

# Goal Setting



As club president-elect, you will lead the club in establishing annual goals to achieve your club's strategic plan. To begin setting goals, you must assess the strengths and weaknesses of your club and determine how your club can improve what it does well and address areas of concern. Encourage broad club participation in the goal-setting process.

## Responsibilities

As president-elect, you have the following goal-setting responsibilities:

- Understanding the characteristics of an effective goal
- Developing or assessing your club's long-range goals in support of your vision or strategic plan
- Establishing annual goals that are in harmony with your club's long-range goals
- Ensuring an action plan has been developed for each goal

As president, you have the following responsibilities:

- Implementing and continually evaluating your club's goals
- Motivating club members to accomplish the goals



### Rotary Reminder

Learn about the RI Strategic Plan and the Foundation's Future Vision Plan at [www.rotary.org](http://www.rotary.org).

## Strategic Planning

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To ensure an effective year as club president, you must set goals that reflect your club's vision and strategic plan. A strategic plan, intended to last three to five years, helps guide the club toward its vision and achieving the Object of Rotary. Once you have evaluated the state of your club, you can begin to outline goals that address its weaknesses and enhance its strengths in areas that support your club's strategic plan.

If your club does not have a strategic plan, the club leadership team (including the current president, president-nominee, and immediate past president) should consider developing one (see worksheet 21: *Strategic Planning Guide*). Strategic planning

- Gives all club members the opportunity to be involved in planning the future of the club
- Ensures consistency and continuity among those who carry out the goals
- Focuses on significant issues and challenges facing the club
- Promotes team work and commitment to strategic issues

Once your club decides to begin the strategic planning process, your club should come up with a vision and ensure the annual goals support this vision.

Effective goals are

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available.
- **Time specific.** A goal should have a deadline or timeline.

Consider these club activities when setting goals:

- Membership
- Service projects
- The Rotary Foundation (participation and contributions)
- Public relations
- Club administration

A club retreat or assembly is an opportunity for members to collaborate and develop a vision for the future of your club. Work with your fellow club leaders to draft long-range goals that will achieve the vision and to determine which committee should address each goal. Consider the steps needed to achieve those goals, including annual goals.

## Annual Goals

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The *Planning Guide for Effective Rotary Clubs* (appendix I) is a goal-setting tool that will help you work with your club leadership team to establish goals for the year. The guide helps you to assess your club's current state and also provides strategies that you may choose to achieve club goals.

You'll work on the planning guide during the presidents-elect training seminar and at the district assembly with your fellow club leaders. A completed copy of the *Planning Guide for Effective Rotary Clubs* should be submitted to your district governor by 1 July.

### Developing an Action Plan

Establishing goals is the first step toward ensuring a successful year. The next step is developing an action plan to achieve them. As president, you will delegate much of the responsibility for implementing club goals to your committee chairs and members. Your role is to ensure that an action plan has been created for all goals and to monitor progress toward them. An action plan can be developed by

- Establishing a timeline
- Outlining the specific steps needed to achieve the goal
- Considering the resources and tools available to support the goal
- Determining who is responsible for implementing each step
- Identifying the criteria for measuring your club's progress
- Monitoring the progress toward the goal
- Evaluating the success of previous goals and current action plans, making modifications as necessary

### Evaluation

Once goals have been achieved, work with those who implemented them to determine which strategies worked and which did not. Apply new insights to other goals, and share them with the president-elect and president-nominee, as applicable, as they begin to develop goals.

Use the planning guide throughout your year in office to help measure club progress toward established goals or to try a new strategy. It's a working document, one that can be updated as needed. Review the planning guide with your assistant governor and district governor during club visits throughout the year.

## Resources

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Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help you set goals for a successful year:



***Planning Guide for Effective Rotary Clubs*** (appendix I) — A club assessment and goal-setting tool that club leaders use to record goals in the areas of membership, service projects, The Rotary Foundation, public relations, leadership development, and club administration.

### **Human Resources**

- Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Rotary Foundation staff.

### **Informational Resources**

- *Presidential Citation Brochure* (900A-EN) — Leaflet that outlines the Presidential Citation Program for the current Rotary year.
- *Strategic Planning Guide* (Web only) — A tool to help clubs create a strategic plan; includes worksheets and information to help clubs set goals and develop a plan to implement them.

### **Discussion Questions**

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Consider these questions in preparation for your presidents-elect training seminar.

If your club currently has a strategic plan, how will you build on the one you have?

If your club does not have a strategic plan, how will you gain your club's support in developing one?

What is your vision for your club?

Which goals from the current year will you carry into your year as president?

How will you ensure your club goals are achieved?