

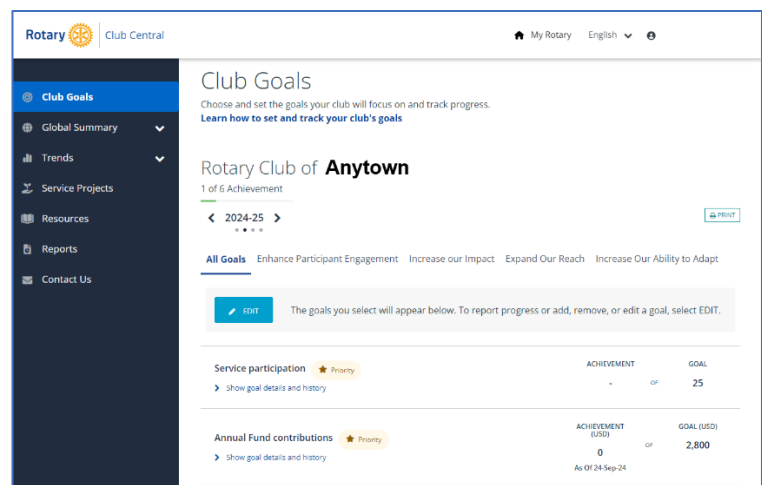
# CRAFTING YOUR CLUB'S FUTURE BY SETTING GOALS

The most successful clubs plan for their future. When members decide together what they want to accomplish in one, two, and three years, they prepare for success by giving their club direction and giving members a shared purpose.

Before each Rotary year begins, incoming leaders should set club goals in Rotary Club Central, using the club's current situation as the baseline and its strategic plan as a guide for the next few years. You can now set goals for three years at a time. Future club leaders will be able to adjust the goals as needed, always planning three years ahead.

Working together as club leaders, review the 26 goals in Rotary Club Central and decide which ones best fit your club's needs and goals. If you set and achieve at least half of the goals in Rotary Club Central, your club will earn the Club Excellence Award for this Rotary year.

Rotary's Board of Directors has selected six top-priority goals that are particularly effective in strengthening a club and helping Rotary create lasting change. These goals are listed in Rotary Club Central and will count toward the Club Excellence Award when you achieve them. Consider these questions as you set the goals:



- **Strategic plan:** Does your club have an up-to-date strategic plan?
- **Club membership:** How many members does your club want to have by the end of the Rotary year?
- **Service participation:** How many members will participate in club service activities during the Rotary year?
- **Annual Fund contributions:** How much money will your club and its members give to The Rotary Foundation's Annual Fund during the Rotary year?
- **PolioPlus Fund contributions:** How much money will your club and its members give to the Foundation's PolioPlus Fund during the Rotary year?
- **Benefactors:** During the Rotary year, how many individuals or couples will inform the Foundation that their estate plans include the Endowment Fund as a beneficiary, or will make an outright gift of US\$1,000 or more to the Endowment Fund?

If you are a club president, secretary, treasurer, vice president, executive secretary/director, Foundation chair, membership chair, public image chair, service projects chair, or club learning facilitator, you have the ability to edit goals in Rotary Club Central. To ensure that all these leaders have access to Rotary Club Central, confirm that they have My Rotary accounts and that their roles have been reported to Rotary through My Rotary or your club management platform.





## 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.

## FAQ: Rotary's New 3-Year Rolling Goal Strategy

### Introduction

Rotary International is excited to introduce a refined approach to club goal setting. Beginning January 2025 for the 2025-26 Rotary year, Rotary clubs will transition to a 3-year rolling goal strategy. This means each year, your club's leadership team will review and update future goals, ensuring alignment with ongoing priorities while maintaining momentum. This strategy emphasizes 6 priority goals, that are fundamental to the health and success of the club. When Rotary clubs are successful, Rotary as a whole is successful.

### Who benefits from this new goal strategy?

Your club does! Rotary has found that clubs focusing on specific priority areas experience higher member engagement, stronger connections, and greater satisfaction. In short, clubs that set well thought out achievable goals and act intentionally to realize those goals, achieve more with less time, energy, and effort. Simplifying the process is designed to help your club thrive.

### Is this a completely new system?

No, this is a refinement of the current system. The goal is to provide more clarity and ease for clubs, ensuring that goals are achievable and impactful. This is a bottom-up initiative. Club leadership sets each priority goal. The goals set by the clubs collectively are the goals of the District and Zone. The District and the Zone prepare a Plan that details the tools and support available to the clubs to prepare and realize their stated goals.

### Why are the goals now set for three years?

Even though Rotary leadership changes annually, meaningful progress often takes longer than a single year. The 3-year rolling goal strategy allows successive leaders to collaborate on shared objectives, ensuring continuity and stronger outcomes for your club. Each year, the leadership team will review and modify upcoming goals, adapting to the club's evolving needs.

### What if our club doesn't have a President-Elect or President-Nominee yet?

That's okay! The three-year goals are meant to be developed by your club's leadership team, whatever that looks like for your club, with input from members. While it's ideal to identify future leaders early, the absence of a President-Elect or President-Nominee shouldn't stop your club from setting and pursuing goals.

### When does this begin?

The 3-year rolling goals strategy begins January 2025 for 2025-26, 2026-27 and 2027-28. Rotary years. You can start entering future goals in Rotary Club Central now. There's no need to adjust current 2024-25 goals already in place.

## Why are three of the six priority goals related to The Rotary Foundation?

The Rotary Foundation is at the heart of all we do as Rotarians, providing the resources that allow us to make a lasting impact worldwide. The 3-year rolling goals ensure continued focus on the Foundation's key priorities, which are essential for club success and engagement:

**Polio Eradication:** We made a promise to the world to end this dreaded disease, and sustained efforts are critical to fulfilling that commitment.

**Annual Fund:** This fund drives our impactful work, supporting District Grants, Global Grants - The World Fund, Peace Centers, and many other life-changing initiatives.

**Endowment Fund:** By building a sustainable legacy, we ensure that future generations of Rotarians have the resources to carry on our great work long after we are gone.

The 3-year rolling goals allow clubs to plan, adapt, and build momentum in these critical areas, ensuring steady progress toward our shared mission and long-term success.

## Who can enter future-year goals in Rotary Club Central?

**Current officers:** can edit three Rotary years: 24-25, 25-26, 26-27.

**Incoming officers (current presidents-elect, for example):** If their data is entered into the Rotary.org database and they go into Rotary Club Central today, they can edit for 25-26 and 26-27. Goals for 27-28 are not available to set yet, but as of 1 July 2025 those officers will have the ability to set for that third year.

**District officers:** As of today, current district officers can edit their clubs' goals for 24-25, 25-26 and 26-27. Incoming district officers can edit for 25-26 and 26-27.

**Club Officers able to adjust goals** are club president, secretary, treasurer, vice president, executive secretary/director, Foundation chair, membership chair, public image chair, service projects chair, or club learning facilitator.

Be sure to coordinate with your leadership team to keep everything up to date!

## Will this make things harder for my club?

Not at all. This strategy is designed to simplify the goal-setting process and make it more meaningful. By focusing on the priority goals the club is allowed to address the activities and actions foundational to a strong healthy club. Have additional questions or concerns?

Reach out to your District's Action Plan Champion, Assistant Governor, or District Governor Team for support. We're here to help your club succeed and make the most of this refined goal-setting approach. Together, we can continue to serve and make a lasting impact!