

Planning for Success



I can strengthen my club by promoting and leading insightful planning.

Session Goals:

Understand the value and process for strategic planning
Analyze my Rotary Club
Review possible areas of improvement
Discuss how specific improvements could be made

Resources

- Rotary Club Self-Evaluation of Performance & Operations PDF
- Rotary Club Central rotary.org
- Rotary Club Health Check rotary.org
- Membership Assessment Tools rotary.org
- Rotary Learning Center rotary.org
- SMART Goals PDF
- SWOT worksheet PDF
- Working Template for a Club's Strategic Plan PDF
- Strategic Plan Simplified PDF

All session materials are also available at www.rlifiles.com

Session Topics

1. Rotary International suggests that clubs develop strategic plans.
2. Does your club have a plan?
3. What is the first step in creating a strategic plan?
4. What challenges might you face in implementing a plan?
5. What could a strategic plan mean to the future of your club?

Summary

- Planning today determines your future
- Every voice should be heard

“Action without vision is wasted, and vision without action is just a dream.

Action with vision brings hope to the world.”

1996-97 RI Pres. Luis Vicente Giay
— *Address to 1996 Rotary Convention,*
Calgary, Alberta, Canada

SMART Goals

S Specific

M Measurable

A Attainable

R Relevant

T Time Stamped

Strategic Plan Simplified

WHERE ARE WE NOW?



DEVELOP/REVIEW CLUB
VISION STATEMENT



REVIEW KEY STRATEGIES OF
DISTRICT AND ROTARY
INTERNATIONAL ACTION PLAN



**ESTABLISH TACTICS FOR
EACH STRATEGY (3 – 5)**



**PREPARE A GOAL FOR
EACH STRATEGY**



IMPLEMENT AND MONITOR PROGRESS ... AT
BOARD MEETINGS AND SEMI-ANNUALLY
WITH THE CLUB

WORKING TEMPLATE FOR A CLUB'S STRATEGIC PLAN

Strategy #1: Increase Our Impact	
Evidence-based programs define and measure our impact. We can improve our projects and outcomes, creating even more effective change.	
TACTICS	FIRST YEAR GOALS

Strategy #2: Expand our Reach	
We can expand our club's capacity for doing good by welcoming and engaging people of action with a variety of experiences, cultures, and perspectives.	
TACTICS	FIRST YEAR GOALS

Strategy #3: Increase Participant Engagement

We can meet our members' diverse needs and keep them engaged while helping them with their personal and professional goals. Active and intentional member engagement will make our clubs stronger and assist us in creating meaningful relationships.

TACTICS	FIRST YEAR GOALS

Strategy #4: Increase Our Ability to Adapt

New projects, new clubs and new perspectives will maintain our connections and ability to make a difference.

TACTICS	FIRST YEAR GOALS

NOTE: This page is NOT in the student guide!! For DL reference only

Below are some suggested activities that clubs could do to follow through with the four Strategies associated with Rotary's Action Plan.



Match each activity to ONE of the four Strategies in the Rotary Action Plan.

Which one(s) might best be suited to your club's needs and aspirations at this time ... or ... which one(s) of these best match your club's vision.

If applicable, modify one of these suggested activities to match your club's needs and aspirations and link it to one of the four strategies.

Identify the main issues/concerns/needs in your local community

Review your club's use (or lack of such) of emerging technologies

Survey your members to see what is important to them in a club experience

Budget for new ideas and initiatives that might help your club to be more responsive to the local community.

Use the Rotary Learning Centre courses as part of a regular Rotary Club meeting

Use social media to tell the community what your club does

Apply for a District or Global grant to support a project

Review club activities to determine which ones can be streamlined or eliminated in order to free up time for impactful activities

Survey your community with the intent of establishing a new club using one of the flexible models available.

Make succession planning in your club a part of the annual processes.

Strategic Planning Guide (SWOT)

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 strategic 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 strategic planning meetings.
- Include a variety of perspectives by involving a diverse range of club members.
- See how your club's goals reflect those of your district and Rotary's strategic plan.

Strategic Planning Worksheet

1. **Where are you now?**

List the opportunities and challenges facing your community.

When checking your club's current state, use Rotary Club Central, Rotary Club Health Check, Membership Assessment Tools, and your region's version of Be A Vibrant Club to see what your club is doing well and what it could improve.

Club Strengths	Club Weaknesses
Opportunities for membership development in the community (<i>new businesses, growing population</i>)	Challenges facing the community (<i>such as economic decline, competing services</i>)

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?**

- Set strategic priorities that will help your club achieve its vision, considering:
 - The club’s strengths and weaknesses
 - The goals of the R.I. Strategic Plan, those of your district, and those of your regional membership
 - Programs and missions of Rotary International and The Rotary Foundation
 - Your community’s opportunities and challenges
 - Members’ opinions
 - Achievability in three to five years
- Get the team to choose the most important strategic priorities — those that will have the biggest impact as your club works toward its vision.
- Identify yearly goals that support each of the top strategic priorities.
- List the tasks and activities, timeline, resources, and people necessary to meet the yearly goals under each of the strategic priorities.
- Use Rotary Club Central to help set goals and track achievements.

Strategic priority 1: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 2: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 3: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

4. How are you doing?

- Have your strategic planning team regularly monitor progress on reaching its goals and suggest plan updates as needed.
- Review your strategic plan, including its vision statement and priorities, each year with club members to see if they would like any revisions.
- Make sure club decisions support the goals of the plan, and discuss observations with the strategic planning team.
- Allot enough resources to achieve the plan.
- Repeat the strategic planning steps every three to five years to produce a new plan or keep the current one.

Rotary Club Self-Evaluation of Performance and Operations

This form is to conduct a self-evaluation and review of your club's current performance and operations. It is NOT intended to "grade" your club, but rather provide a mechanism to discover the strengths of your club and identify areas that might be improved. Many questions will require a degree of reasonable appraisal. Please be guided by the Four Way Test and your best judgment in answering the questions. Divisions and districts are free to adopt and utilize the evaluation.

Club Administration

Score

Please rate the following: Yes= 5 pts No=0 pts Don't Know = DK

1. Our Rotary Club has adopted the Club Leadership Plan.
2. The club has written By-laws that are available to each member.....
3. The club Board of Directors meets on a regularly announced basis.....
4. The club has developed both a long-term and short-term plan of action.
5. The club has an e-mail address and/or web page with current information on it.
6. The official Rotary International Directory is available to the members.....
7. The club publishes a roster listing the officers, members, committees and chairs.
8. The club plans social events for members and partners throughout the year
9. The club makes an effort to contact absent or ill Rotarians.....
10. The club has received a **Rotary Citation** within the last 3 years..
11. The club has an annually prepared budget that is approved by the members.....
12. The club receives a financial report of all income and expenses at least once a year.....

Please Rate the Following: Excellent= 5, Good= 4, Satisfactory=3, Fair=2, Poor=1 Don't know= DK

13. The club meeting location site or area is
14. The food provided during the meal at the club meeting is
15. The quality of speakers and club programs is normally
16. The meetings start and finish on time and the use of an agenda is.....
17. The Board of Directors report to the club about their actions is.....
18. The club's communication of important Rotary information to the members is.....
19. The payment of club dues by the members in a timely fashion is.....
20. The payment of district and International dues in a timely fashion is.....
21. The information and content of the club newsletter/bulletin is
22. The club's use of sound systems, lecterns, decorations, flags, banners, and other Rotary related items is
23. The operation of the club committee system with regards to meeting regularly and reporting to the board of directors and/or the membership is.....
24. The club's promotion of district assemblies, conferences, conventions and special meetings is

Please Rate the Following: Excellent= 5, Good= 4, Satisfactory=3, Fair=2, Poor=1 Don't know= DK

- 25. The club's use of RI Themes and knowledge of the RI President's message and initiatives are . . _____
- 26. The club's greeting and treatment of visiting Rotarians is _____
- 27. The special recognition given to visiting guests during club meetings is....._____
- 28. The information and topics presented at a club assembly is....._____
- 29. The club's treatment and reception of the District Governor's official visit is....._____
- 30. Fellowship encouraged by the use of singing, "happy dollars," raffles, etc. is _____
- 31. The degree of Rotary spirit and friendly fellowship that exists in the club is _____
- 32. The club's efforts to recognize special individuals with "Rotarian of the Year", "Citizen of the Year", etc. is....._____
- 33. The desire of the Rotarians to sit at a different table each week is....._____
- 34. The club's recognition of special events, birthdays etc of the members is....._____

Please assign points for the following:

- 35. Our club has a speaker **weekly** (5 pts), **monthly** (3 pts), **never** (0 pts). _____
- 36. The club newsletter is published **weekly** (5), **bi-weekly** (3), **monthly** (1), **none** (0) _____
- 37. The club holds regular club assemblies **monthly** (5), **quarterly** (3), **semi-annually** (1), **never** (0). _____
- 38. The Rotary International rules on attendance are strictly enforced **always** (5), **usually** (4), **occasionally** (3), **seldom** (2), **never** (1) _____
- 39. The club members are reminded to make-up for absences **always** (5), **usually** (4), **occasionally** (3), **seldom** (2), **never** (0) _____
- 40. The club gives special recognition to individuals who have perfect attendance **regularly** (5), **occasionally** (3), **once in a while** (1), **never** (0)....._____
- 41. My club has sponsored a District Governor candidate within the last **1-5 yrs** (5), **6-10 yrs** (4), **11-15 yrs** (3), **16+ yrs** (0), don't know (DK). _____
- 42. My club has provided an Assistant Governor (AG's) candidate within the last **1-5 yrs** (5), **6-10 yrs** (3), **never** (0), don't know (DK)....._____
- 43. The following number of *Rotarians* from my club attended the last Rotary International Convention- **5+** (5), **3-4** (4), **1-2** (2), **zero** (0), don't know (DK)....._____
- 44. The following number of *Rotarians* from my club has attended the most recent district conference- **10 +** (5), **5-9** (4), **2-4** (3), **1** (2), **none** (0). _____
- 45. The following number of *club leaders* attended the most recent district assembly: **5+** (5), **2-4** (3), **1** (1), **none** (0), don't know (DK). _____
- 46. Generally **10 or more** (5), **5-9** (3), **1-4** (1), **no** (0), *Rotarians* from my club attends special functions (i.e. dinners, seminars, service events, celebrations, etc) sponsored by the district. _____
- 47. The current president-elect **always** (5), **sometimes** (3), **seldom** (1), **never** (0) attends PETS (president-elect training seminar). _____

Please add the totals points for questions 1-47

Club Administration _____

Don't knows _____

Membership

Score _____

Please assign points for the following:

1. The average monthly club attendance figure is **90-100%** (5 pts), **80-89%** (4 pts), **70-79%** (3 pts), **60-69%** (2 pts), **50-59%** (1 pt), don't know (DK)..... _____
2. The average age of the club membership is **35-40** (5), **41-50** (4), **51-60** (3), **61-70** (2), **71+** (1), don't know (DK). _____
3. Last year, the club's membership **increased** (5), **remained the same** (3), **decreased** (0), don't know (DK). _____
4. This year the club membership is likely to **increase** (5), **remain the same** (3), **decrease** (0), don't know (DK)..... _____
5. The club has sponsored a new club within the **last 1-3 yrs** (5), **4-8 yrs** (4), **9-12 yrs** (2), **longer or never** (0), don't know (DK). _____
6. When a member relocates to another community, the club **always** (5), **sometimes** (3), **never** (0) notifies the nearest Rotary club of the move..... _____
7. New members are **always** (5), **sometimes** (3), **never** (0) encouraged to become active in the club _____
8. The club **frequently** (5), **often** (4), **seldom** (2), **never** (0) holds special membership drives (cocktail, wine & cheese parties, meet & greet, etc) to identify and attract potential new members..... _____
9. The club **always** (5), **sometimes** (3), **seldom** (1), **never** (0) has information or materials about joining Rotary at its fund raisers or events..... _____

Please rate the following: Yes= 5, No= 0, Don't know= DK

10. The club has an active membership chair that makes regular reports to the club..... _____
11. The club has and uses a membership classification system. _____
12. The club has developed a membership interest survey form. _____
13. The club assigns new members to committees based on their interests. _____
14. The club annually sets measurable and reasonable membership goals..... _____
15. The club has and uses a "Mentoring" program. _____
16. The club has developed a welcoming package for new Rotarians..... _____
17. The club has a special program (red badge, greeter, etc.) to make new members feel welcome. . _____
18. The club conducts new member orientation meetings _____
19. The club pays for new Rotarians to attend the Rotary Leadership Institute. _____
20. The club conducts an "exit interview" to determine why members leave. _____
21. The club systematically asks each new member for a referral..... _____
22. The club provides non-Rotarian speakers with information about Rotary _____

Rate the following: Excellent=5, Good=4, Satisfactory= 3, Fair=2, Poor=1, Don't know= DK

- 23. The club's promotion of membership issues is..... _____
- 24. The club's use of the classification list is..... _____
- 25. The club membership balance and representation of the community business segments and general population are _____
- 26. The club's attempts to invite qualified members of any race, gender or ethnic group to join the club is..... _____
- 27. The club's new member orientation meetings are _____
- 28. The club's induction ceremony of a new member to the club is _____
- 29. The club's "mentoring" program is _____
- 30. The club has a specific retention program that is..... _____
- 31. The club's participation at district membership seminars is..... _____
- 32. The effort to encourage all members to attend the Rotary Leadership Institute is _____
- 33. Overall, the club's efforts to attract and keep new members is _____

Please add the total points for questions 1-33 Membership _____

Don't knows _____

The Rotary Foundation

Score

Please rate the following: Yes = 5 No = 0 , Don't know = DK

- 1. The club has an active Foundation chair that makes regular reports to the members. _____
- 2. The club sets and achieves its Foundation giving goal each year..... _____
- 3. The club encourages individuals to become Paul Harris Fellows on their own..... _____
- 4. The club matches contributions made by members to the Rotary Foundation. _____
- 5. The club makes a special presentation of a new Paul Harris Fellowship _____
- 6. The club publicly posts a list of all the Paul Harris Fellows..... _____

Please assign points for the following:

- 7. **Most** (5 pts), **many** (4 pts) **some** (3 pts) **few** (2 pts) **none** (0 pts) of the club members understand that money given to The Rotary Foundation returns to the district for its use three years later _____
- 8. Information about The Rotary Foundation is provided to the club every **month** (5), **three months** (3), **six months** (1) **never** (0) _____
- 9. **All** (5), **most** (4), **many** (3), **some** (2), **few** (1), **none** (0) of the club members know about Paul Harris Fellows and how to become one. _____
- 10. **Most** (5), **many** (4), **some** (3), **few** (2), **none** (0) of the club members contribute each year to The Rotary Foundation under the Every Rotarian Every Year program. (EREY). _____
- 11. My club has sponsored a GSE or VTT team member, a global scholar or a peace scholar **within the last 1-3 yrs** (5), **4-6 yrs** (3), **longer or never** (0), don't know (DK). _____

12. My club has hosted a visiting GSE or VTT team **within the last 1-5 yrs (5), 6-8 yrs (3), longer or never (0), don't know (DK)**. _____
13. My club has applied for a Global Grant with an international partner **within the last 1-3 yrs (5), 4-6 yrs (3), longer or never (0), don't know (DK)**..... _____
14. My club has applied for a District Grant **within the last 1 yr (5), 2-3 yrs (3), longer or never (0), don't know (DK)**..... _____
15. **Most (5), many (4), some (3), few (2), none (0)** of club members are Paul Harris Fellows..... _____
16. **Most (5), many (4), some (3), few (2), none (0)** of club members are Paul Harris Sustaining Members..... _____
17. **Most (5pts), many (4), some (3), few (2), none (0)** of club members are Bequest Society donors to The Rotary Foundation. _____
18. **Most (5), many (4), some (3), few (2), none (0)** club members are Benefactors to The Rotary Foundation _____
19. **Most (5), many (4), some (3), few (2) none (0)** of club members are Paul Harris Society members..... _____
20. **Most (5), many (4), some (3), few (2), none (0)** of club members are Major Donors to The Rotary Foundation..... _____
21. **Most (5), many (4), some (3), few (2), none (0)** of club's existing Paul Harris Fellows make subsequent contributions to The Rotary Foundation _____

Please add the total points for questions 1-22 Foundation _____

Don't knows _____

Service Projects

Score .

Rate the following: Excellent=5, Good= 4, Satisfactory= 3, Fair= 2, Poor=1, Don't know= DK

1. The club's attempts to promote vocational service are..... _____
2. The promotion of the 4-Way Test in the club and community is..... _____
3. The use of career development programs by the club in local schools to help students with career choices is..... _____
4. The club's effort to promote high ethical standards, professional dignity or service performance in the club and community is..... _____
5. The club's effort to conduct one new community service project each year is..... _____
6. The club's effort to conduct one new international service project each year is..... _____
7. The club's use of input, talents and resources of the members for service projects is _____
8. The club's use of input, talent and resources from community leaders for service is..... _____
9. I consider the club's activities regarding service, locally and internationally, to be..... _____

10. Please add 3 pts for each service project that your club has done *within the last 3 years*

The club has conducted an active program or project in the following areas:

- Drug use prevention or rehabilitation.....
 - Polio eradication or other community immunization project.....
 - Environmental activities.....
 - Literacy projects.....
 - Clean water programs.....
 - Providing food for the hungry.....
 - Assisting the community’s handicapped or elderly.....
 - Providing health or medical care locally or Internationally.....
 - Providing recreational opportunities for the community.....
 - Helping the poor or needy of the community.....
 - Improving the community’s economic or social quality of life.....
 - Conducting career opportunity programs.....
 - Assisting or guiding the youth of the community.....
 - Creating or supporting a Rotaract or Interact Club.....
 - Working with other local service groups on a common project.....
 - Work with other Rotary Clubs on a common project.....
 - Work with community educational facilities.....
 - Traffic or highway safety programs or projects.....
 - Animal safety or care programs.....
 - Disaster assistance program or project.....
 - Others.....
- Total points for question 10.....

Please rate the following: Yes = 5 No= 0, Don’t know= DK

- 11. The club conducts various fund raisers to support its service programs.....
- 12. The club relies mainly on financial contributions from the members to fund its service programs.....
- 13. The club has participated in an International Service project within the last 2 years.....
- 14. The club participates actively in the Youth Exchange Program.....
- 15. The club regularly invites the local Youth Exchange students to its meetings.....
- 16. Club Rotarians normally act as the host parents for the visiting Youth Exchange.....
- 17. The club is aware of and planning to institute or cooperate with the mandated “Background Checks” for the Youth Exchange program.....
- 18. The club annually recognizes at least one outstanding student or student leader.....
- 19. The club sponsors at least 1 World Community Service project a year.....
- 20. The club participates in or recognizes the Rotary UN day at the United Nations headquarters. .
- 21. The club has participated within the last 3 years in a Rotary Friendship Exchange.....

- 22. Within the last 3 years, the club has participated in a Twin Cities, Sister Club, or Matched Club program with 1 or more Rotary clubs around the world.....
- 23. The club, within the last 3 years has sponsored at least one student with a Rotary Youth Leadership Award (RYLA).....

Please add the total points for questions 1-23

Service Projects _____
Don't knows _____

Rotary Publicity & Public Relations

Score _____

- 1. Our club **always** (5), **often** (3), **seldom** (1) **never** (0) has articles or pictures of our activities in the local media and/or social media.....
- 2. Our club **always** (5), **often** (3), **seldom** (1), **never** (0) uses the Public Access channels to promote or publicize our activities.
- 3. The members of the club **always** (5), **often** (4), **seldom** (1), **never** (0) wear their Rotary pins.....
- 4. Our club has **many** (5), **some** (3), **one** (1) **no** (0) road signs at the entrances to the community announcing the day, time and location of our meeting.
- 5. When the club provides financial support to other organizations, it **always** (5), **often** (4), **seldom** (1), **never** (0) asks the other organization to publicize the donation in the local media.....

Please rate the following: Yes= 5pts No= 0 pts Don't know=DK

- 6. Our club has a visible sign that "Rotary Meets Here" at our meeting site.
- 7. The club has used advertising (billboards, newspapers, community brochures, etc.) within the last 2 years.
- 8. Local Rotarians have been interviewed about the club on radio or TV within the last year
- 9. Representatives from the media are active members of the club.....
- 10. The club has a brochure describing the club and its projects available for handout.
- 11. The Rotary logo and club identification is visible for completed community service projects.

Please add the total points for questions 1-11

Rotary Public Relations _____
Don't knows _____

Bonus Questions

Score _____

- 1. I receive the Rotarian magazine each month. (Y=5, N=0).....
- 2. I have received or am familiar with the District Governor's newsletter. (Y=5 N=0).....
- 3. I have brought in a new member to the club within the last 2 years. (Y=5 N=0).....
- 4. I understand the SHARE System of The Rotary Foundation. (Y=5, N=0)
- 5. I am a Paul Harris Fellow or a Sustaining Member. (Y=5, N=)
- 6. I have worked on, or contributed to a service project within the last 2 years. (Y=5 N=0).....
- 7. I visit the club, district, or Rotary International web sites **daily** (5), **weekly** (4), **monthly** (3), **occasionally** (2), **never** (0).....

8. I **always** (5), **sometimes** (3), **never** (0 pts) make-up for a missed meeting.
9. I have personally served on a district committee within the last **1-5 yrs** (5), **6-10 yrs** (3), **longer or never** (0).....
10. I have attended the district conference or International convention within **the last year** (5), **2-5 yrs** (3), **longer than 5 yrs** (1), **never** (0)
11. I have contributed to The Rotary Foundation within the last **1 year** (5), **2-3 years** (3), **4 years or more** (1), **never** (0).....

Please add the total points for questions 1-11

Bonus Questions

Totals

Total Club Administration (from page 7)	_____	out of 235 points	DKs	_____	(38)
Total Membership (from page 9)	_____	out of 165 points	DKs	_____	(29)
Total Foundation (from page 10)	_____	out of 110 points	DKs	_____	(10)
Total Service Projects (from page 12)	_____	out of 173 points	DKs	_____	(2)
Total Rotary Public Relations (from page 12)	_____	out of 55 points	DKs	_____	(6)
Total Bonus Questions (from page 13)	_____	out of 55 points			
GRAND TOTAL	_____	out of 793 points			

- 700 points plus = Outstanding
- 600–699 points = Excellent
- 500–599 points = Very Good/Average
- 400–499 points = Could be improved
- 300–399 points = Caution—club may need assistance
- less than 300 points = The club is in need of serious and immediate assistance

Please DO NOT make any adjustments to totals for DKs. The following is for reference only.

- 1–10 DK’s = 5 to 50 additional points—**Normal**
- 11–20 DK’s = 55 to 100 points—**Caution**, should be concerned about the lack of knowledge about your club.
- 21–35 DK’s = 105 to 175 points—**Critical**, you need to learn more about your club.
- 36 or more = **Unacceptable**—Unless you’re a new member, you need to seriously learn more about the functioning of your club.

This is a non-weighted, unscientific analysis of your club and the results should only be used to identify areas that either you or the club might be lacking. It should not be taken as a negative reflection on the activities of the club or its Rotarians.