



# Shaping the Future Rotary International's Strategic Plan

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15 June 2007





# Today's Objectives

- Why do a Strategic Plan?
- Brief History and Bylaws' Requirements
- 2004-07 Priorities
- June 2007 Board Actions for 2007-2010 Plan
- Endorsed Mission, Vision, Motto, Core Values, and Priorities
- Benefits of Realizing our Plan
- Next Steps, Process, Impacts on Clubs/Districts



# Why Do a Strategic Plan?

- Emphasizes long-term planning
- Creates a more dynamic organization
- Provides tools for improvement
- Establishes vision for the future of Rotary International
- Failing to plan means planning to fail



# History of RI Strategic Planning

## ■ RY 2003

- Embarked on strategic planning initiative
- Membership widely surveyed
- Board adopted the proposed plan and goals

## ■ 2004 COL

- Endorsed strategic plan
- Approved standing committee to oversee process

## ■ 2004-06 Actions

- Volunteer/staff action teams developed
- Implemented plans to achieve goals

## ■ 2007

- Aligning strategic plan and future vision plan
- Hired Strategic Planning Manager
- COL mandated various changes/endorsed FV Plan



# Terms of Reference (Bylaws)

- Board
  - *adopt strategic plan*
  - *report to each COL*
- President—perform duties consistent with strategic plan
- Committee
  - *develop, update, and recommend*
  - *survey Rotarians and clubs (3 years)*
  - *counsel RI President-elect on upcoming year's program for consistency*
  - *other duties as assigned*



# Priorities 2004-2007

- Eradicate Polio
- Sharpen program focus
- Select new corporate program focus
- Refine governance/leadership structure
- Improve training at all levels
- Expand and integrate membership globally
- Enhance public image



# June 2007 Board Action

- Reviewed new plan elements
- Adopted motto, mission, vision, core values, priorities, and goals
- Agreed to distribute approved components to Rotary world
- Requested presentation to this body and Rotary Institutes
- Requested a comprehensive communication plan



# Mission Statement

The mission of Rotary International, a worldwide association of Rotary clubs, is to provide service to others, to promote high ethical standards, and to advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders





# Vision Statement

The vision of Rotary International is to be universally recognized for its commitment to “Service Above Self” to advance world understanding, goodwill, and peace.



# Core Values

- Service
- Fellowship
- Diversity
- Integrity
- Leadership



# Motto

Service Above Self



# Priorities

- Eradicate Polio
- Advance recognition and public image of RI
- Increase capacity to serve others
- Expand membership globally (numbers and quality)
- Emphasize unique vocational service commitment
- Optimize leadership talents within RI
- Implement strategic planning process throughout organization



# Benefits of Realizing Our Plan

- Key themes of plan are still relevant
  - *Membership*
  - *Service*
  - *Leadership*
- Aligns with Club Leadership Plan



# Next Steps

- Review high-level action plans from staff
- Adopt “Scorecard” for Board monitoring
- Review/Adopt communication and transition plans
- Propose budget alignment philosophy
- Promote strategic planning models for clubs and districts
- Coordinate with TRF Future Vision Plan



# Summary of Process

- Three-year review cycle (Oct. 2006 and 2009)
  - *Review Priorities and Goals*
  - *Refine mission and vision (if necessary)*
- May—SPC counsels Pres. Elect
- October—Board establish annual goal plan in line with budget
- Every Meeting—Board monitors progress
- RI SPC—Meets 1-2 times per year



# Impacts on Clubs and Districts

- Provides guidance on global strategic priorities
- Does not mandate—only a tool for planning locally
- Future RI assistance with planning models, tools, and guidelines
- Consistency and continuity in Rotary





# Thank You