

Action Planning

PELS Computer Seminar

April 18, 2026

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Objectives

- Be able to **define a Goal**
- Describe the **Path of a Goal** from defining to success
- Use **Planning Tools** provided by District 7090
- **Access Rotary Club Center** to record and monitor achieving Goals
- Use Membership as a **example of setting / planning and recording a goal**

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Definition of a Goal

- A goal is an idea of the future or desired result that a person or a group of people envision, plan and commit to achieve.
- People endeavour to reach goals within a finite time by setting deadlines.

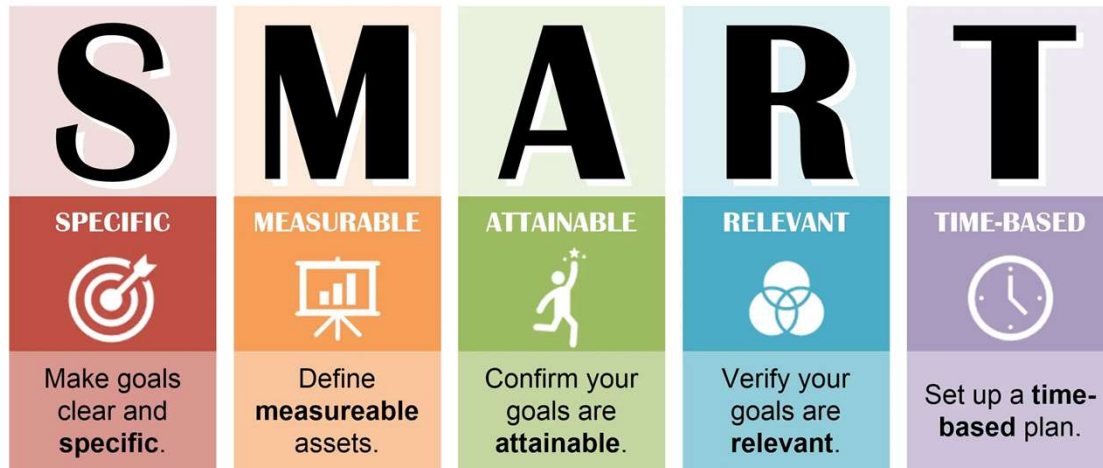
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The Rotary Action Plan Categories

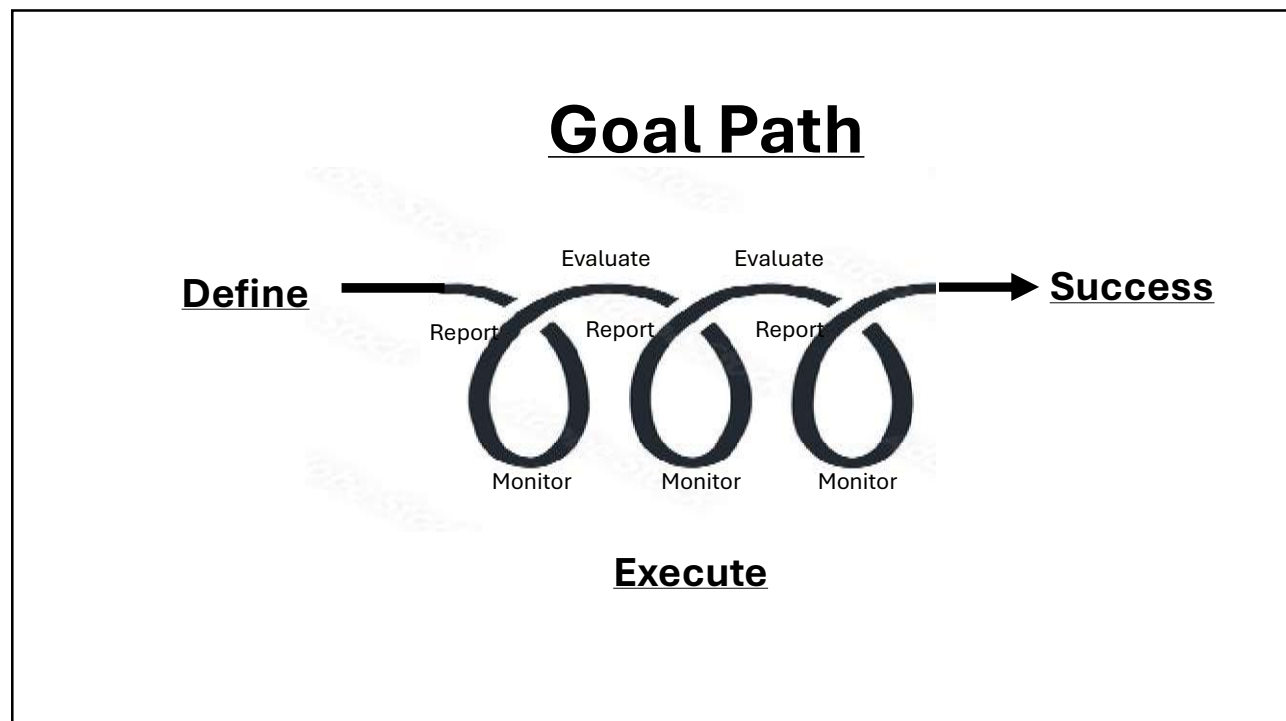


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A Goal Must be: S.M.A.R.T.



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Evaluate to Reflect and Adjust



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Deciding What Goals to Set

- There are three awards that are granted by Rotary International and your District 7090.
 - 1) **Rotary Award of Excellent:** Given to the club that accomplishes at least 13 of the 25 standard Goals specific to Rotary International.
 - 2) **The Lighthouse Award:** District 7090 gives this to all clubs that receive the Rotary Award of Excellence and accomplishes at least 5 of the goal of the 12 on their list of Goals
 - 3) **The District 7090 Governor's Trophy:** Given to the club that achieves the most goals accomplished of the two above awards

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Rotary Club Central Explained 2026-29 Goals

To achieve the Rotary Club Excellence Award, review all the available goals, select at **least half of them (13)**, achieve those goals, and report your achievement in Rotary Club Central.
All achievements need to be reported in Rotary Club Central by 30 June 2026 Light House Pick any 5..of the 12 from any category

1) Enhance Participation Engagement

Goal	Description	Year			Assignment / Tactic	✓
		26-27	27-28	28-29		
Priority						
Service Participation	How many members will participate in club service activities during the Rotary year?					
Other Goals						
Social Activities	How many social activities will your club hold outside of regular meetings during the Rotary year?					
Rotary Action Group Participation	How many club members will be members of at least one Rotary Action Group (RAG) during the Rotary year?					
Leadership Development Participation	How many members will participate in leadership development programs or activities during the Rotary year?					
District Conference Participation	How many members will attend your district conference?					

Go to www.Rotary7090.org under Tools to “Rotary Club Central Toolbox” for complete copy

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Use of Official Promotional Materials	Did your club use Rotary International’s promotional, advertising and public service materials (videos, social media graphics, digital banners, etc.) available in the Brand Center, to post/share content to promote Rotary in your community throughout the Rotary year?					
Rotary Fellowship Participation	How many club members will be members of a Rotary Fellowship during the Rotary year?					
District Training Participation	How many of your club’s leaders will attend a learning event to prepare for their role?					
Lighthouse or “Club” Goals						
	⌘ Participate in the District Human Trafficking awareness initiative					
	⌘ Every Rotarian, every Year (all members of the club contribute to the foundation, a minimum of \$25 USD), the average for the club is \$100.					
	⌘ Have club members (more than 1) join the Polio Plus Society (does not include existing polio society members)					
	⌘					
	⌘					
	⌘					

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Go to the Computer and survey RCC

Enter into Rotary Club Center for your club

- Go to <https://my.rotary.org/> and sign in
 - Click on **Rotary Club Central**
1. Go to the Reports are and Look under Foundation Tab at the “**Club Recognition Report**” **What are the total Club Recognition Points?**
 2. Go to Resources: Find the **Membership Assessment Tools (Pdf)**
 3. Click on **Service Resources Surprise!!!! Don't use go to My Roarty to enter service projects**
 4. Go to **Club Goals** and we'll look at the edit process after demonstration

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First Go to [My.Rotary.org](https://my.rotary.org/) and Sign in:

Rotary.org | Brand Center | English | Sign In | Register

Rotary | My Rotary | Log out | Get Involved

New prospective member management system is live.
Rotary's new prospective member management system is now live! Candidates can now choose a club to connect with. Watch your email for notifications to connect with your candidates.

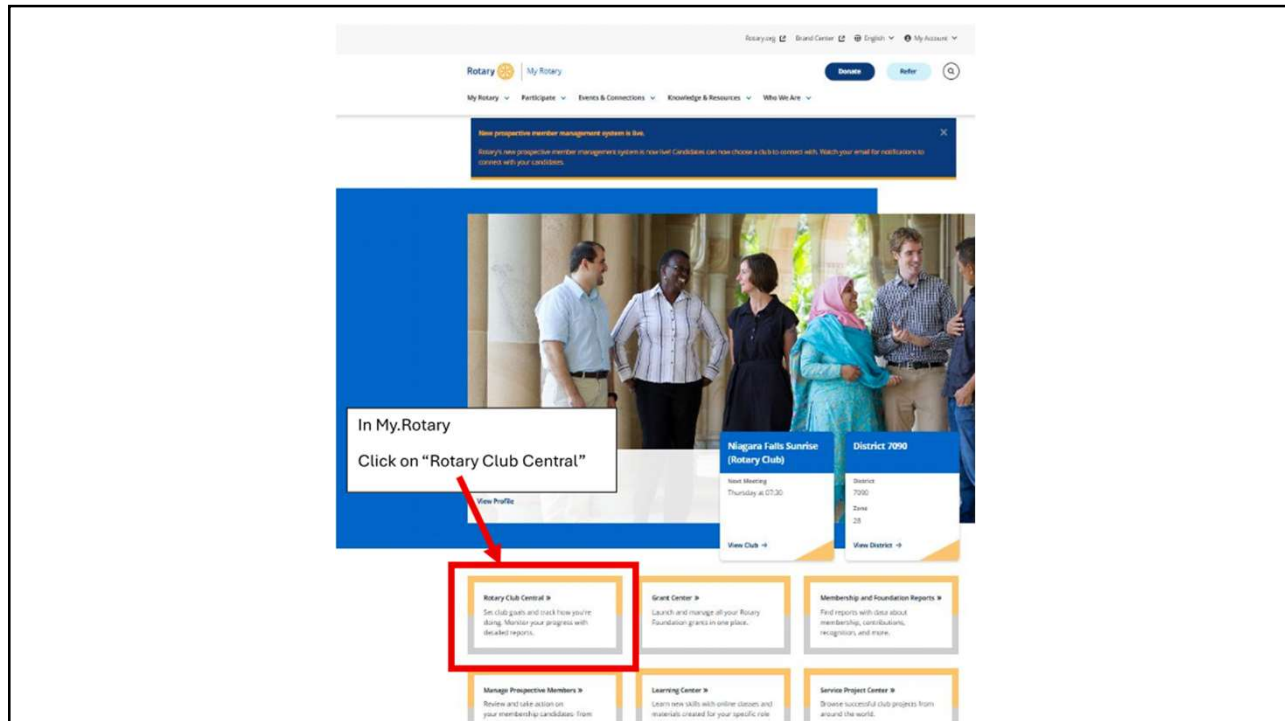
Welcome to My Rotary
Sign in or register to access your personalized My Rotary portal.

Click on “Sign in”
Or... If you have no access codes, click on “Register” and follow instructions

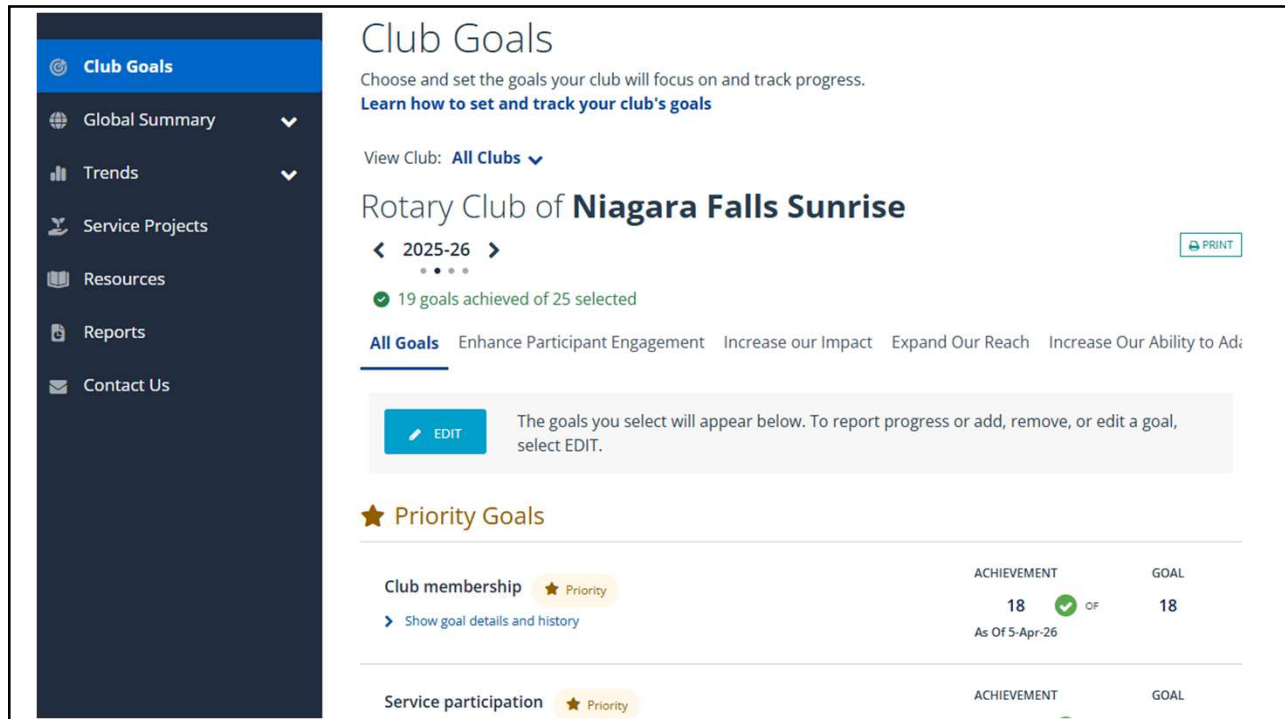
Sign in for easy access to resources

Rotary Club Central Set club goals and track how you're doing. Monitor your progress with detailed reports.	Grant Center Search and manage all your Rotary Foundation grants in one place.	Membership and Foundation Reports Find reports with data about membership, new members, registration, and more.
Learning Center Learn how to best serve clubs and members around the world.	Service Project Center Browse successful club projects from around the world.	Brand Center Find logos, photos, videos, and all the resources you need to promote Rotary in your community.

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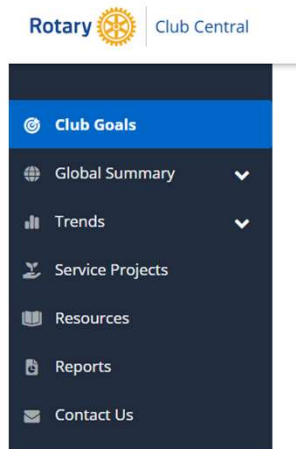


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RCC Menu



- **Club Goals:** The “Home Page” Here you Choose and set the goals your club will focus on and track progress.
- **Global Summary:** View the collective progress towards each goal worldwide and across your zone, district or club groups
- **Trends:** Explore data & trends of club goals.
- **Service Projects:** DO NOT USE. Go to My Rotary to access Project Recording
- **Resources:** You Must explore this. Great source for all sorts of Information
- **Reports:** These reports provide context for your goals and activities. Browse club, district, and regional reports to learn more about membership and engagement, service, and Foundation giving.

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FIND GOALS TO TRACK

Before choosing your club's goals, make sure the **appropriate year** is listed

If the **Edit** button appears, select it to find goals your club wants to track. If this button reads **Save** and goals are displayed, proceed to the next step.

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Rotary Club Central

Club Goals

Choose and set the goals your club will focus on and track progress.
Learn how to set and track your club's goals

Rotary Club of **Anytown**

2024-25

1 goal achieved of 4 selected

All Goals Enhance Participant Engagement Increase our Impact Expand Our Reach Increase Our Ability to Adapt

SAVE CANCEL

Which goals will your club track this year? Browse goals by category and select only those you plan to pursue. Then save.

Sort selected goals

Priority Goals

Strategic plan	ACHIEVEMENT	GOAL	SELECT GOAL
Strategic plan	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Service participation	21	25	<input checked="" type="checkbox"/>
Annual Fund contribution		4,000	<input checked="" type="checkbox"/>

Select the goals your club wishes to track by selecting the check boxes next to them

Note the Tabs

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SET A GOAL

Rotary Club Central

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Learn how to set and track your club's goals

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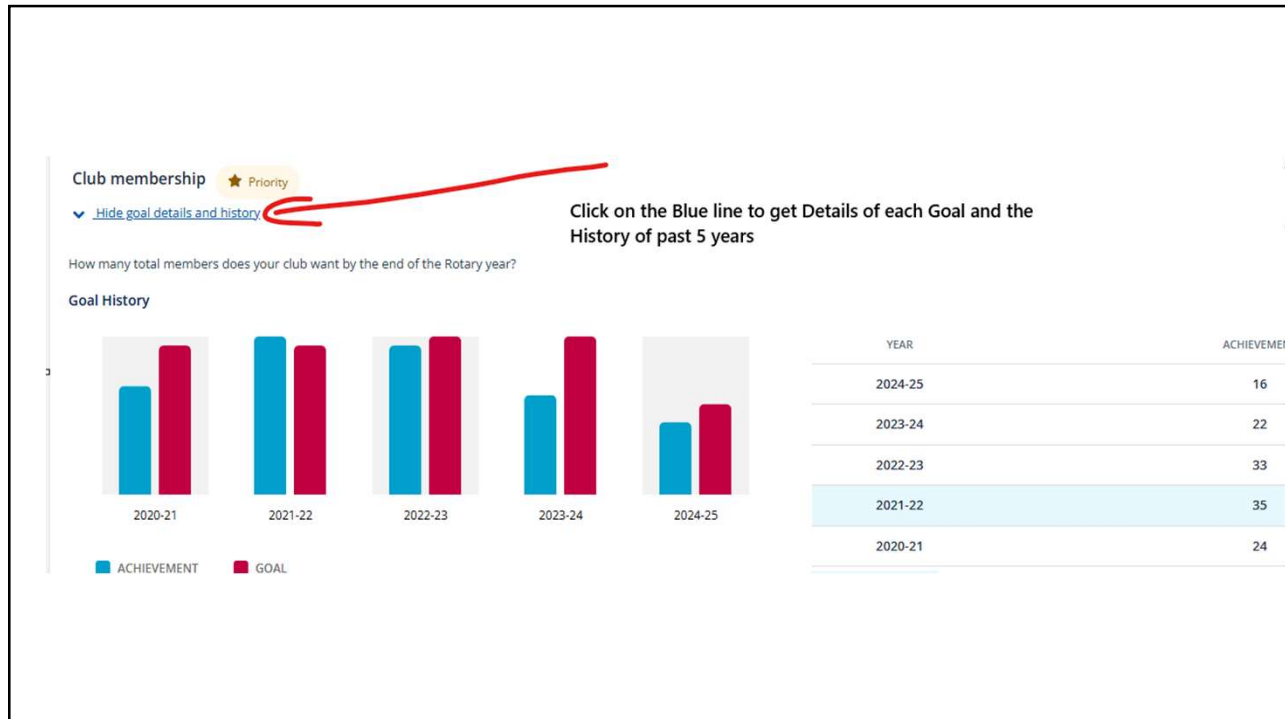
Priority Goals

Strategic plan	ACHIEVEMENT	GOAL	SELECT GOAL
Strategic plan	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
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Annual Fund contribution		4,000	<input checked="" type="checkbox"/>

Enter a goal value in the box titled Goal

Select Save after you've entered a goal value

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Setting Achievements ion some cases.....

- You can set the goal for all lines but you can not always set the "Achievement" for all of them.
- Some goals, if they reflect membership or Financial donations to RI, will automatically be completed by RI after you have recorded the change in membership or the donation to TRF.

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