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|  | **DISTRICT PLANNING GUIDE** April 2012 |  |  |

This guide helps districts assess their current state and establish goals for the coming year. Complete this form during your year as governor-elect to develop goals for your year as governor. Work with your district leadership team to set the goals, which should promote your district’s strategic plan. Review and revise the goals throughout the year. Download a Word version of this form at www.rotary.org.

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| --- | --- | --- | --- |
| District number: |       | Rotary year of office: |       |
| Name of governor: |       |
| Name of immediate past governor: |       |
| Name of governor-elect: |       |
| Name of governor-nominee: |       |

STRATEGIC PLANNING

#### Current State

Does the district have a strategic plan in place? [ ]  YES [ ]  NO

Does your district consult with the Rotary coordinator? [ ]  YES [ ]  NO

If so, when was it last reviewed/established?

#### Future State

The district will focus on the following areas or strategic priorities:

1.

2.

3.

**TRAINING**

#### Current State

Number of Rotarians who attended

District team training seminar:       Presidents-elect training seminar:

District assembly:       District Rotary Foundation seminar:

District membership seminar:       District leadership seminar:

Club leadership development program:

Number of clubs with Rotarians appointed at the district level:

How does the district support club trainers?

The district will focus on the following areas of training and leadership development:

1.

2.

3.

**DISTRICT ADMINISTRATION**

Does the district have a communication plan in place? [ ]  YES [ ]  NO

When does the district’s election process start for the following positions?

Governor:       Council on Legislation representative:       RI director:

What is the district’s election process?

[ ]  Nominating committee [ ]  Ballot at district conference [ ]  Ballot by mail

Do you use Member Access at www.rotary.org? [ ]  YES [ ]  NO

How is the governor’s monthly communication distributed? [ ]  Mail [ ]  Email [ ]  Website

What social media networks does the district use (e.g., Facebook, YouTube, LinkedIn)?

How often is the district’s website updated?

How often does the district conduct fellowship activities?

How does the district involve the families of Rotarians?

Number of clubs that received the Presidential Citation last year:

What awards did the district receive last year?

What awards does the district give out?

#### Future State

The district will focus on the following areas of district administration:

1.

2.

3.

#### FINANCE

**Current State**

How is the district budget prepared?

When was the budget approved by a majority of clubs?

When is the statement of district finances reviewed?

How is the district financial statement shared with clubs?

[ ]  Email [ ]  Mail [ ]  Verbal report [ ]  Website [ ]  Other

Does the district have procedures in place to protect district funds? [ ]  YES [ ]  NO

Were appropriate tax documents filed with local government? [ ]  YES [ ]  NO

Is the per capita levy sufficient for district needs? [ ]  YES [ ]  NO

#### Future State

The district will focus on the following areas in finance:

1.

2.

3.

#### DISTRICT CONFERENCE

#### Current State

Number of participants:

Number of clubs in attendance:

Highlights of the program:

Have participant evaluations been reviewed? [ ]  YES [ ]  NO

**Future State**

During my year, the district will focus on the following areas for the district conference:

1.

2.

3.

**RI CONVENTION PROMOTION**

**Current State**

Is the RI Convention promoted in your district? [ ]  YES [ ]  NO

Have materials been shared with clubs to promote the upcoming convention?

[ ]  YES [ ]  NO

About how many Rotarians from your district attended the last RI Convention?

Does your district website have a link to RI Convention resources? [ ]  YES [ ]  NO

#### Future State

The district will focus on the following areas of RI Convention promotion:

1.

2.

3.

**PUBLIC RELATIONS**

**Current State**

List district activities covered by the media, and the type of media coverage (e.g., radio, newspaper, television):

Does your district consult with the Rotary public image coordinator? [ ]  YES [ ]  NO

Does your district encourage clubs to use RI public relations materials? [ ]  YES [ ]  NO

Does your district budget for public relation materials?[ ]  YES [ ]  NO

Did your district apply for public relations grants in the past two years? [ ]  YES [ ]  NO

#### Future State

The district will focus on the following areas of public relations:

1.

2.

3.

**MEMBERSHIP**

#### Current State

Current number of members:

Net membership growth in existing clubs during current year:

Number of male members:       Number of female members:

Number of clubs targeted to recruit younger members:       .

Number of clubs with 25 or fewer members:

Describe the district’s strategy for incorporating innovative and flexible ideas for membership recruitment and retention into current practices:

#### Future State

The district will focus on the following areas of membership:

1.

2.

3.

#### NEW CLUBS (EXTENSION)

**Current State**

How many clubs have been chartered in your district over the past two years?

Which communities has your district identified as potential locations for new Rotary clubs?

How many years does a sponsor club work with a new club?

#### Future State

The district will focus on the following areas to increase its number of new clubs:

1.

2.

3.

**THE ROTARY FOUNDATION**

#### Current State (for nonpilot district governors-elect in 2012-13)

Does your district consult with the regional Rotary Foundation coordinator? [ ]  YES [ ]  NO

Number of grants awarded:

 District Simplified Grants:       Matching Grants:

Number of Ambassadorial Scholars: Nominated:       Selected:       Hosted:

Number of Group Study Exchange team members: Nominated:       Selected:       Hosted:

Number of Rotary Peace Fellows: Nominated:       Selected:       Hosted:

Number of PolioPlus activities:

Amount contributed to Annual Fund last year:       Current goal:

Amount contributed to Permanent Fund last year:       Current goal:

Number of Rotarians who are

Rotary Foundation Sustaining Members:       Paul Harris Fellows:

##### Paul Harris Society members:       Benefactors:

##### Major Donors:       Bequest Society members:

Arch C. Klumph Society members:

Number of Foundation alumni tracked by your district:

**Current State** (for pilot districts and all district governors-elect in 2012-13)

Does your district consult with the regional Rotary Foundation coordinator? [ ]  YES [ ]  NO

District qualified status: [ ] Qualified [ ]  Pending [ ]  Incomplete

Amount of District Designated Fund for a district grant:

Number of clubs currently participating in a district grant:

Amount of District Designated Fund for global grants:

Global grants:

1.

2.

3.

The district held the following educational, promotional, and fundraising projects for PolioPlus last year:

1.

2.

3.

Number of Rotary Peace Fellows the district nominated last year:

Number of district’s Rotary Peace Fellow nominees selected by the Trustees last year:

Amount contributed to Annual Fund last year:

(Note: This should be the sum as reported on the Fund Development Club Goal Report Form.)

Permanent Fund:

Number of Benefactors last year:       Number of Bequest Society members last year:

Number of Major Donors last year:

**Future State** (for all district governors starting in 2013-14)

Amount of District Designated Fund for a district grant:

Number of clubs you would like to involve in district grants:

Amount of District Designated Fund for global grants:

The district will concentrate on the following area(s) of focus:

[ ]  Peace and conflict prevention/resolution [ ]  Maternal and child health

[ ]  Disease prevention and treatment [ ]  Basic education and literacy

[ ]  Water and sanitation [ ]  Economic and community development

Global grants:

1.

2.

3.

Number of global grants still in progress:

The district will plan the following educational, promotional, and fundraising projects for PolioPlus:

1.

2.

3.

Number of Rotary Peace Fellows the district will nominate:

Annual Fund contribution goal:

(Note: This should be the sum of club goals as reported on the Fund Development Club Goal Report Form.)

Permanent Fund:

 Number of Benefactors:       Number of Bequest Society members:

 Number of Major Donors:

**DISTRICT PROGRAMS**

#### Current State

Number of Rotary Youth Exchange students: Hosted:       Sponsored:

Number of sponsored Interact clubs:       Number of Interactors:

Number of sponsored Rotaract clubs:       Number of Rotaractors:

Number of sponsored Rotary Community Corps:       Number of participants:

Number of Rotary Youth Leadership Awards (RYLA) participants:

Number of Rotary Youth Leadership Awards (RYLA) activities:

Number of Rotary Friendship Exchanges:

Number of service projects coordinated by the district (includes all Avenues of Service):

Number of Rotarians in the district participating in

 Rotarian Action Groups:

 Rotary Fellowships:

#### Future State

The district will focus on the following areas to improve district programs:

1.

2.

3.

**SUMMARY OF GOALS FOR DISTRICT**       **ROTARY YEAR**

#### Strategic planning goals

#### Training goals

#### District administration goals

**Finance goals**

**District conference goals**

#### RI Convention promotion goals

#### Public relations goals

**Membership goals**

#### Organizing new club goals

#### Rotary Foundation goals

The district will participate in the following Rotary Foundation programs and grants:

The district’s Annual Fund contribution goal is      .

The district’s Permanent Fund contribution goal is      .

#### District programs goals

For the local community:

For communities in other countries:

**Other goals**