



Leo Club Year Plan Template

Action plans are an extension of goals and provide a map to meet goals. To achieve the best results, goals and action plans should be on the forefront of membership discussions and activities throughout the year.

This year's plan template is designed to cover important aspects of Leo club administration during a fiscal year. Once completed at the beginning of the year, this can be used as a follow-up tool for year goals.

Where you are?

Please talk to the immediate past club president and fill the club assessment. It will help you to figure out the status of the club.

Membership as the beginning of year	
Number of projects done last year	
Number of general meetings done last year	
Number of board meetings done last year	
Average number of member participation for meetings/projects last year	

Current Strengths and Weaknesses

List out current strengths and the weaknesses of the club/club members. It will help you to identify the areas of improvements/ skills gaps you need to focus on during the year.

Strengths	Weaknesses

Where do you want to be?

Complete the expectation column at the beginning of the year. As you go on, you may use it as a follow-up tools for targeted dates. Fill out the achieved date column with the actual date you achieved your target.

	EXPECTATION	ACHIEVED DATE
Installation date		
Leo 72 submission date		
Expected membership at the end of year		
Targeted number of projects during the year		
Profit target from fundraising projects		
Targeted number of joint projects		
Council/multiple due payment		

Administrative Goals

Mark the months you are not going to perform tasks with a cross (X) at the beginning of the year. That means you are setting targets to perform each task in the months you have not marked. At each month, tick if you performed the task.

	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
Board meeting held?											
General meeting held?											
Monthly report submitted?											
MyLCI updated?											
Quarterly report submitted?											
Council general meetings attended?											
Lions club meeting attended											
Club newsletter published?											

Plan for Official Club Visits

Fill out the expected month you are planning to get each officer for the official visit. Mark if achieved as the year goes on, once visit completed.

	EXPECTED MONTH	ACHIEVED/NOT ACHIEVED
District President		
Multiple District President		
District Vice President		
District Chairman for Leos		
Region Director		
Zone Director		
Lions Club President		

International Relations

Fill out the expected month you are planning to get each banner patch/award. Mark if achieved as the year goes on, once target is achieved.

	EXPECTED MONTH	ACHIEVED/NOT ACHIEVED
October membership growth awards (Targeted number: _____)		
Service together banner patch		
Leo club Excellence banner patch		

Membership Development and Retention

State here on the plan for club orientations and fellowship projects to develop the club membership during the year

	EXPECTED MONTH	ACHIEVED/NOT ACHIEVED
Club orientation		
Membership directory		

How are you going to appreciate and recognize your club members?

Next Leadership Development

State the identified club leadership for the next year. Think of a plan to groom them.

	CANDIDATE NAME	AREAS TO BE GROOMED
Club President		
Club Vice President		
Club Secretary		
Club Treasurer		

How are you going to groom club members?

Action Plan for Presidential Goals

State how are you going to achieve your presidential goals.

How? (Action steps)	When? (Deadline for completion)	Who? (Person responsible)	How will know? (How we will know the action step is accomplished)

Year Budget

Identify the surplus/deficit from major club events planned and set targets for fundraising

	EXPECTED INCOME	EXPECTED EXPENSES
Club installation		
Report printing		
Administration expenses		
TOTAL		

Any Other Notes
