

## 2015-2016 Strategic Planning Worksheet

**Complete this worksheet with your board of directors and/or with your members to create your strategic plan.**

1. Develop a mission statement for your club. (What you plan to do in broad terms.)
2. Develop a vision statement for your club. (What you hope will happen long-term because of your mission.)
3. SWOT Analysis: A SWOT analysis is a listing of strengths, weaknesses, opportunities and threats. The outcomes should be integrated into the strategy development and action planning to achieve strategic goals.

Where is your club now? (Do not be limited by the space given.)

Club strengths	Club weaknesses
Opportunities (for club your club)	Challenges (facing your club)

4. What does the SWOT tell you about your club? How can you incorporate this data in your club plan?
5. What does your club's organization chart look like? Does it include the following positions AND does each job title/position have written duties and responsibilities?  
*(See Bylaws: Articles II & V, Constitution: VI and VIII for reference)*
  - A. Sponsoring Club, B. Rotarian Advisor, C. Faculty Advisor, D. President, E. Immediate Past President, F. President-Elect, G. Vice President, H. Secretary, I. Treasurer, J. Chair-Club Service, K. Chair- Community Service, L. Chair- International service, M. Chair-Professional Development, N. Chair-Finance
  - (Other sample board members: Sargeant-At-Arms)
6. Develop the budget for the year.  
*(See Bylaws: Article IV and Constitution Articles-VIII, #4 & IX for reference)*

NOTE: Who handles the money in our club and how is the money handled? This varies from college to college. There are specific financial requirements with Community-based Rotaract clubs as per RI.

  - A. Project Income (examples: dues, fundraising, donations)
  - B. Project Expenses (examples: tee shirts, speaker gifts, printing, training, like PETS)
7. Club Activities: What is your club's plan for meetings, activities, and service projects?  
*(See Bylaws: Article III, Constitution: Articles II & V, & VIII, also see Rotaract Presidential Citation for reference, Zone Award)*

A. General meeting day/time/place

B. Board meeting day/time/place

C. Activities:

- Community service
- International understanding
- Professional Development
- Speakers at meetings

8. Develop membership goals. Set goals for the year for new members and the retention of current members.  
(See Constitution Article IV and Presidential Citation for reference)

Do you have a membership pre-orientation/fire-side chat before a member is inducted as a member?

Does your club have a commitment form that new members sign? (re: attendance requirements, dues, etc.)

Do you have an induction ceremony?

9. Are you Governance Documents in place? Does every member have a copy?

A. Constitution, B. Bylaws, C. Statement of Policy, D. Policies and Procedures (for board members)

NOTE: Bylaw addition: President-Elect voted on by December 31<sup>st</sup> of any Rotary year.

10. Create a yearly calendar by July 1<sup>st</sup> to include:

A. general meetings, B. board meetings, C. events in your sponsoring Rotary Club, D. your Rotary District's Conferences, Assemblies and Training Seminars, PETS, E. Rotary's designated days/months/themes (New Generation's Month, World Rotaract Week, etc.)

Resources:

- [www.rotary.org](http://www.rotary.org)
- Rotaract Presidential Citation
- [www.rotary6970.org](http://www.rotary6970.org)
- [newgenerations@rotary.org](mailto:newgenerations@rotary.org) "Young Leaders in Action"
- [Rotaract Brochure 663en.pdf](#)
- [Rotaract Club Constitution Bylaws 661en.pdf](#)
- [Rotaract District Leaders Guide 208en.pdf](#)
- [Rotaract Handbook 562en.pdf](#)
- [Rotaract Presentation.ppt](#)
- [Rotaract Statement of Policy 660en.pdf](#)
- [rotaract club contribution form en.pdf](#)

Kelly Sastre, District Rotaract Chair     [Kelly@kasconsultingservices.com](mailto:Kelly@kasconsultingservices.com)