



STRATEGIC PLANNING & INNOVATION TEMPLATE



ROTARY DISTRICT 5400 VISION

Together, we see a world
where people unite and take
action to create lasting change
– across the globe, in our
communities, and in ourselves.

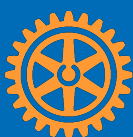
STRATEGIC PLANNING PROCESS:

A strategic plan can be developed by completing the process below. Answer the three questions and use the accompanying worksheet to record your ideas.



3 MAJOR QUESTIONS NEED TO BE ANSWERED:

1. WHERE ARE WE NOW?
2. WHERE DO WE WANT TO BE?
3. HOW DO WE GET THERE?



1. WHERE ARE WE NOW?

Where are we now and how did we get here?
(Include appropriate trend data)

Today's Date _____

1. Solicit feedback from members and others. (e.g. community, partners, Rotaract)
 - a. *Feedback can come via social media, focus groups, surveys, community resources, etc...*
2. Describe your club's current state.
3. Brainstorm your club's strengths and opportunities for improvement.

1. WHERE ARE WE NOW?

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CONSIDERATIONS FOR A MEMBER SURVEY

(Sample on next two pages)

- What are the expectations for your Club's members and how well is the Club meeting or even exceeding them?
- Consider segments of your members (e.g., younger vs. older members, male vs. female, fairly new to Rotary vs. members who have been in Rotary for a longer time)
- Open and honest feedback (consider anonymity)
- Keep the survey focused on the most important items (i.e., no need for lengthy survey if you're not going to analyze and subsequently use the results)
- Look for ways to get a relatively high survey response rate – direct requests to members (e.g., phone calls), incentives, pass out surveys during Club meetings, shorter vs. longer surveys, electronic vs. snail mail (e.g., QR codes)

CONSIDERATIONS FOR SURVEYS TO OTHERS

(Sample questions below)

- What are your organization's (or community's) needs?
- One a scale of 1 to 5, how valuable has our Rotary Club been to your organization (or to the community)? Provide any specific comments below.
- How can we be more valuable to your organization (or to the community) in the future?

1. WHERE ARE WE NOW?

SAMPLE MEMBER SURVEY

Please be open and honest in your responses. The survey is anonymous and your feedback will help us be a more vibrant Rotary Club.

Demographics Questions:

What is your gender?
 Male
 Female
 I would prefer not to respond

What is your ethnicity?
 White
 Hispanic or Latino
 Black or African American
 Native American or American Indian
 Asian/Pacific Islander
 Other
 I would prefer not to respond

What is your age range?
 Younger than 30
 30-39
 40-49
 50-59
 60-69
 70 or older

How many years have you been in Rotary (all Clubs, not just our Club)?
 Less than 3 years
 3-5 years
 6-10 years
 11-15 years
 16-20 years
 More than 20 years

(If applicable) In 2023, which Club meetings did you attend most often (in person or on-line)?
 Main Club Meetings
 Satellite Meetings
 Both
 Neither

(If applicable) In 2023, how did you most often participate in club meetings?
 In-Person
 On-Line
 Both
 Neither

Questions related to your expectations and interest (continued on next page):

When you first joined Rotary, what were your interests in joining (Choose all that apply)?

- Networking/Fellowship
- Local Service
- International Service
- Youth Service
- Personal and/or Professional Growth/Development
- Other (write in your interest) below

1. WHERE ARE WE NOW?

SAMPLE MEMBER SURVEY CONTINUED

What are your interests in Rotary now (choose all that apply)?

- Networking/Fellowship
 - Local Service
 - International Service
 - Youth Service
 - Personal and/or Professional Growth/Development
 - Other (write in your interest below)
-

Which areas of service do you feel your skillset could be best utilized (check all that apply)?

- Youth-related activities (e.g., RYLA, Interact, RYE)
 - Local Service Projects
 - Grant Writing
 - Event Planning (e.g., for fundraising events)
 - Social Activities
 - International Service (such as through global grants)
 - Other (write in your interest below)
-

What do you like most and like least about our Club meetings? What suggestions do you have to improve them?

Most:

Least:

Suggestions:

What do you like most and like least about our Club meetings? What suggestions do you have to improve them?

- Did not meet my expectations
- Met some of my expectations
- Generally met my expectations
- Exceeded my expectations
- Comments:

2. WHERE DO WE WANT TO BE?

1. Create a list of 5-10 characteristics that you would like to see in your Club three years from now.
2. Draft a one-sentence statement reinforcing your aim, purpose, mission, vision, etc. (something that will reflect the "True North" of your Rotary Club)

Target Date _____

Key Characteristics of future state.

"True North" (i.e., big picture vision, aim, mission, purpose, culture considerations).

3. HOW DO WE GET THERE?

1. Brainstorm three-year goals that will help your Club achieve its “True North”, considering:
 - a. Strengths and opportunities for improvement of the Club,
 - b. Programs and missions of RI and the Rotary Foundation
 - c. Involvement of all members
 - d. Achievability in three years
 - e. Opportunities for Innovation (i.e., breakthrough change)
2. Prioritize the three-year goals based on participant consensus. As a group, decide on the top two or three goals that will have the greatest impact as your Club works toward “True North.”
3. Identify annual goals that support each of the top three year goals.
4. Determine the milestones, resources, and responsible parties necessary for meeting the first annual goal for each of the three-year goals.
5. Enter your goals into Rotary Club Central and use Rotary Club Central to monitor progress toward accomplishing goals as the action plans are being implemented.

3. HOW DO WE GET THERE?

OPPORTUNITIES FOR INNOVATION:

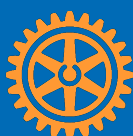
- Involve newer members and input from other stakeholders (Rotaract, Interact, Assistant Governor, Partners) to broaden ideas
- Accept risk if ideas do not work (including learning from failure)
- Acknowledge that change can be difficult
- Innovation isn't trying just anything – it still should align with Club goals, mission, etc.
- Consider Innovation when looking for breakthrough change (e.g., significant increase in membership)

In order to achieve "True North," the following goals must be achieved:

Three Year Goals:



USE 'SMART' GOALS



3. HOW DO WE GET THERE?

In order to achieve the three-year goals, we plan to achieve the following annual goals:

Three-year goal 1: _____

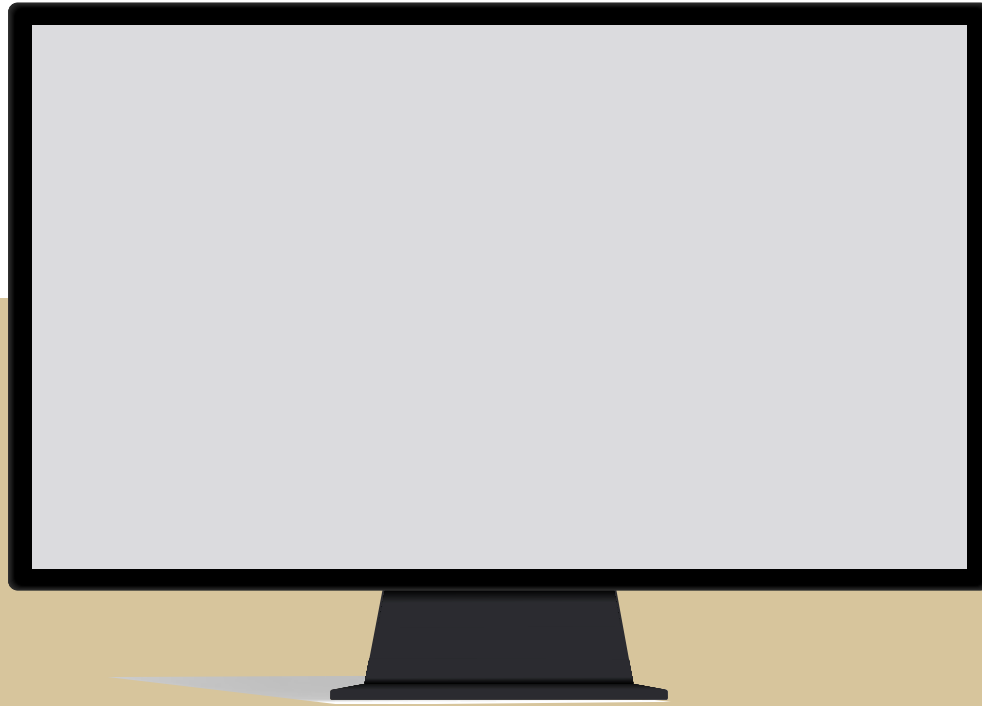
Annual Goal	Key Strategies	Milestones	Resources Needed	Responsible Parties

Three-year goal 2: _____

Annual Goal	Key Strategies	Milestones	Resources Needed	Responsible Parties

Three-year goal 3: _____

Annual Goal	Key Strategies	Milestones	Resources Needed	Responsible Parties



ROTARY DISTRICT 5400 STRATEGIC PLANNING AND INNOVATION CADRE

The Cadre started in 2020 to help our Clubs (and our District) with strategic planning including goal setting and monitoring progress. This past year, in part due to COVID restrictions and us all having to adjust (e.g., virtual or hybrid Club meetings), we added innovation to our charter.

Innovation provides opportunity for breakthrough change, whether it's due to unforeseen circumstances or as a key component to Club growth. The members of the Cadre are available to help your Clubs get on a sustainable path to greater vibrancy (e.g., more engaged members).