Reinvigorate your club and reconnect with your community

David Mylan
Club Visioning Chairman 2016-17
“Rotary is not an organisation for retrospection. It is rather one whose worth and purpose lie in future activity rather than past performance.”

- Paul Harris, Founder of Rotary International
RI STRATEGIC PLAN SURVEY

• Baseline data for priorities, interests, concerns
• Confirm relevance of plan and elements
• Track trends and ideas
• March 2014 survey sent to 67,000 Rotarians
  – Response rate of 15% (10,334 responses)
  – Received responses from over 150 countries
<table>
<thead>
<tr>
<th>The Top Three Strategic Issues</th>
<th>Today</th>
<th>In Ten Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership recruitment and retention</td>
<td>68%</td>
<td>68%</td>
</tr>
<tr>
<td>Membership diversity (age, gender, etc.)</td>
<td>32%</td>
<td>29%</td>
</tr>
<tr>
<td>Innovation, modernization, flexibility and/or simplification of processes and rules</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Collaborating and connecting with other organizations</td>
<td>8%</td>
<td>22%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Financial sustainability</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Areas of focus</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Strategic planning</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Club public relations activities</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>
## Strengthening Clubs

<table>
<thead>
<tr>
<th>Question</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Somewhat Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>Don’t Know / Undecided</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have the opportunities I want to connect and collaborate with other Rotarians -- across clubs and districts</td>
<td>16%</td>
<td>43%</td>
<td>26%</td>
<td>8%</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>My club does a great job involving new members in our club’s activities, projects, and programs</td>
<td>15%</td>
<td>34%</td>
<td>30%</td>
<td>13%</td>
<td>6%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Rotary provides members sufficient opportunities for professional networking</td>
<td>12%</td>
<td>37%</td>
<td>30%</td>
<td>12%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>My club involves each member in activities according to the member’s interests, skills, and availability</td>
<td>13%</td>
<td>33%</td>
<td>30%</td>
<td>14%</td>
<td>6%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Question</td>
<td>Year</td>
<td>Yes</td>
<td>No</td>
<td>Don’t Know</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
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<td>-------</td>
<td>------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does your club have a strategic plan?</td>
<td>2014</td>
<td>45%</td>
<td>34%</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2012</td>
<td>41%</td>
<td>33%</td>
<td>27%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2009</td>
<td>44%</td>
<td>50%</td>
<td>7%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Those that answered “yes” were asked the following:

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use resources on rotary.org for planning?</td>
<td>56%</td>
<td>20%</td>
<td>24%</td>
</tr>
<tr>
<td>Does your club create annual and long-term goals using Rotary Club Central?</td>
<td>39%</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Does your club monitor club goals in Rotary Club Central?</td>
<td>34%</td>
<td>31%</td>
<td>35%</td>
</tr>
</tbody>
</table>
# Club & District Strategic Planning

<table>
<thead>
<tr>
<th>Level of Importance</th>
<th>Year</th>
<th>Very Important</th>
<th>Important</th>
<th>Somewhat Important</th>
<th>Somewhat Unimportant</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Importance of district having a strategic plan</td>
<td>2014</td>
<td>48%</td>
<td>38%</td>
<td>11%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>2012</td>
<td>42%</td>
<td>42%</td>
<td>14%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Importance of club having a strategic plan</td>
<td>2014</td>
<td>47%</td>
<td>35%</td>
<td>14%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>2012</td>
<td>43%</td>
<td>39%</td>
<td>15%</td>
<td>3%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Members in clubs with strategic plans are more satisfied and have a more positive view of their club and Rotary as a whole:

<table>
<thead>
<tr>
<th>Does club have a strategic plan?</th>
<th>2014 average “Strongly Agree / Agree” on questions about members’ experience in club and with Rotary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, club has strategic plan</td>
<td>63%</td>
</tr>
<tr>
<td>No, club does not have strategic plan</td>
<td>47%</td>
</tr>
</tbody>
</table>
START WITH THE “DESTINATION” IN MIND....

SUCCESSFUL CLUBS

- Sustain and increase membership
- Implement successful service projects
- Support The Rotary Foundation
- Develop leaders in the club and beyond
REASON CLUBS MAKE PROGRESS

- Enthusiastic leadership
- Committed planning team
- Supportive Board
- Focus on the Vision
- Open communications
- Regular reporting to Members
HURDLES THAT CLUBS ENCOUNTER

- **Don’t know – did not follow up after event**
- **No leadership - President not committed or too busy**
- **Club does not buy in - Change is difficult or Vision does not fit different views in Club**
- **Member turnover – reinvent the wheel**
- **Focused on Membership first**
- **Time & Energy - Need to narrow focus**
WHAT IS “CLUB VISION”? 

Dynamic Management Tool
- Defines a shared commitment
- Provides long-term direction
- Creates a framework to establish goals and objectives
- Optimizes use of resources
INTRODUCTION TO CLUB VISIONING

Purpose of club visioning

https://www.youtube.com/watch?v=b-nuLL4wQ5c

Member Engagement A takeaway from Club Visioning

https://www.youtube.com/watch?v=0RZdEFR0mGE
VISION FACILITATION IS:

- an opportunity for every member to be involved in the future of their club
- Taking your Rotary Club where it wants to go/can go
- Formation of Ideas: (Brainstorming – reality vs fiction)
- Creation of a 5 year plan with core elements
- Identifying Short term and long term goals
- Who does what and by when to achieve goals?
To have a successful Plan we need a Vision:

Club Planning steps

1. Create a Vision

2. Develop a Long Range Plan

3. Implement: Actions, Tactical Club Plan and Programme

4. Monitor and follow-up...
WHY DO WE NEED A VISION AND LONG-TERM PLAN?

• Tradition of annual cycles breaks continuity, consistency, and consensus

• Clubs end up “re-inventing the wheel” instead of moving forward

• Or stagnating….  

• …..or worse….  

Rotary
District 9685
Failing to Plan = Planning to Fail
VISION TO PLAN PROCESS

1. RVQ - Rotary Vision Questionnaire

2. Rotary Club Visioning Event

3. Club creates formal drafts of vision, mission and/or purpose statement

4. Club Assembly Event

5. Club Builds out a Long Range Plan Document (Strategic Initiatives)

6. Club builds out Annual Goals and Objectives document (Action Planning)

7. Club identifies measurements and milestone expectations for annual goals and objectives (Part of the Action Plan)

8. Club reviews and monitors progress (Implementation Phase) on a consistent timeline
CLUB COMMITMENT

A Visioning session requires:

• A Visioning Club Coordinator
• Up to 30 club members
• Dedicated 4 hours
• Thinking ability (outside the box is good!)
• Follow-up during Club Assembly 2-3 weeks later
HOW?

- Clubs need to pick a date/possible dates, and allocate 4 hours one evening or on the weekend.
- Contact the Chair or Coordinator to confirm availability of facilitators.
- Ensure as many members as possible attend.
FURTHER INFORMATION?

- Contact the District Vision Facilitation Team

- District Chair
  David Mylan
  0411 878 854
  david.mylan@bigpond.com
CLUB VISIONING

..An opportunity to spread our wings…
and to create the Rotary clubs we want in the future

….to be the best we can be….

Thank you for your commitment