

## Club Visioning and Strategic Planning Services

Rotary International survey results have shown 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.

The District 5950 Club Visioning Team helps clubs identify 2-4 actionable strategic initiatives to focus their work and achieve their vision for impacting their community and delivering value to their members. The process includes elements of the Rotary International Strategic Planning Process as well as other visioning processes. The Visioning Team is comprised of volunteers from various clubs within the district.

### Participation

All club members are encouraged to participate in the process. It's important to get a variety of perspectives by involving club members who have diverse backgrounds and experiences.

### Preparation

Conducting a survey of club members to get the perspective of members that may not be able to participate in the visioning process is helpful but not necessary. It can also be helpful to talk to community leaders to better understand current opportunities and challenges in the community that the club could help address.

### Process

The visioning process typically takes two 2-hour sessions. This gives participants a chance to think about potential initiatives before making a final decision on which initiatives the club should take on. These sessions can be done in person or virtually. Also, if travel for the Visioning Team facilitator and/or club scheduling is an issue, visioning can be done in one 3–4-hour session.

#### Session 1 Agenda

- I. Rotary International Review – Vision and Action Plan Priorities
- II. Club Review – Membership and Giving Trends
- III. Dreams for Your Club – What are your dreams for the club 3-5 years from now? What do you want it to look like, be known for, have accomplished?
- IV. Strengths, Weaknesses, Opportunities & Threats Analysis (SWOT)
- V. Prioritize Dreams

#### Session 2 Agenda

- I. Recap of Session 1
- II. Review Categorization of Dreams and Alignment of SWOT Analysis with Dreams
- III. Finalize List of Dream Options
- IV. Categorize Dreams as Hows, Nows or Wows
- V. Vote on Final List of Dreams to Identify 2-4 Key Initiatives
- VI. Action Planning
- VII. Next Steps

### Action Planning

Ideally committee leaders and immediate next steps for each initiative will be identified at the second Visioning session. The club will also need to determine how progress for each initiative will be objectively measured and communicated to the club. The Visioning facilitator will follow up with the club in 90 days to check on progress and suggest District resources that may be available to help with club initiatives. The facilitator is also available for consultation at any time.

Contact Kim Ross at [Kim@KimARoss.com](mailto:Kim@KimARoss.com) for more information.