

Strategic Planning in a Box
District 5810

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"Strategic Planning in a Box" (SPB)

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Link to SP Guide: <https://my.rotary.org/en>
and enter strategic planning guide in search box

Key element is for a club to reach out into the community to find a facilitator (school district, Chamber, city, college faculty, member relatively new to Rotary, Rotaractor, etc., are a few suggestions for finding such volunteers).

As part of your preparation for your club's SP event, please contact me and I will guide you through the process and will also talk with your facilitator.

As a general guideline, the planning team should be from 12 to 24 members.

1/3 = Wisdom – prior leaders still active in the club

1/3 = Responsibility – incoming Board members

1/3 = Possibilities – newer members (see with fresh eyes)

Strive for diversity: Gender balance, generational balance, professions balance, and ethnic representation.

Room with sufficient space to accommodate a U-shaped set-up for up to 24 participants, plus a small table for the facilitator and some room to move around.

It is essential that, in an all-volunteer organization, we take an inclusive and transparent approach to build advocates through participation. Planning team members can prepare for the session by talking to folks in the club. Two and a half weeks before the scheduled date, the planning team members should receive a SWOC assessment via email to capture thoughts for consideration.

If this is a first-time effort, then 2 half-days separated by 2 weeks is recommended since the club is developing a 3-year plan.

It is extremely helpful to have someone capture what the planning team produces. Smart phones can capture what gets written on flipcharts or white boards so a summary can be prepared and sent to all who participated (group memory).

Time management may require stopping some discussion processes and asking for a few folks to volunteer to work on the details to present at a follow up meeting.

The effort will help focus club resources on the three strategic priorities. The planning team is providing recommendations. The Board decides on action plans for the Rotary year.

When your plan comes together, it is essential that the “one page” be communicated throughout the club and that periodic updates are shared as well.

Build in a club commitment to conduct an annual event to gauge progress and adjust action plans. The annual event generally takes no more than ½ day. Then after three years, develop your club’s next three-year plan (generally six hours or less, as vision and mission continue, and some priorities will be appropriate for the next three years as well).



ROTARY'S VISION STATEMENT

TOGETHER WE SEE A WORLD
PEOPLE UNITE AND TAKE ACTION
TO CREATE LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.

To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the next five years.

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

INCREASE OUR ABILITY TO ADAPT

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

ROTARY'S CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:

FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant, but thriving.



rotary.org/strategicplan

STRATEGIC PLANNING GUIDE



ROTARY'S 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.

ABOUT THIS GUIDE

Just as a map guides people from one location to their destination, a strategic plan that is rooted in action guides an organization through achieving its goals and, ultimately, fulfilling its strategic vision. Strategic plans are important for Rotary and Rotaract clubs, too. Our survey results have shown us that clubs that develop and follow a strategic plan are stronger than clubs that don't because they have more satisfied members who view their clubs and Rotary more positively overall.

Use this Strategic Planning Guide to help you set long-term priorities as well as annual goals that support your club's strategic vision. This guide is designed for Rotary and Rotaract clubs, but districts may also find it useful.

STRATEGIC PLANNING PROCESS OVERVIEW

| PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW? | PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE? | PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION? | PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS? |
|--|---|--|--|
| <ul style="list-style-type: none">• Identify strategic issues to address• Determine club's strengths and weaknesses• Assess member satisfaction and needs• Identify opportunities and challenges in the community | <ul style="list-style-type: none">• List five to seven characteristics you want your club to have• Create a vision statement | <ul style="list-style-type: none">• Set strategic priorities• Set annual goals• List the activities, timeline, and resources you'll need | <ul style="list-style-type: none">• Monitor progress toward your annual goals• If you missed your targets, determine why• Adjust your action plans |

GETTING STARTED

- Assemble a strategic planning team made up of past, present, and incoming club leaders to develop the plan and make sure it's helping your club achieve its goals.
- Ask a non-Rotarian/Rotaractor or a club member that is not in a leadership position to facilitate strategic planning meetings.
- Get a variety of perspectives by involving club members who have diverse backgrounds and experiences.
- Make sure your club's vision reflects Rotary's official strategic vision.
- Align your club's goals to reflect those of your district and Rotary's [strategic plan](#).

PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?

Before you set your club's long-term goals, it's important to:

- Determine your club's strengths and weaknesses by gathering comments from members
- Identify opportunities and challenges in the community by meeting with other community leaders

IDENTIFY STRATEGIC ISSUES

What are the critical issues or concerns that your club wants to address? Strategic issues are those critical unknowns that are driving you to embark on a strategic planning process. These are issues that are looking for a solution or decision. Think about what issues you want to address with this strategic plan.

Potential questions to ask your members:

- How will we increase our membership and engage members in our club?
- How can we attract a diverse group of members?
- How can we include more community members in our club activities?



Reviewing your club's past strategic plans and using the [Rotary Club Health Check](#) can help give you direction.

STRATEGIC ISSUES

STRENGTHS AND WEAKNESSES

List what your club does well and what your club could improve.

STRENGTHS

WEAKNESSES



TIP

Use the member satisfaction survey in [Enhancing the Club Experience](#) to get your members' insight and help you identify your club's strengths and weaknesses.

IDENTIFY OPPORTUNITIES AND CHALLENGES IN THE COMMUNITY

List the opportunities in your community that your club can act on. Maybe it's finding more members from a growing demographic group. Or mentoring entrepreneurs to help them develop their businesses. Also list the challenges in your community that your club can help address, such as unemployment or quality of education.

OPPORTUNITIES

CHALLENGES

PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?

CLUB CHARACTERISTICS

Rotary's vision statement asks us to "unite and take action to create lasting change." List five to seven characteristics you want your club to have within three to five years that will help realize that vision, e.g. fun, service-oriented, innovative, representative of the community, etc.

CHARACTERISTICS

VISION STATEMENT

A vision statement defines your desired future and provides direction for what you want your club to be. Write a one-sentence vision statement with your strategic planning team using the list of club characteristics as a reference.

Potential questions to consider:

- What will our club look like in three to five years?
- How will we know we've succeeded?
- What do we want to achieve?

TIP



Your vision statement should resonate with club members. One example could be: "Our vision is to be recognized as the service club that supports youth in our community."

VISION STATEMENT

PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?

STRATEGIC PRIORITIES

Your strategic priorities should help you achieve your vision. These priorities answer the question, “How will we succeed?” Develop your most important strategic priorities — those that will have the biggest impact as your club works toward its vision.

Consider the following when you develop strategic priorities:

- The Rotary vision statement and [strategic plan](#)
- Your club’s strengths and weaknesses
- Your district’s goals
- Your community’s opportunities and challenges
- Your club members’ opinions
- What you can achieve in three to five years

STRATEGIC PRIORITIES

ANNUAL GOALS

When you have set your strategic priorities, you can develop yearly goals that support them.

Write down your strategic priorities. Then list your annual goals, along with the actions you’ll take, the resources you’ll need, and who will lead the effort to meet each goal. Set a timeline for each. [Rotary Club Central](#) can also assist you in setting goals and tracking achievements.



TIP

Effective goals clearly state what, when, how, and who. They are also measurable.

STRATEGIC PRIORITY 1: _____

| ANNUAL GOALS | ACTIONS | RESOURCES NEEDED | MEMBER ASSIGNED | TIMELINE |
|--------------|---------|------------------|-----------------|----------|
| | | | | |
| | | | | |
| | | | | |

STRATEGIC PRIORITY 2: _____

| ANNUAL GOALS | ACTIONS | RESOURCES NEEDED | MEMBER ASSIGNED | TIMELINE |
|--------------|---------|------------------|-----------------|----------|
| | | | | |
| | | | | |
| | | | | |

STRATEGIC PRIORITY 3: _____

| ANNUAL GOALS | ACTIONS | RESOURCES NEEDED | MEMBER ASSIGNED | TIMELINE |
|--------------|---------|------------------|-----------------|----------|
| | | | | |
| | | | | |
| | | | | |

STRATEGIC PRIORITY 4: _____

| ANNUAL GOALS | ACTIONS | RESOURCES NEEDED | MEMBER ASSIGNED | TIMELINE |
|--------------|---------|------------------|-----------------|----------|
| | | | | |
| | | | | |
| | | | | |

PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?

MONITOR PROGRESS

You'll need to track progress toward your annual goals with your strategic planning team and suggest changes to action plans if needed. You may want to try a new approach or allocate more resources to your goals.

Consider the following when monitoring progress:

- How often should we measure progress toward our goals?
- How should we communicate our progress to club members?
- Who should approve changes to action plans or annual goals?



TIP

Rotary Club Central
can assist you in
tracking progress
toward your goals.

GOAL PROGRESS REVIEW PLAN

REVIEW AND ADJUST

As you review the progress you've made, list your goals, including any goals that were not met and the reasons why. Determine what adjustments or actions should be taken to achieve those unmet goals.

Consider the following when identifying and listing your missed targets:

- What goals were met?
- What goals were not met?
- What are the top reasons we fell short of those goals?
- What adjustments need to be made to help us achieve those goals?

STRATEGIC PRIORITY 1: _____

| ANNUAL GOALS | MET OR UNMET | REASONS FOR UNMET GOALS | ADJUSTMENTS TO ACTION PLAN |
|--------------|--------------|-------------------------|----------------------------|
| | | | |
| | | | |
| | | | |

STRATEGIC PRIORITY 2: _____

| ANNUAL GOALS | MET OR UNMET | REASONS FOR UNMET GOALS | ADJUSTMENTS TO ACTION PLAN |
|--------------|--------------|-------------------------|----------------------------|
| | | | |
| | | | |
| | | | |

STRATEGIC PRIORITY 3: _____

| ANNUAL GOALS | MET OR UNMET | REASONS FOR UNMET GOALS | ADJUSTMENTS TO ACTION PLAN |
|--------------|--------------|-------------------------|----------------------------|
| | | | |
| | | | |
| | | | |

STRATEGIC PRIORITY 4: _____

| ANNUAL GOALS | MET OR UNMET | REASONS FOR UNMET GOALS | ADJUSTMENTS TO ACTION PLAN |
|--------------|--------------|-------------------------|----------------------------|
| | | | |
| | | | |
| | | | |



ROTARY'S ACTION PLAN WHAT CLUBS CAN DO

Rotary's Action Plan builds on our past successes and sets our future direction to ensure that we continue to grow, unite people, and make a lasting impact.

We encourage all members to review the Action Plan, think about your own club and district goals, and find meaningful ways to align those goals with our plan. Have open and ongoing discussions in your club and throughout your district about the new priorities and objectives, then use those talks to shape your own strategies.

For each of the four priorities that will direct our work, we've listed ways you can put that goal into practice. Think about how you can bring Rotary's Action Plan to life.

ROTARY'S ACTION PLAN

INCREASE OUR IMPACT



DEVELOP A STRATEGY for educating members about the importance of impactful service projects. Research shows that measurable, data-driven results offer proof of the impactful service that is attractive to the next generation of leaders.

CONDUCT A COMMUNITY ASSESSMENT to determine which issues are top concerns in the area. Learn about needs and strengths and identify the key decision-makers. Try conducting evaluations both before and after you implement projects to get a better sense of where and how you can create measurable, lasting change that truly helps the communities you serve.

FOCUS YOUR EFFORTS. Review your club's activities and determine which ones can be streamlined or eliminated so your club can spend more time on activities that make a real impact.

ENCOURAGE YOUR CLUB OR DISTRICT TO CELEBRATE THE

LONG-TERM SUCCESSES of service and program offerings, but to be open to new projects or opportunities to prove that your club or district's impact has only begun. Apply for a global or district grant to fund a project that will have sustainable, measurable outcomes.

EXPAND OUR REACH



SET A GOAL to collaborate with new groups in your community, either through service projects or social events, to introduce more people to Rotary. As our vision statement says, we want to unite people — not just Rotarians — to create lasting change.

USE ROTARY'S MEMBERSHIP TOOLS and resources to assess your club and learn how to make it more diverse, open, and attractive to everyone in your community.

Districts should **CONSIDER FORMING NEW CLUBS.** Take advantage of our flexible club models to create clubs that are welcoming to people with diverse interests, backgrounds, and needs. As always, these new clubs should embrace our core values and deliver value to members.

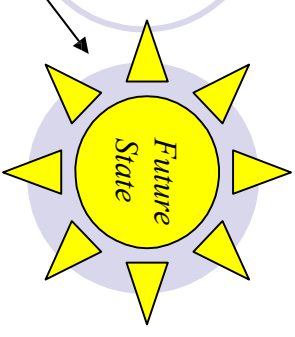
BE SURE TO TELL COMPELLING STORIES about how your club or district is making a difference. Use the People of Action materials and other resources in the Brand Center to learn how to show your club or district's impact through the media, on social media, and in the community. Strengthening your public image can help you attract like-minded people to your club, form new partnerships for service, and build a stronger and more diverse network of collaborators.



Rotary

rotary.org/actionplan

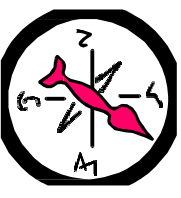
Components of an Organization's Strategy



Vision - the desired, future state if anything was attainable, what you want to look like 10 years from now, *where you're going*

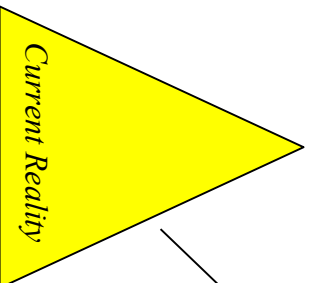
Mission - *reason for the journey*, why we exist, our purpose, what the organization would lose if we did not exist

Strategic Priorities & Action Plans – which roads we travel, *how we travel the road*, activities that provide sustainable differentiation, how we get to the Vision



Objectives & Metrics - *measures of success*, critical areas needing monitoring, forward looking and lagging indicators (financial, process, performance)

Core Values - *what is considered correct behavior*, what we consider vital, how we measure the “rightness” of implementing strategies, core values do not shift with trends, organization's conditions, for financial gain or short term expediency.



Sample SP Agenda
First half-day

| | Step | What we want to accomplish | Time | Notes |
|---------|--|---|----------|---|
| 8:00 am | Welcome | <ul style="list-style-type: none"> - Welcome “Members of the Strategic Planning Team”, - Provide context and encourage all to trust the process - Overview agenda & logistics | 10 mins | <ul style="list-style-type: none"> • Last Strategic Plan (if any) • Make-up of Planning Team (12 min up to 24 max) • 3yr. plan covers 2020-23 • Open seating at the start • Stick-on name tags are helpful |
| 8:10 | SWOC Analysis | <p>Analyze current state of organization</p> <p>*Framework sent ahead of time (no need to collect; used to get people thinking and preparing for the event)</p> | 45 mins | <p>Flipcharts in each corner. Count off by 4 1’s to S, 2’s to W, 3’s to O, 4’s to C After 11 min rotate clockwise, after 8 min, rotate again, then 6, 5 = 30 Report out 25 mins – 6 each Put on wall for reference</p> |
| 8:55 | List <i>Changes to be More Effective</i> | <p>SWOT application:</p> <p>Leveraging Strengths Minimizing Weaknesses Pursuing Opportunities Addressing Challenges</p> | 40 mins | <p>Rotate teams to next letter of SWOC to address solutions for top 3 or 4 factors (15 min) Share for 25 min – 6 mins per group</p> |
| 9:35 | | --- Break --- | 15 mins | |
| 9:50 | Mission Exercise | Develop DRAFT Mission statement | 30 mins. | <p>Use Mission worksheet back at table and flipchart draft – 15 min Gather at front, each team presents draft Facilitate toward consensus (common key words)</p> |
| 10:20 | Vision Exercise | Develop DRAFT Vision Statement | 30 mins | Use Vision Worksheet – then same as Mission process |
| 10:50 | Re-arrange room | Create three tables configuration | 5 mins | Participants count off 1-3 and move to same number table |
| 10:55 | Strategy Exercise | <p>Determine (3) Strategic Priorities (Consensus on the 3 topics)</p> <ul style="list-style-type: none"> -Teams move f/c to front - Facilitate collaborative selection of 3 SP at front while they stay at tables | 30 mins | <p>1. Use Strategies Worksheet 2. Reference <i>Changes to Be More Effective</i> f/c sheets for ideas 3. F/C team’s 3 choices 20 minutes table work; 10 minutes for group consensus</p> |
| 11:25 | Developing Strategic Priority Descriptive Statements | Expand selected priority topics to declarative statements that describe desired outcomes for each priority | 25 mins | <p>1. Have each team choose 1 of the 3 priority topics. Use worksheet to develop robust statement - 10 mins 2. F/C statements 3. Report out – 12 mins</p> |
| 11:50 | Wrap up | <p>Announce next steps</p> <p>Express appreciation for today’s effort</p> | 10 mins | <p>Next meeting Small group assignments End at Noon</p> |

Sample SP Agenda
Second half-day

| Start | Step | What we want to accomplish | Time | Notes |
|----------|--|---|---------|--|
| 8:00 am | Welcome | <ul style="list-style-type: none"> - Welcome “Members of the Strategic Planning Team”, - Introduce anyone new - Overview agenda & logistics | 15 mins | <ul style="list-style-type: none"> • 3yr. plan covers 2020-23 • Open seating at the start • Stick-on name tags are helpful |
| 8:15 | Share results of work assignments from session 1 | Get everyone up to speed before moving into next phase | 30 mins | Examples might be:: <ul style="list-style-type: none"> - Updated drafts and get buy-in on mission and/or vision. - Revisions to the strategic priority statements |
| 8:45 | Priority Team Selection | Move to table according to which strategy they are: <ul style="list-style-type: none"> • Passionate about • Subject Matter Expert • Have skillset needed for implementation • | 5 mins | Declare tables #1-3 Priorities Should be about the same number of people at each of the tables |
| 8:50 | Desired Shifts Exercise | For each Strategic Priority list the current state and the Desired State in 3 years’ time | 45 mins | Table work – use worksheet and flipchart response – 20 min Report out- open to discussion 25 |
| 9:35 | | --- Break --- | 15 mins | |
| 9:50 | Setting Targets | Creating 3-year goals and dividing the effort into yearly segments | 45 mins | Using desired shifts, determine 3-year goals – 25 min “Chunk” 3-year effort – 20 min <ul style="list-style-type: none"> - Realistic Year 1, - Year 2 builds on 1st year, - Year 3 with momentum |
| 10:35 | Action Planning | Draft action plans for each strategic priority | 65 mins | Decide objectives for 1 st year; F/C 3-year goals and Year 1 objectives for your priority – 20 min Report out – 12 min/priority and interaction to revise with input from the others in the room. = 45 min |
| 11:40 am | Wrap up | Get commitments from 3 volunteers to process the key summary information Thank everyone for their participation | 20 min | Share timeline for sharing with the club. Establish timing of annual event to assess progress made in year 1 and craft action plans for year 2 End at Noon |

SWOC Analysis

Assess the current state of your Rotary club. Note these criteria examples relate to assessing your *existing* organization and factors *external* factors that could help or hurt the club. Many listed criteria could apply to other quadrants. Examples are intended to stimulate your thinking. Add criteria you identify.

| Internal to the club | | | |
|---|-----------|------------|--|
| Criteria Examples | Strengths | Weaknesses | Criteria Examples |
| Recruiting practices Unique selling points Resources, Assets, People Experience, Knowledge, Data Financial reserves Marketing reach Communications Collaborative relationships Membership process Location considerations Cost, value, quality Cultural, Attitudinal, Behavioral Leadership/Succession process Philosophy and values | | | Gaps in capabilities Lack of competitive strength Reputation, presence and reach Financials Own known vulnerabilities Timescales and pressures Continuity of membership commitment Low levels of engagement Effects on core activities, distraction Reliability of data, planning predictability Morale, commitment, leadership Processes and systems |

| External to the club | | | |
|--|---------------|------------|---|
| Criteria Examples | Opportunities | Challenges | Criteria Examples |
| Marketing developments Competitors' vulnerabilities Lifestyle trends Technology development Niche target markets Geographical Club development Information and research Partnerships, Collaborative partnerships | | | IT developments Competitors intentions Market demand New technologies, services, ideas Vital partners, collaborators Sustaining internal capabilities Obstacles faced Loss of key members/staff Sustainable financial support Family |

Strategic Planning Worksheet

Mission

Mission statement is a one-sentence statement describing the reason an organization exists and is used to help guide decisions about priorities, actions, and responsibilities. It declares the things that need to be done going forward in order to achieve the vision someday. Vision talks about the future, while Mission stresses building for the future, in the present. An organization's mission statement is a reminder to its people of why the organization exists. It addresses the what (service), who (customer groups) and how (activities, methods).

Your Mission statement answers the question: Why does this organization exist?

- What service do you provide?
- Value? Unique benefit?
- Why will your customers use your service?
- What differentiates you from the competition?
- What are you committed to providing?

Answers:

-
-
-
-
-

Draft Your Mission Statement: Incorporate 8-10 key words or phrases (from answers above) that describe why your organization exists from a customer point of view. Capture your competitive edge or unique proposition.

Examples:

- TED: Spreading Ideas. (2 words)
- Smithsonian: The increase and diffusion of knowledge. (6 words)
- New York Public Library: To inspire lifelong learning, advance knowledge, and strengthen our communities. (10)

Version 1:

Version 2:

Proof question: Is it clear, memorable and concise? Try it on two people. Edit based on comments.

Strategic Planning Worksheet

Vision

Vision Statement: (Desired End-State) A one-sentence statement describing the clear and inspirational long-term (at least 5 years out) desired change resulting from an organization's work. It talks about where an organization wants to be in the future in terms of growth, achievements and development; it is a declaration of an organization's goals for the future. It must have a level of excitement and motivation to it.

Ask yourself: What will this group be known for? Describe characteristics of your service. Describe characteristics of your BEST current or potential "customers". Describe characteristics of successful organizations you admire and would like to emulate. List words below:

-
-
-
-

Draft Your Vision Statement: Using the words and phrases above.

- In a perfect world what does this organization look like?
- What does success look like?
- Can it be easily described by members?

Examples:

- NPR, with its network of independent member stations, is America's pre-eminent news institution (12)
- Teach for America: One day, all children in this nation will have the opportunity to attain an excellent education. (16)
- Goodwill: Every person has the opportunity to achieve his/her fullest potential and participate in and contribute to all aspects of life. (21)
- Alzheimer's Association: Our vision is a world without Alzheimer's (7)
- Habitat for Humanity: A world where everyone has a decent place to live. (10)
- San Diego Zoo: To become a world leader at connecting people to wildlife and conservation. (12)

Version 1:

Version 2:

Version 3:

Proof question:

Review for length, clarity, and inspiration. Try it on two people. Edit based on comments.

Strategic Planning Worksheet

Defining Your Strategic Priorities

Strategic Priorities set the direction, philosophy, values and/or methodology for building and managing your organization. Strategic Priorities also establish guidelines and boundaries for evaluating important decisions. Following a predefined set of strategic priorities is critical to keeping an organization on track and moving towards its goals.

Determining Your Strategic Priorities: When deciding on areas critical to building your organization, consider:

- Positioning in the community/Marketing/Branding
- Membership profile
- Opportunities for service, engagement and impact
- What Services – match members' passion to need
- Technology capabilities
- Strategic Alliances
- Funds, funding, fund raising

Examples of Strategic Priority Topics

Your topics are probably in your *Changes to be More Effective* document. Determine the areas you see the most doable and beneficial. Do you see repetitive areas/topics across the document? Write down your own ideas before sharing at your team table.

1. Member Engagement
2. Signature Service Project
3. Club Foundation
4. Community Recognition
5. Technology Enhanced Club

Choose 3 Strategies to pursue for the next three years: List three possibilities first then share at your table.

1.

2.

3.

Strategic Planning Worksheet

Desired Outcomes for Strategic Priorities

For each of the three strategic priorities you have identified, analyze the current state of that area in the Club then define what you want it to be.

| Describe the CURRENT State | Describe the DESIRED state |
|--|--|
| What you are doing now: | What you want it to be like in 3 years |
| <ul style="list-style-type: none"> | <ul style="list-style-type: none"> |
| <ul style="list-style-type: none"> | <ul style="list-style-type: none"> |
| <ul style="list-style-type: none"> | <ul style="list-style-type: none"> |
| What you are Not Doing now: | New Ideas: |
| <ul style="list-style-type: none"> | <ul style="list-style-type: none"> |
| <ul style="list-style-type: none"> | <ul style="list-style-type: none"> |
| <ul style="list-style-type: none"> | <ul style="list-style-type: none"> |

Strategic Planning Worksheet

Draft Robust Priority Statements

Every strategy needs to be connected to a goal. For each strategic priority topic identified, you must expand on it to provide direction to the efforts. What will your club do to achieve in that area in the next three years?

Examples of Strategic Priority Statements:

- Engage current members and attract new members through meaningful service projects.
- Increase awareness of Club through community partnerships.
- Fight hunger at home and abroad
- Increase membership by implementing new membership options.
- Strengthen the finances of our Club so we can better meet the needs of our community.
- Concentrate on club service by focusing efforts on leadership development opportunities.

Action Steps:

1. Work on one strategic priority statement at a time.
2. Refer to your *Desired Outcomes* worksheets for a start. Clarify what success would look like after three years of effort on the topic.
 - a. How much do you think you have the time, money and resources to address over the next three years? For example, beyond the identification of Membership as one of your strategic priorities, what about it, Attraction? Engagement? Development? Retention?
3. State what you want in the future, give the statement definition so everyone knows what you are trying to accomplish.
4. Use action verbs to describe progress towards the desired outcome.

Draft your statement first then share with the team:

Proof question: How would you measure success/know you are making progress?

Note: The Planning Team is making recommendations for the Board to decide. Once this work is completed, plan to present at upcoming Board meeting for review and feedback before finalization.

Strategic Planning Worksheet

Plan Action Steps for the Rotary year

Choose one strategic priority for each team to work on. Your team is responsible for determining the steps you believe can be accomplished in the next Rotary year. Remember a three year goal has been set. You are determining how much progress can be made in year one.

Steps:

1. Define the goal for the first year of effort.
 - a. Be specific, it is easier to plan the more specific you are.
2. List all the Action Steps to be completed in the year then prioritize them.
3. List Action Steps by quarter
4. Suggest who could lead the team effort
5. Recommend who are the best individuals to be part of this team.
6. Define additional resources needed to do the work.

Note: The Planning Team is making recommendations for the Board to finalize. Once this action plan is completed, plan to present at upcoming Board meeting for review and feedback before finalizing.

Reference for goal setting, S.M.A.R.T. Goals:

- ❖ Specific
- ❖ Measurable
- ❖ Actionable
- ❖ Realistic
- ❖ Time-Specific

Your Club Name/Logo

VISION STATEMENT

MISSION STATEMENT

SLOGAN

(Optional)

STRATEGIC PRIORITIES

| ONE | TWO | THREE |
|-----|-----|-------|
| | | |

CORE VALUES

(Optional)