

Rotary 
District 7090

TED

Anne Bermingham
Strategic Plan

Talks

April 18, 2026

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Simple, Smart, Strategic
A New Take on Club Planning

Anne Bermingham
Rotary Club of Hamilton AM

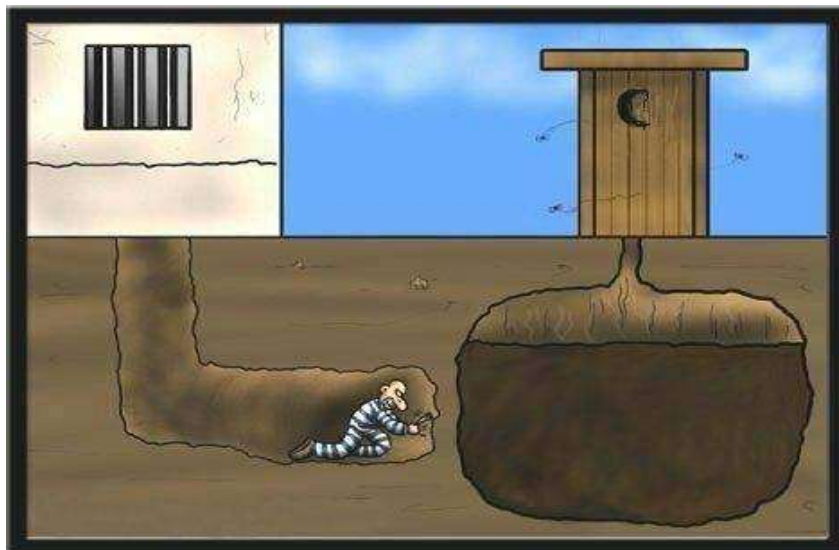
Rotary 

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WHY STRATEGIC PLAN?

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Good Planning Just Makes Sense !!



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A key characteristic associated with the most VIBRANT and GROWING clubs in North America (based on 2022 Study of Rotary Zones 28 / 32)

Active, intentional member engagement

Dynamic, meaningful service



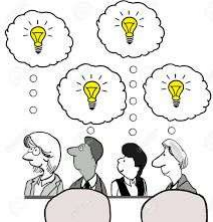
Effective Governance
(have strategic plan and future Presidents)


Strong Public Image
(well known in community)

Diversity
(representative of the

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Why Strategic Plan?

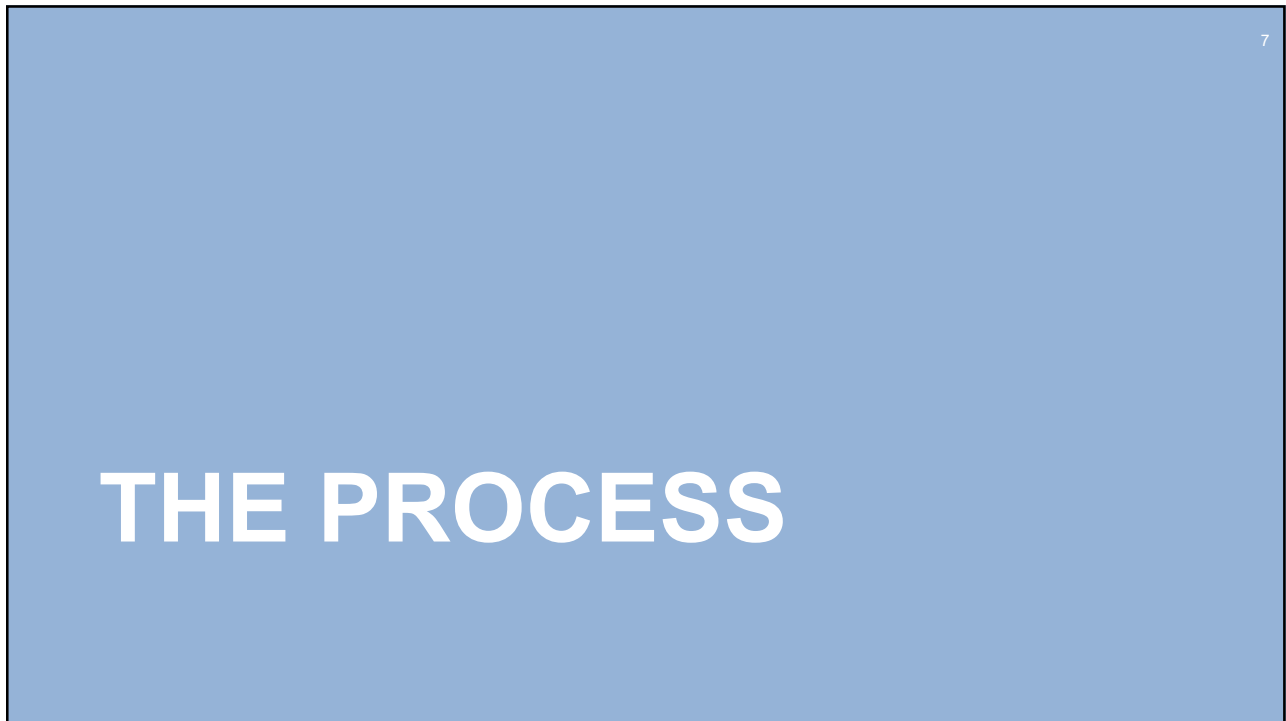
Otherwise, your club is swimming in a sea of ideas and suggestions but no clear direction of what way to go!

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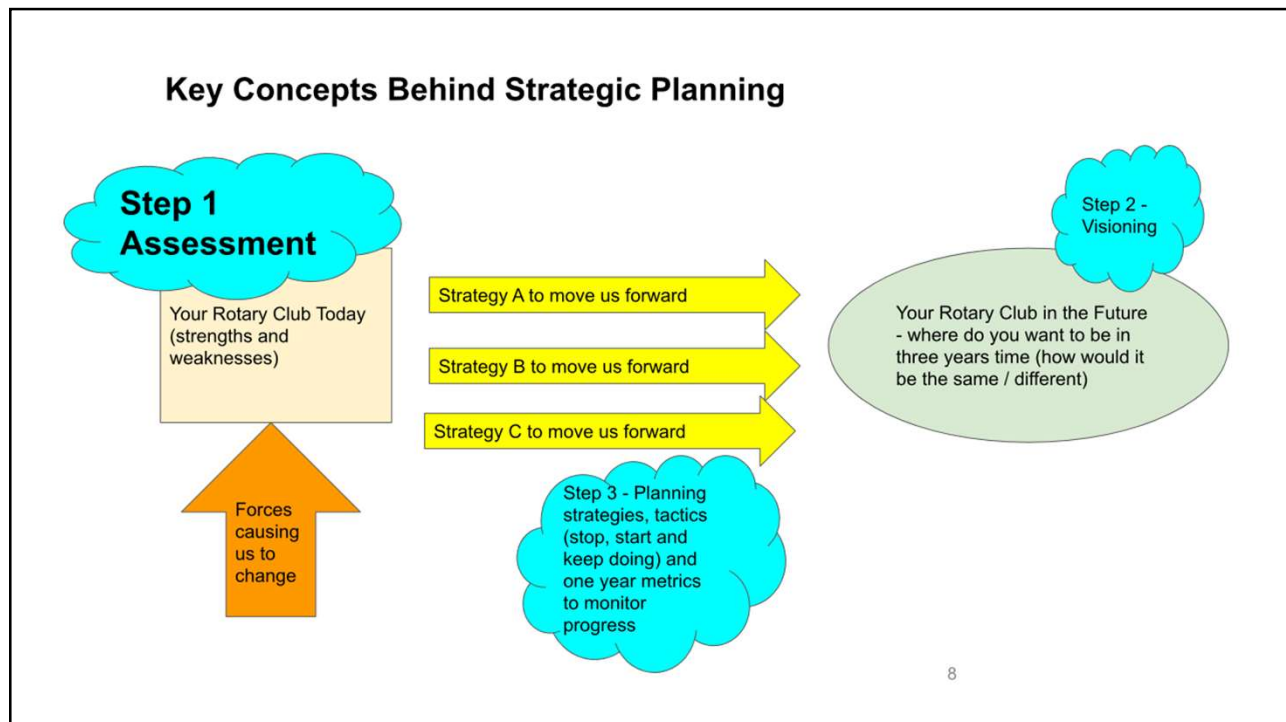


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Assessment needs to answer ...

Is status quo the right plan of action for our club?

Or do we need to change in 2-3 key ways?

- Improve membership recruitment or retention figures
- Strengthen understanding and giving to Foundation
 - Find ways to re-invigorate club as it feels like same old..
- Diversify membership
 - Streamline committees as too much work for number of members
- Amplify public image so our impact is better understood
 - Being able to find new successors for all that we do

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ROTARY CLUB HEALTH CHECK

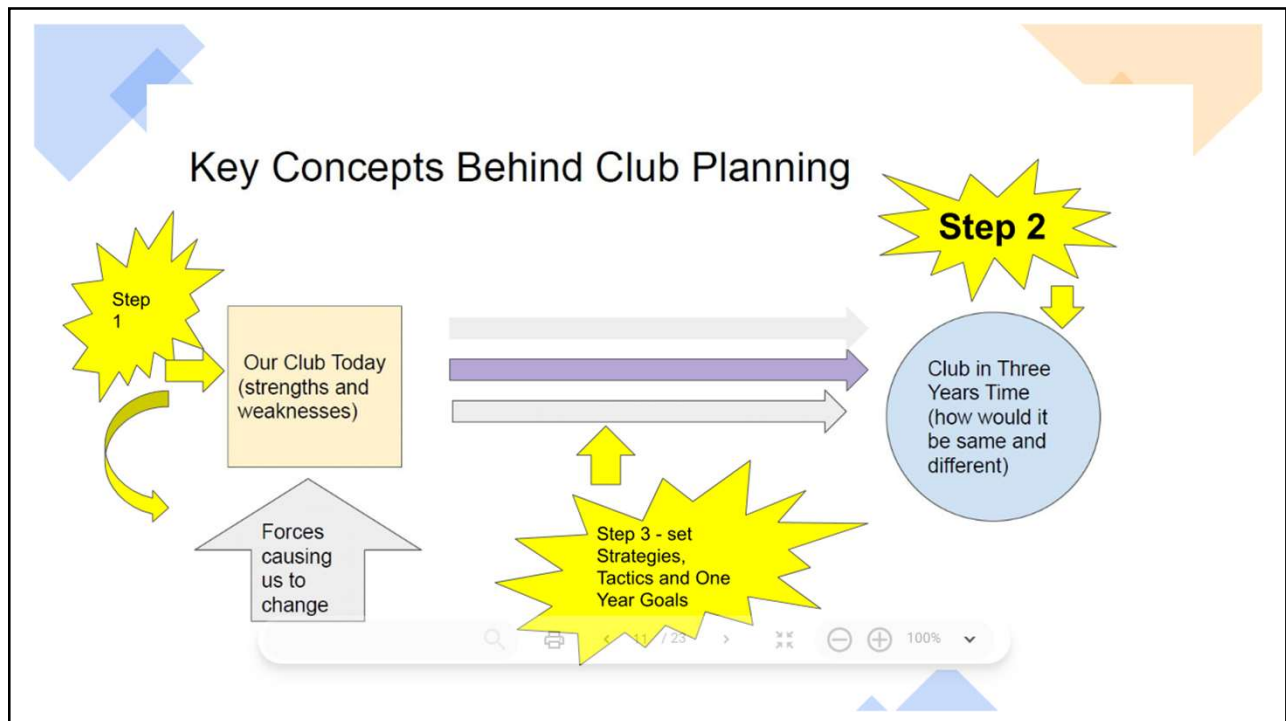
Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.

- 1 Your Club Experience
- 2 Service & Socials
- 3 Members
- 4 Image
- 5 Business & Operations

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Rotary

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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Visioning - Answer Two Questions

In what ways do you want club to stay the same in 3 years time?

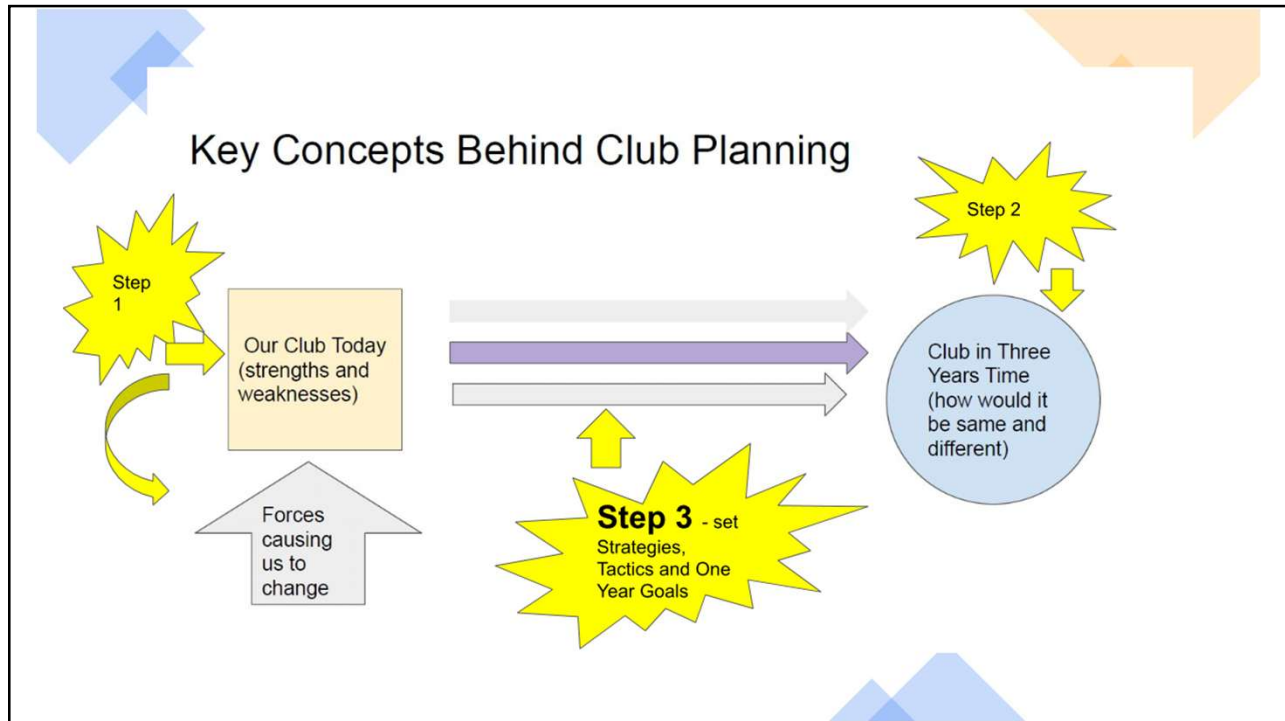
- Remain committed to youth programming
- Want to keep having fun in all we do
- Stay focused on keeping environment as one of our areas for hands on service

In what ways do you want the club to be different in 3 years time?

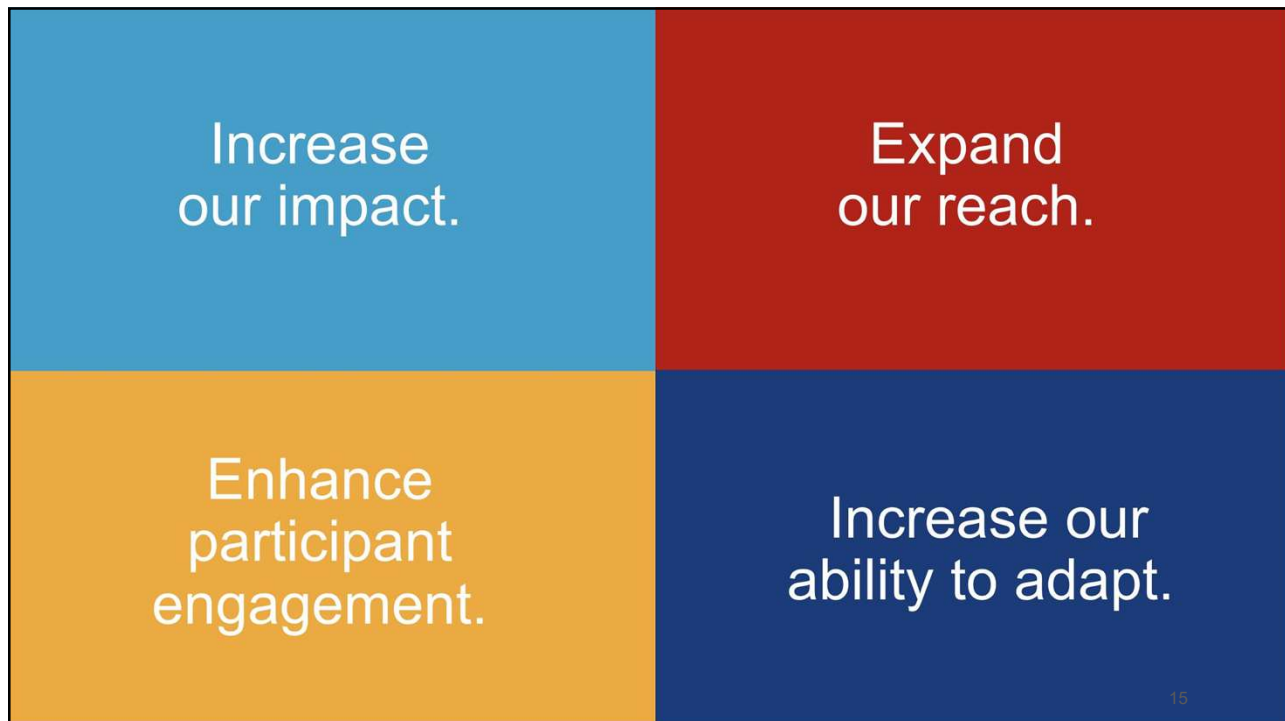
- Increase net size of club by 5 members
- Have greater diversity in vocations, age and ethnicity in our membership
- Found ways to offer more meaningful service projects
- Streamlined committees and work so less burnout and a more manageable workload

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Our Club - Today and 3 Years Time



3 Year's Time - July 1 2028

- How many members - 20-25
Raise same amount (\$50-60K)
with less effort - diversify efforts
- More hands-on service projects
My socials to engage those not
always able to attend meetings

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Agreed Upon Actions for Expand our Reach

1. Speaker follow-up - invite them to come back to Rotary
2. Develop a membership committee
3. Create 3+ Rotary Action Days and invite potential members
4. Develop e-brochure and / or hard copy brochure
5. Thank you event following fundraiser - light on selling

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Agreed Upon Actions for Enhance Participant Engagement

1. Member of the month - why they love Rotary - post on social media
2. Booth at various events - interactive - engaging audience
3. Have a brochure about things we do - talk of our impact
4. Appreciation night for people who help us out
5. Impact report on what the club is doing

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Once we have the plan, then what?



Take all the actions and
decide what your 1st Year

And what should be done in
Year 2 and 3

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And then...

- Assign Board lead for each action
- Give some tactics to existing committees
- Perhaps create a few ad-hoc working groups to tackle a few more
- Make strategic plan the topic of at least 5-6 Board meetings over coming year to check on progress, address obstacles, etc..
- Set 2-3 times a year when whole club reviews progress in achieving plan

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In Conclusion

Why is Club Planning Smart? Otherwise you will end up in the same place (and yet you determined your club wants to change)

Why is Club Planning Simple? Three main steps... doable using steering committee, assessment of data Rotary International collects for you plus member your Board

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In Conclusion

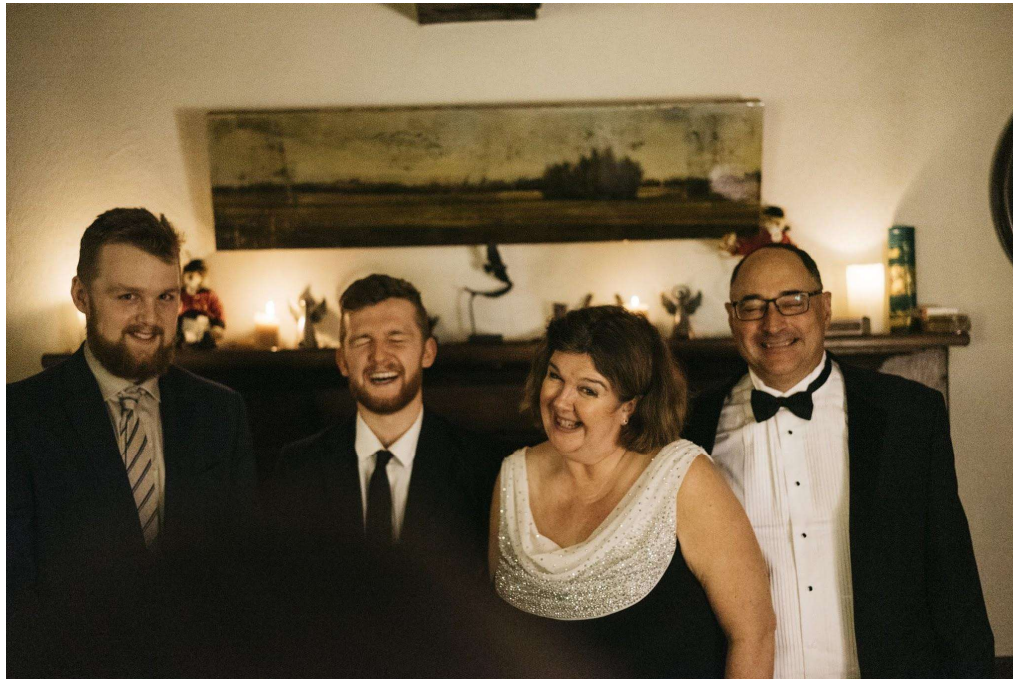
Why is Club Planning Strategic?

- Strategic is defined as the long-term or overall direction of an organization
- Defines a few “do different things” that we agree to make a focus
- Lessens the “you should” ideas
- Helps you with recruiting future Presidents / Board as job is to implement the will of the club

"A strategic plan doesn't limit a Rotary club's action — it focuses it. With clarity of purpose and shared direction, clubs turn good intentions into meaningful Impact."

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Thank you
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