# DISTRICT PLANNING GUIDE

Plan for success by thinking about what your district does well and what your goals and priorities are. As governor-elect, assess the current state of your district with your leadership team by completing the health check below. The more boxes you mark, the healthier your district.

## Part 1: District health check

### Our goals

* We have a strategic plan.
* Our strategic plan is aligned with Rotary’s Action Plan.
* District leaders review the strategic plan each year and adjust it as necessary.
* Most clubs have a strategic plan.
* Most clubs set goals in Rotary Club Central.

### Assistant governors

* They visit clubs regularly to discuss club activities, opportunities within Rotary, and resources such as handbooks and Learning Center courses that help clubs thrive.
* They help clubs achieve their goals and coach them on how to offer people an engaging experience.
* They keep the governor informed on the progress clubs make toward their goals.

### Committees

* Members work with the governor, governor-elect, and governor-nominee to set strategies to achieve the district’s goals.
* Committees support the activities of most of our clubs.
* A succession plan is in place and committee members share their knowledge.

### Learning events

* More than 85% of assistant governors and district committee chairs attend the district team learning seminar.
* Attendance at district conferences regularly exceeds 15% of our district’s membership.
* More than 85% of presidents-elect attend PETS. Presidents-elect who cannot attend PETS receive appropriate alternate learning opportunities.
* More than 85% of club leaders attend the district training assembly.
* Our district organizes inclusive events that are attractive to club leaders.

### Engagement

* We promote participation in Rotary Fellowships and Rotary Action Groups.
* We regularly offer inclusive professional development opportunities to members.
* We offer districtwide orientation sessions for new members.
* We offer districtwide social or networking opportunities.
* We cultivate emerging leaders from diverse backgrounds in all clubs, including those that meet online.

### Membership

* We’ve had a net increase in membership in the past year.
* Our district formed at least two new clubs in the past year.
* Clubs are making diversity and inclusion a priority.
* Most clubs have a club membership committee.
* Clubs assess the club experience they offer and make changes in response to feedback.

### Service and grants

* Most of our clubs participate in district grants.
* Our district has partnered on a global grant in the past year.
* We provide grant management seminars for required grant training.
* We give clubs a report about all our grant activity to be candid about how funds are used.
* We are certified to participate in the Rotary Youth Exchange program.
* Our district offers a RYLA program to young leaders in our community.
* We jointly plan at least two events a year with Interact clubs in the district.

### Rotary Foundation giving

* Our district’s per capita giving meets or exceeds US$100 per member.
* More than 90% of our clubs contribute to The Rotary Foundation.
* At least 60% of our clubs contribute to PolioPlus.
* We use DDF to support polio eradication efforts.
* We thank and recognize donors in timely ways that align with their preferences.

### Communication and public image

* We use a plan for how the district team communicates with clubs and with each other.
* Our website and social media sites are updated regularly.
* All our clubs adhere to Rotary’s brand guidelines.
* We encourage clubs to collaborate with new organizations.
* We host World Polio Day and World Immunization Week events annually.

### Finance

* Rotary and Rotaract clubs are in good financial standing and their dues have been paid.
* Rotary and Rotaract clubs update their membership lists at least twice a year and officer names are current in My Rotary.
* We work together to review and present the Annual Statement and Report of District Finances to the clubs.

After you complete the list above, it’s time to think about the results and plan which items your district will work on. Use the questions below to set or refine your short- and long-term goals (aligned with your district’s strategic plan).

## Part 2: Plan what’s next

What does our district do well?

In what ways could our district improve?

What priorities do we want to focus on?

What goals do we want to set?

What do we need to do to implement these goals?

How will we measure our progress toward these goals?

What do we consider success to be?