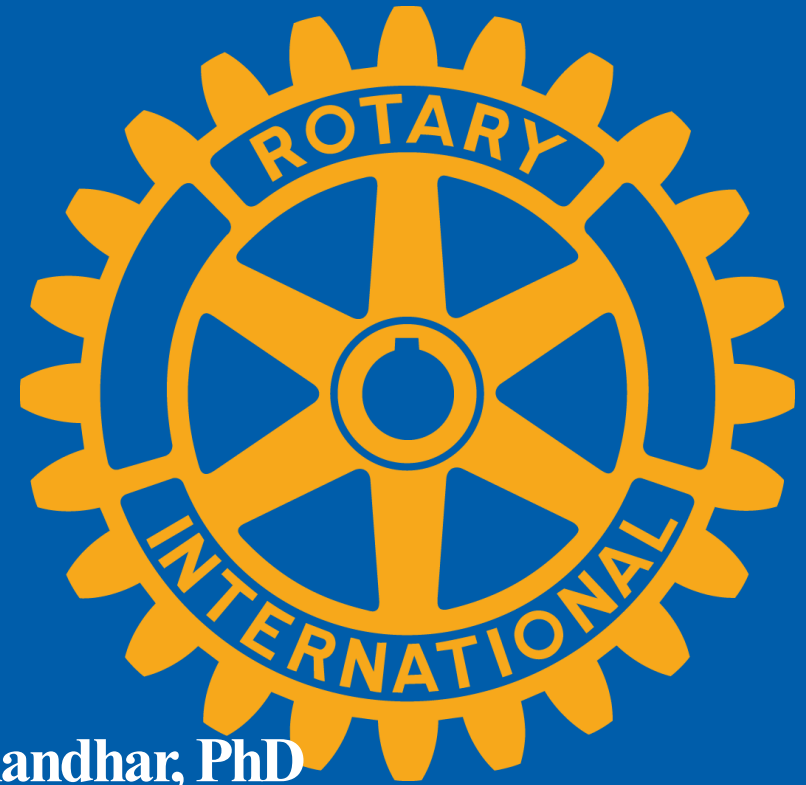


**President Elect
Learning Seminar
May 1-2, 2026
Bhairahawa**

**Session on:
Planning Your Year/Goal Setting
2026/27**

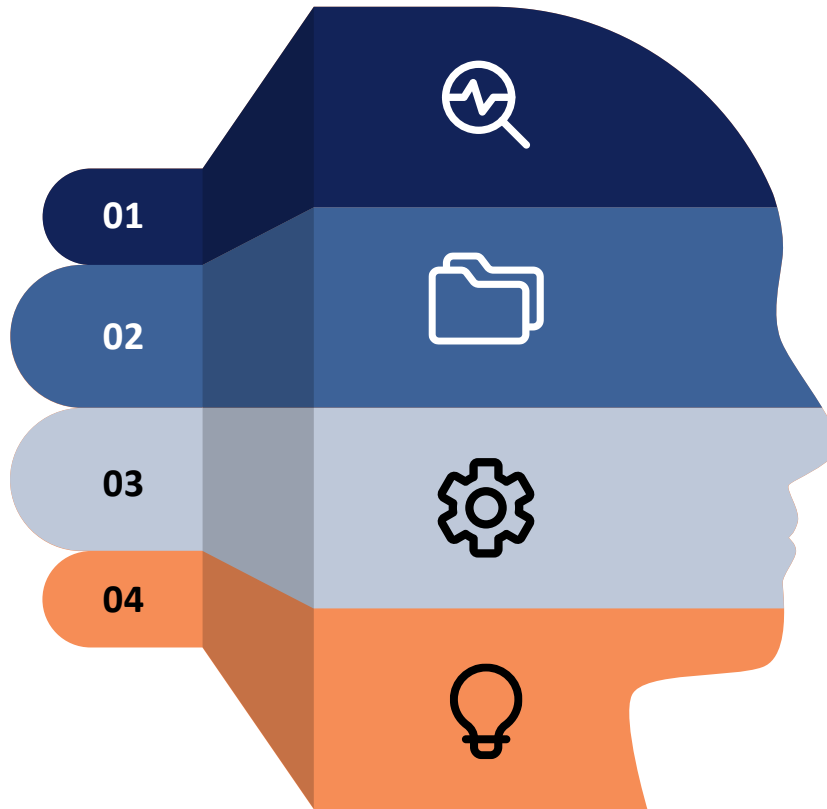


**Compiled by:
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District Secretary, 2023-24
RI District 3292 Nepal Bhutan**





Content of Presentation



Learning Objectives

My Rotary:

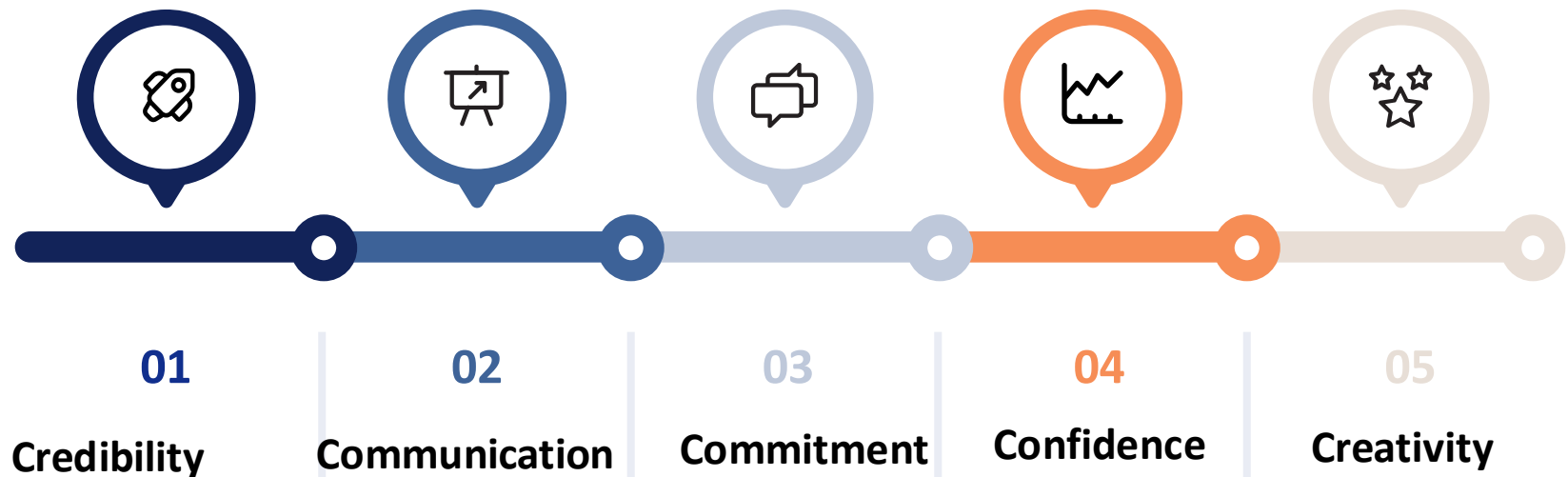
- Learning Center
- Rotary Club Central

Strategic Planning

Action Plan

Vision and Leadership

The 5 C's of Leadership



The five C's encompass the key traits that are considered the bedrock of effective leadership

Learning Objectives

After this session, participants should be able to:

- ❖ Identify their club's strengths and weaknesses
- ❖ Set goals that use the club's strengths and address the weaknesses **(and support District/RI Goals and Citation)**

Note: All of you have to get ready for the planning of your year and **you have to plan now**

Rotary's Learning Center

- ❖ The best thing to plan for Your Year is to take **courses** in Rotary Learning Center.
- ❖ For Presidents there is one **Learning Plan** which comprises of 11 short courses. **15/20 Minutes** each
- ❖ **Enter:** <https://learn.rotary.org/learn/catalog> and register to go directly to the Learning Center
- ❖ Take only one course to start with: **Get Ready Club President**. The course will greatly help to plan for your year

Rotary's Learning Center

- ❖ Download **certificate** and share with your AG
- ❖ Take additional courses if you wish at your leisure and complete your **Learning Plan**
- ❖ **Encourage** your Committee Chairs, Secretary and Treasurer to take at least one courses each such as: Get ready CA Committee and so on and suggest them to share their **certificates**.
- ❖ Let them complete their **Learning Plan** at their leisure time.



Reference for Planning Your Year

- ❖ Get Ready Club President (Manual) ++
- ❖ District Goals
- ❖ 26/27 Rotary Citation
- ❖ Strategic Plan of Your Club (**existing**)
- ❖ **Current** Action Plan or Work Plan
- ❖ Relevant **Resources**

Reference for Planning Your Year

Review your current year activities in terms of:

- ❖ What need to be **continued as it is**
- ❖ What need to be **continued** with **modification**
- ❖ What need to be **dropped** because of completion or no relevancy
- ❖ What new activities to be **added** (with reference to District Goals and Presidential Citation as reference)

Your Club's Health Check



CLUB HEALTH CHECK



Rotary Club Central

- ❖ Enter your goals in Rotary Club Central and **review** them regularly throughout your term, making **adjustments** as needed.
- ❖ Your club goals should **align** with the **Strategic priorities** (four) of RI and **goals** of your District.
- ❖ Review the status of your goals with members at club assemblies.
- ❖ Work with your **Assistant Governor**

District Goals Related to Clubs

General:

- ❖ Promote RI Presidents Message 2026/27 “CREATE LASTING IMPACT” and “CITATIONS”
- ❖ Clubs set their goals and achievements in “Rotary Club Central”
- ❖ Clubs to Prepare Strategic Plan (Road map for own club)
- ❖ Participate in all the capacity building program of district focused to clubs

Planning 26/27 Citation Goals

- ❖ **Beginning** in 2026-27, Rotary club leaders can go into Rotary Club Central and select at least **13 out of 25 goals** they wish to apply toward citation achievement.
- ❖ Once you are in Rotary Club Central, **navigate** to the Goal Center, select the year, and click on the All tab to see the goals.

Planning 26/27 Citation Goals

- ❖ **25 Goals** has been set by RI related to all the five standing committees
- ❖ Clubs will receive Citation Goals if **at least 13 goals** are achieved
- ❖ The charm of it is that clubs can set the goals (**relevant and achievable**)
- ❖ **Upload** in Rotary Club Central and report achievements

Four Strategic Priorities of RI

Increase
our impact.

Expand
our reach.

Enhance
participant
engagement.

Increase our
ability to adapt.



ROTARY'S ACTION PLAN

INCREASE OUR IMPACT



DEVELOP A STRATEGY for educating members about the importance of impactful service projects. Research shows that measurable, data-driven results offer proof of the impactful service that is attractive to the next generation of leaders.

CONDUCT A COMMUNITY ASSESSMENT to determine which issues are top concerns in the area. Learn about needs and strengths and identify the key decision-makers. Try conducting evaluations both before and after you implement projects to get a better sense of where and how you can create measurable, lasting change that truly helps the communities you serve.

FOCUS YOUR EFFORTS. Review your club's activities and determine which ones can be streamlined or eliminated so your club can spend more time on activities that make a real impact.

ENCOURAGE YOUR CLUB OR DISTRICT TO CELEBRATE THE LONG-TERM SUCCESSES of service and program offerings, but to be open to new projects or opportunities to prove that your club or district's impact has only begun. Apply for a global or district grant to fund a project that will have sustainable, measurable outcomes.

EXPAND OUR REACH



SET A GOAL to collaborate with new groups in your community, either through service projects or social events, to introduce more people to Rotary. As our vision statement says, we want to unite people — not just Rotarians — to create lasting change.

USE ROTARY'S MEMBERSHIP TOOLS and resources to assess your club and learn how to make it more diverse, open, and attractive to everyone in your community.

Districts should **CONSIDER FORMING NEW CLUBS.** Take advantage of our flexible club models to create clubs that are welcoming to people with diverse interests, backgrounds, and needs. As always, these new clubs should embrace our core values and deliver value to members.

BE SURE TO TELL COMPELLING STORIES about how your club or district is making a difference. Use the People of Action materials and other resources in the Brand Center to learn how to show your club or district's impact through the media, on social media, and in the community. Strengthening your public image can help you attract like-minded people to your club, form new partnerships for service, and build a stronger and more diverse network of collaborators.

Rotary



CREATE
LASTING
IMPACT

District 3292

Your Club's Strategic Plan

Steps to prepare your club's Strategic Plan:

- ❖ Analyze your clubs current strengths and weaknesses in the (a) Club Administration (b) Membership (c) Service projects (d) Rotary Foundation and (e) Public Relation
- ❖ Identify **external opportunities** to improve on the strengths or address the weaknesses?
- ❖ Identify **external challenges** that may hinder

Strategic Plan

5 Ws



01 What is it?



02 Why strategic plan?



03 Who to be involved?



04 How to frame it?



05 When to prepare it?



Strengths, Weaknesses, Opportunities & Challenges (SWOC) Analysis

Club's Current Status

	Helpful to achieving the objective	Harmful to achieving the objective
Internal origin attributes of the organization	S	W
External origin attributes of the organization	O	C



Your Club's Strategic Plan

Steps to prepare your Strategy Plan:

- ❖ Write down the **future scenario** (say after 3 years) if the strengths are utilized, weaknesses minimized, opportunities cashed challenges faced
- ❖ **Set 3 years goals** for all **5 standing committees** to realize the future scenario and corresponding **annual goals**. (SMART)
- ❖ **Prepare** Action Plan or Annual Plan whatever we call it



Action Plan (Committee Wise)

S.No	Annual Goals	Major Actions	Time Schedule	Responsible Main/Support	Remarks/ How will progress be measured?
1	Goal One	1.1 1.2 1.3			
2	Goal Two				
3	Goal Three				
4	Goal Four				



Goal Examples

- ❖ Bring 12 National and International **speakers** in RWM
- ❖ Increase **3 members** (gender balance and diverse with new classifications)
- ❖ Apply at least one District Grant and one Global Grant
- ❖ Host one TRF event and contribute --- \$ to TRF
- ❖ Establish partnership with at least one print and one electronic media
- ❖ Target for getting Rotary Citation from RI President

Goal (SWOC)

S.No	Annual Goals	Strength	Weakness	Opportunity	Challenge
1	Goal 1: <i>Our club will use its strength in community service to acquire three new members this year</i>	<i>Membership committee members are very active in the community</i>	<i>Our club members don't engage community service visitors before and after attending an event</i>	<i>Change the mindset of members to engage actively with potential members</i>	<i>Without this change, the club will not appeal to energetic new members.</i>
2	Goal 2:				

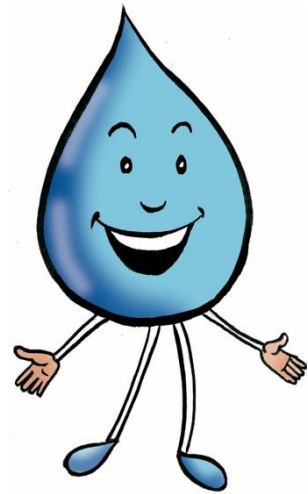
Action Plan Worksheet (For Goal 1)

S.No	Action Step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1					
2					
3					



Resources

- ❖ [Lead Your Club: President](#): Ch: Planning Your Year
- ❖ [Be a Vibrant Club: Your Club Leadership Plan](#) and [worksheet](#)
- ❖ [Rotary Club Health Check](#)
- ❖ [Rotary Citation page](#) on My Rotary
- ❖ [Rotary Club Central](#)
- ❖ [Learning Center and Learning Topics](#)
- ❖ [Your Assistant Governor and District Committee Chairs](#)
- ❖ [Websites, GML, Rotary news etc.](#)



Thank you

Congratulations and Best Wishes for the Year 2026-27

Jai Rotary !!!