



Session 1: Planning for Your Year (45 minutes)

Relevance: Club presidents are responsible for implementing and continually evaluating the club's goals and motivating members to accomplish them.

Option 1: Workshop



Workshops work best when the objective is to teach participants a practical skill by having them practice it, or to give them new understanding through an interactive activity. Workshops should be led by experts, and require a room configuration that allows for group collaboration and space for the facilitator to circulate among participants.

Learning Objectives

- Identify your club's strengths and weaknesses.
- Set goals to capitalize on those strengths and address the weaknesses.
- Create an action plan for each goal.

For the Trainer

Before the session:

- Review the resources listed below.
- Consider involving assistant governors.
- Review slides 1-4. Decide which ones you will use, make edits or additions, and think about when you will show each one.
- Choose the activity that will work best. You may want to combine the activities or do them both consecutively.
- Make sure you have the necessary materials: flip chart and markers. (For second activity, you will need a computer with Internet access, a projector, and a screen.)

During the session:

- Review learning objectives with participants at the start.
- Refer participants to the resources below.

Resources

Chapter 2 of the [*Club President's Manual*](#): Setting Goals and Creating a Strategic Plan
[Planning Guide for Effective Rotary Clubs](#)

Rotary Club Central

Activities

Choose one of the following activities:

1. Ask presidents-elect to think about their club's strengths and weaknesses. Then ask them to formulate two goals they would like to accomplish during their year as president that capitalize on those strengths or address the weaknesses. Record the goals on a flip chart. Identify common themes among the goals, and group participants based on those themes. For example, if several participants' goals relate to the weekly meeting, group them together. For 10 minutes, ask members of each group to discuss how they are going to accomplish this goal, by creating an action plan (show slide 4: Creating an Action Plan):
 - a. Actions needed to achieve the goal
 - b. Person responsible for each action
 - c. Timeline for actions
 - d. How progress will be measured
 - e. Available resources

If time allows, have participants start working on another goal. Each group then presents its goal and strategy to the larger group. Encourage the other groups to provide additional suggestions.

2. Access Rotary Club Central on www.rotary.org and demonstrate logging on and entering club goals. Then have participants practice on their laptops, offering assistance as needed. After they have entered their goals, have them create an action plan for each, indicating
 - a. Actions needed to achieve the goal
 - b. Person responsible for the action
 - c. Timeline for action
 - d. How progress will be measured
 - e. Available resources

(Show slide 4: Creating an Action Plan for participants to reference during this activity.)

Note: Allow time to cover any district or regional issues pertaining to this topic.



Session 1: Planning for Your Year (45 minutes)

Option 2: Table Topics



Table topics sessions are designed for idea sharing. They are led by a trainer, with assistants or facilitators at each table who keep the topic-focused discussion on track. Facilitators ensure that all participants have the opportunity to contribute, and that no single participant dominates the discussion. They should also know enough about the topic to clarify any questions. Tables should be round, to maximize idea sharing.

Learning Objectives

- Identify the steps for creating a strategic plan.
- Collaborate on strategies for creating a new strategic plan or evaluating an existing one.

For the Trainer

Before the session:

- Review the resources listed below.
- Review slides 5-8. Decide which ones you will use, make edits or additions, and think about when you will show each one.
- Ask presidents-elect to bring their strategic plans.
- Consider having an expert in strategic planning lead this session.
- Consider involving assistant governors as facilitators.
- Choose the activity that will work best.
- Make sure you have the necessary materials: flip chart, markers, and copies of the Strategic Planning Guide.

During the session:

- Review learning objectives with participants at the start.
- Provide participants with an overview of strategic planning.
- Refer participants to the resources below.

Resources

[Strategic Planning Guide](#)

Chapter 2 of the [Club President's Manual](#): Setting Goals and Creating a Strategic Plan

[Planning Guide for Effective Rotary Clubs](#)

Rotary Club Central

Activities

Choose one of the following activities:

1. Assign a table to each of the following stages of strategic planning: visioning, long-range goals, annual goals, and evaluation. Add other topics if desired, or

assign multiple tables to the same stage or topic. Assign a facilitator to each table and give each a printout of the Strategic Planning Guide. Have each facilitator discuss a strategic planning stage and find out participants' concerns. After 10 minutes, have participants switch tables to learn about another stage of the process.

2. Ask participants to identify four long-term priorities for the clubs in the district (such as attracting new members, member engagement, improved communication, public relations, etc.). Write the priorities on a flip chart and assign each topic to a table. Ask facilitators to lead a discussion to identify annual goals to support each of the priorities. Participants can move to the table that represents the topic they would particularly like to discuss. After 10 minutes, they can either move to another table to discuss another topic or remain where they are.

Note: Allow time to cover any district or regional issues pertaining to this topic.