



## Planning Review & Action Planning

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Alberta Culture and Tourism

## Rotary Planning Update

### SUMMARY



- 23 Rotarians participated in a Strategic Planning Workshop on November 7, 2015.
- 38 Rotarians participated in the Planning Review Lunch Discussion on January 18, 2016
- Rotarians reviewed and clarified the following foundational elements of the Club's Strategic Plan:
  - E- Scan (What's going on in Rotary)
  - Mission / Purpose
  - Goal / Priority Areas
  - Next Steps



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# Planning Process Results

November 5, 2015



## E-Scan:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• <b>People / members</b> (dedicated, compassionate, diversity, energy / fun)</li> <li>• <b>Rotary name / identity / visibility</b></li> <li>• <b>Projects / Activities</b> (Music Festival, local and international projects)</li> <li>• <b>Fellowship</b></li> <li>• <b>Youth</b></li> <li>• <b>Engagement / involvement</b> (range of opportunities, club and social activities)</li> <li>• <b>Structure / Organization</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Membership</b> (declining membership, disengagement)</li> <li>▪ <b>Club culture</b> (traditional, rigid)</li> <li>▪ <b>Meeting Structure</b> (too long, traditional)</li> <li>▪ <b>Organizational Structure</b> (confusion on governance, protocols / procedures)</li> <li>▪ <b>Internal communication</b></li> <li>▪ <b>External communication</b></li> <li>▪ <b>Fundraising</b></li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>▪ <b>Refocus meeting structure / program</b></li> <li>▪ <b>Fellowship</b></li> <li>▪ <b>Rotary at Work Activities</b></li> <li>▪ <b>Member engagement</b></li> <li>▪ <b>Rotary brand / marketing</b></li> <li>▪ <b>Fundraising</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Fundraising</b></li> <li>▪ <b>Competition of other service clubs</b></li> <li>▪ <b>Trends in workplace changes</b></li> <li>▪ <b>Changes in non-profit sector</b></li> <li>▪ <b>Community perceptions</b></li> </ul>

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# Planning Process Results

November 5, 2015

## Our Purpose

### Examples from “What Rotary Means to Me”

- Offer service above self
- Social interaction with like-minded to do good in community and abroad
- Part of a world-wide organization (sense of purpose, belonging, pride)
- Fellowship with people from different backgrounds and experiences
- Getting together with intention – bettering the community and world
- Sharing the same goals and aspirations - genuine kinship
- Committed, dedicated people working together
- Serve the community – in different ways
- Humor / fun / interaction while doing good
- We practice – the 4 Way Test



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# Planning Process Results

November 5, 2015

## Our Purpose: *Mission*

*The purpose of the **Rotary Club of Medicine Hat** is to ethically serve our local and global communities while providing opportunities for service, fellowship and personal growth for our members.*

- Exemplifying the values of Rotary International and “*Service Above Self*”
- Supporting a diverse range of *local community activities and international humanitarian service projects* through financial support and “hands-on” involvement.
- Offering a variety of opportunities for members to engage in meaningful “Rotary at Work” projects and initiatives
- Fostering an environment for members that encourages *fellowship, fun, and personal growth*

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# Planning Process Results

November 5, 2015

## Our Goal Areas:

1. Effective organizational structure and processes
  - Meeting structure
  - Streamlined processes and procedures
2. Diversified and meaningful fundraising
3. Hands-on projects, service and activities
  - Focus on “Rotary at Work” projects locally and internationally
4. Member engagement and communication
5. Promotion and awareness
  - Rotary brand
  - Impact of Rotary and our Club’s work

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# Planning Process Results

November 5, 2015

## Our Priorities:



- Change / innovate **meeting program and structure**
- Ensure more effective and regular **communication**
- Build a stronger **brand / value of Rotary** (to existing members and community)
- Focus on “**Rotary at Work**” projects and activities
- Better **evaluation** on fundraising and projects

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# Planning Process Results

January 18, 2016

## Key points Rotarians felt were important:

- Change **meeting program and structure**
- **Communicate** more about Rotary and what we do (impact)
- **Engage members** more effectively
- Strengthen **social fellowship**
- Dedicate more time to **planning** and working on Rotary **priorities**
- Focus on “**Rotary at Work**” projects and activities

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# Planning Process Results

January 18, 2016

## Ideas / Suggestions:

(Examples):

What	How
<b>Change meeting program / structure:</b>	<ul style="list-style-type: none"><li>• Shorten the agenda (President could tighten)</li><li>• Have specific goals for meeting (ex. Guest speakers every second Monday)</li><li>• Change format (food early / start early; birthdays once a month, happy dollars at beginning)</li><li>• Eliminate God Save the Queen</li><li>• More opportunity to “talk” at meetings / engage Rotarians</li><li>• Talk about impact of Rotary at meetings</li></ul>
<b>Projects:</b>	<ul style="list-style-type: none"><li>• Find hands-on projects to sink teeth into (not fundraising)</li><li>• Doable projects for new members</li></ul>
<b>Planning:</b>	<ul style="list-style-type: none"><li>• Dedicate more time at meetings for dealing with Strategic Plan / priorities</li><li>• Do a Strat Plan “Minute”</li><li>• Select priorities and work on them</li></ul>

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## Next Steps



### Where do we go from here?

- Take ideas / notes from the planning workshop and discussions and develop a **strategic plan document** (3 – 5 year plan)
- Continue working on **goals and priorities** in the coming year
- Identify specific and **measurable strategies** / objectives (targets)
- Create **action plans** (possibly using committees already in place)
- Develop a one-page **summary of the notes** outlining key points

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# Plan to Action



## ACTION PLAN TEMPLATE

**GOAL:**

**STRATEGY:**

Outcomes / Indicators of Success:

:

Action / Tactics (Tasks undertaken) (How)	Lead (Who will lead)	Committee(s) (Who's involved)	Resources (People, \$, tools)	Potential Barriers (Obstacles)	Timeline	
					Initiate	Complete



# THANK YOU!

