

Strategic Planning



I can strengthen my club by promoting and leading insightful planning.

<p>Session Goals</p> <p>Understand the Value and Process for Strategic Planning</p> <p>Analyze Your Rotary Club</p> <p>Review Possible Areas of Improvement</p> <p>Discuss How Specific Improvements Should be Made</p>	<p>Materials</p> <p>◆ □ SPA-1: Strategic Planning Guide.</p> <p>◆ □ SPA-2: Rotary Club Self-Evaluation of Performance & Operations</p> <p>● □ Rotary Club Central https://www.rotary.org/myrotary/en/secure/13301</p>
<p>Key: ◆ attached insert ● online □ article</p>	

All session materials are also available at www.rlifiles.com

Session Topics

The focus is not to detail it in full but rather to highlight the three pillars.

1. Rotary International suggests that clubs develop strategic plans. What is a strategic plan? Why do we need one? What are the benefits?

There are many ways to do strategic planning, and some of your club members may have experience with a particular process.. "Visioning". How can you discover and use this expertise? Are there other people resources you can call on for assistance?

2. Based on your previous group Self-Evaluation result "areas of improvement", develop at least two three-year goals and an annual goal for each one. What strategy are you going to use to accomplish each goal? How can you insure accountability?

Note: Use same small groups established in the Club Analysis section.

3. What is the process of creating a strategic plan? Is board, club, or key member "buy-in" more important? How often does the plan need to be reviewed? Can the plan be changed? How?

4. What is your Rotary club's "brand" or "distinctive position" in your community? Is it different than the "brand" of Rotary International? Is defining your club's "brand" important for strategic planning? How do you define your club's brand?
5. Rotary International has an International Strategic Plan. Let's review the main points of the Plan.
 - a. What is the Rotary District's Strategic Plan?
 - b. Does your Club has a Strategic Plan?
6. Why is analysis by a Rotary club important for the club? Why is it an important exercise for the Rotarians within the club?

7. Complete the survey as directed.

Instructions to Facilitator:

- a. *It is suggested that class be divided into small groups.*
- b. *Have each group complete one section of the survey:*
 - Club Administration*
 - Membership*
 - The Rotary Foundation*
 - Structured Programs / Public Image*
- c. *When completing Club Evaluation Survey in the session, the points do not apply. If participant does not know the answer, assign "DK – Don't Know".*
- d. *Advise participants to not add points in each section.*
- e. *Do not assign the bonus questions.*

"Action without vision is wasted, and vision without action is just a dream.

Action with vision brings hope to the world."

1996-97 RI Pres. Luis Vicente Giay
— Address to 1996 Rotary Convention,
Calgary, Alberta, Canada

8. What was your reaction to the survey?

Discuss within the entire group. Ask participants to briefly explain their reaction and suggestions for improvement. What are you going to do in your club.

9. After performing the Self-Evaluation, what areas of improvement are apparent? Are these improvements specific to your club, or do they have a wider application to other Rotary clubs?

Each group suggests improvements for the area of the survey they completed.

Insert SPA-1 (3 pages)

Strategic Planning Guide

See how your club’s goals reflect those of your district and Rotary International’s strategic plan? Typically, Rotary clubs with a strategic plan are stronger than clubs without one. Research shows that members of clubs with a plan were more satisfied and had a more positive view of their clubs and Rotary overall.

This guide will help you set long-term priorities and goals, all of which will support your club’s vision. It’s designed for Rotary clubs, but districts can use it too. As you prepare a strategic plan, consider these tips:

- Build a team of past, present, and incoming club leaders to oversee the plan’s development and use.
- Ask an unbiased facilitator to run strategic planning meetings.
- Include a variety of perspectives by involving a diverse range of club members.
- See how your club’s goals reflect those of your district and Rotary’s strategic plan.

Strategic Planning Worksheet

1. Where are you now?

List the opportunities and challenges facing your community.

When checking your club’s current state, use Rotary Club Central, Rotary Club Health Check, Membership Assessment Tools, and your region’s version of Be A Vibrant Club to see what your club is doing well and what it could improve.

Club strengths	Club weaknesses
Opportunities for membership development in the community (<i>new businesses, growing population</i>)	Challenges facing the community (<i>such as economic decline, competing services</i>)

2. Where do you want to be?

List five to 10 characteristics that you would like your club to have three to five years from now.

Next, prepare a one-sentence vision statement. Revise it with the team as needed, then see whether club members support it. (Include something that will distinguish your club from other service groups in your community — e.g., “Our vision is to be the most internationally diverse service club in our community,” or “Our vision is to be the service club most supportive of youths in our community.”)

3. How do you get there?

- Set strategic priorities that will help your club achieve its vision, considering:
 - The club’s strengths and weaknesses
 - The goals of the R.I. Strategic Plan, those of your district, and those of your regional membership
 - Programs and missions of Rotary International and The Rotary Foundation
 - Your community’s opportunities and challenges
 - Members’ opinions
 - Achievability in three to five years
- Get the team to choose the most important strategic priorities — those that will have the biggest impact as your club works toward its vision.
- Identify yearly goals that support each of the top strategic priorities.
- List the tasks and activities, timeline, resources, and people necessary to meet the yearly goals under each of the strategic priorities.
- Use Rotary Club Central to help set goals and track achievements.

Strategic priority 1: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 2: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

Strategic priority 3: _____

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned

4. How are you doing?

- Have your strategic planning team regularly monitor progress on reaching its goals and suggest plan updates as needed.
- Review your strategic plan, including its vision statement and priorities, each year with club members to see if they would like any revisions.
- Make sure club decisions support the goals of the plan, and discuss observations with the strategic planning team.
- Allot enough resources to achieve the plan.
- Repeat the strategic planning steps every three to five years to produce a new plan or keep the current one.

List steps that your club should take to track its strategic plan, including a timeline — e.g., reports at monthly board meetings, talks at club assemblies, and annual reviews.

Insert SPA-2 (8 pages)

Rotary Club Self-Evaluation of Performance and Operations

This form is to conduct a self-evaluation and review of your club’s current performance and operations. It is NOT intended to “grade” your club, but rather provide a mechanism to discover the strengths of your club and identify areas that might be improved. Many questions will require a degree of reasonable appraisal. Please be guided by the Four Way Test and your best judgment in answering the questions. Divisions and districts are free to adopt and utilize the evaluation.

Club Administration

Score

Please rate the following: Yes= 5 pts No=0 pts Don’t Know = DK

1. Our Rotary Club has adopted the Club Leadership Plan. _____
2. The club has written By-laws that are available to each member. _____
3. The club Board of Directors meets on a regularly announced basis. _____
4. The club has developed both a long-term and short-term plan of action. _____
5. The club has an e-mail address and/or web page with current information on it. _____
6. The official Rotary International Directory is available to the members. _____
7. The club publishes a roster listing the officers, members, committees and chairs. _____
8. The club plans social events for members and partners throughout the year. _____
9. The club makes an effort to contact absent or ill Rotarians _____
10. The club has received a Rotary Citation within the last 3 years. _____
11. The club has an annually prepared budget that is approved by the members. _____
12. The club receives a financial report of all income and expenses at least once a year. _____

Please Rate the Following: Excellent= 5, Good= 4, Satisfactory=3, Fair=2, Poor=1 Don’t know= DK

13. The club meeting location site or area is. _____
14. The food provided during the meal at the club meeting is _____
15. The quality of speakers and club programs is normally _____
16. The meetings start and finish on time and the use of an agenda is _____
17. The Board of Directors report to the club about their actions is _____
18. The club’s communication of important Rotary information to the members is. _____
19. The payment of club dues by the members in a timely fashion is. _____
20. The payment of district and International dues in a timely fashion is. _____
21. The information and content of the club newsletter/bulletin is. _____
22. The club’s use of sound systems, lecterns, decorations, flags, banners and other Rotary related items is. _____
23. The operation of the club committee system with regards to meeting regularly and reporting to the board of directors and/or the membership is _____
24. The club’s promotion of district assemblies, conferences, conventions and special meetings is. _____

Please Rate the Following: Excellent= 5, Good= 4, Satisfactory=3, Fair=2, Poor=1 Don't know= DK

- 25. The club's use of RI Themes and knowledge of the RI President's message and initiatives are . . . _____
- 26. The club's greeting and treatment of visiting Rotarians is _____
- 27. The special recognition given to visiting guests during club meetings is _____
- 28. The information and topics presented at a club assembly is _____
- 29. The club's treatment and reception of the District Governor's official visit is _____
- 30. Fellowship encouraged by the use of singing, "happy dollars," raffles, etc. is _____
- 31. The degree of Rotary spirit and friendly fellowship that exists in the club is. _____
- 32. The club's efforts to recognize special individuals with "Rotarian of the Year",
"Citizen of the Year", etc. is _____
- 33. The desire of the Rotarians to sit at a different table each week is _____
- 34. The club's recognition of special events, birthdays etc of the members is _____

Please assign points for the following:

- 35. Our club has a speaker **weekly** (5 pts), **monthly** (3 pts), **never** (0 pts). _____
- 36. The club newsletter is published **weekly** (5), **bi-weekly** (3), **monthly** (1), **none** (0) _____
- 37. The club holds regular club assemblies **monthly** (5), **quarterly** (3), **semi-annually** (1),
never (0). _____
- 38. The Rotary International rules on attendance are strictly enforced **always** (5), **usually** (4),
occasionally (3), **seldom** (2), **never** (1) _____
- 39. The club members are reminded to make-up for absences **always** (5), **usually** (4),
occasionally (3), **seldom** (2), **never** (0) _____
- 40. The club gives special recognition to individuals who have perfect attendance
regularly (5), **occasionally** (3), **once in a while** (1), **never** (0) _____
- 41. My club has sponsored a District Governor candidate within the last **1-5 yrs** (5),
6-10 yrs (4), **11-15 yrs** (3), **16+ yrs** (0), don't know (DK). _____
- 42. My club has provided an Assistant Governor (AG's) candidate within the last
1-5 yrs (5), **6-10 yrs** (3), **never** (0), don't know (DK). _____
- 43. The following number of *Rotarians* from my club attended the last Rotary International
Convention- **5+** (5), **3-4** (4), **1-2** (2), **zero** (0), don't know (DK). _____
- 44. The following number of *Rotarians* from my club has attended the most recent
district conference- **10 +** (5), **5-9** (4), **2-4** (3), **1** (2), **none** (0). _____
- 45. The following number of *club leaders* attended the most recent district assembly:
5+ (5), **2-4** (3), **1** (1), **none** (0), don't know (DK). _____
- 46. Generally **10 or more** (5), **5-9** (3), **1-4** (1), **no** (0), *Rotarians* from my club attends special
functions (i.e. dinners, seminars, service events, celebrations, etc) sponsored by the district. _____
- 47. The current president-elect **always** (5), **sometimes** (3), **seldom** (1), **never** (0) attends
PETS (president-elect training seminar). _____

Please add the totals points for questions 1-47

Club Administration _____

Don't knows _____

Membership

Score

Please assign points for the following:

1. The average monthly club attendance figure is **90-100%** (5 pts), **80-89%** (4 pts), **70-79%** (3 pts), **60-69%** (2 pts), **50-59%** (1 pt), don't know (DK) _____
2. The average age of the club membership is **35-40** (5), **41-50** (4), **51-60** (3), **61-70** (2), **71+** (1), don't know (DK). _____
3. Last year, the club's membership **increased** (5), **remained the same** (3), **decreased** (0), don't know (DK). _____
4. This year the club membership is likely to **increase** (5), **remain the same** (3), **decrease** (0), don't know (DK).. _____
5. The club has sponsored a new club within the **last 1-3 yrs** (5), **4-8 yrs** (4), **9-12 yrs** (2), **longer or never** (0), don't know (DK). _____
6. When a member relocates to another community, the club **always** (5), **sometimes** (3), **never** (0) notifies the nearest Rotary club of the move. _____
7. New members are **always** (5), **sometimes** (3), **never** (0) encouraged to become active in the club _____
8. The club **frequently** (5), **often** (4), **seldom** (2), **never** (0) holds special membership drives (cocktail, wine & cheese parties, meet & greet, etc) to identify and attract potential new members. _____
9. The club **always** (5), **sometimes** (3), **seldom** (1), **never** (0) has information or materials about joining Rotary at its fund raisers or events. _____

Please rate the following: Yes= 5, No= 0, Don't know= DK

10. The club has an active membership chair that makes regular reports to the club. _____
11. The club has and uses a membership classification system. _____
12. The club has developed a membership interest survey form. _____
13. The club assigns new members to committees based on their interests. _____
14. The club annually sets measurable and reasonable membership goals. _____
15. The club has and uses a "Mentoring" program. _____
16. The club has developed a welcoming package for new Rotarians. _____
17. The club has a special program (red badge, greeter, etc.) to make new members feel welcome. _____
18. The club conducts new member orientation meetings. _____
19. The club pays for new Rotarians to attend the Rotary Leadership Institute. _____
20. The club conducts an "exit interview" to determine why members leave. _____
21. The club systematically asks each new member for a referral. _____
22. The club provides non-Rotarian speakers with information about Rotary. _____

Rate the following: Excellent=5, Good=4, Satisfactory= 3, Fair=2, Poor=1, Don't know= DK

- 23. The club's promotion of membership issues is _____
- 24. The club's use of the classification list is _____
- 25. The club membership balance and representation of the community business segments and general population are. _____
- 26. The club's attempts to invite qualified members of any race, gender or ethnic group to join the club is _____
- 27. The club's new member orientation meetings are. _____
- 28. The club's induction ceremony of a new member to the club is. _____
- 29. The club's "mentoring" program is _____
- 30. The club has a specific retention program that is _____
- 31. The club's participation at district membership seminars is _____
- 32. The effort to encourage all members to attend the Rotary Leadership Institute is _____
- 33. Overall, the club's efforts to attract and keep new members is. _____

Please add the total points for questions 1-33 Membership _____
Don't knows _____

The Rotary Foundation

Score

Please rate the following: Yes = 5 No = 0 , Don't know = DK

- 1. The club has an active Foundation chair that makes regular reports to the members. _____
- 2. The club sets and achieves its Foundation giving goal each year. _____
- 3. The club encourages individuals to become Paul Harris Fellows on their own. _____
- 4. The club matches contributions made by members to the Rotary Foundation. _____
- 5. The club makes a special presentation of a new Paul Harris Fellowship _____
- 6. The club publicly posts a list of all the Paul Harris Fellows. _____

Please assign points for the following:

- 7. **Most** (5 pts), **many** (4 pts) **some** (3 pts) **few** (2 pts) **none** (0 pts) of the club members understand that money given to The Rotary Foundation returns to the district for its use three years later _____
- 8. Information about The Rotary Foundation is provided to the club every **month** (5), **three months** (3), **six months** (1) **never** (0). _____
- 9. **All** (5), **most** (4), **many** (3), **some** (2), **few** (1), **none** (0) of the club members know about Paul Harris Fellows and how to become one. _____
- 10. **Most** (5), **many** (4), **some** (3), **few** (2), **none** (0) of the club members contribute each year to The Rotary Foundation under the Every Rotarian Every Year program. (EREY). _____
- 11. My club has sponsored a GSE or VTT team member, a global scholar or a peace scholar **within the last 1-3 yrs** (5), **4-6 yrs** (3), **longer or never** (0), don't know (DK). _____

- 12. My club has hosted a visiting GSE or VTT team **within the last 1-5 yrs (5), 6-8 yrs (3), longer or never (0)**, don't know (DK)..... _____
 - 13. My club has applied for a Global Grant with an international partner **within the last 1-3 yrs (5), 4-6 yrs (3), longer or never (0)**, don't know (DK). _____
 - 14. My club has applied for a District Grant **within the last 1 yr (5), 2-3 yrs (3), longer or never (0)**, don't know (DK) _____
 - 15. **Most (5), many (4), some (3), few (2), none (0)** of club members are Paul Harris Fellows _____
 - 16. **Most (5), many (4), some (3), few (2), none (0)** of club members are Paul Harris Sustaining Members _____
 - 17. **Most (5pts), many (4), some (3), few (2), none (0)** of club members are Bequest Society donors to The Rotary Foundation. _____
 - 18. **Most (5), many (4), some (3), few (2), none (0)** club members are Benefactors to The Rotary Foundation _____
 - 19. **Most (5), many (4), some (3), few (2) none (0)** of club members are Paul Harris Society members. _____
 - 20. **Most (5), many (4), some (3), few (2), none (0)** of club members are Major Donors to The Rotary Foundation. _____
 - 21. **Most (5), many (4), some (3), few (2), none (0)** of club's existing Paul Harris Fellows make subsequent contributions to The Rotary Foundation _____
- Please add the total points for questions 1-22 Foundation** _____
- Don't knows** _____

Service Projects

Score

Rate the following: Excellent=5, Good= 4, Satisfactory= 3, Fair= 2, Poor=1, Don't know= DK

- 1. The club's attempts to promote vocational service are _____
- 2. The promotion of the 4-Way Test in the club and community is _____
- 3. The use of career development programs by the club in local schools to help students with career choices is. _____
- 4. The club's effort to promote high ethical standards, professional dignity or service performance in the club and community is _____
- 5. The club's effort to conduct one new community service project each year is _____
- 6. The club's effort to conduct one new international service project each year is _____
- 7. The club's use of input, talents and resources of the members for service projects is _____
- 8. The club's use of input, talent and resources from community leaders for service is _____
- 9. I consider the club's activities regarding service, locally and internationally, to be _____

10. Please add 3 pts for each service project that your club has done *within the last 3 years*

The club has conducted an active program or project in the following areas:

- Drug use prevention or rehabilitation
 - Polio eradication or other community immunization project
 - Environmental activities.....
 - Literacy projects.....
 - Clean water programs
 - Providing food for the hungry
 - Assisting the community’s handicapped or elderly
 - Providing health or medical care locally or Internationally.....
 - Providing recreational opportunities for the community.....
 - Helping the poor or needy of the community
 - Improving the community’s economic or social quality of life.....
 - Conducting career opportunity programs.....
 - Assisting or guiding the youth of the community
 - Creating or supporting a Rotaract or Interact Club
 - Working with other local service groups on a common project.....
 - Work with other Rotary Clubs on a common project.....
 - Work with community educational facilities
 - Traffic or highway safety programs or projects
 - Animal safety or care programs
 - Disaster assistance program or project.....
 - Others
- Total points for question 10.....

Please rate the following: Yes = 5 No= 0, Don’t know= DK

- 11. The club conducts various fund raisers to support its service programs.....
- 12. The club relies mainly on financial contributions from the members to fund its service programs.....
- 13. The club has participated in an International Service project within the last 2 years.....
- 14. The club participates actively in the Youth Exchange Program.....
- 15. The club regularly invites the local Youth Exchange students to its meetings.....
- 16. Club Rotarians normally act as the host parents for the visiting Youth Exchange
- 17. The club is aware of and planning to institute or cooperate with the mandated “Background Checks” for the Youth Exchange program.....
- 18. The club annually recognizes at least one outstanding student or student leader
- 19. The club sponsors at least 1 World Community Service project a year.....
- 20. The club participates in or recognizes the Rotary UN day at the United Nations headquarters. .
- 21. The club has participated within the last 3 years in a Rotary Friendship Exchange.....

- 22. Within the last 3 years, the club has participated in a Twin Cities, Sister Club, or Matched Club program with 1 or more Rotary clubs around the world. _____
- 23. The club, within the last 3 years has sponsored at least one student with a Rotary Youth Leadership Award (RYLA). _____

Please add the total points for questions 1-23

Service Projects _____

Don't knows _____

Rotary Publicity & Public Relations

Score _____

- 1. Our club **always** (5), **often** (3), **seldom** (1) **never** (0) has articles or pictures of our activities in the local media. _____
- 2. Our club **always** (5), **often** (3), **seldom** (1), **never** (0) uses the Public Access channels to promote or publicize our activities. _____
- 3. The members of the club **always** (5), **often** (4), **seldom** (1), **never** (0) wear their Rotary pins. _____
- 4. Our club has **many** (5), **some** (3), **one** (1) **no** (0) road signs at the entrances to the community announcing the day, time and location of our meeting. _____
- 5. When the club provides financial support to other organizations, it **always** (5), **often** (4), **seldom** (1), **never** (0) asks the other organization to publicize the donation in the local media. _____

Please rate the following: Yes= 5pts No= 0 pts Don't know=DK

- 6. Our club has a visible sign that "Rotary Meets Here" at our meeting site. _____
- 7. The club has used advertising (billboards, newspapers, community brochures, etc.) within the last 2 years. _____
- 8. Local Rotarians have been interviewed about the club on radio or TV within the last year. _____
- 9. Representatives from the media are active members of the club. _____
- 10. The club has a brochure describing the club and its projects available for handout. _____
- 11. The Rotary logo and club identification is visible for completed community service projects. _____

Please add the total points for questions 1-11

Rotary Public Relations _____

Don't knows _____

Bonus Questions

Score _____

- 1. I receive the Rotarian magazine each month. (Y=5, N=0) _____
- 2. I have received or am familiar with the District Governor's newsletter. (Y=5 N=0) _____
- 3. I have brought in a new member to the club within the last 2 years. (Y=5 N=0) _____
- 4. I understand the SHARE System of The Rotary Foundation. (Y=5, N=0) _____
- 5. I am a Paul Harris Fellow or a Sustaining Member. (Y=5, N=) _____
- 6. I have worked on or contributed to a service project within the last 2 years. (Y=5 N=0) _____
- 7. I visit the club, district or Rotary International web sites **daily** (5), **weekly** (4), **monthly** (3), **occasionally** (2), **never** (0) _____

- 8. I **always** (5), **sometimes** (3), **never** (0 pts) make-up for a missed meeting..... _____
- 9. I have personally served on a district committee within the last **1-5 yrs** (5), **6-10 yrs** (3), **longer or never** (0)..... _____
- 10. I have attended the district conference or International convention within **the last year** (5), **2-5 yrs** (3), **longer than 5 yrs** (1), **never** (0). _____
- 11. I have contributed to The Rotary Foundation within the last **1 year** (5), **2-3 years** (3), **4 years or more** (1), **never** (0)..... _____

Please add the total points for questions 1-11 Bonus Questions _____

Totals

Total Club Administration (from page 7)	_____	out of 235 points	DKs	_____ (38)
Total Membership (from page 9)	_____	out of 165 points	DKs	_____ (29)
Total Foundation (from page 10)	_____	out of 110 points	DKs	_____ (10)
Total Service Projects (from page 12)	_____	out of 173 points	DKs	_____ (2)
Total Rotary Public Relations (from page 12)	_____	out of 55 points	DKs	_____ (6)
Total Bonus Questions (from page 13)	_____	out of 55 points		
GRAND TOTAL	_____	out of 793 points		

- 700 points plus = Outstanding
- 600–699 points = Excellent
- 500–599 points = Very Good/Average
- 400–499 points = Could be improved
- 300–399 points = Caution—club may need assistance
- less than 300 points = The club is in need of serious and immediate assistance

Please DO NOT make any adjustments to totals for DKs. The following is for reference only.

- 1–10 DK’s = 5 to 50 additional points—**Normal**
- 11–20 DK’s = 55 to 100 points—**Caution**, should be concerned about the lack of knowledge about your club.
- 21–35 DK’s = 105 to 175 points—**Critical**, you need to learn more about your club.
- 36 or more = **Unacceptable**—Unless you’re a new member, you need to seriously learn more about the functioning of your club.

This is a non-weighted, unscientific analysis of your club and the results should only be used to identify areas that either you or the club might be lacking. It should not be taken as a negative reflection on the activities of the club or its Rotarians.