

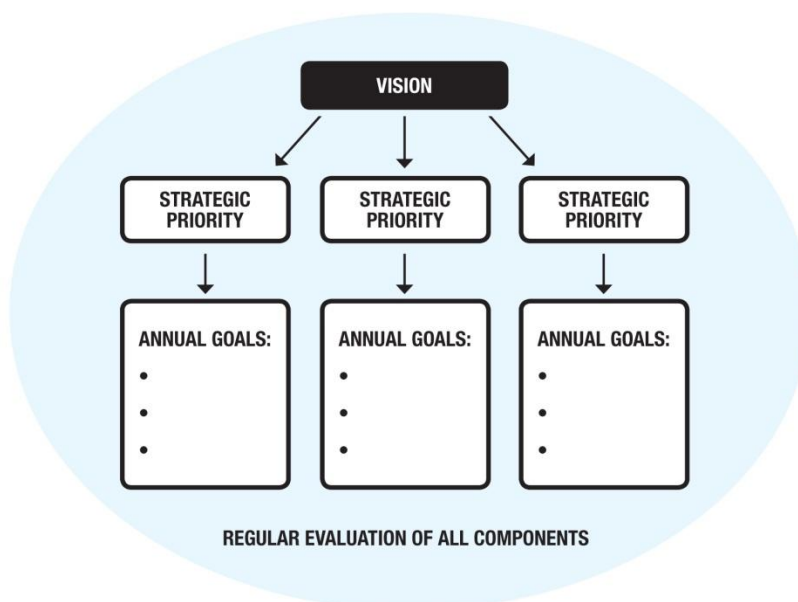
STRATEGIC PLANNING GUIDE



Strategic planning involves creating a vision, with supporting goals that can be regularly measured and adjusted as needed. Use this guide and the accompanying worksheet as a starting point for developing your strategic plan. The guide is designed for Rotary clubs but can be adapted for districts. Complete the worksheet on your own or with other club members. Facilitators should become familiar with these resources and prepare an agenda before conducting a strategic planning meeting. The agenda should allot the majority of time to the second and third steps of the process, which focus on the future, and less time to the current state of the club.

During the strategic planning process, keep the following tips in mind:

- Involve past, current, and incoming club leaders.
- Include a wide variety of perspectives by involving the full club or a diverse representation of your club's membership.
- Consider all ideas.
- Ask an unbiased facilitator or a small group of facilitators to run strategic planning meetings.
- Reflect on how your club's goals align with those of your district and the priorities and goals of [Rotary's Strategic Plan](#).
- Be prepared to revisit your plan each year and adjust your strategic priorities and annual goals as needed.



The Strategic Planning Model

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

Process

Develop a strategic plan by engaging members in the process below. Use the accompanying worksheet to record your ideas.

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.

When assessing your club's current state, consult your region's version of [Be a Vibrant Club](#) to determine what your club is already doing well and what you could do to rejuvenate it.

2. Where do we want to be?

- Create a list of 5 to 10 characteristics that you would like to see in your club three to five years from now.
- Draft a one-sentence vision statement describing your club and what you want it to be in three to five years. Allow for both individual and group work on this step.
- Finalize the vision statement with the full group, and make sure that all club members support it.

3. How do we get there?

- Develop strategic priorities that will help your club achieve the vision, considering:
 - Strengths and weaknesses of the club
 - Programs and missions of Rotary International and The Rotary Foundation
 - External environment

- Involvement of all members
- Achievability in three to five years

- 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.

Use Rotary Club Central to set annual goals and track achievements.

4. 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.
- Review your strategic plan annually with all club members, including the vision statement, strategic priorities, and annual goals, and revise it as needed.
- Repeat the full strategic planning process every three to five years to create a new plan or uphold the current one.

Strategic Planning Worksheet **Draft**

Complete this worksheet to create your strategic plan.

1. Where are we now?

Today's date: March 23, 2016

Club strengths

- Ability to maintain / grow membership

Club weaknesses

- Member retention
- Club diversity
- Age diversity

Opportunities for the community (e.g., new businesses, growing population)

- Modest population growth

Challenges facing the community (e.g., economic decline, competing services)

- Economic opportunity for working age adults
-

Club strengths

Club weaknesses

2. Where do we want to be?

Target date: Survey Nov 24, 2015

Key characteristics of future state (e.g., number of members, retention percentage, balance between local and international projects, support of The Rotary Foundation)

Based on 2015 / 2016 Lake Chelan Rotary Club Survey

- Top Rotarian interests 1) Community Service / Community Service Programs 2) Scholarships 3) Student and Interact 4) International Projects 5) Rotary Foundation
- Survey indicated that members have greater interest in medium and longer term projects (only 4 of 48 members believe we should be focusing on short term projects)
- Interact sponsorship had very strong support
- Supporting Rotary Student Exchange program had very strong support
- Top fundraising events per survey 1) Century Challenge / Cycle de Vine 2) Smoke on the Water BBQ 3) Radiothon
- Fundraising goals majority interested in \$30,000 to \$75,000. Lower interest in maintaining cash reserves (Note this is in conflict with greater interest in longer term projects which would require saving over several years for large project)
- Top international interests 1) Nkoilale Primary School 2) Rotary Student Exchange 3) Shelterbox 4) Polio Plus
- Membership – Survey results mixed
- Foundation strong support for Every Rotarian Every Year

Vision statement (Include something that will make your club stand out from other service clubs in your community — e.g., *Our vision is to be the most internationally diverse service club in our community, Our vision is to be the service club most supportive of youth in our community.*)

3. How do we get there?

To reach our vision, we must achieve the following goals. (On the lines below, write out each of your strategic priorities. Then, in the chart beneath each one, list annual goals that will help you achieve each of them. Though there is no limit to the number of strategic priorities or annual goals in your strategic plan, consider the resources available to you, and focus on goals that you can accomplish.)

Strategic priority 1: Membership Attraction and Engagement

Annual goals	Timeline	Resources needed	Member assigned
Achieve net gain of at least two members	June 30, 2017		Mary Watson – Membership Chair
Improve member retention rate by one percent over last year	June 30, 2017		Mary Watson – Membership Chair

Strategic priority 2: Foundation Giving

Annual goals	Timeline	Resources needed	Member assigned
Support our foundation with at least \$536 in appreciation for the Rotary Foundation centennial (1917)	June 30, 2017		Rich Watson – Foundation Chair
Support our foundation with at least \$26.50 per member in appreciation for the Rotary Foundation centennial (1917)	June 30, 2017		Rich Watson – Foundation Chair
Increase total number of Benefactors or Bequest Society Members by at least 1	June 30, 2017		Rich Watson – Foundation Chair
Increase Lake Chelan Rotary Fund (501c3) donations over 2015-2016 year	June 30, 2017		Rich Watson – Foundation Chair

Strategic priority 3: Online Tool Adoption

Annual goals	Timeline	Resources needed	Member assigned
Post one initiative in Rotary Showcase	June 30, 2017		Lester Cooper – Website Chair
Post a project in need of assistance in Rotary Ideas (Nkoilale Primary School)	June 30, 2017		Lester Cooper – Website Chair

Strategic priority 3: Humanitarian Service

Annual goals	Timeline	Resources needed	Member assigned
Implement a project with one of Rotary's service partners. Lake Chelan Rotary will partner with Shelterbox (approved Rotary service partner) to fund one emergency shelter.			TBD
Partner with the Foundation by sponsoring at least one project funded by a district grant. Complete year 2 (2016-2017) of Rotary International District 5060 grant for Nkoilale Primary School.			Lester Cooper
Establish a partnership and conduct a project with one or more corporations, government entities, or nongovernmental organizations. Lake Chelan Rotary Club will establish and document a partnership to plan and implement a major project to celebrate our club's 100 th anniversary in 2026.			TBD

Strategic priority 3: New Generations

Annual goals	Timeline	Resources needed	Member assigned
Continue sponsorship of Chelan Interact	June 30, 2017		Tiffany Gering
Involve Interact Club members in Century Challenge, Radiothon, and other events.	June 30, 2017		Tiffany Gering
Sponsor one Rotary Youth Exchange Student	June 30, 2017		Lexy Lieurance

Strategic priority 3: Public Image

Annual goals	Timeline	Resources needed	Member assigned
Involve local media to cover the Century Challenge and Cycle de Vine. Promote scholarships.			Mike Steele

4. How are we doing?

To monitor our progress, we will take these steps. (List the actions the club will take to follow up on the plan's implementation, including a timeline for checking in and evaluating your

progress — e.g., reports at board meetings each month, strategic plan reviews at club assemblies, annual reviews.)