

Building Effective Clubs — Club Administration



The administration of your Rotary club is ultimately under the supervision of your club's board of directors, which you lead. Your club leadership team, particularly the club administration committee, can assist you with your administrative responsibilities in order to increase the effectiveness of club operations.

The Club Leadership Plan is the recommended administrative structure for Rotary clubs. Under this plan, effective club administration is key to carrying out your club's annual and long-range goals. In order to implement the Club Leadership Plan, Rotary clubs develop standard procedures for continuity, communication, and Rotarian involvement. The plan's simple committee structure focuses on the central functions of a club and can be expanded to address club service goals and fellowship.

Responsibilities

As president, you have the following club administration responsibilities:

- Fulfilling district and RI administrative requirements
 - Overseeing the club's reporting requirements
 - Working closely with the club secretary to ensure that required reports and forms are sent to RI and the district in a timely manner
 - Understanding how to use Member Access to update club records and make the semiannual dues payment
 - Overseeing the management of club finances
 - Minimizing risk during club activities

- Ensuring the Rotary Marks are used properly
- Developing weekly club meetings and club assemblies that will interest club members
- Encouraging attendance at the district assembly and additional training meetings, as appropriate
- Preparing for the district governor's official visit and the quarterly (or more) visits of your assistant governor

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As a president-elect, you have the following club administration responsibilities:

- Appointing and meeting with your club administration committee
- Knowing your club's administrative policies and procedures by reviewing the most recent versions of the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws (worksheets X and X)
- Understanding the process for amending club bylaws and working with club leaders to update your club's constitution and bylaws
- Determining which aspects of the Club Leadership Plan can strengthen your club

Minimum Standards

To ensure that clubs function effectively, the RI Board has adopted these minimum standards:

- Paying per capita dues to Rotary International
- Meeting regularly
- Subscribing to a certified Rotary World Magazine Press publication (*The Rotarian* or Rotary regional magazine)
- Implementing service projects that address needs in the local community and communities in other countries
- Receiving the visiting governor, assistant governor, or any other officer of Rotary International
- Maintaining liability insurance appropriate for the geographic region in which the club is located (United States only: Paying mandatory liability insurance with the semiannual report)

Work with your assistant governor to ensure your club is exceeding the minimum standards.

Club Administration Committee

Ensuring effective club administration is a collaborative effort. As club president, you lead this effort while the club administration committee carries out the specific responsibilities. Include the club administration committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

The club administration committee should help carry out your club's annual goals. The club secretary and treasurer should be members of this committee. The chair of this committee, appointed by you, should be part of your club leadership team. More information about the club administration committee is in the *Club Administration Committee Manual*, the *Club Secretary's Manual*, and the *Club Treasurer's Manual*.

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Your club administration committee has the following responsibilities:

- Helping the club secretary track club attendance
- Maintaining club membership lists and reporting to Rotary International
- Helping the club treasurer collect dues
- Organizing weekly and special programs
- Promoting fellowship among club members
- Producing the club bulletin

Your Club's Constitution and Bylaws

The Standard Rotary Club Constitution must be adopted by all clubs admitted to membership in Rotary International. It provides a model framework for Rotary club operations. Following the Council on Legislation, which will occur in 2010 and 2013, the Standard Rotary Club Constitution will be updated to include Council enactments. Be sure that your club is using the correct version of the Standard Rotary Club Constitution.

NOTE: 2010-2011 Club Presidents: Be sure to find out the changes made to the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws following the 2010 Council on Legislation.

Your club's bylaws provide additional guidelines, not included in the club constitution, for managing your club. The Recommended Rotary Club Bylaws are developed in harmony with the Standard Rotary Club Constitution and reflect current Rotary policy. You can adapt them to meet your club's needs, goals, and activities and reflect its unique identity. To prepare for your year as club president, you should review your club's bylaws and work with your club leadership team to amend them to reflect any new practices and procedures as well as the club committee structure and the roles and responsibilities of your club's leaders.

Proposing and Voting on Amendments

If your club needs to amend its bylaws to reflect its current practices:

- Notify all members of the proposed amendment at least 10 days before the meeting.
- Ensure you have at least one-third of active members (a quorum) present at the regular meeting to vote.
- Pass the amendment if it is supported by two-thirds of the members present.
- Ensure that the amendment is in harmony with the Standard Rotary Club Constitution and the RI Constitution and Bylaws.

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RI and Rotary Foundation Reporting Requirements

Most RI and Foundation reports can be submitted through Member Access.

To ensure that RI mailings and communications, including semiannual reports, reach the appropriate members of your club, regularly update all club records. The information below can also be updated through Member Access at www.rotary.org.

Every Rotary club is required to submit the following reports and information:

- To RI
 - Semiannual reports (due 1 July and 1 January), which include RI per capita dues
 - Changes in membership
 - Changes in officer or meeting information
 - Information for the *Official Directory* (by 31 December)
 - Individual and club subscriptions to *The Rotarian* or Rotary regional magazine
 - Council on Legislation dues (July only)
 - USA and its territories only: Insurance (July only)
- To The Rotary Foundation
 - Use of Rotary Foundation funds
- To the district
 - Club goals (using the *Planning Guide for Effective Rotary Clubs*)
 - Monthly attendance figures

You'll find more information about club reporting requirements in the *Club Secretary's Manual*.

Financial Management

As club president, you have fiscal responsibilities such as monitoring your club's funds, practicing good stewardship, and ensuring that the club complies with all local laws, including tax and nonprofit (as applicable). Refer to worksheet ____ for a list of financial management best practices.

Dues and Fees

Work with your club treasurer to review or establish a system to collect and pay dues and fees.

Club dues

Club dues can be collected weekly, monthly, or quarterly, as determined by your club, and the dues amount is set each year. These dues, which vary by club, generally fund operating expenses such as meetings, meals, speaker gifts, and supplies.

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Admission fees

Many clubs charge an admission fee for new members, as determined by the club's bylaws. This fee does not apply to transferring or former members of other clubs or to Rotaractors.¹

District dues

Many districts have funds for financing district-sponsored projects and supporting district administration. In these districts, each club contributes through per capita dues approved each year at a district assembly, district conference, or presidents-elect training seminar.

RI per capita dues

Twice a year, clubs are charged per capita dues.² All dues, including prorated dues, are payable on 1 July and 1 January. For each new member admitted within a semiannual period, the club must pay prorated per capita dues to Rotary International; the amount payable for each full month of membership is one-twelfth of the annual per capita dues.

Per capita dues pay for the organization's general operating expenses, including producing publications in multiple languages; providing club, district, and project support; offering training, guidance, and resources for incoming club leaders; and maintaining www.rotary.org.

RI fees

Besides dues, Rotarians are charged for required magazine subscriptions, Council on Legislation fees, and other expenses. Payments for *The Rotarian* or the *Revista Rotaria* regional magazine should be submitted with semiannual dues. All other regional magazine subscription payments should be sent directly to the appropriate magazine editor.

Semiannual dues invoice (SAR)

RI sends a semiannual dues invoice as part of a SAR package to each Rotary club secretary in late June for the July billing and in late December for the January billing. The package includes a current membership list, which serves as the basis for the estimated billing; a worksheet to calculate any necessary revisions; and instructions for completing the forms and sending the information and payment to RI or its fiscal agents.

The invoice charges clubs RI per capita dues and fees based on their most current membership list. (Clubs with fewer than 10 members are required to pay for 10 members.) Help the club secretary keep this list up to date through Member Access on www.rotary.org so that your club's per capita billing is accurate. Make sure your club number is included on all payments. Your club's balance may also be paid by credit card through Member Access by you, the secretary, or the treasurer.

If the secretary does not receive the SAR package by the end of July or January, a copy can either be printed from Member Access or requested by contacting data.services@rotary.org or your international office.

Submitting dues to the district and RI guarantees your club's membership and good financial standing in Rotary International as well as access to the organization's resources.

¹ See the Standard Rotary Club Constitution, article 11, for more details.

² Dues are determined by the triennial Council on Legislation.

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Termination and Reinstatement

Any club that does not pay its dues and fees to RI will be terminated and will not receive services from RI or the district.

Six months after the 1 January or 1 July deadline, clubs with obligations of US\$250 or more will be terminated from Rotary International. When a club seeks reinstatement within 90 days of termination, it must pay all financial obligations due at the time of termination, all semiannual dues payments that have accrued during the period between termination and reinstatement, and a \$10 per member reinstatement fee. If the club has fewer than 10 members, it is subject to a 10-member minimum payment requirement.

A club that seeks reinstatement more than 90 days but less than 365 days after termination must complete an application for reinstatement and pay a \$15 per member application fee in addition to fulfilling the requirements noted above. The application fee is also subject to the 10-member minimum payment requirement. Terminated clubs that have not fulfilled their entire financial responsibility to RI within 365 days of termination will lose their original charter and will not be eligible for reinstatement. Similarly, any club that fails to pay district dues may have its membership in RI suspended or terminated by the RI Board.

Any member failing to pay dues within 30 days of the deadline should be notified in writing by the club secretary. If the dues are not paid within 10 days of the notification date, membership may be terminated, subject to the discretion of the club's board. The board may reinstate membership upon a member's petition and payment of all debts to the club.

Taxes

Check with local and national tax codes to determine which forms, if any, the district and its clubs must file. If a club is incorporated, for example, it may need to file additional tax forms. Work with your district finance committee and your assistant governor for more information about these requirements.

All clubs in the United States are required by law to submit an informational return to the Internal Revenue Service every year. Contact your RI Club and District Support representative or the IRS for more information.

Fundraising

Most Rotary clubs and districts engage in fundraising. Be sure to follow these guidelines and educate members about them:

- Report money earned through fundraising to your local government, if required.
- When promoting fundraising initiatives, be precise about where the funds will go — to a local club, the district's own foundation, The Rotary Foundation, or some other entity. Money raised through public fundraising activities should be used for service activities, rather than for supporting the club itself.
- If a fundraiser qualifies as a tax-deductible event, issue receipts to donors as needed.
- Submit all contributions to The Rotary Foundation separately from payments to Rotary International.

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For more detailed information about planning a fundraiser, refer to the *Club Service Projects Committee Manual*.

Club Foundations

If your club has or is going to set up a foundation or charitable trust, be sure it follows local laws. Some countries require foundations to register with the government or follow specific rules. For example, clubs that accept contributions to their own foundations are often expected to issue tax receipts from club foundations. Consult with your local tax authority about reporting requirements.

You'll find more information about the club treasurer's responsibilities and role in the *Club Treasurer's Manual*.

Risk Management

Risk management is the process of planning, organizing, leading, and controlling an organization's activities to minimize the adverse effects of accidental losses. As club president, you are in a position to minimize risk and safeguard your club's members and assets. Liability issues and potential penalties are geographically specific, and it is your responsibility to learn the laws regarding financial practices and to make sure your club abides by them. Refer to worksheet x for a list of risk management best practices. Limit your personal liability and that of your club by answering three basic questions when planning activities and events for your year as president:

- What can go wrong?
- If something goes wrong, how will I or the club respond?
- How will any losses be paid for?

If there is a significant possibility that something will go wrong, you can reduce risk by:

- Choosing not to conduct the activity or event
- Modifying the activity or event to lessen the risk
- Preparing a plan to address any potential problems
- Finding another organization that will agree to participate and share the risk

Though conducting business through handshakes or verbal agreements may be common, RI strongly recommends that your club use written and signed contracts. A contract attempts to clearly define the roles and responsibilities of each party and can include provisions to limit risk. When negotiating a contract, read it thoroughly to understand what you are agreeing to, and seek legal counsel if necessary. Retain legal documents after the event in case a claim is made. Clubs are urged to obtain the advice of legal and insurance counsel regarding liability protection, which may come through the incorporation of the club or its activities, or the purchase of liability insurance. General liability insurance for clubs in the United States and its territories is mandatory and administered through RI. Clubs outside the United States should consider

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acquiring insurance if they do not already have it. See the *Manual of Procedure* for additional information.

Member Access

The Member Access area of www.rotary.org helps Rotarians perform Rotary business more quickly and easily, provides more continuity between years of leadership, and ensures that RI has accurate records.

Only you and your club secretary can activate other officers' Member Access privileges. Activation requires logging on to Member Access at www.rotary.org, and indicating the officer's position.

Rotarian Privileges in Member Access

MAP Feature	President	Secretary	Treasurer	Rotarians
Fund Development Club Goal Report Form	X			
Update Club Data	X	X		
Update Membership Data	X	X		
View Club Recognition Summary (for own club only)	X	X		
Pay Semiannual Dues or Print Semiannual Report (SAR)	X	X	X	
View Daily Club Balance report	X	X	X	
View EREY Eligibility Report	X	X	X	

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View Monthly Contribution, SHARE, and Polio Reports	X	X	X	
Contribute to The Rotary Foundation	X	X	X	X
View your Contribution history	X	X	X	X
Search the Online Official Directory	X	X	X	X
Manage E-mail Preferences	X	X	X	X
Register for meetings	X	X	X	X
View Member Benefits	X	X	X	X

Currently, club Rotary Foundation committee chairs can also view Rotary Foundation reports. Rotary International continues to enhance its services to Rotarians in its efforts to provide more online support.

Rotary Marks

The Rotary emblem identifies Rotary clubs and their members in every part of the world. All Rotarians should be concerned with protecting the integrity of the Rotary emblem and ensuring it is available for Rotary clubs and districts to use in the future.

Rotary International is the owner of trademarks and service marks (referred to as the Rotary Marks) for the benefit of Rotarians worldwide. RI has registered the Rotary Marks in over 50 countries to ensure their exclusive use by the association and to strengthen RI's ability to prevent misuse by others. The Rotary Marks include the Rotary emblem, the Rotary name, the Rotary International name, and The Rotary Foundation name. See appendix X for a more comprehensive list.

As club president, RI depends on you to understand how to use the Rotary Marks and to help correct improper uses of the Rotary Marks with the help of your RI Club and District Support representative if needed. Report any misuse of the Rotary Marks by a Rotary Entity* or by non-Rotarians to your RI Club and District Support representative.

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RI policy on the use of the Rotary Marks is included in the *Manual of Procedure* and the Rotary Code of Policies.

**A Rotary Entity is defined as Rotary International, The Rotary Foundation, a Rotary club or group of clubs, a Rotary district or group of districts (including a multidistrict activity or multidistrict administrative group), a Rotarian Action Group, a Rotary Fellowship, RI Convention host committee, and administrative territorial units of Rotary International. Individual RI programs are not Rotary Entities.*

Reproducing the Rotary Emblem

When reproducing the Rotary emblem, follow the guidelines approved by the RI Board of Directors:

- The Rotary emblem may not be altered, modified, or obstructed in any way. It must be reproduced in its complete form.
- The most common problem when reproducing the Rotary emblem is not using it in its entirety. Avoid the following improper uses of the Rotary emblem:
 - The keyway is missing from the center.
 - The center of the emblem is filled in.
 - The emblem is partially covered or modified.
- The Rotary emblem may be printed in any single color or in two colors. When it is printed in two colors, it must be reproduced in its official colors of royal blue (PANTONE® 286 Blue) and either metallic gold (PANTONE® 871 Metallic Gold) or gold (PANTONE® 123 C or 115 U Gold [yellow]).** The Rotary emblem should never be printed in more than two colors.

The Rotary Marks should never be used to further any commercial purpose or political campaign. Also, the Rotary name and emblem may appear on club and district stationery and personal cards but never on business stationery or business cards. All incorrect or incomplete reproductions of the Rotary emblem by a club or district should be corrected as soon as possible for electronic publications and in the next reprinting for printed materials.

The Rotary emblem and other Rotary Marks can be downloaded at www.rotary.org or ordered on CD-ROM at shop.rotary.org.

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Naming Guidelines: Use of the Rotary Name and Emblem

When the Rotary name, emblem, or other Rotary Marks appear with the name of a club project, program, Web site, or publication, make sure that the name is placed near the emblem and given equal prominence and used immediately following or preceding the Rotary name. By including your club name, you ensure that your club is recognized in the community for its projects and activities. These guidelines also help protect RI from liability.

As president, review the names of existing and planned club projects and programs to ensure that they're clearly identified by your club's name. For example:

Valley Rotary Club Cleanup Project
Centennial Park of the Rotary Club of Mountain City

www.anycityrotaryclub.org

For assistance with naming guidelines, contact your RI Club and District Support representative.

Merchandise and Licensing

The RI Board of Directors has developed a licensing system to provide high-quality products to Rotarians, and RI asks Rotarians to buy merchandise containing the Rotary Marks only from RI's official licensees. For a list of official licensees, go to www.rotary.org or the *Official Directory*.

If your club wants to raise funds for a project by selling merchandise that bears the Rotary name, emblem, or other Rotary Marks, your club may be able to do so without a license from Rotary International provided that the merchandise bears the Rotary club name, fundraising event or project name, and project date(s). Make sure your club buys merchandise from an RI official licensee. If your club wants to sell merchandise for a long-term fundraising project, you'll need to apply for a license from Rotary International.

Meetings

Club, district, and international meetings allow Rotarians to learn more about Rotary, develop future leaders, and provide an opportunity for fellowship. Throughout your year as club president, you and your club trainer, if appointed, will prepare for the following meetings:

- Weekly club meetings
- Club assemblies
- Board meetings
- Assistant governor visits
- District governor's official visit
- Leadership development program

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You should also promote district and international meetings during weekly meetings, at club assemblies, and in your club's bulletin. Encourage attendance at the following meetings:

- RI Convention
- District-level meetings
 - District assembly
 - District conference
 - District Rotary Foundation seminar
 - District membership seminar
 - District leadership seminar

These meetings offer a unique opportunity for Rotarians at the club level to learn about the broader scope of Rotary activities and enhance fellowship. District meetings provide a forum to discuss club and district projects and to develop project partnerships with other clubs in the district and in the Rotary world.

Weekly Club Meeting

Develop a weekly club meeting that provides club members with the information and motivation necessary to increase their participation in activities that serve the club, the community, and the world. To ensure that weekly meetings are effective and well planned:

- Determine programs and create an agenda in advance of the meeting.
- Relate programs to current club projects, activities, using the Rotary calendar. Avoid discussing details more properly discussed at committee meetings, club assemblies, or club board meetings.
- Delegate the responsibilities of arranging programs to the club administration committee.
- Include programs that update members on Rotary information.
- Begin and end the meeting on time.
- Have a contingency plan in case a scheduled program is canceled.

Organized meetings that feature interesting, relevant programs will enhance members' personal Rotary knowledge, reinforce the value of continued membership, and make members aware of their local and world community.

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Weekly Meeting Sample Agenda

Adapt this sample agenda to the needs of your club.

Start	Finish	Suggested Duration	Activity
		5 min.	Meeting Call to Order According to local custom
		30 min.	Meal and Fellowship Period
		20 min.	President's Time Introduction of visiting Rotarians and guests Correspondence and announcements: Present relevant Rotary information and announcements Committee reports: Allow committee chairs to make committee reports Club business: Vote on matters before the club, and report progress made on clubwide projects. Finish pending club business before addressing new business.
		30 min.	Program Introduction of speaker Speaker's presentation Closing remarks by president
		5 min.	Adjournment

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Rotary Calendar

The Rotary calendar provides a natural framework for planning weekly meetings. At the beginning of the year, introduce the new RI theme. Discuss events such as the district assembly, district conference, and the RI Convention as they occur. You can also plan programs to occur at the same time as these special Rotary year observances:

July	<i>No Rotary designation</i>
August	Membership and Extension Month
September	New Generations Month
October	Vocational Service Month
November	Rotary Foundation Month World Interact Week (week including 5 November)
December	Family Month
January	Rotary Awareness Month
February	World Understanding Month 23 February: World Understanding and Peace Day/Rotary's anniversary
March	Literacy Month World Rotaract Week (week including 13 March)
April	Magazine Month
May	<i>No Rotary designation</i>
June	Rotary Fellowships Month

Special observances on the Rotary calendar are incorporated into the Club President's Monthly Checklist, available from your Club and District Support representative.

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Club Assemblies

A club assembly is a meeting of all club members, including officers, directors, and committee chairs. Club assemblies are excellent opportunities to discuss your club's programs and activities and educate members. New members particularly should be encouraged to attend club assemblies to learn more about the workings of your club.

Regular club assemblies that include all members and your assistant governor ensure clear communication between club leaders, club members, and district leaders.

As president, you are responsible for planning and conducting club assemblies. You, or another designated officer, preside at club assemblies.

Club assemblies allow club members to:

- Set goals and develop action plans
- Coordinate committee activities and receive committee plans
- Understand how the club's action plans are implemented
- Participate in informal discussions that stimulate creative solutions
- Learn about Rotary and its programs
- Review your club's strengths and weaknesses

Relevant topics for discussion include:

- Annual and long-range goals
- Service projects and club activities
- Membership growth and retention strategies
- District conference or other district and RI meetings
- Rotary programs
- Any topic raised in an open forum

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Scheduling

Four to six club assemblies during the year may be the most effective number. Many clubs hold monthly assemblies. The following schedule is suggested.

Time Frame	Purpose
Immediately following the district assembly (before 1 July)	To describe, review, and discuss plans developed and suggested at the district assembly and to discuss how the club will incorporate the RI theme and emphases (president-elect presides)
After 1 July	To discuss and adopt a plan for the year
Two weeks before the official visit	To prepare for the official visit
During the official visit	To discuss the club's status with the district governor
Midpoint of Rotary year (January/February)	To review the club's progress toward goals and determine the club's plan for the rest of the year
April or May	To provide an opportunity for open discussion (Ideas and suggestions may be implemented to help bring club plans toward completion.)

Assistant governors should visit clubs a minimum of four times a year. Some clubs use these visits as opportunities for club assemblies.

The Official Visit

The district governor is required by RI to visit each club in the district. The visit can be done with individual or multiple clubs. The purpose of this personal visit is to focus attention on important Rotary issues and motivate the Rotarians in your club to participate in service activities. The official visit is also an opportunity for your club leadership team to ask the governor for guidance with challenges facing your club.

Maximize the impact of the governor's presence by scheduling the official visit to coincide with an important clubwide event (if possible), such as:

- Charter night
- Induction ceremony
- New member orientation program

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- Citation or award program
- Rotary Foundation recognitions or related
- Intercity meeting

Preparing for the Official Visit

The official visit can be an exciting time for your club, providing opportunities to learn about important issues facing Rotary and to discuss possible solutions to pressing club issues. To best ensure that club members participate:

- Announce the visit at weekly club meetings.
- Publish announcements about the visit in the club bulletin.
- Ask club members to make a special effort to attend the official visit.
- Arrange for recognition or awards (for example, Paul Harris Fellow Recognition) to be presented by the governor.

Club leaders should work together to prepare for a thoughtful discussion on important club topics and issues that would benefit from the governor's knowledge and experience. Arrange your schedule to allow for as much time with the governor as needed. To prepare for the visit:

- Review your club's progress toward the goals established in the *Planning Guide for Effective Rotary Clubs*, and be prepared to discuss it during the visit.
- Make a list of questions, problems, and concerns that can be addressed during the visit.
- Arrange reports of committee plans, activities, and accomplishments.
- Make appropriate arrangements for the governor's spouse, if necessary.
- The purpose of a visit by the district governor or assistant governor is to provide support for your club. Rotary clubs are required to allow these visits.

Elections

During your first six months in office, you will need to oversee the election of officers. When electing new officers and directors, it is important to conduct elections that are fair to all members involved. The selection process for a club's board of directors and officers should be stated in your club's bylaws. Each officer and director should be a member in good standing of the club.

The club should hold an officer installation meeting at the beginning of each Rotary year, to give club officers and members an opportunity to renew and reaffirm their commitment to the objectives of RI. Refer to appendix X for examples of a club officer installation.

Building Effective Clubs — Goal Setting



As a club president, you will lead the club in establishing annual goals to achieve your club's strategic plan. To begin setting goals, you must assess the strengths and weaknesses of your club and determine how your club can improve what it does well and address areas of concern. Encourage broad club participation in the goal-setting process.

Responsibilities

As president, you have the following goal-setting responsibilities:

- Understanding the characteristics of an effective goal
- Developing or assessing your club's long-range goals in support of your vision or strategic plan
- Establishing annual goals that are in harmony with your club's long-range goals
- Ensuring an action plan has been developed for each goal
- Implementing and continually evaluating your club's goals
- Motivating club members to accomplish the goals

Strategic Planning

To ensure an effective year as club president, you must set goals that reflect your club's vision and strategic plan. A strategic plan, intended to last three to five years, helps guide the club toward its vision and achieving the Object of Rotary. Once you have evaluated the state of your club, you can begin to outline goals that address its weaknesses and enhance its strengths in areas that support your club's strategic plan.

If your club does not have a strategic plan, the club leadership team (including the current president, president-nominee, and immediate past president) should consider developing one (see Worksheet ___: Strategic Planning Guide). Strategic planning

- Gives all club members the opportunity to be involved in planning the future of the club
- Ensures consistency and continuity among those who carry out the goals
- Focuses on significant issues and challenges facing the club
- Promotes team work and commitment to strategic issues

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Once your club decides to begin the strategic planning process, your club should come up with a vision and ensure the annual goals support this vision.

You can learn about the RI Strategic Plan and the Foundation's Future Vision Plan at www.rotary.org.

Effective goals are:

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available.
- **Time specific.** A goal should have a deadline or timeline.

Consider these club activities when setting goals:

- Membership
- Service projects
- The Rotary Foundation (participation and contributions)
- Public relations
- Club administration

A club leadership retreat or assembly is an opportunity for members to collaborate and develop a vision for the future of your club. Work with your fellow club leaders to draft long-range goals that will achieve the vision and to determine which committee should address each goal and the steps needed to achieve those goals, including annual goals.

Annual Goals

The *Planning Guide for Effective Rotary Clubs* (within Tab 4) is an excellent goal-setting tool that will help you work with your club leadership team to establish goals for the year. The guide helps you to assess your club's current state and also provides strategies that you may choose to achieve club goals. A completed copy of the *Planning Guide for Effective Rotary Clubs* should be submitted to your district governor by 1 July.

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Developing an Action Plan

Establishing goals is the first step toward ensuring a successful year. The next step is developing an action plan to achieve them. As president, you will delegate much of the responsibility for implementing club goals to your committee chairs and members. Your role is to ensure that an action plan has been created for all goals and to monitor progress toward them. An action plan can be developed by:

- Establishing a timeline
- Outlining the specific steps needed to achieve the goal
- Considering the resources and tools available to support the goal
- Determining who is responsible for implementing each step
- Identifying the criteria for measuring your club's progress
- Monitoring the progress toward the goal
- Evaluating the success of previous goals and current action plans, making modifications as necessary

Evaluation

Once goals have been achieved, work with those who implemented them to determine which strategies worked and which did not. Apply new insights to other goals, and share them with the president-elect and president-nominee, as applicable, as they begin to develop goals.

Use the *Planning Guide for Effective Rotary Clubs* throughout your year in office to help measure club progress toward established goals or to try a new strategy. It's a working document, one that can be updated as needed. Review the planning guide with your assistant governor and district governor during club visits throughout the year.