


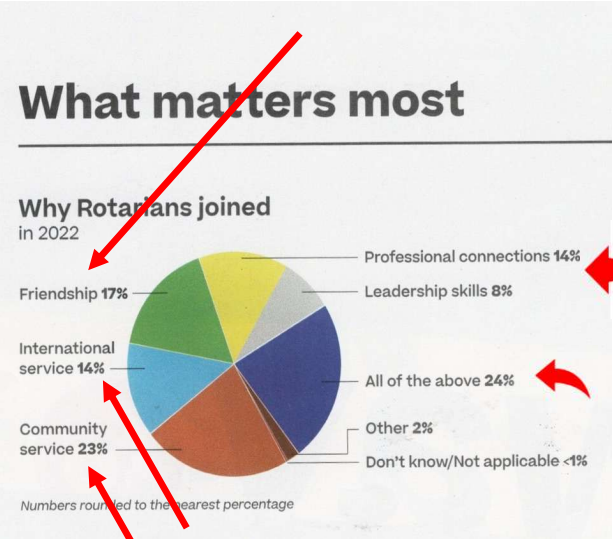
Club Action Plan President-Elect Learning Session March 22, 2025

Canon Robert Morrow
Dundas Valley Sunrise Rotary Club,
Club Action Plan Facilitator, D7090

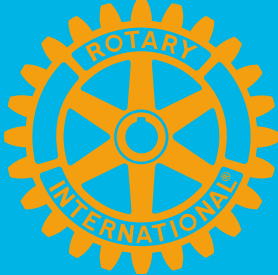


1

WHY DID YOU JOIN ROTARY?



Reason	Percentage
Professional connections	14%
Leadership skills	8%
All of the above	24%
Other	2%
Don't know/Not applicable	<1%
Community service	23%
International service	14%

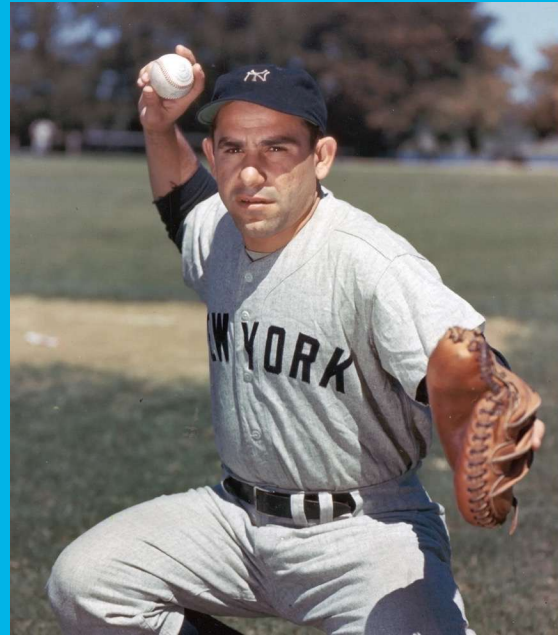


2



YOGI BERRA – 20TH CENTURY PHILOSOPHER

**If you don't know
where you are going,
you probably will end
up someplace else.**



3

Why hasn't it worked before?

We did it before and then Nothing, no follow-up.

We really tried but the first year wore us out.

It's too much of a top-down notion.

How can we keep track of all this stuff?

It takes too much time and effort.

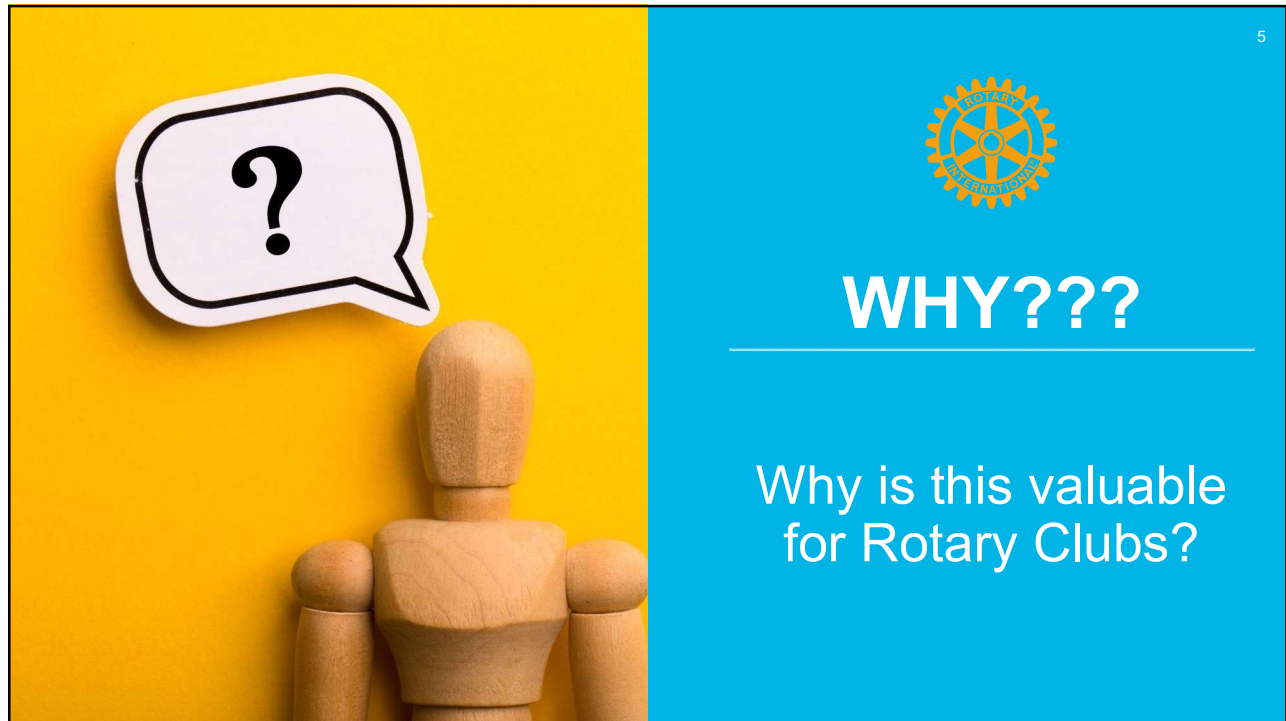
I didn't join Rotary to do this kind of thing.

Strategies, Tactics, Goals ... I don't like the terminology.

Will it be of value to our club at this time?



4




5

5

WHY???

Why is this valuable for Rotary Clubs?

5




6

AT THE CLUB LEVEL ...

- **Research** indicates that **clubs with Strategic Plans** are ...
 - **more vibrant*** ... AND
 - members have a more positive view of the club ... AND
 - are more positive about its effectiveness in the community.

[reference – *Rotary's Action Plan and You* course]
- **CHANGE** ... the **PACE** of change ... demographics ... technology
 All emphasize the need for strategic planning and ...
 an **INTENTIONAL implementation process**



6

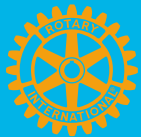
6

GUIDING PRINCIPLES ... CLUB VIBRANCY

- **Active, intentional** membership engagement
- Dynamic **meaningful** service
- **Effective** governance
- A strong **public image**
- Diversity, equity and inclusion



7



AT THE CLUB LEVEL ...

8

The process is “member” oriented, and a key element is **input** by ALL members.

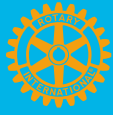
With an action plan, club leaders can **focus on implementation making directors’ work more efficient and effective.**

The process is intense for a brief time, but the results are worth the time and effort.

The new plan will be **simple and implementable.**

Implementation/progress is easily shared with members.

8



AND FOR D7090 CLUBS ...IT JUST MAKES SENSE

9

- The Action Plan emphasizes **consistency** with the District Strategic Plan and the RI Action Plan – same format, same “language”, same processes – **but adapted to CLUB needs** ... even the **same colours!**
- The Action Plan will make it easier to put goals into MY ROTARY ... and can be “rolled over” into subsequent years.
- Members involved in RLI will see the **consistency** with the double unit on Strategic Planning in Part 3.

9

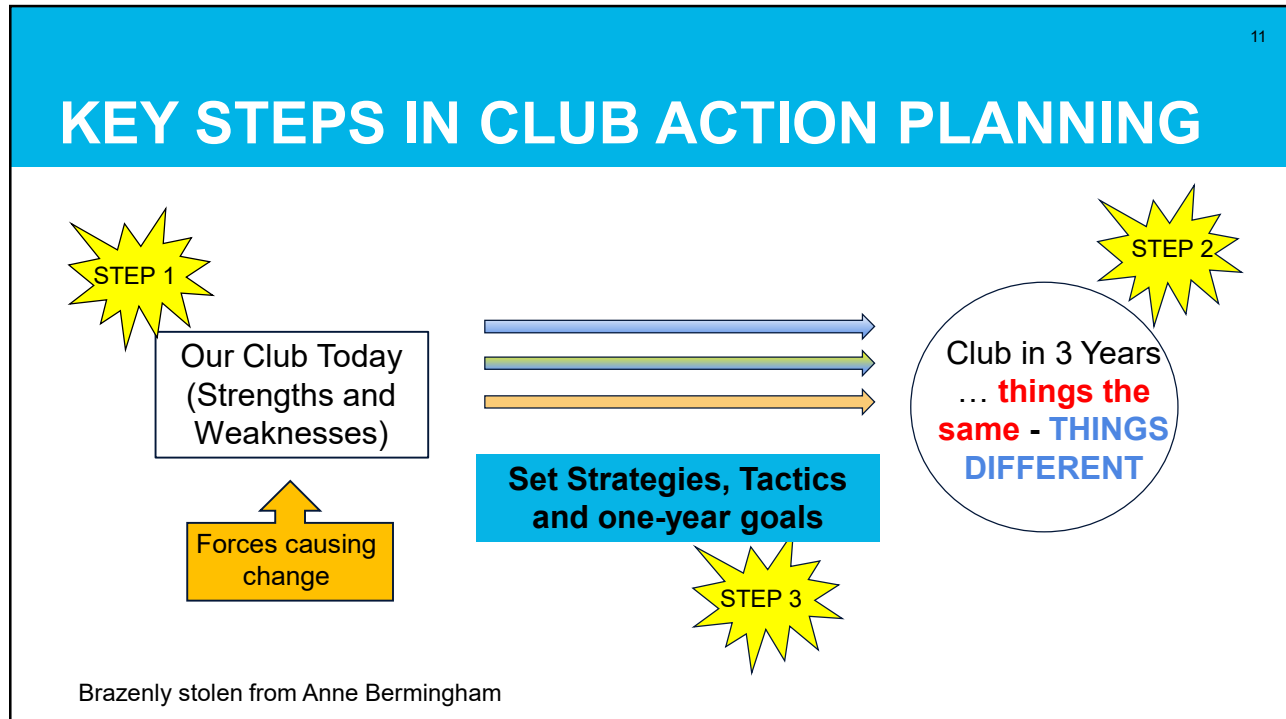
STEPS IN THE PROCESS

10

- **Where are we now? [Data + QUESTIONNAIRE]**
- Establish **Tactics** (the long-term look)
- Prepare short –term [one-year] **Goal(s)** for each tactic
- **Implement AND MONITOR** the implementation



10




11

12

MEMBER INVOLVEMENT

Two key areas!

- 1. Complete a questionnaire – on-line, (Survey Monkey). Completely confidential – members are only identified as an individual when returning the form. No data on a personal level is saved or presented.**
- 2. Be involved in the session where members develop the key tactics (three year goals) and short-term goals for the plan. (usually about 1 ½ - 2 hours)**



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BIG AREAS

INCREASE OUR IMPACT	EXPAND OUR REACH
Local Project to increase Club's Identity within the community	Increase membership with a focus on younger members and diversity to reflect community
The potential for International Projects	Membership expectations for new members with a focus on leadership
New twists to fundraisers	
ENHANCE PARTICIPANT ENGAGEMENT	INCREASE OUR ABILITY TO ADAPT
Communication within the club	Communications – communications with the community
Meetings – a revisit (time, location, format...)	xxxxxxxxxxxxxx
Member knowledge about Rotary outside the club	

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STRATEGIES, TACTICS AND GOALS

- **STRATEGIES** – the four “strategic directions” as outlined in the Rotary International Action Plan....
 - INCREASE OUR **IMPACT**
 - EXPAND OUR **REACH**
 - ENHANCE PARTICIPANT **ENGAGEMENT**
 - INCREASE OUR ABILITY TO **ADAPT**




- **TACTICS** - Where do you want to go? What do you want to accomplish? The long game. THE 3-YEAR LOOK....
- **GOALS** – the short-term **ACTIONS** that help you get there!

Increase our impact.	Expand our reach.
Enhance participant engagement.	Increase our ability to adapt.

14

FOUR STRATEGIC DIRECTIONS [ROTARY ACTION PLAN]

Increase our impact.


Expand our reach.

Enhance participant engagement.

Increase our ability to adapt.



15

Strategy #1: Increase Our Impact		STRATEGY
Evidence-based programs define and measure our impact. Through data-driven decisions, we can IMPROVE OUR PROJECTS AND OUTCOMES , creating even MORE EFFECTIVE CHANGE that can be scaled up and applied to other communities.		AND THAT MEANS...
1A. Assist clubs to build effective membership plans that speak to the research findings related to the five characteristics of a vibrant club.	June 2024 Goal - Assist 12 interested clubs in developing their membership plan around these findings and then sharing with other clubs in their area.	 Rotary Strategic Plan District 7090
1B	June 2024 Goal -	
1C	June 2024 Goal -	
TACTIC	<div style="background-color: red; color: white; padding: 5px; display: inline-block;">If you can't measure it, you can't manage it!</div>	<div style="border: 1px solid black; padding: 10px; background-color: #FFF2CC;"> GOAL Specific Measurable Achievable (Realistic) Results-oriented Time-Frame included </div>

16

17

STRATEGY #1 : INCREASE OUR IMPACT

We can improve our projects and outcomes, creating more effective change

What do we want to accomplish? [Tactics]	Step(s) along the way [Goals]
	<div style="border: 1px solid black; background-color: #FFF9C4; padding: 5px; display: inline-block;"> GOAL Specific Measurable Achievable (Realistic) Results-oriented Time-Frame included </div>

If you can't measure it, you can't manage it!

17

18

STRATEGY #1 : INCREASE OUR IMPACT DOLLY PARTON'S IMAGINATION LIBRARY

We can improve our projects and outcomes, creating more effective change

What do we want to accomplish? [Tactics]	Step(s) along the way [Goals]
Improve Literacy Rates in X state by x%	Send each child born a new age-appropriate book every month until the child starts school
	<div style="border: 1px solid black; background-color: #FFF9C4; padding: 5px; display: inline-block;"> GOAL Specific Measurable Achievable (Realistic) Results-oriented Time-Frame included </div>

18


19

APPLICATION for YOUR Club

STRATEGY #1 : INCREASE OUR IMPACT

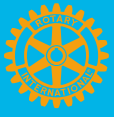
We can improve our projects and outcomes, creating more effective change

TACTICS	GOALS
Develop a new service project to meet community needs that involves as many members as possible	



19

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APPLICATION for YOUR CLUB

STRATEGY #1 : INCREASE OUR IMPACT

We can improve our projects and outcomes, creating more effective change

TACTICS	GOALS
Develop a new project to meet community needs that involves as many members as possible	Establish a committee to investigate community needs and recommend a project to meet the needs (June 2025)
	Implement the project; evaluate success (April 2026)
	Recommend project continuance to the club and board (June 2026)

Specific
Measurable
Achievable (Realistic)
Results-oriented
Time-Frame included

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SO WHAT MIGHT IT LOOK LIKE...?

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INCREASE OUR IMPACT	
Improve our projects and outcomes, creating even more effective change	
Tactic	Goal
1.1 Develop a new project to meet community needs that involves as many members as possible	Establish a Committee to investigate community needs and recommend a project meeting those needs to the club. (June, 2025) Implement the
1.2	
1.3	

GOAL

Specific
Measurable
Achievable (Realistic)
Results-oriented
Time-Frame included

Just a reminder.....

21

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APPLICATION AT THE CLUB LEVEL

INCREASE OUR IMPACT

Improve our projects and outcomes, creating more effective change

TACTICS	GOALS	LEAD
<p>Develop a new project to meet community needs that can involve as many members as possible</p>	<p>June 2025 - Establish a committee to investigate community needs and recommend to the club a project to meet the need.</p>	<p>BOARD (AKA PRESIDENT) COMMITTEE CHAIR COMMUNITY SERVICES ??????</p>




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IMPLEMENTATION

Try not to “front-end load” the plan ... too much, too soon



 Focus on the Action Plan in alternate board meetings

Use a **TEMPLATE** to report on progress towards the goals (steps in the process)

IMPLEMENTATION WAS THE BIGGEST ISSUE
IN PREVIOUS PLANNING EFFORTS



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TRACKING OUR PROGRESS – CLUB LEVEL		
WHAT DO WE WANT TO DO? (TACTIC) AND STEP(S) ALONG THE WAY (GOAL)	STATUS (PLEASE INDICATE STAGE OF IMPLEMENTATION (√))	TASKS/ELEMENTS TO BE COMPLETED FOR NEXT BOARD MEETING
<p>Develop a new project to meet community needs that can involve as many members as possible</p> <p>June 2025 Goal</p> <p>Establish a committee to investigate community needs and recommend to the club a project to meet the need.</p>	<p>STAGE OF IMPLEMENTATION (√)</p> <p>Thinking ___</p> <p>Initial Implementation <input checked="" type="checkbox"/></p> <p>Well into the Task ___</p> <p>Completed ___</p>	<p>Committee established, meet for the first time, and generate some ideas to investigate.</p>  

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DUNDAS VALLEY SUNRISE ROTARY CLUB		
ACTION PLAN IMPLEMENTATION		
MEMBERSHIP		
TACTIC(S) AND GOAL(S)	STATUS	TASKS/ELEMENTS TO BE COMPLETED BY THE NEXT BOARD MEETING WITH ACTION PLAN ON THE AGENDA
<p>Tactics are bold, goals with proposed dates follow</p> <p>2. Increase club membership including uncovered vocational categories and to reflect more of the diversity in the community</p> <p>2.1 List possible businesses/vocations that have not been filled but exist in our area [06/25]</p> <p>2.2 Identify 3 – 5 vocational areas as a focus to recruit new members [06/25]</p> <p>Note: 2.1 and 2.2 with Vocational Service</p> <p>5 Evaluate the role of membership recognition in the club</p> <p>5.1 Evaluate how members are appreciated in this club and other clubs and develop a plan for increased member recognition [06/26]</p>	<p>Please indicate the Stage of Implementation (√)</p> <p>STAGE OF IMPLEMENTATION (√)</p> <p>Thinking ___</p> <p>Initial Implementation ___</p> <p>Well into the Task ___</p> <p>Completed ___</p> <p>Thinking ___</p> <p>Initial Implementation ___</p> <p>Well into the Task ___</p> <p>Completed ___</p> <p>Thinking ___</p> <p>Initial Implementation ___</p>	

Sample from the Dundas Valley Sunrise Rotary Club

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AND THE TEMPLATE MIGHT INCLUDE....

What has been achieved since the last report in relation to the tactics/goal?

Briefly describe any issues you may have encountered that impacts your ability to achieve these goals and tactics?

As a club's board...we are here to help! What can we provide to help you with the Action Plan implementation?

What elements of the Action Plan need board approval relative to your process for implementation?

IMPLEMENTATION – RANDOM THOUGHTS

Share and the

When a t

ed

hed", it may club



ed


“You can never get enough books into the hands of enough children.”

Dolly


TOTAL KIDS REGISTERED 3,038,941	TOTAL BOOKS GIFTED 241,652,906
---	--

ROTARY INTERNATIONAL

Strategy #1: Increase Our Impact	
Evidence-based programs define and measure our impact. Through data-driven decisions, we can IMPROVE OUR PROJECTS AND OUTCOMES , creating even MORE EFFECTIVE CHANGE that can be scaled up and applied to other communities.	
1A. ASSIST CLUBS TO BUILD EFFECTIVE MEMBERSHIP PLANS that speak to the research findings related to the five characteristics of a vibrant club.	June 2024 Goal - Assist 12 interested clubs in developing their membership plan around these findings and then sharing with other clubs in their area
1B KEEP THIS 	June 2024 Goal - MODIFY THIS 
1C	June 2024 Goal - If you can't measure it, you can't manage it!



TOO AMBITIOUS


Rotary 
Strategic Plan
District 7090

GOAL


Specific
Measurable
Achievable (Realistic)
Results-oriented
Time-Frame included

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REFLECTIONS ... GOALS AND PLANS



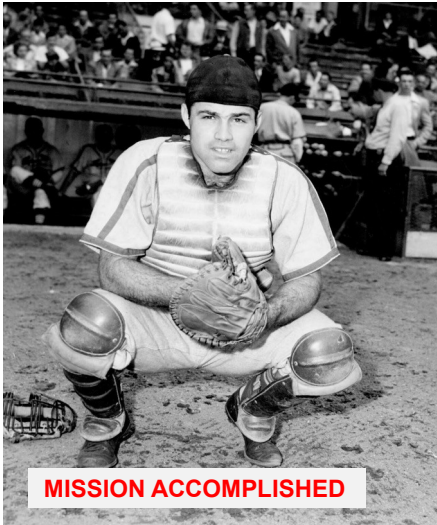
1. He had a **mission/vision** in mind....to be a major league (baseball) catcher.
2. He collected data on where the best catchers in MLB came from...and...
3. He set himself a **tactic (long term goal)** – to be the best catcher in his city



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JUST BECAUSE YOU MADE A GOOD PLAN, DOESN'T MEAN THAT'S WHAT'S GONNA HAPPEN
(TAYLOR SWIFT)

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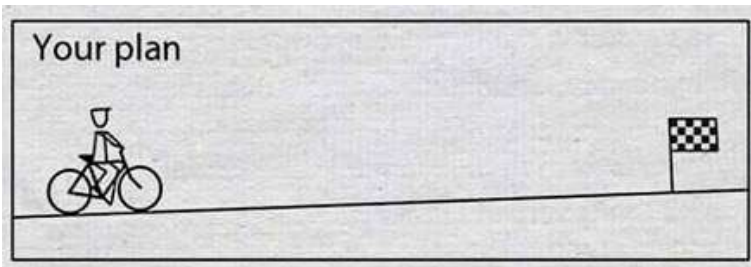
HOWEVER, HIS TACTIC – TO BE THE BEST CATCHER IN HIS CITY OF ST. LOUIS - WAS NEVER REACHED.

HE MET MOST OF HIS SHORT-TERM GOALS AND ACCOMPLISHED HIS MISSION...

BUT NOT THE TACTIC

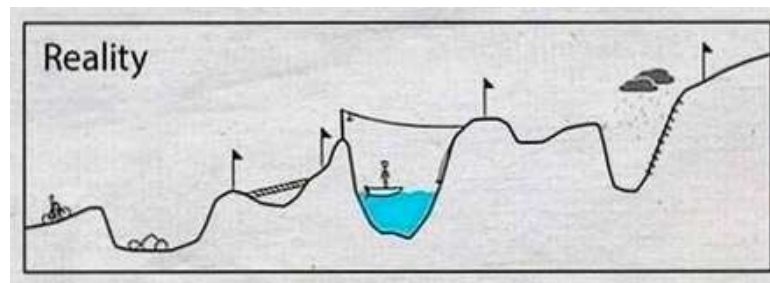


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Adjust goals ...how to get there!

Adjust tactics (where we want to go ..) if club agrees.



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THE DETAILS ...In review

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Board and Club	Approve Involvement	
President	Obtains basic Club information from My Rotary	
The "TEAM"	Establishes broad areas for questionnaire – about the club now, and in the future	ZOOM Meeting
	Helps to develop questionnaire	ZOOM Meeting
	Prods (where needed) members to get questionnaire completed	
	Establishes broad areas for the development of Tactics/Goals	ZOOM meeting
ALL Club Members	Questionnaires Completed	20 – 30 Minutes
	Develop Tactics and Goals	1.5 – 2.0 hours
Board	Monitors Implementation	On-going



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CLUB ACTION COORDINATOR

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- Directs Traffic
- Coordinates Questionnaire development
- Directs Questionnaire into Survey Monkey
- Assists with analyzing results and with general direction for development of tactics and goals from the "big areas".
- Takes member input and prepares a draft plan
- After consultation with club, prepares final plan
- Assists with development of Templates to monitor implementation process
- Prepares final report to club including reflections on the process and provision of the data on which the plan is based.

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QUESTIONS AND COMMENTS

Canon Robert Morrow
Dundas Valley Sunrise Rotary Club
robertmorrow@bell.net
905 304 6658



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