




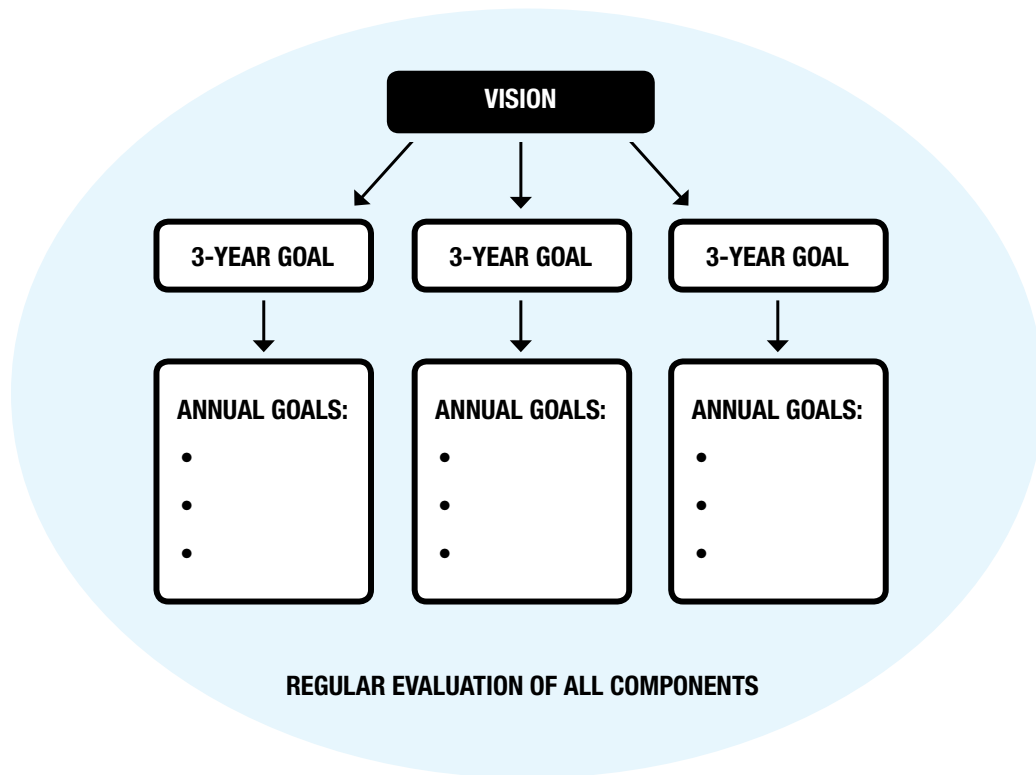
Strategic Planning Guide

Strategic planning helps individuals, clubs, and districts develop a long-range vision and serves as a framework for establishing goals. This guide and the accompanying worksheet provide clubs with a starting point for strategic planning. These resources can also be easily adapted for individuals or districts, and the worksheet can be completed independently or as a group. Facilitators should become familiar with this resource 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.

When conducting the strategic planning process, keep the following tips in mind:

- Include a wide variety of perspectives and consider all ideas.
 - Involve past, current, and incoming club leaders.
 - Have an unbiased facilitator or a small group of facilitators run strategic planning meetings.
 - Reflect on how your club's goals align with those of your district and the RI Strategic Plan.
- 





The Strategic Planning Model

Strategic planning involves creating a vision, with supporting goals that can be regularly evaluated and adjusted as needed.

Process

A strategic plan can be developed by completing the process below. Use the accompanying worksheet to record your ideas.

1. Where are we now?

- Describe your club's current state.
- Brainstorm your club's strengths and weaknesses.

2. Where do we want to be?

- Create a list of 5-10 characteristics that you would like to see in your club three years from now.
- Draft a one-sentence vision statement describing your club three years from now.
- Finalize the vision statement, making sure that all participants support it.

3. How do we get there?

- Brainstorm three-year goals that will help your club achieve the vision, considering:
 - Strengths and weaknesses of the club
 - Programs and missions of RI and its Foundation
 - Involvement of all members
 - Achievability in three years

- 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 the vision.
- Identify annual goals that support each of the top three-year goals.
- Determine the deadlines, resources, and people necessary for meeting the first annual goal for each of the three-year goals.

4. How are we doing?

- Create a strategic planning team to regularly monitor progress and recommend revisions to the plan.
- Allocate sufficient resources for the plan's implementation.
- Evaluate all decisions to make sure they support the plan, providing feedback to the strategic planning team on their implementation.
- Review the strategic plan annually, including the vision statement, three-year goals, and annual goals, and revise as needed.
- Repeat the full strategic planning process every three years to create a new plan or affirm the current one.



ROTARY INTERNATIONAL

Strategic Planning Worksheet

Use the process outlined on the previous page to complete this worksheet and create your strategic plan.

1. **Where are we now?** _____

Today's date: _____

Describe your current state:

Strengths:

Weaknesses:

2. **Where do we want to be?** _____

Target date: _____

Key characteristics of future state:

Vision Statement:

3. **How do we get there?** _____

In order to reach the vision, the following goals must be achieved:

Three-year goals:

In order to achieve the three-year goals, the following annual goals must be achieved.

Note: There is no limit to the number of three-year or annual goals for your strategic plan.

Three-year goal 1: _____

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

Three-year goal 2: _____

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

Three-year goal 3: _____

Annual goals:	Deadlines:	Resources needed:
• _____	_____	_____
• _____	_____	_____
• _____	_____	_____

4. **How are we doing?**

List the actions that you will take to follow up on implementation of the plan: