

DISTRICT PLANNING GUIDE

April 2013

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. To complete this form, refer to Rotary Club Central. 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 rotary.org.

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: _____

Grant Management seminar: _____

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 rotary.org? YES NO

How is the governor's monthly communication distributed? Mail Email Website Video

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 image 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 attract younger members: _____

Number of clubs with 25 or fewer members: _____

Describe the district's strategy for incorporating innovative and flexible ideas for attracting and keeping members 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

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 in Rotary Club Central.)

Permanent Fund:

Number of Benefactors last year: _____

Number of Bequest Society members last year: _____

Number of Major Donors last year: _____

Future State

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 in Rotary Club Central.)

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. _____

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 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

