

**Planning to Plan  
Rotary Club Strategic Planning Worksheet**

<b>Activity</b>	<b>Responsibility</b>	<b>Date to be completed</b>
Gather resources (any Club strategic plan, District strategic plan, RI strategic plan)		
Board buy-in (authorizing the planning process, appointment of chair and committee)		
Who else needs to be on board (past and future leadership, others)?		
Develop planning calendar & communications strategies		
Visioning exercises (Board, Club Assembly, Committee leadership, others) held together or separately		

Guiding principles		
Vision Statement		
Mission Statement		
Goal Statements		

Objectives, strategies, responsibility, timeframe, benchmarks, budget estimates		
S.W.O.T. Analysis		
Share and solicit feedback		
Communications opportunities with Board and Club		
Finalize plan		

Review committee structure based on the plan.		
Use plan as a guide for annual tactical plans		
Establish schedule for review of progress and plan revisions as well as communicating results		

**Other Questions:**

1. Is there a club member who has strategic planning experience who would be willing to chair the process?
2. Do we need an outside facilitator? For the whole process?  
For part of the process?
3. Are there opportunities to engage committee leadership and other club members in the planning?
4. Is there a time in the year that is better than others for going through the planning process?
5. Is it possible to complete the strategic plan so that it is available to the President Elect by Feb.?
6. Who are our future leaders (next 3 to 5 years)?