

CHAPTER 1

PLANNING YOUR YEAR



What are your goals for your year as club president? How will you connect with leaders in your community, club, and district to make positive, lasting change?

As president, you're in a unique position to strengthen relationships, discover and celebrate your club's diverse perspectives, and apply your members' professional expertise and experience to improve communities at home and around the world.

Rotary's [guiding principles](#) give members a common purpose and direction, serving as a foundation for our relationships with one another and for the action we take in the world.

In 2017, Rotary adopted a new vision statement to guide the organization into the future: "Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves." Consider how your club can further this vision as you set goals for your year as president.

Work with your club's leadership team to set goals for your year as club president and after. Rely on the [Strategic Planning Guide](#) for developing goals and action plans.

GOAL-SETTING RESPONSIBILITIES

AS PRESIDENT-ELECT	AS PRESIDENT
Develop and evaluate your club's strategic plan to make sure it's current and relevant	Implement action plans and regularly evaluate your club's progress toward its goals
Set annual goals in Rotary Club Central that build toward your club's long-range goals	Inspire every club member to participate in club activities
Create an action plan for each goal	Celebrate accomplishments
Attend training events to develop goals with your leadership team	

STRATEGIC PLANNING

Your club's strategic plan is a long-term commitment requiring the support of all your members. Rotary International encourages clubs and districts to align their goals with [Rotary's strategic plan](#).

Clubs that follow a strategic plan report higher levels of member engagement, retention, and satisfaction. Clubs with more engaged members are more successful at achieving their goals. Use the [Strategic Planning Guide](#) to develop or refine a collaborative strategic plan that works for your club.

SETTING ANNUAL GOALS

You can use your club's strategic goals to help set annual goals. Start by meeting with your assistant governor before your presidents-elect training seminar to examine past club trends and current practices. You can find a five-year history of your club's performance on [Rotary Club Central](#). Your club leadership team will carry out the club's plans, so be sure to involve the team in goal development too.

To determine which goals to set, survey members to find out what they like about the club and what they would like to change. Find a sample membership questionnaire in [Membership Assessment Tools](#). Review the results with your club leadership team to determine a course of action.

For best results, set goals that are specific, measurable, attainable, realistic, and time-specific. "Increase membership by 10 percent by the end of the year" is a more effective goal than "Add new members."

Set and track your annual goals for membership, service, and Rotary Foundation giving in Rotary Club Central. (The Rotary Club Central Resources course in the [Learning Center](#) can help you with this.) You can assess your progress using Rotary Club Central's trend graphs and reports. Review your goals often to determine whether you need to make adjustments.

The following club officers can set and edit goals in Rotary Club Central for the year of their term, starting the year before they take office and ending the year after:

- President
- Secretary
- Treasurer
- Foundation chair
- Membership chair
- Executive secretary

Although only designated club leaders can revise goals in Rotary Club Central, all members can view and track club achievements on My Rotary.

After you've defined your goals, continue to work with your club leadership team to plan how you'll achieve them. Involve all members in implementing your club's action plans.

ROTARY CITATION

The [Rotary Citation](#) goals have helped many clubs strengthen their operations and engage their members. Most of the goals are consistent from year to year, although the Rotary president often includes some additional goals designed to focus club activities around the presidential theme. Clubs have the entire year, from 1 July to 30 June, to achieve the goals. Club officers can use their club management system, as well as a variety of Rotary applications such as [Rotary Club Central](#), [Rotary Ideas](#), and [Rotary Showcase](#), to record and track progress toward the citation.

EVALUATING GOALS

As you monitor progress toward your club's goals, talk with members to identify strategies that have been effective. Then apply these insights and share them with the club president-elect and president-nominee.

Review long-term and annual goals with your assistant governor and district governor when they visit your club.

DISCUSSION QUESTIONS

How does your club reflect Rotary's vision statement?

Which part of your club's strategic plan has the biggest impact on your club?

How will you involve your members in setting goals?

NOTES on Planning Your Year



