



STRATEGIC PLANNING *Guide*

Using Rotary's Action Plan to improve the club experience and make meaningful, lasting change within your community



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.



THE FOUR PRIORITIES



Let's develop and implement the practices, capacity, and infrastructure we need to define, measure, track, and analyze data from our service projects in a more effective way.

In your club this might look like...

Develop service projects that reflect the needs of your community and are more effective.



Let's share our values with new audiences, create ways to bring people together to experience the power of Rotary, and show that we're inclusive, engaging, compassionate, and ambitious about making change.

In your club this might look like...

Work with groups, organizations, and community leaders that you haven't partnered with before.



Let's use every encounter as an opportunity to show people how getting involved with Rotary allows them to make a bigger difference in their communities and for causes they care about.

In your club this might look like...

Make all members feel like they have a role in the club and make sure that anyone who engages with your club feels empowered to share their ideas and get involved.



Let's create a culture of research, innovation, and willingness to take risks so we can learn, evolve, and better serve our communities.

In your club this might look like...

Ask members what your club should continue, start, or even stop doing to ensure that the club reflects the needs of its members and potential members.

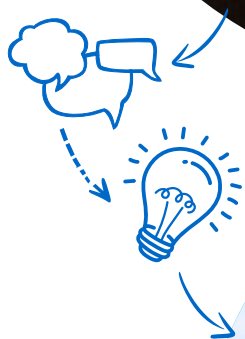


ABOUT THIS GUIDE

Just as a map guides people from where they are to their destination, a strategic plan that's based in action guides an organization to its goals and, ultimately, its strategic vision. Rotary's Action Plan, the long-term guide toward our vision of uniting people and taking action to create lasting change, was developed from what you and your fellow members want Rotary to be.

In the same way, strategic planning helps clubs move toward what members want from their Rotary experience. It acknowledges the challenges that clubs experience and addresses the underlying causes of those issues. It can also work as a guide to elevate participant experiences as well as their presence in communities. Our research has shown that clubs that develop and follow strategic plans are stronger than clubs that don't, with members who are more satisfied and who view their clubs and Rotary more positively overall.

This Strategic Planning Guide can help you set long-term priorities, using the framework of the Action Plan and time-based goals to 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 your club doing now?

- Identify significant issues to address.
- Determine your club's strengths and weaknesses.
- Identify opportunities and challenges in the community.

PHASE 2

Develop a vision: What do you want your club to be like?

- List several characteristics that you want your club to have.
- Think about what you want your club to be known for.
- Write a vision statement.

PHASE 3

Make a plan: How can you achieve your vision?

- Identify the strategic priorities to focus on.
- Set your goals.
- List the action you'll take, your timeline, and the resources, such as financial support, that you'll need to succeed.

PHASE 4

Track your progress: How close are you to your goals?

- Monitor progress toward your goals.
- If you miss your targets, determine why.
- Adjust your strategic plans as needed.

GETTING STARTED

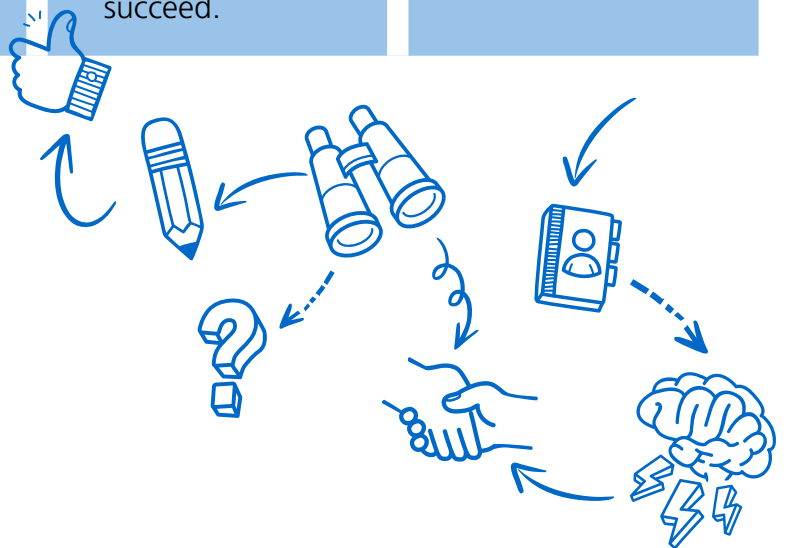
- Assemble a team made up of members with experience or an interest in strategy, as well as past, present, and incoming club leaders and committee members. This team will develop the strategic plan that reflects what members envision for the club's future.
- Choose someone to lead your strategic planning sessions. It could be a member who has experience in strategy, a club leader who is a skilled facilitator, or even an expert from the community.
- Get a variety of perspectives by involving club members who have diverse backgrounds and experiences.
- Make sure your club's vision statement aligns with Rotary's strategic vision.
- Use the Action Plan as a framework to develop your club's strategic plan.

TIP

Asking community members to join in on your planning session is a great way to get diverse perspectives reflected in your plans.

FACILITATION GUIDE

Strategic planning is an opportunity to get members involved! Consider using the facilitation guide along with this worksheet to lead a strategic planning session. Include any member who expresses interest in participating. Remember, the more diverse perspectives you involve, the better your plan will reflect what members want. This helps create a shared vision that members will want to achieve together.



PHASE 1

DETERMINE YOUR STATUS: HOW IS YOUR CLUB DOING NOW?



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

- Identify any significant issues your club is experiencing
- Determine your club's strengths and weaknesses by gathering ideas from members and asking them what they're satisfied with and what they'd like to change
- Identify opportunities and challenges in the community by meeting with the leaders of other organizations or groups

IDENTIFY OPPORTUNITIES OR SIGNIFICANT CHALLENGES YOUR CLUB IS EXPERIENCING

What are the critical issues or concerns that your club wants to address with this strategic plan?

Ask members questions such as these to help you identify strategic issues:

- What do members and participants want that our club does not currently provide?
- What does our community need that our club could address through service projects?
- If our club is not attracting a diverse group of members and keeping them engaged, why is that?
- Who are the community members that our club should be including in our club activities and why?
- What are some processes and procedures your club can stop doing?
- What are some new and innovative ideas the club can test, and how?

TIP



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

STRATEGIC ISSUES

Reviewing the strategic issues you just identified, categorize them by the priorities they align with. This will help your club focus your strategic plan. It may be balanced across all four priorities, or your club may focus on one or a few priorities.

IMPACT	REACH	ENGAGEMENT	ADAPTABILITY

DETERMINE YOUR CLUB’S STRENGTHS AND WEAKNESSES

List what your club does well and what it could improve on, based on what members said.

STRENGTHS

WEAKNESSES

TIP

Use the member satisfaction survey in [Enhancing the Club Experience](#) to get insights from members to help determine your club’s strengths and weaknesses.

IDENTIFY OPPORTUNITIES AND CHALLENGES IN THE COMMUNITY

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

OPPORTUNITIES

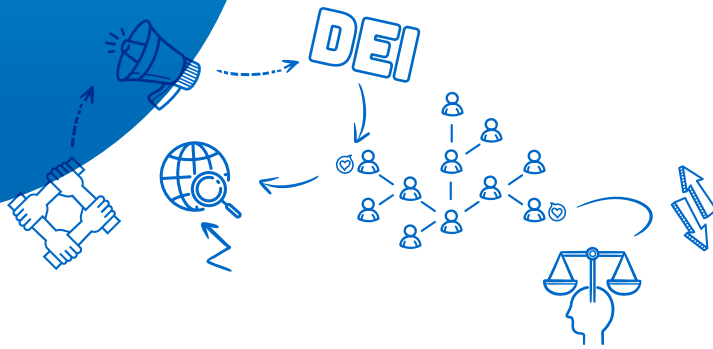
CHALLENGES

PHASE 2

DEVELOP A VISION: WHAT DO YOU WANT YOUR CLUB TO BE LIKE?

In determining what you want your club to be, work with the strategic planning team to:

- Identify characteristics that you want your club to have
- Think about what you want your club to be known for
- Create a vision statement



CLUB CHARACTERISTICS

Rotary's vision statement calls on 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. Some examples might be service-oriented, fun, innovative, or representative of the community.

CHARACTERISTICS

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WHAT DO YOU WANT YOUR CLUB TO BE KNOWN FOR?

Think about how you'd want someone to describe what your club does in the community. List what you'd like someone new in town to know that you do or what you want the legacy of your club to be.

Some examples might be that your club's tutoring program helps students go to college or that the club is part of a coalition that builds tiny homes for people who don't have permanent housing.

CLUB VISION STATEMENT

A vision statement defines your desired future and provides direction toward what you want your club to be. Referring to the list of club characteristics and what you want your club to be known for, write a one-sentence vision statement with your strategic planning team.

Consider these kinds of questions:

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

VISION STATEMENT

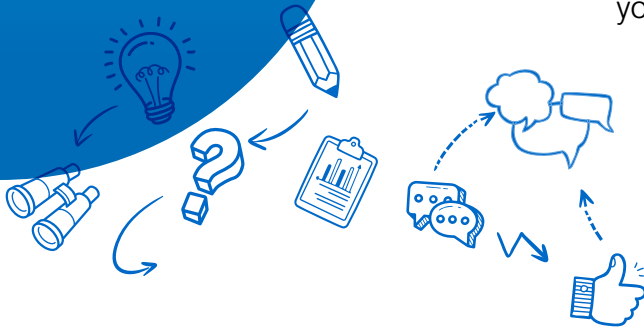
TIP



Your vision statement should resonate with club members. One example: "Our vision is to be recognized as meaningfully supporting youth in our community."

PHASE 3

MAKE A PLAN: HOW CAN YOU ACHIEVE YOUR VISION?



Now it's time to develop a plan to focus your club's strategic priorities and achieve your goals. To do this:

- Identify the strategic priorities your club is focusing on
- Set your goals
- List the actions you'll take, your timeline, and the resources, such as financial support, that you'll need to succeed

Goals are specific to the opportunities or significant challenges your club is working to address, and they should align with Rotary's strategic priorities. Working with your incoming leaders is also essential to ensuring the continuity of your multi-year goals.

In the chart below, list which priority (Impact, Reach, Engagement. Adapt) your goal is related to. Then list the goal, along with the action you'll take, the resources you'll need, and who will lead the effort to meet each goal. Set a timeline for each one. Strategic plans typically run on a 3-5 year cycle, please be sure to take club leadership changes into account.

When you set your goals, consider:

- Rotary's vision statement and the Action Plan
- Your club's strengths and weaknesses
- Your community's needs, opportunities, and challenges
- What your club's members and participants need and want
- What you can realistically achieve in three to five years



TIP

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

LIST THE SPECIFICS

PRIORITY (IMPACT, REACH, ENGAGEMENT, OR ADAPTABILITY)	GOAL	ACTION TO TAKE	RESOURCES NEEDED AND TIMELINE	WHO LEADS THE EFFORT

PHASE 4 TRACK YOUR PROGRESS: HOW CLOSE ARE YOU TO YOUR GOALS?



MONITOR YOUR PROGRESS

You'll need to track the progress toward your goals with the rest of the strategic planning team and suggest changes to the plan if needed. When new club leaders are named, discuss the strategic plan and your progress with them. Make sure they are familiar enough with the plan to suggest or understand if changes are necessary. If you're not making the progress you expected, you may want to try a new approach or allocate more resources toward your goals.

When you're monitoring your progress, consider using the questions in the table provided:

GOAL MONITORING PLAN

HOW OFTEN SHOULD WE MEASURE PROGRESS TOWARD OUR GOALS?	
WHAT INDICATORS WILL WE MEASURE, AND WHAT IS OUR BASELINE?	
HOW SHOULD WE COMMUNICATE OUR PROGRESS TO CLUB MEMBERS?	
WHO SHOULD APPROVE CHANGES TO OUR PLANS OR GOALS?	

REVIEW ANY GOALS YOU MISSED AND ADJUST THE PLAN

As you review the progress you’ve made, list your goals, including any goals that your club didn’t meet and why it didn’t. Determine what adjustments you need to make or what action to take.

When you’re identifying and listing your missed targets, ask:

- What goals did we meet?
- What goals didn’t we meet?
- What are the main reasons that we didn’t achieve some goals?
- What adjustments do we need to make to help us achieve those goals?

GOAL	DID WE ACHIEVE IT?	WHAT WENT WELL?	WHAT CAN WE IMPROVE UPON?	WHAT CAN WE DO DIFFERENTLY NEXT TIME?

Congratulations on creating a strategic plan for your club! Remember that this is an ongoing process, and that you can always revisit your plan and make changes if the circumstances warrant it.