




CLUB REFERENCE GUIDE

Rotary Club Central is an online tool to help clubs set and track club goals and achievements. This reference guide outlines the steps you need to take to set and edit goals as well as report achievements in Rotary Club Central. If any data is displayed incorrectly, please contact your Club and District Support Representative.

All goals and achievements have three broad categories: Your Club, Service, and Foundation Giving. Below the Trends section in each category, you will see “Goals and Progress.” Next to each goal, you can either **EDIT** or **VIEW**. Club leaders including the club president, club secretary, club treasurer, club executive secretary, club Foundation chair, and club membership chair can **EDIT** goals and achievements and all club members can **VIEW** club goals and achievements.

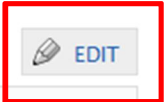
To set a goal, choose the year and the goal and click **EDIT**. Below is an example for Membership Retention. Throughout the tool, click on this icon  for additional details.

Goals and Progress

You can access yearly data by selecting the appropriate tab. After reviewing trends, set your goal or edit it at any time by selecting the “Edit” tool.

2011-12 2012-13 2013-14

Membership Retention



| | | |
|-------------------|---------------------------------|-------------------------------|
| 52 1 JULY 2011 | – 30 JUNE 2013 GOAL TOTAL | 51 2012-13 YEAR TO DATE |
|-------------------|---------------------------------|-------------------------------|

| | 30 JUNE PRIOR YEAR | 2012-13 MEMBER GOAL | 2012-13 RETENTION GOAL |
|----------------------------------|--------------------|---------------------|------------------------|
| Existing members retained | 52 | – | % |
| New members retained | 2 | – | % |

Below, are instructions about how to set each goal and report achievements in Your Club, Service, and Foundation Giving.



Your Club

The Your Club tab includes three goals: Membership Retention, Rotary Engagement, and Club Communication.

Membership Retention

Set and Edit Your Goals

| | 1 JULY START FIGURE | YEAR TO DATE MEMBER COUNT | RETENTION GOAL | MEMBER RETENTION GOAL |
|----------------------------------|---------------------|--|-------------------------------------|--|
| Existing members retained | 21 ^a | <input type="text" value="21"/> ^b | <input type="text"/> % ^c | <input type="text" value="-"/> ^d |
| Achievement | | | | <input type="text" value="21"/> ^b |
| New members retained | 3 ^e | <input type="text"/> ^f | <input type="text"/> % ^c | <input type="text" value="-"/> ^d |
| Achievement | | | | <input type="text" value="1"/> ^b |
| 2012-13 Goal Total | | | 0 % ^g | |

- a. From 1 July- 1 October, the 30 June member count is populated. In October, the 1 July start figure is populated. Data is populated by RI.
- b. Actual number of members in the club at close of business day. Data is populated by RI.
- c. Enter the percentage of members you plan to retain for the current year. *
- d. Enter the number of members you plan to retain for the year. *
- e. Data is populated by RI. This number reflects the number of new members who joined the club after 1 July.
- f. Enter the new members you plan to induct this year.
- g. Overall retention percentage. Data is calculated by RI and shown on the trends graph.

**If you enter the percentage first, the member count will automatically populate, if you enter the member count first, the percentage will automatically populate.*



Rotarian Engagement

Set and Edit Your Goals

| | PREVIOUS YEAR ^a | MEMBERS ^b | PERCENTAGE ^c | GOAL TOTAL ^d |
|---|----------------------------|---------------------------------|-------------------------|---|
| Members in club roles | No Data | <input type="text" value="21"/> | <input type="text"/> % | <input type="text" value="-"/> |
| Achievement | | | | <input type="text"/> ^e |
| Members participating in club service activities | No Data | <input type="text" value="21"/> | <input type="text"/> % | <input type="text" value="-"/> |
| Achievement | | | | <input type="text"/> |
| Members participating in club social activities | No Data | <input type="text" value="21"/> | <input type="text"/> % | <input type="text" value="-"/> |
| Achievement | | | | <input type="text"/> |
| Unique number of members involved | No Data | <input type="text" value="21"/> | <input type="text"/> % | <input type="text" value="-"/> ^f |
| Achievement | | | | <input type="text"/> |
| 2012–13 Goal Total | | | | - ^g |

- a. Data populated by RI to show the previous year achievement. “No Data” indicates this is the first year RI is collecting this information.
- b. Actual number of members in the club at close of business. Data is populated by RI.
- c. Enter the percentage of club members you plan to be involved in each activity listed. *
- d. “Goal Total” is the number of goals set for the current year. Enter the number of club members you plan to be involved in each activity listed.*
- e. Report the achievement for club members participating in each activity.
- f. After reviewing all the activities listed, enter the total number of club members (the same member could be involved in multiple activities) you plan to involve in club activities during the year and enter that number.
- g. The “Goal Total” will populate based on the number you enter in f.

**if you enter the percentage first, the member count will automatically populate, if you enter the member count first, the percentage will automatically populate.*



Club Communication

Set and Edit Your Goals

| | PREVIOUS YEAR ^a | GOAL TOTAL |
|--|----------------------------|---|
| Our club has a strategic plan | No Data | - <input type="button" value="v"/> ^b |
| Achievement | | - <input type="button" value="v"/> ^c |
| Club assemblies conducted per year | No Data | - <input type="text" value=""/> |
| Achievement | | <input type="text" value=""/> ^c |
| Our club uses social media to promote service activities | No Data | - <input type="button" value="v"/> ^b |
| Achievement | | - <input type="button" value="v"/> ^c |
| Our online presence accurately reflects current activities | No Data | - <input type="button" value="v"/> ^b |
| Achievement | | - <input type="button" value="v"/> ^c |

- a. Data populated by RI to show the previous year achievement. No Data indicates this is the first year RI is collecting this information.
- b. "Goal Total" is the number of goals set for the current year. Depending on the goal being set, use the drop-down to choose Yes or No or enter a number in the field.
- c. As the Rotary year comes to a close, report the achievement for each goal.

Public Relations

Set and Edit Your Goals



Service

The Service tab includes three goals: Service Projects and Activities New Generations Clubs and New Generations Participants. ~~In January 2013, Service Projects and Activities will be added.~~

Service Projects and Activities

Set and Edit Your Goals

| | PREVIOUS YEAR | GOAL TOTAL |
|--|---------------|------------|
| Service Projects and Activities | | 5 |
| Achievement | | 1 |

[Expand All](#) | [Close All](#)

1
✖ Delete

Title (maximum 50 characters)

Bike to End Polio

✔
Achieved

Summary (maximum 100 characters)

Annual fundraiser hosted by our club to raise funds for End Polio Now.

30 – characters remaining

▶ Expand Project View



PROJECTED RESOURCES

| Total volunteer hours | Number of volunteers | Cash contributions (USD) |
|----------------------------------|---------------------------------|-----------------------------------|
| <input type="text" value="300"/> | <input type="text" value="25"/> | <input type="text" value="5000"/> |

In-kind donations

| Type | Quantity | Total value (USD) | |
|--|----------------------------------|-----------------------------------|---|
| <input type="text" value="Water bottles"/> | <input type="text" value="500"/> | <input type="text" value="1000"/> | + |

[Details](#)

ACTUAL RESOURCES

| Total volunteer hours | Number of volunteers | Cash contributions (USD) |
|----------------------------------|----------------------------------|-----------------------------------|
| <input type="text" value="500"/> | <input type="text" value="100"/> | <input type="text" value="8000"/> |

In-kind donations

| Type | Quantity | Total value (USD) | |
|--|-----------------------------------|-----------------------------------|---|
| <input type="text" value="Water Bottles"/> | <input type="text" value="1000"/> | <input type="text" value="2000"/> | + |
| <input type="text" value="Banners"/> | <input type="text" value="5"/> | <input type="text" value="100"/> | - |

Project Status

Note: At least one "actual resource" is required before the project can be marked "Achieved."

Achieved

[Details](#)



New Generations Clubs

Set and Edit Your Goals

| | PREVIOUS YEAR ^a | GOAL TOTAL |
|--------------------------|----------------------------|---|
| Number of Rotaract clubs | 1 | <input type="text" value="-"/> ^b |
| Achievement | | <input type="text" value="1"/> ^c |
| Number of Interact clubs | 1 | <input type="text" value="-"/> ^b |
| Achievement | | <input type="text" value="1"/> ^c |

- a. Data populated by RI to show the previous year achievement.
- b. Enter the number of clubs you plan to sponsor.
- c. Data populated by RI.

New Generations Participants

Set and Edit Your Goals

| | PREVIOUS YEAR ^a | GOAL TOTAL |
|--|----------------------------|---|
| Number of inbound Youth Exchange students | | <input type="text" value="-"/> ^b |
| Achievement | | <input type="text"/> ^c |
| Number of outbound Youth Exchange students | | <input type="text" value="-"/> ^b |
| Achievement | | <input type="text"/> ^c |
| Number of RYLA participants | | <input type="text" value="-"/> ^b |
| Achievement | | <input type="text"/> ^c |

- a. "Previous Year" data is populated by RI. No Data indicates this is the first year RI is collecting this information.
- b. Enter the number of participants you plan to be involved in each goal.
- c. Achievement data is populated by RI.



Foundation Giving

The Foundation Giving tab includes three goals: Annual Fund, PolioPlus Fund and Major Gifts and Permanent Fund.

Annual Fund

Set and Edit Your Goals

| | 5-YEAR HIGH | NUMBER OF INDIVIDUAL DONORS | AVERAGE CONTRIBUTION AMOUNT | GOAL TOTAL USD |
|---|--------------------|-----------------------------------|---------------------------------------|--|
| Paul Harris Society (1000 USD or more) | 0 USD ^a | <input type="text"/> ^b | <input type="text"/> USD ^c | USD ^d |
| Achievement | | | | <input type="text" value="0"/> USD |
| Sustaining Members (100 USD or more) | 3070 USD | <input type="text"/> | <input type="text"/> USD | USD ^e |
| Achievement | | | | <input type="text" value="0"/> USD |
| Every Rotarian, Every Year (Up to 100 USD) | 427 USD | <input type="text"/> | <input type="text"/> USD | USD ^e |
| Achievement | | | | <input type="text" value="0"/> USD |
| Other Contributions (Fundraising events, corporate and community gifts) | 400 USD | | | <input type="text" value="2200"/> USD ^e |
| Achievement | | | | <input type="text" value="0"/> USD |
| 2012-13 Goal Total | | | | 2200 USD ^e |

f

- a. "5-Year High" data is populated by RI.
- b. Enter the number of individual donors for each goal.
- c. Enter the average contribution amount for each goal.
- d. The "Goal Total" will automatically calculate based on the numbers entered for b and c.
- e. "Achievement" is populated by RI.
- f. "Goal Total" is populated by RI.



PolioPlus Fund

Set and Edit Your Goals

| | 5-YEAR HIGH ^a | GOAL TOTAL USD |
|---------------------------|--------------------------|--|
| PolioPlus Fund | No Data | <input type="text" value="3600"/> USD ^b |
| Achievement | | <input type="text" value="0"/> USD ^c |
| 2012-13 Goal Total | | 3600 USD |

- a. "5- Year High" data is populated by RI. No Data indicates this is the first year RI it is collecting this information.
- b. Enter the goal amount for giving to the PolioPlus Fund.
- c. "Achievement" data is populated by RI.

Major Gifts and Permanent Fund

Set and Edit Your Goals

| | ALL-TIME TOTAL ^a | GOAL TOTAL |
|--|-----------------------------|---|
| Major Gifts (10,000 USD or more) | 0 | <input type="text" value="-"/> ^b |
| Achievement | | <input type="text" value="0"/> ^c |
| Bequest Society | 0 | <input type="text" value="-"/> ^b |
| Achievement | | <input type="text" value="0"/> ^c |
| Benefactors | 0 | <input type="text" value="-"/> ^b |
| Achievement | | <input type="text" value="0"/> ^c |

- a. "All-Time Total" is the total number of club members that achieved this level over the course of time and is populated by RI.
- b. Enter the number of individuals who will commit to each giving level. The contribution doesn't have to occur during this club leader's term, but the commitment must occur during their term.
- c. "Achievement" is the actual number of commitments. Data is populated by RI.