

## Rotary 3-Year Rolling Goals Action Plan Guide

The Goal Action Planning Template will list your plans for Club operations and growth during your year of service as Club President. Together with your Club Board and leadership, you will prepare this goal sheet, and your next president following you (and their Board and leadership) will prepare a similar sheet for 2026-2027. Serving as your guide to organize your Club's multi-year actions, these goals will help you gauge your Club's progress to becoming an effective agent of change across the globe, in your communities, and in your members. Make realistic, achievable goals. Once set, you shouldn't change your goals so you can accurately track achievement. The future years will be reviewed, adjusted and modified as necessary. Complete and enter your goals into Rotary Club Central by the beginning of the Rotary year, July 1.

A multi-year plan, made in coordination across the leadership of your Club, will assure that everyone is moving in the same direction, even if individual goals vary from year to year. For each goal, you will need to consider and record the financial and physical resources you will need, and the "who, what, where, when and how" resources needed to successfully execute (or attain) the goal. This can be done on separate sheets, or when you develop a more fulsome Strategic Plan.

### Step 1: Expand our Reach - Membership.

Rotary Clubs need members to organize, lead and accomplish global and community service. Using your current membership as a guide, what should your membership be at the end of the Rotary Year? Keep in mind that a net increase in membership means you need to consider membership attrition throughout the year. Of critical importance is accounting for your net member loss throughout the year. Review your club's historical membership performance in Rotary Club Central and adjust new member intake to reflect anticipated attrition in order to meet your goal.

### Step 2: Increase Our Impact – The Rotary Foundation.

Now that you have plans for your membership, plan for the funds they will need to accomplish their global and community service goals, including the final elimination of polio from the world. Emphasize that Polio Plus and the Annual Fund need funding every year! Replenishing those funds is an ongoing task.

- **Annual Fund**

Rotary asks that every Rotarian give something every year to the Annual Fund. Often, your members don't individually focus on the impact they can have by making regular gifts. Encouraging members to sign up for modest, regular, and predictable annual fund contributions can result in reliable increases in annual giving. Members earn EREY

recognition for an annual gift of at least \$25. Emphasizing automatic contributions through Rotary Direct is an easy way to enhance your Club's Annual Fund giving.

- **Polio Plus**

Rotary suggests that each club give at least \$1,500 to Polio Plus each year. These funds don't all have to come from your club members. Plan on at least one special Polio Plus community project or event during your year of service to raise awareness of Rotary's near elimination of polio and to raise funds from your community. Rotary International has many resources and ideas. Here's just one of many:

[https://www.endpolio.org/sites/default/files/event\\_planning\\_guide\\_en.pdf](https://www.endpolio.org/sites/default/files/event_planning_guide_en.pdf)

- **Endowment Fund Benefactor Recognition.**

During the Rotary year, how many individuals or couples will inform The Rotary Foundation of their intent to include the Endowment Fund in their estate plans or will make an outright gift of US \$1,000 or more to the Endowment Fund? This goal tracks new gifts made during your year of service as President. Participants in the Bequest and Legacy Societies fulfill this goal. Gifts to The Rotary Foundation Endowment Fund will leave a permanent source of funding for Rotarians to meet the needs of our local and global communities. Increasing the number of Benefactors will assure your club's commitment to Rotary will pay dividends forever. Work with your club and district Foundation chairs to provide detailed information to your club members on how to become Benefactors to The Rotary Foundation.

### **Step 3. Enhance Participant Engagement - Service Activities.**

Members, money and plans. Now what do you need to have a successful year as Rotary Club President? ACTION! And to have action, you need your club members to be engaged and actually work the Club's activities.

Of your club members, how many members will participate in club service activities during the Rotary year?

A simple way to measure action is just to count the number of club members who participate in club service activities. Use sign-up sheets or other tracking aids during Club service activities to keep a running total throughout the year. Regularly inform your club of the impact they're having by reporting the number of Club members who have participated. One club member participating in one activity is counted as a "1". Since this goal seeks to measure how many of your club members participate, each member is only counted once no matter how many service activities that member participates in during the year. Your participation number should not be greater than the number of members in your club. While you should encourage the broadest possible participation in club activities, this goal seeks to track participation by club

members (not non-Rotarians who may participate in a service activity). “Participate” means to perform some useful task during the service activity; the discretion to consider this fulfilled is up to you.

#### **Step 4. Increase Our Ability to Adapt – Strategic Plan**

The Rotary Action Plan (see below) provides guidance on how clubs can be more successful and effective. Having a strategic plan implementing the four priorities of the Action plan is critical to your club’s success. Here is more information:

<https://my.rotary.org/en/document/action-plan-flyer>.

**CONGRATULATIONS!** If you completed your attached Club Goals Planning Sheet, you now have a Strategic Plan outline! You can now answer the Rotary Club Central question of “Does your club have an up-to-date strategic plan?” as “Yes”. But you can do a more robust Strategic Plan at any time, and you **SHOULD** update your Strategic Plan on a regular (annual) basis.

If you want to do more, Rotary International has an Action Plan Tool Kit for your use to help you edit, monitor, follow up on, and execute your strategic plan:

<https://my.rotary.org/en/who-we-are/about-rotary/action-plan>

#### **Other Goals**

The Goals listed above are the “priority” goals chosen for emphasis by Rotary International. They are designated as such in Rotary Club Central, where you will enter your goals.

These are not the only permissible goals for your club! Rotary Club Central suggests many other goals, and clubs have long history of supporting things like youth programs, literacy programs and the like. Continue to support those (and many others). Blanks have been provided for you to record and plan other goals, as well. Use extra sheets of paper as necessary to fully describe your plan and goals.