

Defining Your Path



Visioning and Strategic Planning for Clubs
June 18, 2020
District 5930 Leadership Training

Strategic Planning is not magic



It is not a list of goals

- XX New Members
- XX Service Projects
- XX Funds Raised



Poll Questions #1: Does your club have
a strategic plan?

Yes

No

Poll Questions #2: Who was involved
in creating that strategic plan?

Club President

Club Leadership

Club Leadership and some members

Open to all club members

Planning needs to go from this...



To this



Create a thoughtful conversation ...

- With constituents
- About a shared vision of the future
- So we can develop a path
- Around the challenges
- To get there



But we start here.. with members



Because that's the power of Rotary



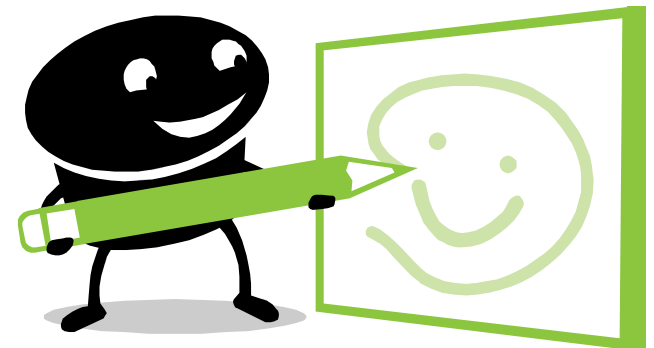
If we don't listen before planning

Houston, we have a problem



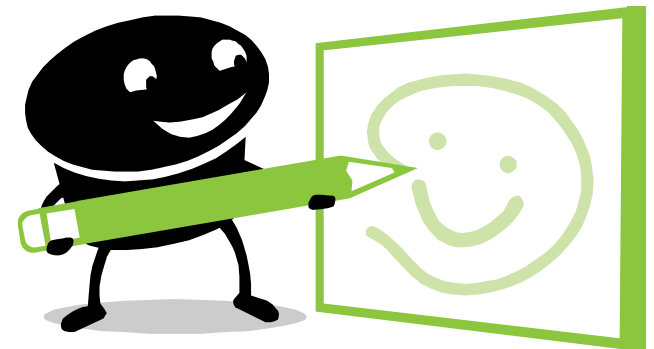
What does it provide?

1. Club visioning defines and celebrates the unique culture of each club
2. Culminates in a written plan that promotes ...
3. Continuity of leadership, vision and process
4. Consistency in club programming
5. Consensus toward solidarity and unanimity in purpose and action



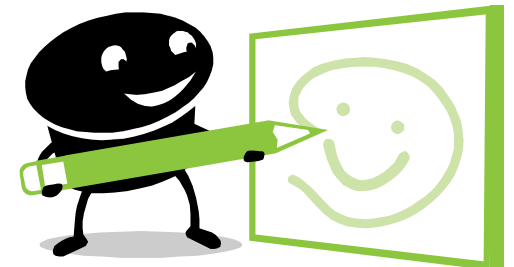
How does that happen?

1. Identify who needs to be in the conversation
2. What questions need to be asked
3. What do the conversations reveal
4. Identify themes
5. Prioritize those concepts
6. Develop Action Plans
7. Develop KPIs for success



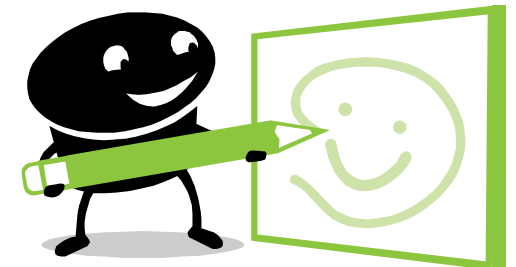
The Steps

1. Process Development: Club Leadership develops questions for club visioning.
2. Visioning Process: Open questions for brainstorming, no judgement
3. Theme Development: group ideas & concepts
4. Voting Process: Members prioritize concepts
5. Action Process: Leadership creates Strategic plan



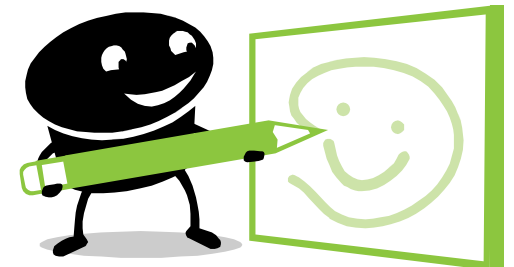
Process Development

1. Club assessment: Where we are now?
2. Question development: ideas of questions to pose – what do we need to know
3. Develop meeting outline
4. Decide if meeting as a whole or assign to groups
 1. Membership
 2. Service
 3. Youth
5. Assign roles
6. Recruit members to meeting



Visioning Process/Theme/Voting

1. Start with quick overview of where club is now
2. Provide rules for brainstorming
 - Quick ideas
 - No judgement allowed
 - No deep discussion
 - Goal to capture all thoughts
3. Group concepts (theme development)
4. Vote for top 5-7 ideas (if time allows)



Example Brainstorming Ideas

- Our Club is really good at
- Our club needs to change or improve ...
- In the future our Club will provide ...
- Our Club provides me ...
- The biggest challenge our club faces is ...

Poll Questions #3: Our club needs to improve or change ...

(Open ended question: input your idea/s)

Our Club needs to Improve

Membership
recruitment

Networking
Opportunities

Connection to
Community

Membership
Retention

IMPROVE

Generational
Communication

Leadership
Development

Service
Projects

Youth
Programming

Fundraising
for projects

Poll Questions #4: Our club's biggest challenge is ...

(Open ended question: input your idea/s)

The biggest Challenges our club faces



Service to our Members

Q1. Our Club is really good at...

- a. (Suggestion #1) •
- b. (Suggestion #2)
- c. (Suggestion #3)



***VOTE WITH
DOTS***

Q2. Our Club needs to change or improve...

- a. (Suggestion #1) ••
- b. (Suggestion #2)
- c. (Suggestion #3) ••••••••
- d. (Suggestion #4) •

Q3. The Rotary Club of Corpus Christi of the future will provide...

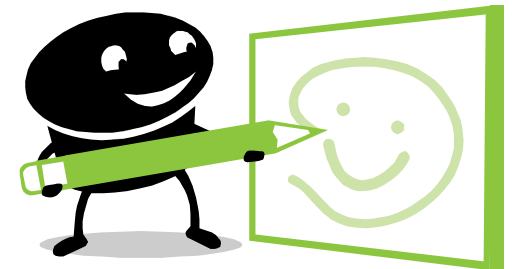
- a. (Suggestion #1) ••••
- b. (Suggestion #2)

Example Scoring Results: Members

- Broaden speaker pool and get larger variety of speakers (17 votes)
- Create more opportunities to promote our business with other Rotarians/Network (14 votes)
- Do a better job recruiting new members (13 votes)
- Encourage higher attendance percentage at meetings (13 votes)
- Train members to be mentors (11)

Action Process

1. Assess results of visioning
2. Develop concepts for delivery
3. ID members for program development and delivers
4. ID Measurements/Key Performance Indicators (KPI)
5. Develop targets (KPI and timelines)
6. Draft Strategic Plan
7. Present to members for validation or adjustment



Example Strategic Plan: Members

- Provide outstanding value to members through existing member network.
- Provide quality programs at our weekly meetings bringing in speakers from around the area, region, state and country to inform about timely issues
- Provide social and project events outside the regular meetings to engage and support current and new members and their family

Example Strategic Plan: Members

- MEASUREMENTS/ KPI:
 - Increasing membership attendance at weekly meetings by 5% over 6 months
 - Increasing club membership retention by 5% over 6 months
 - Overall memberships growth by 5% over 12 months.

Example Strategic Plan: Members

- Activities/Committees
 - New member orientation
 - Mentor committee
 - Family of Rotary Care
 - Membership development/retention
 - Club socials
 - Programs

No, it's not simple, not always easy

**If there is no struggle,
there is no progress.**

Frederick Douglass



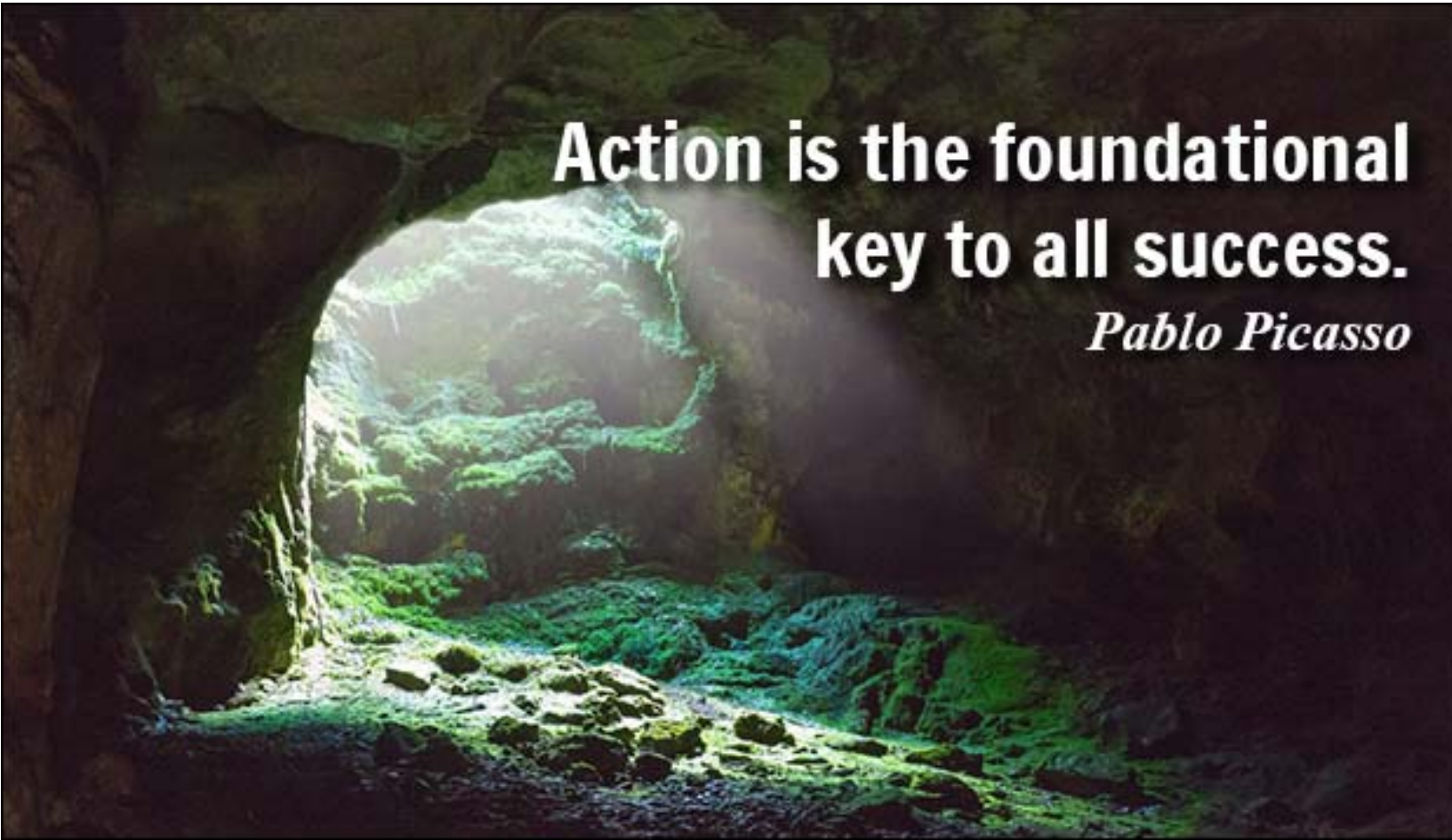
Shared Vision is a start



**You have to dream
before your dreams
can come true.**

A. P. J. Abdul Kalam

Vision is basis for Action Plan



**Action is the foundational
key to all success.**

Pablo Picasso

Poll Question #5: Would you be interested in having your club participate in a visioning/ strategic planning process?

Yes

No



Next Steps

ID 2-3 Clubs for Pilot Visioning Process

Contact:

Mary McQueen

361-815-1157

mmcqueen2@delmar.edu

If you are interested



Because ...



**What you do today can improve
all your tomorrows.**

Ralph Marston

Questions?

