

STRATEGIC PLAN DATA SUMMARY:

Do GOOD & Have FUN!

Rotary Club of _____ **President** _____ **Date** _____

1. Humanitarian Service

- a. Signature Project: _____
- b. Community Projects _____
- c. International Projects _____
- d. Grants*: District _____ Global _____ Attend Grant Seminar* _____
- e. Rotary Community Corp*: _____ Rotary Action Group* _____ Club Partners _____ Other Partners _____

2. Membership Attraction and Engagement

- a. Membership*: Current _____ 7/1 TY _____ Goal 7/1 NY _____ Retention % _____
- b. Diversity: Men _____ Women _____ < 40 yrs old* _____ >40 yrs old _____
- c. Current Club Strategic Plan adopted on _____
- d. Attraction/retention plan summary: _____
- e. Leadership development program: _____
- f. Fun/Fundraising activities: _____
- g. New initiative/program/goal for this year? _____
- h. Annual Budget: Income \$ _____ Expenses \$ _____ Reserves \$ _____
- i. Attend#: RLI _____ PETS _____ Assembly _____ Conference _____ Convention _____
- j. Other _____

3. Foundation Giving

- a. Annual Fund Giving Last Year: Total Club \$ _____ Average/Member \$ _____ Participation % _____
- b. Annual Fund Goals This Year*: Total Club \$ _____ Average/Member \$ _____ Participation % _____
- c. Other Fund Goals This Year: Polio Plus \$ _____ Endowment Fund \$ _____ Rotary Direct # _____
- d. Donor Recognition #* : PH Fellows _____ Major Donors _____ Bequest Society _____ Benefactors _____
- e. Club Recognition*: 100% Foundation _____ EREY Sustaining _____ PH Fellow Club _____ ShelterBox Hero _____

4. Youth Programs

- a. Club Sponsors*: Interact _____ RYLA _____ Youth Exchange _____ Rotaract _____ Mentors _____

5. Public Image

- a. Media Coverage of Club*: Projects _____ Fundraisers _____ Foundation Centennial Event _____
- b. PR Committee Activities: Brochure _____ Website _____ Facebook _____ Newsletter _____
- c. Other _____

6. Online Tool Adoption

- a. Rotary Club Central Goals**: Membership _____ Service _____ Foundation _____ Members on My Rotary %* _____
- b. Rotary.org Resource Use*: Rotary Showcase _____ Rotary Ideas _____ Discussion Groups _____

*2016-17 Presidential Citation: ** Required Activity *Additional Activity*