***NOTES:***

1. *The purpose of this template / guide is to assist clubs choose and plan their goals for the RY 2024-25.*
2. *This is an extract of all Goals on the RCC Goal Center and should ease the process of eventually mapping and entering your club goals into RCC . You are encouraged to visit the Goal center (*[*https://my.rotary.org*](https://my.rotary.org)*) and the Rotary Showcase (*[*https://my.rotary.org/en/secure/showcase*](https://my.rotary.org/en/secure/showcase)*) for additional details and guidance on which goals to select.*
3. *Additional Goals or indicators have been added to align with the district expectations of the clubs, assist clubs address governance issues and later feed into the M&E and reporting requirements through the RY.*
4. *As part of good governance practices, the goals should reflect the aspirations of the entire club and be “owned” by the entire club. PEs should therefore work with their Club Boards, Committees and the entire club to develop these goals, and eventually work towards implementation / execution.*
5. *The AGs and District Leadership team is available to support as necessary. Please reach out where you need support.*
6. *You will be expected to attach your goals, targets and initiatives in the Club Report to the DG as a prerequisite for the DG’s visit.*
7. *Club should have developed their Plans and Goals by Feb/March 2024 (come with a copy to PETS to help you with calibrating with District Goals), Club Budget by April 2024 (inclusive of approval at a Club Assembly) and entered them in RCC by May 2024.*

**A: Strategic Priority: Enhance Participant Engagement**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Goal Description** | **Benchmark with Past Club Performance (check on RCC)** | | **RY2024-25 Target**  *(Indicate target or N/A if the club plans not to select the goal)* | **How do you plan to achieve the target?**  *eg. Indicate the key initiatives / activities to achieve target or additional details to contextualize the goal/target* |
| RY2022-23 Achievement | RY2023-24 Achievement for July-Mar 24 |
| 1 | Service Participation  *How many members will participate in club service activities during the RY* |  |  |  |  |
| 2 | Social Activities  *How many social activities will your club hold outside of regular meetings during the Rotary year?* |  |  |  |  |
| 3 | Rotary Action Group Participation  *How many club members will be members of at least one Rotary Action Group (RAG)? Indicate the RAG(s).* |  |  |  |  |
| 4 | Leadership Development Participation  *How many members will participate in leadership development programs or activities?* |  |  |  |  |
| 5 | District Conference attendance  *How many members will attend the district conference?* |  |  |  |  |
| 6 | Use of official Rotary Promotional materials  *Use of RI’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.* |  |  |  |  |
| 7 | Rotary Fellowship Participation  *How many club members will be members of a Rotary Fellowship? Indicate the Fellowship(s)* |  |  |  |  |
| 8 | Training Participation  *How many club members and leaders will attend a learning event? In the comments indicate numbers for Learning Center, Internal Club Learning events, District Learning Events and others.* |  |  |  |  |
| 9 | Add any other Goals/indicators set by Club |  |  |  |  |

**B.1: Strategic Priority: Increase our Impact**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Goal Description** | | **Benchmark with Past Club Performance (check on RCC)** | | **RY2024-25 Target**  *(Indicate target or N/A if the club plans not to select the goal)* | **How do you plan to achieve the target?**  *eg. Indicate the key initiatives / activities to achieve target or additional details to contextualize the goal/target* |
| RY2022-23 Achievement | RY2023-24 Achievement for July-Dec 23 |
| 1 | | TRF Annual Fund Contributions  *How much money (USD) will be contributed to the Annual Fund by your club and members?* |  |  |  |  |
| 2 | | PolioPlus Fund  *How much money (USD) will be contributed to The Rotary Foundation PolioPlus Fund by your club and members?* |  |  |  |  |
| 3 | | Major Gifts  *How many single outright donations of US$10,000 or more will be made by individuals associated with your club?* |  |  |  |  |
| 4 | | Inbound Youth Exchange Students  *How many Rotary Youth Exchange students will your club host?* |  |  |  |  |
| 5 | | Bequest Society Members  *how many members will inform The Rotary Foundation of their plans to leave US$10,000 or more to The Rotary Foundation through their estate?* |  |  |  |  |
| 6 | | Outbound Youth Exchange Students  *How many Rotary Youth Exchange students will your club sponsor?* |  |  |  |  |
| 7 | | Benefactors  *How many members will make an outright gift of US$1,000 or more to the Endowment Fund?* |  |  |  |  |
| 8 | | TRF Utilization  *How much money (USD) does the club intend to utilize as Global Grants from TRF?* |  |  |  |  |
| 9 | | Service Activities (Projects)  *How many service projects will your club undertake during the Rotary year?* |  |  |  |  |
| 10 | | Add any other Goals/indicators set by Club |  |  |  |  |

**B.2: Breakdown of Service Activities / Projects (Note. Don’t include fundraising or similar events)**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **#** | **Service Project Name** | **Brief Description** | **Is project already in progress or New / proposed for 2024/25** | **Implementation location** (district/location of beneficiary community) | **Indicate the Areas of Focus addressed** | **Approx Budget (USD)** | **Is project funded by TRF Grants** | **Indicate other Partners in the project** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |  |  |
| n |  |  |  |  |  |  |  |  |

**C. Strategic Priority: Expand our Reach.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Goal Description** | **Benchmark with Past Club Performance (check on RCC)** | | **RY2024-25 Target**  *(Indicate target or N/A if the club plans not to select the goal)* | **How do you plan to achieve the target?**  *eg. Indicate the key initiatives / activities to achieve target or additional details to contextualize the goal/target* |
| RY2022-23 Achievement | RY2023-24 Achievement for July-Dec 23 |
| 1 | Club Membership  *How many total members does your club want by the end of the Rotary year?* |  |  |  |  |
| 2 | Interact Clubs  *How many new Interact clubs will your club sponsor* |  |  |  |  |
| 3 | Rotaract Clubs  *How many new Rotaract clubs will your club sponsor* |  |  |  |  |
| 4 | Rotary Clubs  *How many new Rotary clubs will your club sponsor* |  |  |  |  |
| 5 | New Member sponsorship  *How many members will sponsor a new club member during the Rotary year?* |  |  |  |  |
| 6 | Media Stories about club Projects  *How many media stories will cover your club's projects during the Rotary year?* |  |  |  |  |
| 7 | RYLA Participation  *How many individuals will your club sponsor to participate in Rotary Youth Leadership Awards (RYLA) events* |  |  |  |  |
|  | Add any other Goals/indicators set by Club |  |  |  |  |

**D. Strategic Priority: Increase our ability to Adapt.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Goal Description** | **Benchmark with Past Club Performance (check on RCC)** | | **RY2024-25 Target**  *(Indicate target or N/A if the club plans not to select the goal)* | **How do you plan to achieve the target?**  *eg. Indicate the key initiatives / activities to achieve target or additional details to contextualize the goal/target* |
| RY2022-23 Achievement | RY2023-24 Achievement for July-Dec 23 |
| 1 | Club Strategic Plan for (at least 3 years)  *Does your club have an up-to-date strategic plan? (in the Remarks indicate the Start and end date of plan)* |  |  |  |  |
| 2 | Online Presence: Branding & People of Action  *Does your club’s branding (promotional materials, website, social media accounts) use current and correct Rotary logos and portray members as People of Action?* |  |  |  |  |
| 3 | Website and Social Media   * *Indicate Website and Social Media channels/Address/handles and* * *how many times per month will your club's website and social media accounts be updated to reflect current activities and information of interest to the public?​* |  |  |  |  |
| 4 | Club Bylaws   * *Are your club bylaws up to date, and do they reflect your members and other participants’ needs?* * *In the remarks indicate the revision date of the current bylaws, and if all members have a copy.* |  |  |  |  |
|  | Add any other Goals/indicators set by Club |  |  |  |  |

**E. Club Health and Governance Practices**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Goal / Indicator** | **Current Status** | **Plans / Activities for 2024/25** |
| 1 | Club Policies and Procedures  *Does club have additional policies or procedures? Eg.  i) Financial Management*  *ii) Procurement*  *iii) Others?* |  |  |
| 2 | New Member admission criteria and induction processes  *Indicate the key criteria and induction processes the club follows to admit new members?* |  |  |
| 3 | Mentorship  *Describe the mentorship practices in the club, eg.*   * *How are mentors selected?* * *How & when are mentors and mentees allocated/paired?* * *How is the mentorship process monitored?* |  |  |
| 4 | Member Retention   * *What strategies does the club have for member retention?* |  |  |
| 5 | Payment of Dues   * *Culture of members paying dues in time.* * *Are there no arrears?* * *Have dues for 2024-25 been paid?* |  |  |
| 6 | Club Calendar  *Does the club have a schedule of the key events and activities planned for the year ahead of time?* |  |  |
| 7 | Board and Club Committees   * *Is there a calendar/schedule for Board meetings* * *Are club committees formally constituted and functional?* * *Have Board members and Committees been trained on their roles and responsibilities?* * *Are there report, meeting minutes and record(s) of resolutions, and are they shared with club members?* |  |  |
| 8 | Club Assemblies   * *Is there a calendar/schedule for Club Assemblies?* * *Is the Agenda and documents for discussion / decision making in Assemblies shared in advance?* * *Are minutes of assembly meetings shared with members* |  |  |
| 9 | Statutory Compliance   * *Is the Club registered by URSB as a company limited by guarantee?* * *Are copies of the MEMARTS and Certificate of Incorporation available and accessible to members?* * *Is the club up to date with the reporting / filing requirements by URSB?* |  |  |
| 10 | Annual Reports and Financial Statements   * *Are Annual reports and audited financial statements for RY 2022/23 completed?* * *Have they been approved by the Club?* * *What is the status of the annual reports for RY 2023/24? (should be audited by Sept 2024 and approved by club)* |  |  |
| 11 | Annual Budget   * *Did the club have an approved budget for RY 2023/24* * *Has the club developed an Annual Budget for RY2024/25* * *Is the club following and complying with the Budget* |  |  |
| 12 | Bank Accounts   * *Are all Bank Accounts known.* * *Are there Accounts for specific projects* * *Are the Bank Signatories and signing mandates updated.* |  |  |
| 13 | Qualification   * *Is the Club qualified to participate in TRF Global Grants in RY 2024/25* |  |  |
| 14 | Use of Rotary Online Tools  *i) How many members have active accounts on My Rotary?*  *ii) Have the incoming officers been updated in My Rotary?*  *iii) Does the club use the following tools*   * *Rotary Learning Center* * *Rotary Brand Center* * *Rotary grants Center* * *Rotary Showcase* * *District Website / Club Runner* |  |  |
| 15 | Does your club carry out periodic:   * *Club Health Checks* * *Membership Satisfaction Survey* * *Classification Survey* * *Are the results shared with members and recommendations implemented.* |  |  |
| 16 | Performance Monitoring and Evaluation  *How does the club track performance.* |  |  |
|  | Add any other Goals/indicators set by Club |  |  |