Club Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Club Year: \_2022-23\_ President: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The purpose of this guide is to provide you a manageable, stepwise process for planning your year as Club President. It is organized by **month**, helping to break down the planning process into parts you can work on a few hours here and there. It’s a combination of a process path and a timetable. **Save** this template as an MSWord file, and work on it month-by month until complete.

Start on your plan as soon as possible and consider having your current President, Secretary and your successor (President-Nominee) assist you.

Take a hard look at the club, as if you were an outsider:

* What’s your club going to look like at the end of your term?
* Can you step up your club’s expectations of itself – challenge your members to a new level of service?
* What legacy do you want your term as President to be remembered for?

We stand on the shoulders of giants – past Presidents who have led the club up to this point. Be sure your **vision** is sufficient to move the club positively forward, ensuring your position in the club’s history as one of those giants.

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1. Team Selection **-- Build a team to help you January**

The essence of leadership and delegation is assembling a team around you to whom you can delegate. Select people you know you can count on – people who have previously demonstrated their commitment to Rotary and their ability to deliver on their commitments.

***A. Officers***

Your bylaws likely require the club to have elected all your officers and the Board of Directors for your Presidential year as of the end of December. Some clubs don’t get that done in a timely fashion. If for some reason the following aren’t yet elected, work with your current Board or Nominating Committee to get these offices filled as quickly as possible:

**Club Secretary** – Other than President, the Club Secretary is the most important job in the club. The Secretary needs to be administratively proficient, computer-literate, comfortable with both web applications and office automation applications (Word, Excel, etc.).

Club Secretary for the year of my Presidency is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Club Treasurer** – Treasurer is an important working position. This position requires some technical knowledge of bookkeeping and accounting. A person familiar with computer-based accounting platforms like QuickBooks would be a good choice.

Club Treasurer for the year of my Presidency is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**President-Elect** – The key to club sustainability is a line of Presidents designated well in advance.

President-Elect (my successor) for the year of my Presidency is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***B. Board of Directors*** – These are the people who will support and assist you in achieving your vision. Check your Bylaws to see how Board members are elected, their terms of service and how many there are.

Board members for the year of my Presidency are:



Usual Board Meeting Date/Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***C Key Committee Chairs*** – There are several Committees you’ll need to be able to count on to achieve your vision. These leaders (committee chairs) should be lined up well before PETS so you can work with them to develop strategies and action plans to support you. Plan on putting your strongest members in the key "Primary Committee" roles:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Primary Committees** | **Chair** |  | **Specialized Committees** | **Chair** |
| Membership |  |  | CART |  |
| Service Projects |  |  | Literacy |  |
| Rotary Foundation |  |  | Interact |  |
| Programs |  |  | Rotaract |  |
| Club Administration |  |  | RYLA |  |
| Public Image/PR |  |  | Vocational Service |  |
| Fundraising |  |  | Youth Exchange |  |

If you don't have commitments on these positions, list your prospective candidates

2. Membership & The Rotary Foundation–  **February**

The purpose of this section is to take a hard look at the club's history of membership growth and support of The Rotary Foundation, then set some goals for achievement in the upcoming year.

A. Membership Trends – What does the 5-year membership trend look like? What would it take to grow the club by 10%?? By 20%?? Growth is not optional – clubs are either growing or shrinking. If you don’t have a growth strategy your club will be shrinking. Staying that course long enough will cause the club to disband.

Membership History (available from the **Club Fundraising Analysis**)

|  |  |  |
| --- | --- | --- |
| **Year** | **Club Year**  **(e.g. 2022-2023)** | **Members at year beginning (July 1)** |
| This Month | January 2022 |  |
| This Year - July 1 | 2021-2022 | **From Club  Fundraising Analysis** |
| Prior year July 1 | 2020-2021 |  |
| Prior year July 1 | 2019-2020 |  |
| Prior year July 1 | 2018-2019 |  |
| Prior year July 1 | 2017-2018 |  |
| 17 Years Ago  **From 17-year membership history** | July 1, 2004 |  |

An effective, vibrant Rotary club grows moderately each year. If your club is not growing, it is a sign that something needs to be changed to attract and retain members. You'll need strategies to find those reasons and make those changes. Likewise, if your club is growing it's important to understand why and to reinforce those strategies.

## B. Membership Growth Goals (Required Section)

**\*\*** Clubs lose members for reasons beyond our control.   
10% - 20% attrition is a pretty good estimate.  
District average is 14%

Estimated Membership at **start** of my Presidency (July 1): \_\_\_\_\_\_\_\_ (a)

**Membership Goal by end of my Presidency (June 30):** \_\_\_\_\_\_\_\_ (b)

**Estimate starting membership from  
Club Dashboard**

**Net** Membership Growth (**Suggested =** **5% to 10%**) \_\_\_\_\_\_\_\_\_(c=b-a) \_\_\_\_\_%

New Members needed to replace attrition **\*\***  \_\_\_\_\_\_% = \_\_\_\_\_\_\_\_\_ (d)   
 **Use 15% minimum  
Actual attrition data available at:** [**RIZones33-34.org/Zone33MGI**](http://rizones33-34.org/Zone33MGI) **(Page down to D-7750 and find your club)**

Total new members needed (net growth+ attrition) \_\_\_\_\_\_\_\_\_ (c+d)

Other Membership-related goals (diversity, member engagement, retention, etc.)

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

C. Demographic Study – These numbers should be easily available from DACdb. If not, your club needs to undertake a project to get birth dates (including year) entered into DACdb.

|  |  |  |
| --- | --- | --- |
| **Age Bracket** | **Number** | **\*\*Percentage** |
| Members over 60 |  | **Demographic Data available from Club Reports in DACdb** |
| Members 50-59 |  |  |
| Members 40-49 |  |  |
| Members under 40 |  |  |
| Unknown/Undefined age |  |  |
| **Total** |  |  |
| **% Women** |  | \*\* Divide Number in each Bracket by Total Members | |
| Average age of members (yrs) |  |

If nothing changes, what will our club demographics look like 10 years from now?

D. RI Foundation Contribution History – Analyze the **Club Fundraising Analysis** and the **Club Recognition Summary (CRS)** (Log into My Rotary [www.Rotary.org](http://www.Rotary.org/MyRotary) to find these reports – you may need the current President’s or Secretary’s login to access RI Foundation records). Understanding your club's giving history is essential to effectively set and achieve goals.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Club Year**  **(e.g. 2019-20)**  **From Club  Fundraising Analysis** | **Annual Fund (AF)** | **AF**  **Per Capita** | **Polio Plus** | **PPlus Per Capita** |
| 2021-2022 (YTD) |  |  |  |  |
| 2020-2021 |  |  |  |  |
| 2019-2020 |  |  |  |  |
| 2018-2019 |  |  |  |  |
| 2017-2018 |  |  |  |  |
|  | **Best AF Year**  **$ Per Capita** | $ | **Best PPlus Year**  **$ Per Capita** | $ |

How many members contributed last year (2020-2021)? \_\_\_\_\_\_\_\_ (EREY)

How many sustaining members last year (2020-2021 )? \_\_\_\_\_\_\_\_\_ ($100+/year)

How many Paul Harris Society (PHS) ($1,000 **per year**)? \_\_\_\_\_\_\_\_ Long-term strategy  
This data indicates the **breadth** of Rotary Foundation support by your members

What’s the last contribution **date** of most members? \_\_\_\_\_\_\_\_ Are members continuing to give?

**From Club Recognition Summary**

How many Paul Harris Fellows ($1,000 total contributions)? \_\_\_\_\_\_\_

How many members are stuck at a PHF level (at $x,000)? \_\_\_\_\_\_\_\_ Are members making progress toward becoming multiple Paul Harris Fellows?

How many members haven't contributed for a year or more? \_\_\_\_\_ Why might that be?

Other observations about member giving patterns?

## E. RI Foundation Goals (Required Section)

Contribution History is found in the **Club Fundraising Analysis**

**Best Year From RI Foundation Contribution History (Section D)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Category** | **Best AF Year $ Per Capita**  **(from Sec. D)** | **Estimated Members 7/1/ 2022** | **Annual Fund Goal $ Per Capita** | **Annual Fund Goal Total ($ Per Capita x Members)** |
| **Annual Fund**  Suggested Goal: $175 Per Capita  If already over $175, Best Year +$1  If under $175, close the gap by 1/2 | $ |  | $ | $ |
| Successful fundraising includes giving members reasons to give and recognition for doing so.  What are your strategies & goals for increasing member giving & recognition? | | | | |
| **Recognition Level** | **Current** | **Goal # New or Increased Level** |  |  |
| Paul Harris Fellows ($1,000 total) |  |  | How will you encourage members to become PHFs or to step up another level? | |
| Paul Harris Society ($1,000 **per year**) |  |  | Pledges of $1,000 per year supercharge your Rotary Foundation giving | |
|  |  |  |  |  |
| **Category** | **Best PPlus Year**  **Per Capita**  **(from Sec. D)** | **Estimated Members 7/1/ 2022** | **Polio Goal $ Per Capita** | **Polio Goal Total**  **($ Per Capita x Members)** |
| **Polio Plus**  Suggested Goal: $50 Per Capita  If already over $50, Best Year +$1  If under $50, close the gap by 1/2 | $ |  | $ | $ |

***Major Gifts & Endowment Fund (optional goals)***

|  |  |  |
| --- | --- | --- |
| **From Club Recognition Summary**  **Lifetime Donor Types** | **# Current** | **Goal  # New or Increased Level** |
| **# Major Donors/Major Gifts ($10,000+ lifetime contr.)** |  |  |
| **# Bequest Society ($10,000+ Estate Pledge)** |  |  |
| **# Benefactors ($1,000+ Estate Pledge)** |  |  |

3. Service Projects, Sustainability & SWOT Analysis **- March**

A. Projects Assessment – Take a hard look at your club’s service projects. Are they still relevant?

Catalog the club’s **fundraising** projects – List all projects whose primary purpose is raising funds for use in supporting either club service projects or grants to other organizations



Catalog the **club’s own service** projects (local or international) – List all "hands-on" club projects where Rotarians work together under the Rotary "Brand". This is a worthwhile effort to get yourself in touch with the club's own projects. In a vibrant club, members engage and work together on "real" service projects.



Catalog the club’s **grants** to other organizations – List Non-Rotary organizations the club presently supports. This is a worthwhile effort to get yourself in touch with organizations the club is currently funding. Is this funding fulfilling to your members, and do these projects promote the Rotary brand?



Service Project Analysis

* Has your club ever applied for a district or global grant\_\_\_\_\_? If so, for what purpose?   
  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* How many projects are new (1-3 years old)? \_\_\_\_\_\_\_\_
* How many carry the Rotary “brand”? \_\_\_\_\_\_\_\_
* How many directly support one of the six Rotary areas of focus? \_\_\_\_\_\_\_
* New service projects or areas to consider
* Service Projects that should be enhanced, revisited or eliminated

B. Sustainability– Identification and depth of future leadership. Does the club have a sufficient number of potential and future leaders on hand to ensure the club’s future success?

* How many years forward are Presidents identified? \_\_\_\_\_\_\_
* My successor is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* His/her successor (or likely successor) is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Which of our leadership candidates have completed (or started) Rotary Leadership Institute (RLI)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ <http://www.RLI33.org>
* Other sustainability strategies already in place:

C. Club Administration – Take a hard look at your club’s Administrative processes. If you can’t answer “Yes” to each of the following, perhaps some remediation needs to be done:

* Can you locate your club’s Bylaws and Constitution, and are both up to date?
* Does your club have a complete financial report (Income Statement and Balance Sheet) presented to the Board at least quarterly? Is a Budget included?
* Does your club have regular Board meetings, minutes, etc.?
* Does your club elect all officers by December each year?
* Is your club’s data up to date in DACdb? All members have photos? Most members have email addresses? All members have phone numbers?
* Does your club have documented operational processes (an operations manual)?

D. Strengths, Weaknesses, Opportunities & Threats (SWOT) Analysis  
***IMPORTANT -- This is the Executive Summary of the club assessment***

See Appendix for more detail and ideas on how to do SWOT Analysis. You may want to convene a 1-2 hour working session with the thought leaders of your club to help with this.

|  |  |
| --- | --- |
| Strengths (internal) - Things we are really good at | Weaknesses (internal) - Things that get in the way of us being the best Rotary club we could be |
| Opportunities (external) - Things in the external environment that we could take advantage of | Threats (external) – Things in the external environment that may be a problem for us |

4. Vision, Strategies & Action Plans **April**

A **vision** is a word picture of the future – a compelling reason for your members to pull together behind the leadership of yourself and your leadership team. A vision that inspires your club and challenges the status quo. Something that steps up the members’ own expectations of themselves as a group.

Vision is important. All people fall somewhere along a continuum from “vision-oriented” to “execution focused” – On the one end are people with ideas, and on the other end are people who want to help. Where are you on that spectrum?

Vision-oriented people want to hear the vision in order to get behind it. As leaders, they need to remember that execution-oriented people need to know not only the vision, but also the steps along the way to achieving the vision, so the organization can follow them.

Execution-focused people need to know the vision – what does the end look like? They also need to know the steps expected. As leaders, they need to remember that vision oriented people need to understand the destination in order to effectively help in its execution. What are your plans for leaving the campground in better shape than when you found it?

A. My Vision -- What will our Rotary Club look like at the end of my year as President? (2-5 sentences describing the future state of the club) Or, “For what accomplishments will my year as President be remembered?”

**See Appendix for a wealth of potential strategies that have worked for other clubs**

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

B. Membership Vision **–** What will our membership look like at the end of my year as President?

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

C. Membership Strategies & Action Plans --

Strategies and Action Plans are the "bottom line" of your plan. The following sections should be expanded to list the full set of strategies \* action plans needed to reach your membership goals.

The 1-Page Membership Plan Template that follows is a framework for you to identify intentional strategies for success in the 4 essential areas of membership success. Sections expand as you build your plan.

You may wish to take advantage of several excellent resources that have proven helpful for other clubs:

* 10 Intentional Membership Strategies that **work**: <https://www.rizones33-34.org/?s=intentional>
* Recipe for a Successful Membership Event: <https://www.rizones33-34.org/?s=recipe>
* Rotary Club Health Check: <https://my.rotary.org/en/document/rotary-club-health-check>

Club Membership Growth Plan(Required Section)

**Goals from Section 2B above (page 2):**

**Current Membership:** \_\_\_\_\_\_\_members  **Average Annual Attrition:** \_\_\_\_\_\_\_ members

**Membership Goal --** Grow by \_\_\_\_\_ members (net), requiring \_\_\_\_ new members (growth + attrition).

Actual attrition data at: [**http://RIZones33-34.org/Zone33MGI**](http://RIZones33-34.org/Zone33MGI) (page down to D-7750 & find your club)

**Our Membership Challenges** -- What are the membership challenges facing our club?

|  |  |  |
| --- | --- | --- |
| * High Attrition rate? | * Low Attraction Rate? | * Maintaining existing growth momentum? |

|  |  |
| --- | --- |
| **Prospect Identification (Lead Generation)** -- What is our plan for prompting members to think of candidates AND for inspiring members to contact them? Intentional strategy(ies) we will use: | |
| Who's responsible/accountable? |  |

|  |  |
| --- | --- |
| **Attracting Members** -- How will we make our club attractive to prospects? How will we tell the Rotary story? Intentional strategy(ies) we will use: | |
| Who's responsible/accountable? |  |

|  |  |
| --- | --- |
| **Onboarding New Members** -- How will we ensure that new members understand Rotary, our  club, expectations and opportunities for service? Intentional strategy(ies) we will use: | |
| Who's responsible/accountable? |  |

|  |  |
| --- | --- |
| **Retaining Members** -- How will we improve our club experience so members want to remain in Rotary? How will we make our service projects more compelling for our members? Intentional strategy(ies) we will use: | |
| Who's responsible/accountable? |  |

D. RI Foundation Vision **–** What will our RI Foundation accomplishments look like at the end of my year as President?

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E. RI Foundation Strategies & Action Plans

**RI Foundation Strategies**

* **\_\_\_\_\_\_\_\_\_**
* **\_\_\_\_\_\_\_\_\_**
* **\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **RI Foundation Strategy** | **Action Plan (description)** | **Person Responsible** | **Start Date** | **Completion Date** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

F. Service Projects Vision **–** What will our service project accomplishments look like at the end of my year as President?

* \_\_\_\_\_\_\_\_\_\_

G. Service Projects Strategies & Action Plans

**Service Projects Strategies --** New projects, changes to existing projects or projects to be terminated:

* **\_\_\_\_\_\_\_\_\_**
* **\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Service Projects Strategy** | **Action Plan (description)** | **Person Responsible** | **Start Date** | **Completion Date** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

H. Club Administration & Sustainability Vision **–** What Club Administration processes need attention? What will our club’s sustainability look like at the end of my year as President? How will I ensure our club’s future, 3-5 years out? 10 years out?

* \_\_\_\_\_\_\_\_\_\_

I. Club Administration & Sustainability Strategies & Action Plans

* **\_\_\_\_\_\_\_\_\_\_\_**
* **\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Admin/Sustainability Strategy** | **Action Plan (description)** | **Person Responsible** | **Start Date** | **Completion Date** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

5. Prepare for Success**- Activities on my schedule March/April/May**

A. President Elect Training Seminar (PETS)**--** Prepare for PETS and adjust my plan

* Participate in PETS **-- REGISTER NOW AT**: <http://carolinaspets.org>

B. Update Planning Guide, based on ideas from PETS

* Create compelling, crystallized Visions for becoming more effective in each of 4 plan areas:
  + Membership
  + Rotary Foundation
  + Service Projects
  + Sustainability
* Meet with Officers, Directors and Key Committee Chairs individually or in small groups
  + Share your Vision and Top 5 Priorities
  + Secure their commitment and help them build strategies and action plans for each of their areas of responsibility

C. Assess Club Culture Change Challenges

* Develop strategies and ideas for leading change in the club. **This is your major leadership development opportunity - learning how to avoid classic mistakes in changing club culture and their successful antidotes. If you have changes in mind, avoid the classic mistakes shown below, and rather use the approach in the "solution" column.**

|  |  |  |
| --- | --- | --- |
|  | **Classic Mistake** | **Solution** |
| 1 | Allowing Too Much **Complacency**  (Rotary’s #1 Enemy) | Establish a Sense of Urgency  (Eliminate "Happy Talk", Create a Crisis) |
| 2 | Failing to Create a Sufficiently Powerful **Guiding Coalition** | Create a Powerful **Guiding Coalition**  (a small group of like-minded thought leaders) |
| 3 | Underestimating the Power of **Vision** (or the vacuum if one is lacking) | Create a Vision  (Characteristics of an effective Vision) |
| 4 | **Undercommunicating the Vision** by a Factor of 10 (or 100 or even 1,000) | Communicate the Vision  (Key Elements of effective communication)  (**S**ituation, **P**roblem, **I**mplication, **N**eed) |
| 5 | Permitting **Obstacles** to Block the New **Vision** (including elder naysayers) | Empower others to act on the Vision  Confront those who undercut the vision |
| 6 | Failing to Create **Short-Term Wins** | Celebrate Short-Term Wins  (Congratulate achievers, build momentum) |

D. Joint Board Meeting – Your handoff between the outgoing and your incoming Board

* + **Officers**
    - President Nominee (your successor)
    - Treasurer
    - Secretary
  + **Other Board Members**
  + **Key Committee Chairs** 
    - Membership
    - Foundation
    - Service Projects
    - Club Administration
    - Club Public Image

Appendix – Ideas for using this guide more effectively

The planning process is one of **creating a vision of a future state different from the past**. Vision is not only about saying “yes” to a few big ideas. It’s also about saying “no” to a hundred other ideas that aren’t part of your vision. It’s also about your legacy to the club.  **Will you turn over a healthy, vibrant and effective club to your successor? What will your club remember about your year as President?**

**Vision Statement**

A good vision statement outlines what the club wants to be, or how it wants the world in which it operates to be (an "idealized" view of the club and the world). It is a long-term view and concentrates on the future. It has two important purposes in a Rotary club:

* Helps the membership understand where you want to go – how you want the club to look in the future
* Inspires your leadership team and the members themselves to get onboard – to expect more of themselves and their club
* Gives the naysayers a reason to embrace (or at least not get in the way of) change

**Objectives (Goals)**

An **Objective** is an end that the organization strives to attain. Objectives include:

* Metrics – Contain some measurable item by which progress can be assessed
* Timeframe – Definition of the time horizon of the Objective (generally similar to the Plan time horizon)
* Descriptive information to be communicated throughout the organization – i.e. “What does success look like?”

Example: Grow membership by 10% per year from (current) to (future) by (year).

There should be no more than 5 big objectives – any organization is limited in how many “big things” it can accomplish.

It’s useful to remember the acronym “**SMART**” when testing objective statements:

* **S**pecific – Clearly stated, in a way that can be understood throughout the organization
* **M**easurable – Include specific metrics to be accomplished
* **A**chievable – Within reach, considering constraints of time, resources, market, etc.
* **R**elevant – Meaningful to the business – would improve overall results if achieved
* **T**ime-based – Specific time frame for achievement is identified

**Intentional Strategies**

Intentional Strategies are those that have a beginning, middle and end that can be expected to directly lead to the desired result. A club president calling members individually and asking each to invite someone to join Rotary is an intentional strategy.

Those are different from "accidental" or "indirect" strategies, such as website updates, social media, podium announcements, etc. Those "indirect" strategies may result in a prospect on occasion, but rarely in sufficient quantities to grow a club.

A **Strategy** is a course of action created to achieve one or more Objectives. Strategies are, almost by definition, not individually measurable. They describe “What we’re going to work on to achieve the Objectives”.

Example: “Create an intentional process for identifying new member prospects, making them aware of Rotary and bringing them into the club”

There should be a sufficient number of strategies beneath each objective to ensure its accomplishment.

Note that Strategies are not ends of themselves – they exist only as a focal point to ensure that the organization is adequately committed to achievement of the Objectives. Strategies require **Action Plans** – commitment of time and resources, and holding people accountable for their execution. Your plans for follow-up are essential to success.

**Action Plans**

**Action Plans** are specific projects or activities in support of Strategies. They include:

* What – A description of the project or activity
* Who – Definition of who’s accountable for getting the Action Plan accomplished. Perhaps also a definition of resources (money, people, assets, etc.) committed by the organization in support of the Action Plan.
* By When – A specific time frame for the completion of the Action Plan. Perhaps also a “Start Date”. It’s important that the organization doesn’t attempt to accomplish the whole plan in, say, 90 days. That’s an overwhelming list of “to-do’s” that paralyzes both leaders and followers.
* Follow-up - Who is responsible for ensuring the plan is on-track and completed?

Example: Create a “source list” of new member prospects – where will we look to find new member prospects? John will accomplish by mm/yyyyy  
  
**NOTE** that action plans can be started, or even accomplished **before** you take office on July 1. You’ll be more successful if your team doesn’t wait until July to begin planning and executing.

**Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis**

This is an important introspective look at your club. You might host a meeting of your Board or key thought leaders of your club to work on this for an hour or two. Look for 3 to 6 items in each category. Ask yourself questions like:

* **What does our club have to "sell" to prospective (or current) members****? Attract**
* **Why would someone want to join (or stay in) our club? Engage**
* **What would get in the way of someone joining (or staying in) our club? Retain**
* **Strengths** – What are we really good at? What makes us a great club? **Examples:**
  + Growing membership
  + Good RI Foundation participation
  + Outstanding programs
  + Strong membership – key leaders of our community represented
  + Sustainability – depth of leadership identified for 2, 3 or 4 years looking forward
  + Compelling projects that capture the members' interests
* **Weaknesses** – What do we need to fix?  **Examples:**
  + Flat to declining membership
  + Aging membership
  + Disengaged membership – a lunch club only
  + Lack of membership diversity – age, gender, ethnic, business types
  + Weak Foundation participation (<$100 per capita historically)
  + Boring meetings
  + Tired projects – same things we’ve been doing forever
  + Misfit Projects that don’t fit the 6 Focus Areas of RI Strategic Plan
  + Leadership deficiencies – Officers, Board, no President line of succession
* Opportunities – (External environment) – What outside forces can we take advantage of?
  + Growing business community – new businesses in town
* Threats -- \*External environment) – What outside forces must we be concerned about?
  + Competition for volunteers by other organizations

**Managing Change**

Your club may be many decades old, and you may have members far more senior than yourself, either in age or in Rotary membership or both. Phrases such as “This is the way we’ve always done it” and “We tried that once – it doesn’t work” have stopped many would-be change agents in their tracks.

Be ready for the naysayers – they’re always with us and they mean well. Trouble is, they sometimes get in the way of really good ideas and initiatives.

If you have a change management challenge, read ***Leading Change*** by John Kotter.

Kotter offers 8 reasons change efforts fail, along with an 8-stage process to effect changes in an organization:

1. Establishing a sense of urgency
2. Creating the guiding coalition
3. Developing a Vision and Strategy
4. Communicating the change Vision
5. Empowering a broad base of people to take action
6. Generating short-term wins
7. Consolidating gains and producing even more change
8. Institutionalizing new approaches in the culture

**Idea Toolbox** – Here are some Strategies and Action Plans your club might consider using to improve in various areas of service, and questions you might ask during your club assessment process. Some of these qualify as Strategies and many are Action Plans that fit into one or more of your Strategies

**Membership**

* Review membership requirements/categories in Rotary Citation
* Review membership requirements/categories in D-7750 Governor’s Award
* Membership Minute at each club meeting – remind members to share the gift of Rotary with others – create a culture of membership growth
* New Member Orientation – Implement, or assess and update current practice
* Continuing Rotary education of current members - Implement, or assess and update current practice
* Why is our club attractive to new members?
* What’s getting in the way of us attracting more new members?
* What are you doing to retain your current members?
* Potential membership development & retention strategies
  + Review club meeting flow and programs to make sure they’re interesting and relevant to both members and prospective members
  + Host a Club Open House or a Rotary information session for prospects, outside the regular club meeting
  + Organize a special outreach/information event focused on a specific prospect audience
    - Under 40
    - Retired
    - Ethnic minority
    - Women
  + Club Assembly focused on brainstorming names of prospective members – everyone in the club brings their address books/contact lists
  + Exit interviews of departing members (perhaps by someone outside the club) to determine the real reasons members leave
  + Appoint a membership chair experienced in lead generation and prospecting – someone with selling experience
  + Create a new (or enhance an existing) Family of Rotary fellowship activity, perhaps in cooperation with another club
  + Encourage members to join a Rotary Fellowship or Rotarian Action Group
* Create an active Public Image campaign within the club’s local media market

**Rotary Foundation** -- Here are some ideas your club might use to inspire increased giving to The Rotary Foundation

* Rotary Foundation minute at each club meeting – Remind members of the work of the Rotary Foundation, both globally and in the community/District
* PHF Matching Points program to encourage members to step up to the next PHF level
* Become a 100% PHF Sustaining Member club ($100/member/year)
* Special Polio Plus fundraiser
* Plan a Rotary Foundation program 2x or 4x per year
* Promote member participation in “outside the club” Rotary Events, and budget to subsidize members who do so
  + District Assemblies
  + District Foundation Seminar
  + District (All Club) Conference
  + International Convention
* Regularly recognize Foundation contributions – new PHFs, etc. Make the awards ceremony an opportunity to communicate about the Foundation to members
* Participate in Foundation programs
  + Vocational exchanges
  + Scholarships
  + District Grants
  + Global Grants

**Service Projects** – Here are some ideas your club might use to create new service projects or to upgrade/refresh existing projects

* Review service project requirements/categories in Rotary Citation
* Review service project requirements/categories in D-7750 Governor’s Award
* Convene a Club Assembly to brainstorm service project ideas or assess current service projects
* Youth Exchange
* Interact Club(s)
* Rotaract Club(s)
* RYLA
* Early Act First Knight
* Literacy/Numeracy
  + Read to Me
  + Dictionaries
  + Money Smart
* Support local events (Christmas parade, other holiday celebrations and festivals)
* Partnership with other organizations
  + Salvation Army
  + Toys for Tots
  + Meals on Wheels
  + Josh the Otter
  + Volunteer tutors for local Literacy organization(s)
* International Service Projects
  + Sawyer Water
  + Shelter Box
  + Haiti (D-7750) agriculture and education
* Community needs assessment
* Project management training of service projects committee
* Create/upgrade fundraising projects to expand the club’s service project capacity
* Awards to members for outstanding service leadership and accomplishments
* District Grants or Global Grants to create additional service project funding
* Partner with one or more nearby clubs to expand service project scope, funding and available volunteers
* Publicize the Club’s projects on Rotary Project Showcase ([www.rotary.org](http://www.rotary.org)) and link the club’s website or social media pages to the club’s showcase projects

**Sustainability** – Here are some ideas you may consider for developing future leadership to ensure the sustainability of your club:

* Encourage members to participate in Rotary Leadership Institute (RLI) and budget to cover their fees to participate
* Send both President-Elect (required) and President-Nominee to President-Elect Training Seminar (PETS)
* Actively promote participation in Leadership Skill Development training offered by Rotary or third party sources
* Focus on leadership potential when selecting or attracting new members
* Encourage/recognize members’ participation in District events, committees and leadership
* Encourage all club officers and key committee chairs to participate in:
  + District Assemblies
  + District Foundation Seminar
  + District (All Club) Conference
  + International Convention

**Club Administration** – Some best practices of Club Administration you may wish to consider or review:

* Schedule regular Board meetings, including Membership, Foundation and Financial reports by responsible chairs
* Review the Club Leadership Plan Worksheet [my.rotary.org/en/document/be-vibrant-club-club-leadership-plan-worksheet](https://my.rotary.org/en/document/be-vibrant-club-club-leadership-plan-worksheet)
* Annual review of club’s Financial Statements, policies and practices by an independent CPA outside the club
* Use DACdb Attendance Module for attendance record keeping
* Use DACdb PMail (personalized email) for communications with members, including an electronic club newsletter or bulletin
* If you don’t have a website, secure a club URL ([www.godaddy.com/domains/domain-name-search](https://www.godaddy.com/domains/domain-name-search)) and forward it to a social media page (Facebook or LinkedIn)
* Schedule club elections by or before December
  + President-Elect (upcoming year)
  + President-Nominee (following year)
  + Secretary-Elect (upcoming year)
  + Treasurer-Elect (upcoming year)
* Update membership in DACdb at least monthly