Planning for Your Year

The Planning Guide for Effective Rotary Clubs and the Strategic Planning Guide are key resources for developing your goals and action plan for your year.

As club president-elect, you will lead your club in establishing annual goals that support your strategic plan. The Planning Guide for Effective Rotary Clubs (appendix 2) will help you assess your club's strengths, weaknesses, opportunities, and risks in order to set annual goals.

Responsibilities
As president-elect, you have these goal-setting responsibilities:

- Developing or assessing your club's strategic plan in support of your vision
- Establishing annual goals that coincide with your club's long-range goals
- Ensuring that an action plan has been developed for each goal
- Attending PETS and the district assembly to further develop your goals with your team
As president, you have these goal-setting responsibilities:

- Implementing and regularly evaluating your club's goals
- Motivating club members to accomplish the goals

**Strategic Planning**

A strategic plan, intended to last three to five years, helps guide the club toward its vision and stay relevant to current and potential members’ interests. Your club's strategic plan should be considered a working document that is regularly evaluated to ensure that it continues to represent your club's goals for reaching its vision.

If your club doesn't have a strategic plan, develop one using the Strategic Planning Guide (appendix 3). Rotary International encourages Rotary clubs and districts to align their goals with the RI Strategic Plan (appendix 4).

**Long-range and Annual Goals**

Your club strategic plan should include long-range and annual goals. The Planning Guide for Effective Rotary Clubs (appendix 2) will help you develop your annual goals by assessing your club's current state and identifying strategies to achieve club goals.

You'll work on the planning guide during the presidents-elect training seminar and at the district assembly with your fellow club leaders. Submit your completed copy of the guide to your district governor by 1 July.

**Evaluation**

Once goals have been achieved, work with those who implemented them to determine which strategies were effective. Apply new insights to other goals, and share them with the president-elect and president-nominee, as applicable, as they begin to develop goals for their terms.

Use the planning guide as a working document that can be updated as needed throughout the year. Review the guide with your assistant governor and district governor during club visits.
Call to Action

What will you do to improve your club’s strategic plan?

How will you involve your members in the goal-setting process?

What will you delegate and to whom?

What do you need to learn more about?

What will you do to ensure your club’s goals are met?
Appendix 2: Planning Guide for Effective Rotary Clubs

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:**

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**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 Friendship Exchange
  ☐ 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:

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LEADERSHIP DEVELOPMENT

Current State

Number of club leaders who attended

District assembly: _____        District Rotary Foundation seminar: _____
District membership seminar: _____  District leadership seminar: _____
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:

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 worldrotary.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


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<th></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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<tr>
<td>Membership goal</td>
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<td>_____ members by 30 June</td>
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<td>Service goals</td>
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<td>For communities in other countries:</td>
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<td>Rotary Foundation goals</td>
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<td>Annual Fund 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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<td>Leadership development goals</td>
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<td>Club administration goals</td>
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Strategic planning involves creating a vision, with supporting goals that can be regularly measured and adjusted as needed. Use this guide and the accompanying worksheet as a starting point for developing your strategic plan, and customize these resources to meet your club’s needs. The guide is designed for Rotary clubs but can be adapted for districts. The worksheet can be completed independently or as a group. Facilitators should become familiar with these resources and prepare an agenda before conducting a strategic planning meeting. The agenda should allot the majority of time to the second and third steps of the process, which focus on the future, and less time to the current state of the club.

During the strategic planning process, keep the following tips in mind:

• Involve past, current, and incoming club leaders.

• Include a wide variety of perspectives by involving the full club or a diverse representation of your club’s membership.

• Consider all ideas.

• Ask an unbiased facilitator or a small group of facilitators to run strategic planning meetings.

• Reflect on how your club’s goals align with those of your district and the priorities and goals of the RI Strategic Plan.

• Be prepared to revisit your plan each year and adjust your strategic priorities and annual goals as needed.

**The Strategic Planning Model**

Create a vision for your club, with strategic priorities that will help you achieve it. Then develop annual goals that support each strategic priority.
Process
Develop a strategic plan by engaging members in the process below. Use the accompanying worksheet to record your ideas.

1. Where are we now?
   • Create a list of your club’s strengths and weaknesses as of today.
   • Create a list of opportunities and challenges facing your community.
   When assessing your club’s current state, consult *Be a Vibrant Club: Your Club Leadership Plan* to determine what your club is already doing well and what you could do to rejuvenate it.

2. Where do we want to be?
   • Create a list of 5 to 10 characteristics that you would like to see in your club three to five years from now.
   • Draft a one-sentence vision statement describing your club and what you want it to be in three to five years. Allow for both individual and group work on this step.
   • Finalize the vision statement with the full group, and make sure that all club members support it.

3. How do we get there?
   • Develop strategic priorities that will help your club achieve the vision, considering:
     – Strengths and weaknesses of the club
     – Programs and missions of Rotary International and The Rotary Foundation
     – External environment
     – Involvement of all members
     – Achievability in three to five years
   • As a group, decide on the most important strategic priorities — those that will have the greatest impact as your club works toward the vision.
   • Identify annual goals that support each of the top strategic priorities.
   • Determine the timeline, resources, and people necessary to meet the annual goals under each of the strategic priorities.
   Use the Planning Guide for Effective Rotary Clubs while identifying your annual goals for ideas and strategies to achieve them.

4. How are we doing?
   • Create a strategic planning team to regularly monitor progress and recommend revisions to the plan, if needed.
   • Allocate sufficient resources for the plan’s implementation.
   • Continually evaluate all decisions to make sure they support the plan, providing feedback to the strategic planning team on their implementation.
   • Review your strategic plan annually with all club members, including the vision statement, strategic priorities, and annual goals, and revise it as needed.
   • Repeat the full strategic planning process every three to five years to create a new plan or uphold the current one.
Strategic Planning Worksheet

Complete this worksheet to create your strategic plan.

1. Where are we now?  

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<th>Club strengths</th>
<th>Club weaknesses</th>
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Opportunities for the community (e.g., new businesses, growing population)  

Challenges facing the community (e.g., economic decline, competing services)

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2. Where do we want to be?  

Target date: ______________

Key characteristics of future state (e.g., number of members, retention percentage, balance between local and international projects, support of The Rotary Foundation)

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Vision statement (Include something that will make your club stand out from other service clubs in your community — e.g., *Our vision is to be the most internationally diverse service club in our community*, *Our vision is to be the service club most supportive of youth in our community.*)

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3. How do we get there?
To reach our vision, we must achieve the following goals. (On the lines below, write out each of your strategic priorities. Then, in the chart beneath each one, list annual goals that will help you achieve each of them. Though there is no limit to the number of strategic priorities or annual goals in your strategic plan, consider the resources available to you, and focus on goals that you can accomplish.)

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<thead>
<tr>
<th>Strategic priority 1:</th>
<th>Annual goals</th>
<th>Timeline</th>
<th>Resources needed</th>
<th>Member assigned</th>
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<th>Strategic priority 2:</th>
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<td>Annual goals</td>
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<th>Strategic priority 3:</th>
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<td>Annual goals</td>
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4. How are we doing?
To monitor our progress, we will take these steps. (List the actions the club will take to follow up on the plan’s implementation, including a timeline for checking in and evaluating your progress — e.g., reports at board meetings each month, strategic plan reviews at club assemblies, annual reviews.)
Appendix 4: RI Strategic Plan

A worldwide network of inspired individuals who translate their passions into relevant social causes to change lives in communities.

Support and strengthen clubs
Service
Fellowship
Diversity
Leadership
Integrity
Focus and increase humanitarian service
Enhance public image and awareness
The goals for **Support and Strengthen Clubs** are:

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels

The goals for **Focus and Increase Humanitarian Service** are:

- Eradicate polio
- Increase sustainable service focused on
  - New Generations programs
  - Rotary’s six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally

The goals for **Enhance Public Image and Awareness** are:

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities

[www.rotary.org/strategicplan](http://www.rotary.org/strategicplan)