



**WELCOME!**

# **Assistant Governors Action Planning**

Jenny Bates, Ignacio  
Pam Moulton, Windsor

# OBJECTIVES

---

## Action Planning

- Understand Rotary's Action Plan
- Develop Your Action Plan
- Prepare to facilitate Action Planning

# MENTORING AND COACHING



You are an Assistant Governor for a long-standing Rotary Club. It comes to your attention by one of the members that the President of the club has been making offensive jokes from the podium that are sexual in connotation. While most members laugh off the jokes, this particular member is very offended and wants to report the concern to the District. They have not talked to anyone in the club nor the Board as they didn't feel safe to address the situation. The member is considering leaving the club but instead decided to enlist the District for support.

## Questions:

- What are the issues and concerns here?
- How would you approach this as an AG? What communication strategies would you use?

# The ROTARY ACTION PLAN





We are People of Action



# INCREASE OUR IMPACT

---

- Eradicate polio & leverage the legacy**
- Focus our programs & services**
- Improve our ability to measure impact**
- Celebrate the successes!**



# EXPAND OUR REACH

---

- ❑ **Grow & diversify membership**
- ❑ **Increase club flexibility**
- ❑ **Create new ways for participants to experience Rotary**
- ❑ **Tell compelling stories to build understanding**



# ENHANCE PARTICIPANT ENGAGEMENT

---

- Better engage members & support connections**
- Improve support of individual participants**
- Provide opportunities for learning & leadership development**





# INCREASE OUR ABILITY TO ADAPT

- Build a culture of innovation**
- Streamline governance & structure**
- Foster more diverse perspectives in decision-making**



# 3-YEAR ROLLING GOALS ACTION PLAN - ROTARY CLUB OF \_\_\_\_\_

GOAL *Priority Goals	YEAR 1 GOAL (2025-26)	YEAR 2 GOAL (2026-27)	YEAR 3 GOAL (2027-28)	ACTION TO TAKE (Add additional sheets as necessary)
<b>Expand our REACH</b>				
*Number of total members at end of year				
<b>Increase our IMPACT</b>				
*Contributions to TRF Annual Fund in \$				
*Contributions to PolioPlus in \$				
*Number of Members who become new TRF Benefactors				
<b>Enhance Participant ENGAGEMENT</b>				
*Number of Club Members who participate in a Rotary service activity				
GOAL *Priority Goals	YEAR 1 GOAL (2025-26)	YEAR 2 GOAL (2026-27)	YEAR 3 GOAL (2027-28)	ACTION TO TAKE (Add additional sheets as necessary)
<b>Increase our ability to ADAPT</b>				
*Develop a Strategic Plan				
<b>Other CLUB GOALS</b>				



# 3 - YEAR ACTION PLAN - ROTARY CLUB OF \_\_\_\_\_

What is the three-year goal?

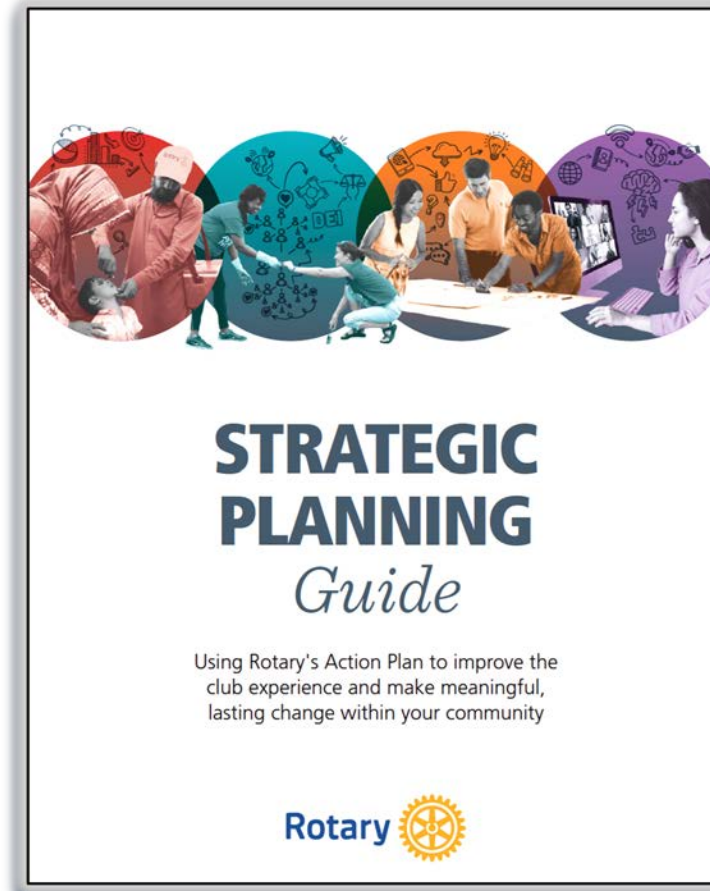
Increase Foundation giving by 5% a year.



	YEAR 1 Goal (2025-26)	YEAR 2 Goal (2026-27)	YEAR 3 Goal (2027-28)
			<b>Foundation giving up 5%/yr</b>
	Polio Plus Goal \$7,875 (currently \$7,500)	Polio Plus Goal \$8,269	Polio Plus Goal \$8,683
	Polio Plus Goal \$1,260 (currently \$1,200)	Polio Plus Goal \$1,323	Polio Plus Goal \$1,389
	6 New TRF Benefactors (currently 4)	7 New TRF Benefactors	8 New TRF Benefactors
	Create advisory group with advocate for each area	Update Progress and recommendations to club	Update Progress and recommendations to club
	Each Advisory develops individual goals	Refine Goals using yrs of data, club feedback	Progress report and recommendations to the club
	Share Goals, current data (to Board, club mtgs, bulletin, post on website)	Use Club Fundraising Analysis/refine goals	Review Goals using yrs of data, re-establish goal for upcoming years
	Identify potential partners (District/Area, other clubs, community)	Annual appreciation of partnerships	Annual appreciation of partnerships
	Celebrate progress PHF pins, certificates		Celebrate 3 <sup>rd</sup> year progress/achievements

Actions

# STRATEGIC PLANNING GUIDE



# Your Leadership Plan

- Faculty kick off session on Sunday with overview
- Allows for President self reflection
- Facilitation by AG with their assigned Presidents to share their leadership plan



# Your Leadership Plan - AG Role

- AG find a space to meet with his/her Presidents for 40 minutes;
- AG and other Presidents job is to ask evocative questions, reflective listening, and affirm the plan;
- No advice giving.



# GROUP EXERCISE

---

Where Am I?

Where do I want to go?

How do I plan to support and incorporate the 3 year plan?







**AHA Moments**



*Thank you*

**PLEASE COMPLETE YOUR EVALUATION**