

# PLANNING GUIDE



How would you rate your club? Typically, Rotary clubs with a plan are stronger than clubs without one. Research shows that members of clubs with a plan were more satisfied and had a more positive view of their clubs and Rotary overall.

This guide will help

you set long-term priorities and goals, all of which will support your club's vision. It's designed for Rotary clubs, but districts can use it too. As you prepare a plan, consider these tips:

- Build a team of past, present, and incoming club leaders to oversee the plan's development and use.
- Ask an unbiased facilitator to run planning meetings.
- Include a variety of perspectives by involving a diverse range of club members.
- See how your club's goals reflect your District and Rotary's strategic plan.

## **The Planning Model**

Create a vision for your club, with priorities that will help you achieve it. Then set up an action plan and goals for the year ahead for each priority.



# Planning Worksheet

## 1. Where are you now?

List the opportunities and challenges facing your community.

Consider your club's current demographics and any assessments/surveys of what members like and don't like, plus results of your club's current health check.

**Club Strengths** (things you do easily and well and want to keep doing the reasons why)

**Club Weaknesses** (identify things that hold you back and make it hard to be effective and need to be changed)

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**Opportunities** for the club and community (such as new businesses, growing population, partnerships with other clubs and organisations)

**Challenges** facing the club and community (such as economic decline, competing services, demographic issues/aging population etc.)

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## **2. Where do you want to be?**

List five to 10 characteristics that you would like your club to have three to five years from now.

Next, prepare a one-sentence vision statement. Revise it with the team as needed, then see whether club members support it. (Include something that will distinguish your club from other service groups in your community – e.g., “Our vision is to be the most internationally diverse service club in our community,” or “Our vision is to be the service club most supportive of youths in our community.”)

**3. How do you get there?**

- Agree priorities that will help your club achieve its vision, considering:
  - Your Club’s strengths and weaknesses
  - The priorities and goals of Rotary International and those of your District.
  - Programs and missions of Rotary International and The Rotary Foundation
  - Your community’s opportunities and challenges
  - Members’ opinions
  - Achievability in three to five years
- Agree the most important priorities — those that will have the biggest impact as your club works toward its vision and agree a “Stop Doing List”.
- Develop/agree an action plan showing goals, tasks and activities, timeline, resources, and people to meet the yearly goals under each of the priorities.
- Use Rotary Club Central to help set goals and track achievements.

**Priority 1:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member/ Committee Assigned

**Priority 2:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member/ Committee Assigned

**Priority 3:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member/ Committee Assigned

#### **4. How are you doing?**

- Have your board regularly monitor progress against the action plan and goals agreed and suggest plan updates as needed.
- Each years review the plan and priorities to see if they would like any revisions.
- Make sure club decisions support the goals of the plan
- Allot enough resources to achieve the plan.
- Commit to transparency and communication so all members feel involved - hold regular Club Assemblies to share progress and revisions as needed.

List steps that your club should take to track its progress and share such with members including a timeline — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.