****

**Strategic Plan**

**2015 - 2018**



**Table of Contents**

[Overview 3](#_Toc420409882)

[Key Focus Areas 3](#_Toc420409883)

[Background on Club 3](#_Toc420409884)

[Brief history 3](#_Toc420409885)

[Structure (Board / Committees) 4](#_Toc420409886)

[Board of Directors Approval 4](#_Toc420409887)

[Organizational Profile 5](#_Toc420409888)

[Our Purpose (Mission) 5](#_Toc420409889)

[Our Values 5](#_Toc420409890)

[Our Goals and Strategies 6](#_Toc420409891)

[Environmental Scan 7](#_Toc420409892)

[Action Plan and Evaluation 8](#_Toc420409893)

[Priorities 8](#_Toc420409894)

As a result of the commitment of the Sunrise Rotary Board and members, the followi**n**g information provides a summary of the 2015 – 2018 Strategic Plan.

# Overview

The Medicine Hat Sunrise Rotary Club is committed to planning for its future. Building on the excellent work and facilitated discussions conducted by the Club through group planning in both March 2008 and the follow up session held in November 2011, a collaborative planning process took place on January 31, 2015 to discuss and review Sunrise Rotary’s purpose, goals, and priorities both in the coming months and in the long-term. Follow-up conversations with the membership also took place on March 4, 2015 and April 14, 2015 with a final recap and presentation on June 16, 2015.

## Key Focus Areas

* **Communication:** Effective communication (internally) and compelling communication (externally).
* **Member Engagement:** Attraction, Orientation, Retention and Education
* **Community Impact:** Identifying projects and celebrating success – continue with broad distribution/support or focus on a specific area/need
* **Commitment to Plan:** How we will measure success – ongoing regular periodic review and analysis at the Board and Membership levels

At the end of the day, creating a strategic framework against which future decision making is measured and remaining loyal to the Core Values of the Club and Rotary are the key desirable outcomes.

# Background on Club

## Brief history

The Rotary Club of Medicine Hat Sunrise was chartered **June 1, 1998** and has grown from 15 to over 35 members. The Sunrise Rotarians represent business, professional and those wishing to make a difference in their community by lending their attributes, time and talents, resulting in an active membership.

The Club has fun, energetic and lively meetings while remaining committed to a strong community involvement focus. Through our exceptional blend of vision, commitment, projects & activities, the Sunrise Rotary Club has created positive outcomes and benefits for members, the community and the world. Projects such as the Sunrise Rotary Trail at Medicine Hat College, Sunrise Rotary Ride the Road to Reading program with the Medicine Hat Library, Rotary Track & Field Site at Crescent Heights High School and the Mexican Schools Project are just a few examples.

Designed purposely for the development of acquaintance as an opportunity for service along with a world of fellowship with other community professionals, the Sunrise Rotary Club offers an attractive place to participate and engage.

## Structure (Board / Committees)

Elected/Appointed members of the Board act as Chair on our Committees including

* Club Service
* Community Service
* Membership
* Vocational Service
* International Service

Additional positions of the Board include members in the roles of President, Past President, President Elect, Secretary and Treasurer.

# Board of Directors - Approval

The Board of Directors of the Sunrise Rotary Club reviewed and considered the enclosed 2015 – 2018 Club Strategic Plan at its regularly scheduled Board meeting held May 26, 2015. A motion was made to adopt the Strategic Plan as presented and was approved/carried.

# Organizational Profile

## Our Purpose (Mission)

The Medicine Hat Sunrise Rotary Club exists to foster the Rotary principle of “service above self” by encouraging a spirit of fellowship among our members and their families to provide humanitarian service at the local and international level.

We do this by:

* Focusing on *service* by leading through example
* Encouraging *fun, fellowship and networking* between our members, families and community
* Supporting *local community initiatives* focused on youth, children and families, and education
* Providing *international humanitarian service* by promoting literacy through hands-on projects.

## Our Values

Sunrise Rotarians identified the following values as an important aspect of their Club’s success:

**Service:**

* Passion for service – Rotary enables us to do it together
* The ability to serve our local and international community with like-minded individuals
* Giving back to our community
* Working on projects that make a difference
* Dedication and commitment of members to serve others
* Strong connection to community

**Fellowship:**

* Sense of family
* Welcoming feeling to our club
* Friendship, socializing, having fun
* Volunteering with a like-minded group of people to develop ideas and projects to help others in the community and abroad
* To be involved in service with friends and colleagues

**Community Impact:**

* Rotary makes a difference – has a huge network and impact locally and all over the world
* Rotary provides an outlet and opportunity to make major positive changes both locally and internationally
* We are part of Rotary as a well-respected organization with longevity and commitment to making a difference

# Our Goals and Strategies

**Goal 1: Sunrise Rotary attracts and retains an active and engaged membership**

Strategy: Develop customized communication strategy for members

Strategy: Identify a member recruitment plan with targets

Strategy: Encourage increased participation of members

**Goal 2: Sunrise Rotary provides a spirit of fun and fellowship for its members and families**

 Strategy: Focus on fellowship at meetings, volunteer activities, social events

 Strategy: Build and expand on social / family engagement

**Goal 3: Members are informed and knowledgeable of what it means to be a Sunrise Rotarian**

Strategy: Develop a new member orientation plan

Strategy: Engage members to understand / balance their expectations

**Goal 4: Sunrise Rotary actively promotes awareness of Rotary to its stakeholders and community**

Strategy: Enhance our profile – what is our compelling invitation?

Strategy: Increase external connections / awareness

**Goal 5: Sunrise Rotary focuses on advocacy and support of local initiatives based on club- identified community needs**

Strategy: Identify and prioritize fundraising projects

**Goal 6: Sunrise Rotary provides support of international projects based on a recognized need**

Strategy: Identify and prioritize fundraising projects

Strategy: Remain engaged in District Grants Committee

# Environmental Scan

Doing a bit of an “enviro scan” sets the context for planning. It takes a “snapshot” of where an organization is at. It also provides valuable information that helps in making decisions and creating a meaningful analysis of the potential implications that your organization faces.

Rotarians discussed what is going on internally and externally in the Sunrise Rotary Club. This helped to identify some of the successes and challenges that the club is facing and how to strategize ways to make effective planning decisions.

|  |  |
| --- | --- |
| **HOT** | **NOT-SO HOT** |
| * What are we good at? What are our strengths?
* What do members or others identify as our advantages / strengths?
 | * What do we struggle with as a club?
* What are the challenges / issues we face?
* What could we do better?
 |
| * Lots of new members recently
* Good mix of age groups
* Current members feel good about club & spread the word
* Respectful of members’ time (focused meetings)
* Good community profile “public” projects – big impact
* Club evolving in all aspects of Rotary
* Members involved in community on other levels
* Morning club magnet for busy people
* Attendance not strictly enforced – more open / less pressure
* Positive start to the day
* Have fun / laughter / humour
* Really involved / engaged board & members
* Volunteer slots fill (quickly)
* Strategic about priorities chosen
* C:\Users\karen.blewett\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\2EC5GBTC\smiling-sun-face-in-sunglasses[1].jpgNot just about monetary donation but also time spent volunteering
* “Sunrise State of Mind”
* Good speakers
* Financials - treasurer
* Welcoming / welcome spouses & families
* Good at fundraising (once we have idea)
* We’re in a good place – solid foundation
* Mugs to speakers (pride as Rotarians)
 | * New member orientation
* New and existing member engagement
* Communication to members of roles, projects and goals (clarity)
* Consistency and continuity in club operations and activities
* Don’t revisit our goals and objectives as much as we should
* Developing and implementing new fundraising activities
* We don’t have an elevator speech – what is our ‘self-definition’
* Increase social / celebration
* Member education in Rotary
* Processes on decision- making not clear or followed
* Fear of time commitment on projects (more vs. less projects) – this is a struggle that needs clarity
* Fundraising competition
* Communication balance – too much, too little - challenge of people receiving information to be invested
* Breakfast menu
 |

# Action Plan and Evaluation

Keeping the Strategic Plan alive is an important part of the planning process.

Sunrise Rotarians have already started working on action plans for each of the six goal areas identified in the 2015-2018 strategic plan. These action plans will be used as the foundation of work for the Sunrise Rotary Club’s committees and will also be reviewed annually or more frequently to evaluate how progress is being made.

Further information on the notes from the planning sessions and action plans for each of the goal areas are available upon request.

# Priorities

While it is important to set goals in a long-term plan, it is also important to focus on short-term priorities that can be reviewed and assessed on a more ongoing basis. This helps to keep the planning process current and realistic.

For 2015 -2016, Sunrise Rotarians identified the following priorities:

* Further develop our communication strategy
* Focus on community impact (identify what and how)
* Develop a membership strategy (orientation package)
* Commit to reviewing our plan (goals and action plans) more regularly at the membership and board levels.