

# STRATEGIC PLANNING GUIDE



# 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.

## ABOUT THIS GUIDE

Just as a map guides people from one location to their destination, a strategic plan that is rooted in action guides an organization through achieving its goals and, ultimately, fulfilling its strategic vision. Strategic plans are important for Rotary and Rotaract clubs, too. Our survey results have shown us 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.

Use this Strategic Planning Guide to help you set long-term priorities as well as annual goals that 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

<b>PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?</b>	<b>PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?</b>	<b>PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?</b>	<b>PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?</b>
<ul style="list-style-type: none"><li>• Identify strategic issues to address</li><li>• Determine club's strengths and weaknesses</li><li>• Assess member satisfaction and needs</li><li>• Identify opportunities and challenges in the community</li></ul>	<ul style="list-style-type: none"><li>• List five to seven characteristics you want your club to have</li><li>• Create a vision statement</li></ul>	<ul style="list-style-type: none"><li>• Set strategic priorities</li><li>• Set annual goals</li><li>• List the activities, timeline, and resources you'll need</li></ul>	<ul style="list-style-type: none"><li>• Monitor progress toward your annual goals</li><li>• If you missed your targets, determine why</li><li>• Adjust your action plans</li></ul>

## GETTING STARTED

- Assemble a strategic planning team made up of past, present, and incoming club leaders to develop the plan and make sure it's helping your club achieve its goals.
- Ask a non-Rotarian/Rotaractor or a club member that is not in a leadership position to facilitate strategic planning meetings.
- Get a variety of perspectives by involving club members who have diverse backgrounds and experiences.
- Make sure your club's vision reflects Rotary's official strategic vision.
- Align your club's goals to reflect those of your district and Rotary's [strategic plan](#).

## PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?

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

- Determine your club's strengths and weaknesses by gathering comments from members
- Identify opportunities and challenges in the community by meeting with other community leaders

### IDENTIFY STRATEGIC ISSUES

What are the critical issues or concerns that your club wants to address? Strategic issues are those critical unknowns that are driving you to embark on a strategic planning process. These are issues that are looking for a solution or decision. Think about what issues you want to address with this strategic plan.

Potential questions to ask your members:

- How will we increase our membership and engage members in our club?
- How can we attract a diverse group of members?
- How can we include more community members in our club activities?

### STRATEGIC ISSUES



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

## STRENGTHS AND WEAKNESSES

List what your club does well and what your club could improve.

### STRENGTHS

### WEAKNESSES



**TIP**

Use the member satisfaction survey in [Enhancing the Club Experience](#) to get your members' insight and help you identify your club's strengths and weaknesses.

## IDENTIFY OPPORTUNITIES AND CHALLENGES IN THE COMMUNITY

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

### OPPORTUNITIES

### CHALLENGES

## PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?

### CLUB CHARACTERISTICS

Rotary's vision statement asks 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, e.g. fun, service-oriented, innovative, representative of the community, etc.

### CHARACTERISTICS

### VISION STATEMENT

A vision statement defines your desired future and provides direction for what you want your club to be. Write a one-sentence vision statement with your strategic planning team using the list of club characteristics as a reference.

Potential questions to consider:

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

**TIP**



Your vision statement should resonate with club members. One example could be: "Our vision is to be recognized as the service club that supports youth in our community."

### VISION STATEMENT

# PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?

## STRATEGIC PRIORITIES

Your strategic priorities should help you achieve your vision. These priorities answer the question, “How will we succeed?” Develop your most important strategic priorities — those that will have the biggest impact as your club works toward its vision.

Consider the following when you develop strategic priorities:

- The Rotary vision statement and [strategic plan](#)
- Your club’s strengths and weaknesses
- Your district’s goals
- Your community’s opportunities and challenges
- Your club members’ opinions
- What you can achieve in three to five years

## STRATEGIC PRIORITIES

## ANNUAL GOALS

When you have set your strategic priorities, you can develop yearly goals that support them.

Write down your strategic priorities. Then list your annual goals, along with the actions you’ll take, the resources you’ll need, and who will lead the effort to meet each goal. Set a timeline for each. [Rotary Club Central](#) can also assist you in setting goals and tracking achievements.



**TIP**

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

**STRATEGIC PRIORITY 1:** \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

**STRATEGIC PRIORITY 2:** \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

**STRATEGIC PRIORITY 3:** \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

**STRATEGIC PRIORITY 4:** \_\_\_\_\_

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

## PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?

### MONITOR PROGRESS

You'll need to track progress toward your annual goals with your strategic planning team and suggest changes to action plans if needed. You may want to try a new approach or allocate more resources to your goals.

Consider the following when monitoring progress:

- How often should we measure progress toward our goals?
- How should we communicate our progress to club members?
- Who should approve changes to action plans or annual goals?



**Rotary Club Central**  
can assist you in  
tracking progress  
toward your goals.

### GOAL PROGRESS REVIEW PLAN

### REVIEW AND ADJUST

As you review the progress you've made, list your goals, including any goals that were not met and the reasons why. Determine what adjustments or actions should be taken to achieve those unmet goals.

Consider the following when identifying and listing your missed targets:

- What goals were met?
- What goals were not met?
- What are the top reasons we fell short of those goals?
- What adjustments need to be made to help us achieve those goals?



**STRATEGIC PRIORITY 1:** \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

**STRATEGIC PRIORITY 2:** \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

**STRATEGIC PRIORITY 3:** \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

**STRATEGIC PRIORITY 4:** \_\_\_\_\_

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN