

# STRATEGIC PLANNING GUIDE



How would you rate your club? Typically, Rotary clubs with a strategic plan are stronger than clubs without one. Research shows that members of clubs with a plan were more satisfied and had a more positive view of their clubs and Rotary overall.

This guide will help you set long-term priorities and goals, all of which will support your club's vision. It's designed for Rotary clubs, but districts can use it too. As you prepare a strategic plan, consider these tips:

- Build a team of past, present, and incoming club leaders to oversee the plan's development and use.
- Ask an unbiased facilitator to run strategic planning meetings.
- Include a variety of perspectives by involving a diverse range of club members.
- See how your club's goals reflect those of your district and [Rotary's strategic plan](#).

## The Strategic Planning Model

Create a vision for your club, with strategic priorities that will help you achieve it. Then set yearly goals that support each strategic priority.

Explore club's current condition

Prepare vision statement

Align vision statement with club's current condition

Set priorities to achieve vision

List 3 to 5 yearly goals to support priorities

Track the club's new strategic plan

# Strategic Planning Worksheet

## 1. Where are you now?

List the opportunities and challenges facing your community.

When checking your club's current state, use [Rotary Club Central](#), [Rotary Club Health Check](#), [Membership Assessment Tools](#), and your region's version of [Be a Vibrant Club](#) to see what your club is doing well and what it could improve.

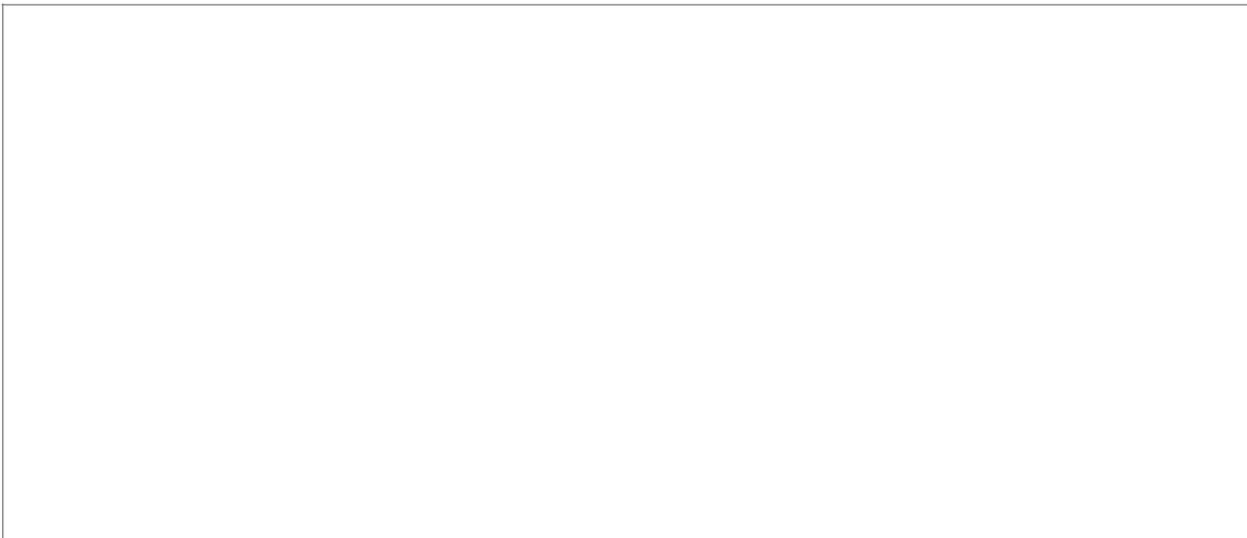
Club strengths	Club weaknesses
Opportunities for the community (such as new businesses, growing population)	Challenges facing the community (such as economic decline, competing services)

## 2. Where do you want to be?

List five to 10 characteristics that you would like your club to have three to five years from now.



Next, prepare a one-sentence vision statement. Revise it with the team as needed, then see whether club members support it. (Include something that will distinguish your club from other service groups in your community – e.g., “Our vision is to be the most internationally diverse service club in our community,” or “Our vision is to be the service club most supportive of youths in our community.”)



### 3. How do you get there?

- Set strategic priorities that will help your club achieve its vision, considering:
  - The club’s strengths and weaknesses
  - The goals of the Rotary strategic plan, those of your district, and those of your regional membership
  - Programs and missions of Rotary International and The Rotary Foundation
  - Your community’s opportunities and challenges
  - Members’ opinions
  - Achievability in three to five years
- Get the team to choose the most important strategic priorities — those that will have the biggest impact as your club works toward its vision.
- Identify yearly goals that support each of the top strategic priorities.
- List the tasks and activities, timeline, resources, and people necessary to meet the yearly goals under each of the strategic priorities.
- Use Rotary Club Central to help set goals and track achievements.

**Strategic priority 1:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

**Strategic priority 2:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

**Strategic priority 3:** \_\_\_\_\_

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

#### 4. **How are you doing?**

- Have your strategic planning team regularly monitor progress on reaching its goals and suggest plan updates as needed.
- Review your strategic plan, including its vision statement and priorities, each year with club members to see if they would like any revisions.
- Make sure club decisions support the goals of the plan, and discuss observations with the strategic planning team.
- Allot enough resources to achieve the plan.
- Repeat the strategic planning steps every three to five years to produce a new plan or keep the current one.

List steps that your club should take to track its strategic plan, including a timeline — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.