

STRATEGIC PLANNING & CONTINUITY

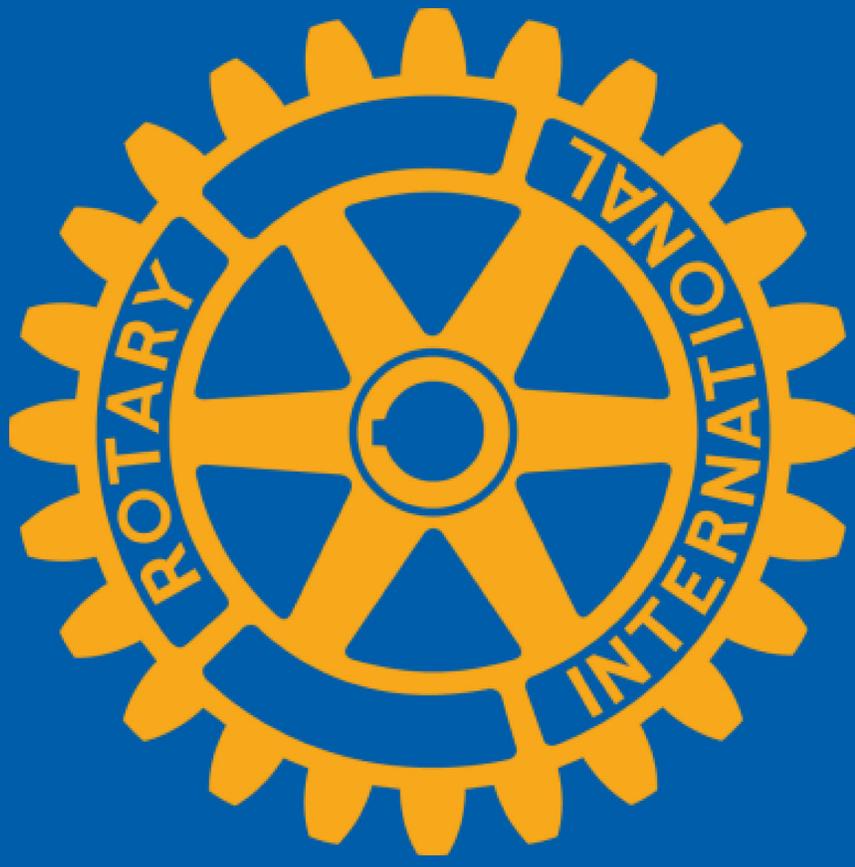
MidWest PETS

March 2018

Rotary Coordinator: Nicki Scott



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LEARNING OBJECTIVES

By the end of this session, you should be able to:

- Be able to articulate the need for planning
- Work with your club to create or refine a strategic plan
- Understand the basics of managing change and key components to a successful outcome



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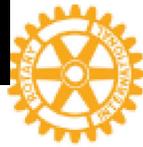
WHY PLAN?

PLAN AHEAD

THE BENEFITS OF PLANNING

- Balancing long and short term objectives
- Knowing where you want to lead the club to
- Having a way to communicate that
- Creating buy-in
- Getting everyone on the same page

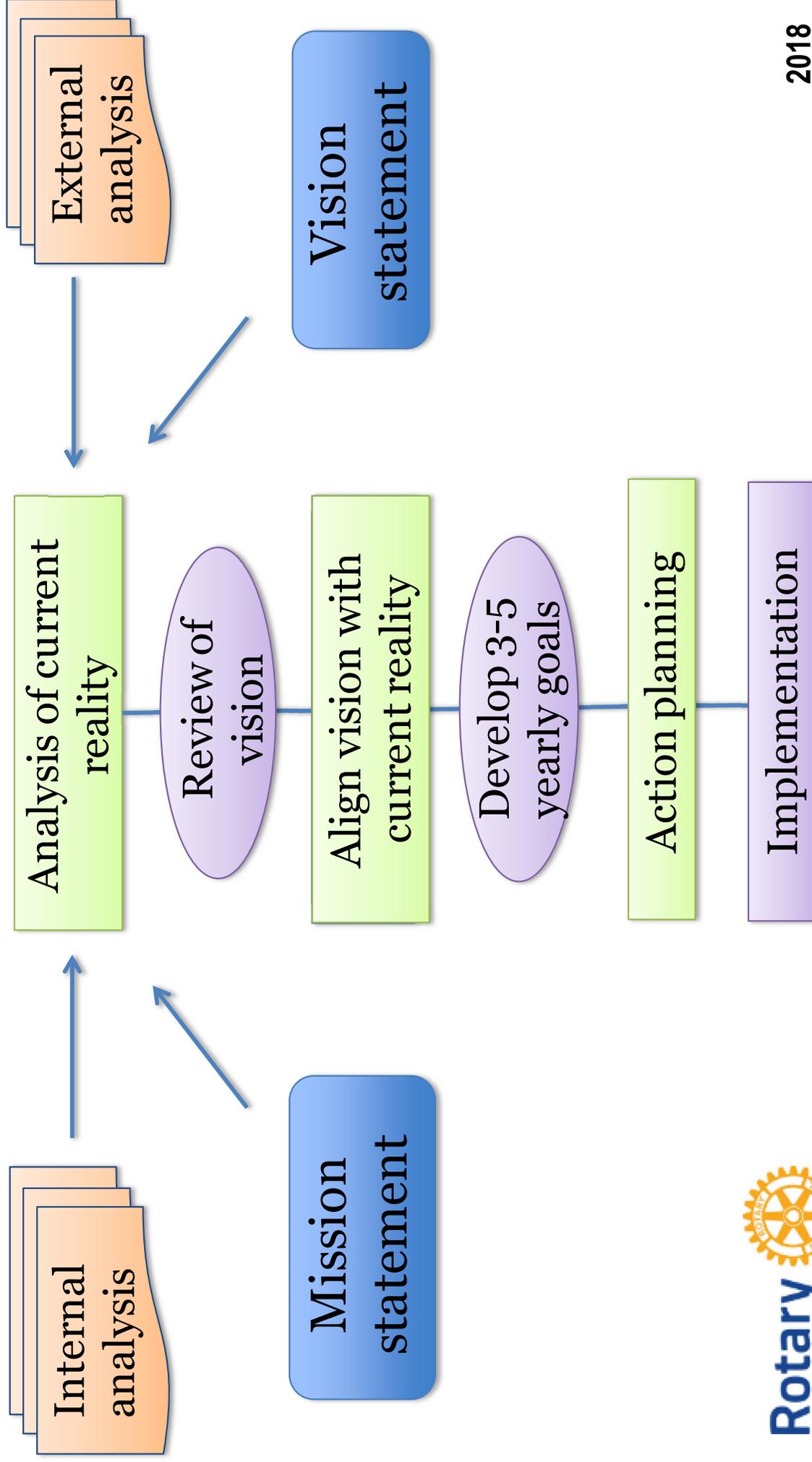
THE LACK OF VISION?



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STRATEGIC PLANNING MAP



STEP 1: WHERE ARE WE NOW?

- **Mission statement: What is our purpose?**
- **Values/principles: What do we stand for?**
- **SWOT: Assessment of current reality**



ASSESS THE CURRENT CONDITION: SWOT Analysis!

What are our
strengths?

What are our
weaknesses?

What are our
opportunities?

What are our
threats?



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STEP 2: WHERE ARE WE GOING?

- **Vision statement**
- **What will we be like in 3-5 years?**
- **What are we best at?**
- **What should we stop doing?**
- **What distinguishes us from other service groups in our community?**



ROTARY'S NEW VISION STATEMENT

Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.



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STEP 3: HOW DO WE GET THERE?

- Strategic priorities: Long-term
- Goals: Short-term
- Action items: Plans for implementing goals
- Score card: Measures and manages the plan
- Implementation: Who manages, communicates, and supports the plan?

PRESIDENTIAL THEME & CITATION



BE THE

INSPIRATION



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BARRY RASSIN
2018-19 President
Rotary International



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TO LEAD OR TO MANAGE?

- **Management**
 - Doing things right
- **Leadership**
 - Doing the right thing!

On Becoming a Leader: Warren Bennis

LEADING & MANAGING CHANGE

CHANGE PLANNING FRAMEWORK

VISION

Articulate what the change will look like when fully implemented. What would people do differently?

Vision statement, group meetings, repetition across communication vehicles

SKILLS

What skills will be needed to be successful? Do key people have those skills? How would they get them?

Training, best practices, stories, lessons learned, job aids

INCENTIVES

Express the "what's in it for me?" What are the benefits and, if any, what incentives or activities can be offered to encourage adoption?

Contest, recognition, teambuilding

RESOURCES

What tools and resources will be available to tell the story? Who will assist in providing support and info to encourage adoption?

Ambassadors, consistent, available support

ACTION PLAN

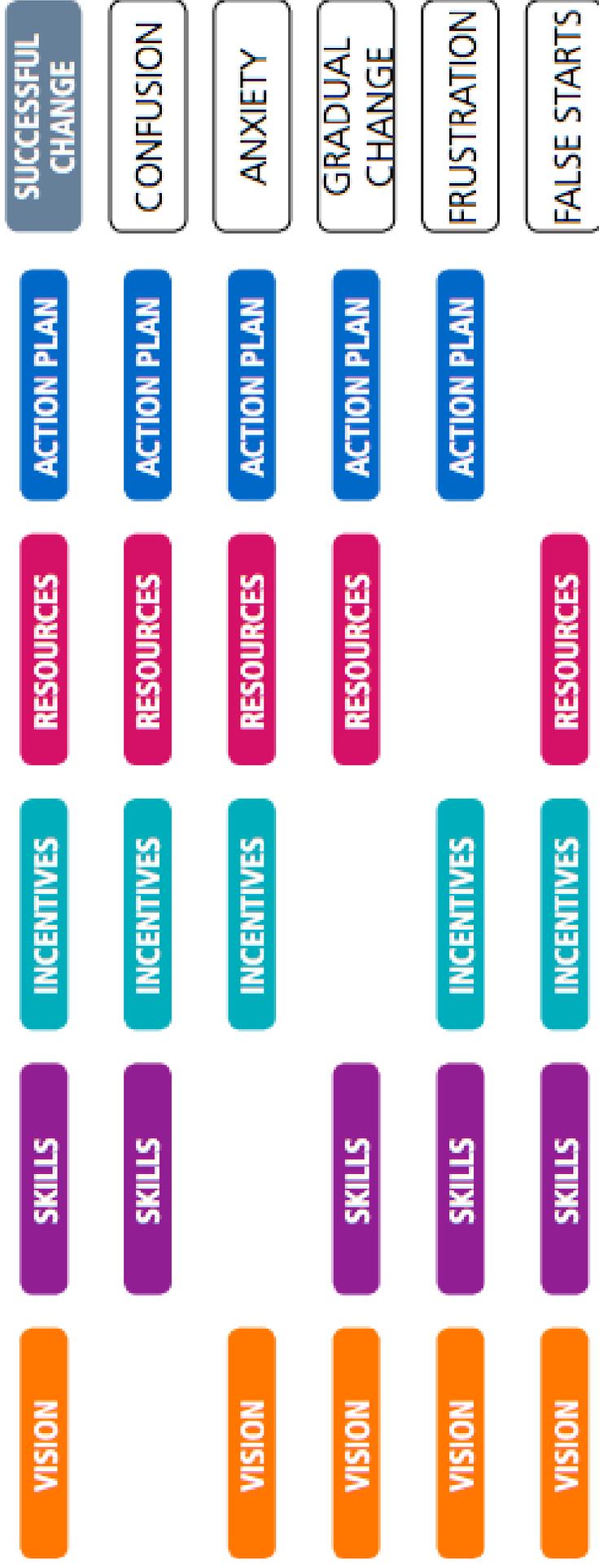
What are the steps to be taken to communicate and implement the desired change?

Roadmap, performance planning, success stories

Adapted from Dolores Ambrose, 1987

OVERCOMING RESISTANCE TO CHANGE

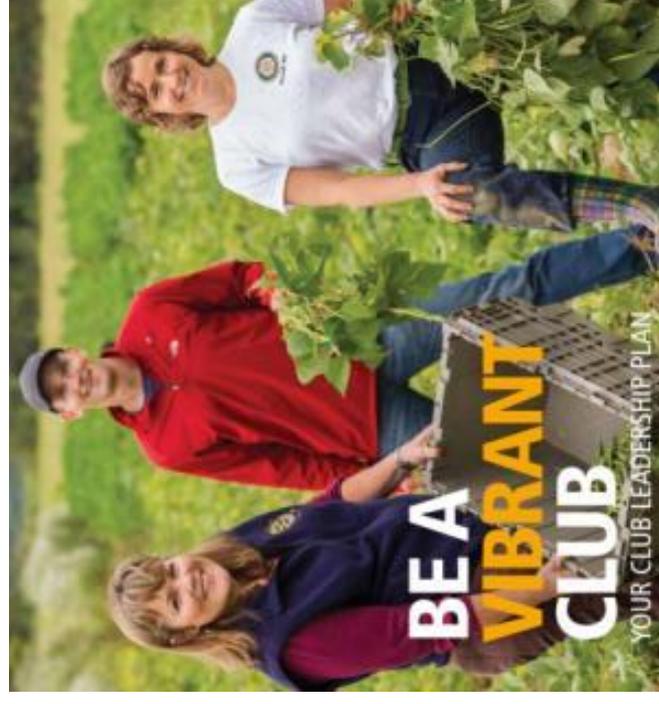
CHANGE PLANNING GAP CONSEQUENCES



Adapted from Dolores Ambrose, 1987

KEY RESOURCES

- Strategic Planning Guide
- Rotary Club Central goals
- Membership Assessment Tools
- Be a Vibrant Club
- Rotary coordinators
- Assistant governors
- Your club members!!



TAKE ACTION!

1. What are three key takeaways / action steps you will take towards establishing or updating your **Club Strategic Plan**?
2. How will you embrace being a champion for change?