Are your committee chairs responsible for selecting other committee members? ……

Do your committees have an updated action plan? ……

What percentage of active members are assigned to a club committee: ……

Do your club committees submit appropriate and timely reports? ……

Briefly describe how your committees report to your club board and/or membership: ……

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Service Projects

(Be sure to attend the Grants Seminar so that your club can qualify for Grants)

What are your goals for service projects in local communities for the upcoming year? …….

What are your goals for service projects in other countries for the upcoming year? …….

Does your club currently sponsor or plan to sponsor a Rotaract club? …….

Does your club currently sponsor or plan to sponsor an Interact club? …….

Does your club currently sponsor or plan to sponsor an EarlyAct club? …….

Does your club currently sponsor or plan to sponsor participants to RYLA? …….

Do you plan to involve non-members (volunteers) in service projects? …….

Which avenues of service do your projects cover? …….

Which areas of focus do your projects cover? …….

List Action Steps needed to achieve your service project goals: ……

Rotary Foundation

Proposed Contributions to the Polio Plus Fund for 2022/2023 (USD): ……

Proposed Contributions to the Annual Fund / SHARE for 2022/2023 (USD): ……

Proposed Contributions via EREY for 2022/2023 (USD): ……

Number of current Paul Harris Fellow members: ……

Number of new Paul Harris Fellow members for 2022/2023: ……

Number of current Paul Harris Society members for 2022/2023: ……

Number of new Paul Harris Society members for 2022/2023: ……

Have you scheduled Rotary Foundation educational talks for your club members? ……

Do you plan to apply for any project Grants (District/Global)? …….

Has your current or incoming club foundation chair attended a Grants Seminar? …….

Have you received, signed and returned the District Grants MOU? …….

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Public Image

Does your club have a current Public Image Chair/Director/Committee? ……

Does your club have an overall and current Public Image Plan? ……

Branding

- Does your club have an updated club "logo"? ……
- Does your club logo follow the RI visual identity guidelines? ……
- Is your club logo up-to-date on all club printed collateral (signage/promo items)? ……
- Is your club logo up-to-date on all club digital collateral (letterheads, emails, presentations, etc.)? ……
- Is your club logo up-to-date on all printed/digital distributables (fliers, posters, tickets, etc.)? ……

Resources

- Does your club use the resources from the Rotary Brand Center? ……
- Does your club use the Rotary People of Action campaign resources? ……
- Does your club use the Rotary End Polio Now campaign resources? ……
- Does your club use Rotary image/video resources? ……
- Does your club use Rotary logo/lockup templates? ……
- Does your club use Rotary brochure template? ……

Online

- Does your club have a current and updated website? ……
- Does your club have a current and updated Facebook page? ……
- Does your club have a current and updated Instagram account? ……
- Does your club have other current social media accounts? ……
- Does your club produce and circulate a regular e-newsletter? ……

Content

- Does your club have an updated content calendar? ……
- Does your club use standard content creation tools (e.g. Canva)? ……
- How often is your club's content published/updated? ……

Media

- Have your established/maintained good relationships with local media outlets? ……
- Have you included the media in your club activities? ……

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Administration

Governance

- Does your club have a Club Strategic Plan in place? ……
- How often is your club strategic plan reviewed? ……
- Does your club have an updated Club Constitution? ……
- Does your club have updated Club By-Laws? ……
- Is your club locally registered as an NGO/NPO? ……
- Is your club in adherence with local regulations for NGOs/NPOs? ……
- How often and when does your Club Board meet? ……
- When is/are your Club Assembly/ies held? ……
- Has the club developed a system for continuity of leadership? ……
- Are your current club governance documents made available to all members? ……

Finance

- How is your club's budget prepared? ……
- Is there an updated club budget template? ……
- Does your club's budget include non-case-based administrative and project items? …
- Is your club's budget proposed, reviewed and approved before 1st July? ……
- Is your club's budget reviewed during the Rotary year? ……
- Are your club's banking practices up-to-date? ……
- Does your club or its agents utilize current accounting standards and/or software? …
- Are your club's finances audited regularly? ……

Management

- Does your club use a member and club management system (e.g. ClubRunner)? ……
- Does your club have/maintain a unique email address? ……
- Does your club have a formal records management and archival system? ……
- Does your club use shared online storage for its records? ……
- Do all your members have access to and up-to-date credentials for My Rotary? ……
- Is all your member information current and correct on My Rotary?
- Does your club regularly record and report its activities and accomplishments in Rotary Club Central? ……
- Does your club regularly report on service projects using Rotary Showcase? ……
- Is there any area of your club's operations/records to which only one member has access and/or control? ……

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Meetings

- How often are your club regular meetings (in-person/online/hybrid) held? ……
- Do your regular club meetings follow an advanced prepared schedule? ……
- Do your regular club meetings follow a pre-determined agenda? ……
- What percentage of your membership attends regular club meetings? ……
- Are your members actively involved in regular club meeting proceedings? ……
- Does your club maintain and use attendance records to improve meetings? ……
- How do you plan to attract more members to meetings? ……

Fellowship

- How are you currently dealing with club fellowship activities? ……
- Is fellowship part of your regular club meetings? ……
- Have your scheduled any unique fellowship activities for the upcoming year? ……
- Does your club encourage families to participate in activities? ……

……END……