

# Strategic Planning For Your Club



**ROTARY  
SERVING  
HUMANITY**

# What is a Strategic Plan?

A Strategic Plan helps clubs to develop a long range plan which serves as a framework for establishing your goals and objectives. To do this however you need to answer three main questions ..

**Where are we now?**

**Where do we want to be?**

**How do we get there?**



**Clubs that follow a strategic plan report higher levels of member engagement, retention, and satisfaction.**



# How to Develop a Strategic Plan

- Involve past, current and incoming club leaders.
- Include a wide variety of perspectives by involving the full club.
- Consider all ideas.
- Reflect on how your club's goals align with District and RI Strategic Plans
- Be prepared to revisit your plan each year and adjust your strategic priorities and annual goals as needed.





# Rotary International Strategic Plan

# ROTARY VALUES





Rotary

# STRATEGIC PLAN

## OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

## Support and strengthen clubs

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels



## Focus and increase humanitarian service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally

## Enhance public image and awareness

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities



# **District 7030 Strategic Plan for 2016-2019**



# **Strategic Planning for Your Club .. A Checklist**

# 1. Where are we now?

- Create a list of your club's **strengths and weaknesses** as of today.
- Create a list of **opportunities and challenges** facing your community.

# 2. Where do we want to be?

- Create a list of 5 to 10 characteristics that you would like to see in your club 3-5 years from now.
- Draft a one-sentence **vision statement** describing your club and what you want it to be in 3-5 years.
- Finalize the vision statement with the full group, and make sure that all club members support it.



- As a group, decide on the most important **strategic priorities** — those that will have the greatest impact as your club works toward the vision.
- Identify **annual goals** that support each of the top strategic priorities.
- Determine the **timeline, resources, and people** necessary to meet the annual goals under each of the strategic priorities.



### 3. How are we doing?

- Create a strategic planning team to regularly **monitor progress** and recommend revisions to the plan, if needed.
- **Allocate sufficient resources** for the plan's implementation.
- Continually **evaluate all decisions** to make sure they support the plan, providing feedback to the strategic planning team on their implementation.



- Repeat the full strategic planning process every 3-5 years to create a new plan or uphold the current one.
- **Review your strategic plan annually** with all club members, including the vision statement, strategic priorities, and annual goals and revise as needed.
- Enter your Annual Goals into **Rotary Club Central**.



# ONLINE TOOLS

[www.rotary.org/strategicplan](http://www.rotary.org/strategicplan)

[www.rotary.org/myrotary](http://www.rotary.org/myrotary)

[www.rotary.org/myrotary/en/document/vibrant-club-your-club-leadership-plan-caribbean-245en-c](http://www.rotary.org/myrotary/en/document/vibrant-club-your-club-leadership-plan-caribbean-245en-c)

