03_Flow Chart: 12 Stages of The Club Planning Process V23 (2023-07-27)

1 Board Meeting - New & Continuing Plan

- Board confirms new or continuing planning process
- Appoints or confirms Planning Team
- PE and Board confirm items to pursue in the Rotary citation

2 Planning Team 1 - Issues & plans (New plan)

- Planning Team completes Club Health Check
- Identifies Club Strategic Issues
- Organizes "Plan Introduction Club meeting" and Club Visioning event for New Plans
- Plans Member Satisfaction Survey

3 Club Meeting - New Plan Introduction (New plan)

- Introduce Planning process & rationale
- Members complete Satisfaction Survey
- Projects & Routines forms handed out
- Members asked to think about projects & customs, complete details on Projects & Routines form and give to Standing Committee chairs

4 Extended Club Meeting - Club Visioning OR Program Expo (New plan)

- Members share desired characteristics for a club
- Characteristics voted on to prioritize them
- Participants generate ideas for club projects and routines in each Standing Committee area.
- Members prioirtize these with sticky dots

5a Planning Team 2 (New Plan)

- Collates Satisfaction Survey, produces SWOT analysis, develops a Vision / Mission, Strategic Priorities and annual goals for each priority, a draft Strategic Plan and lists of projects from Visioning /Expo event for each Committee along with other recommended objectives.

5b Planning Team 2 (Continuing Plan)

- Reviews & lists current objectives for each Stand. C/tee.
- Emails lists to members with Projects & Routines forms and recommended objectives from RI, and District etc.
- Members send P&R forms to Standing C/tees by Stage 6

6 Standing Committees - Plan Review

- Incoming Committee Chairs should be included
- All Standing Committees review current year objectives with new projects / routines proposed in their areas, or based on the Rotary Citation and they make a list of projects / routines to pursue in the coming year.
- Proposed list is sent to Planning Team by early May

7 Planning Team 3

- Refines the list of all proposed club projects and routines for each Standing Committee into actionable objectives, and forms the list into the Engagement survey (15) - emailed to all members
- Plans Program Buy-in Club Assembly

8 Club Meeting - Program Buy in Assembly

- All objectives presented to members who complete Engagement survey and Committee selection on the spot
- Members can ask questions
- Absent members are contacted to complete survey ASAP.
- Draft Standing Committee lists are prepared.

9 Planning Team 4

- Collates Engagement Survey
- Completes Draft Action plans andCommittee lists based on survey results
- Survey summary and Committee lists are emailed to members
- Draft Action Plan is emailed to C/tee chairs

10 New Standing Committees - Action Plan Workshop part 1

- (During meeting time) New Service Committees confirm objectives and complete details in Draft Action plan columns
- Completed plans given or emailed to Planning Committee and referred to as part of new President's Changeover address

11 New Governance Committees - Action Plan Workshop part 2 - Mid July

- (During meeting time) New Governance Committees confirm objectives and complete details in Draft Action Plan columns
- Completed plans given or emailed to Planning Committee

12 Planning Team 5 (Mid July)

- Produces Working Strategic and Action Plans with allocation of fundraising.
- Sends to July Board meeting for confirmation
- Plan emailed to members with suggestions for use, and displayed at meetings.
- Process then moves to Stage 1 (Jan.) - see above.