



STRATEGIC PLANNING FACILITATION GUIDE

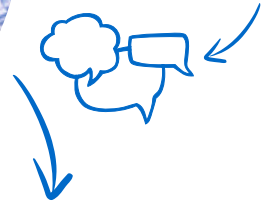
Using Rotary's Action Plan

Strategic planning is an opportunity to get members involved! You can facilitate a planning session using this guide to lead discussions with participants who'll be using the Strategic Planning Guide: Using Rotary's Action Plan. Include any member who's interested in participating and invite others with different perspectives. If you include more people with diverse ideas, your plan will better reflect what members want. This collaboration helps create a shared vision that members will want to achieve together.

GETTING STARTED

To lead a strategic planning session, you'll need:

- A place to meet (in person if possible), whether it's your club's location or a conference room
- A diverse group of members (including past, present, and incoming club and committee leaders) and, if possible, participants such as alumni and members of your community
- About three hours
- The Action Plan flyer
- [The Strategic Planning Guide](#)
- Sticky notes
- Whiteboard/large posterboards
- Markers
- Information gathered in advance (Club Health Check results, club survey data, Enhancing the Club Experience responses, etc.)



INTRODUCE ROTARY'S ACTION PLAN

INSTRUCTIONS:

Ask participants to tell the group what they know about Rotary's Action Plan.

Give participants the Action Plan flyer to review. Pause for a few minutes so people can familiarize themselves with the Action Plan and discuss its priorities and objectives. Then provide this information:

- Rotary's Action Plan is our long-term guide to achieving our vision of people uniting and taking action to create lasting change.
- Using the Action Plan to develop a strategic plan for your club can invigorate the experience your club offers and enhance your presence in the community, help you create meaningful connections, and improve your service activities.
- Strategic planning is important so clubs can identify what members want in their club experience and determine how to meet that need.
- A strategic plan gives a club a map of how to achieve its goals and vision.

KEY OBJECTIVE:

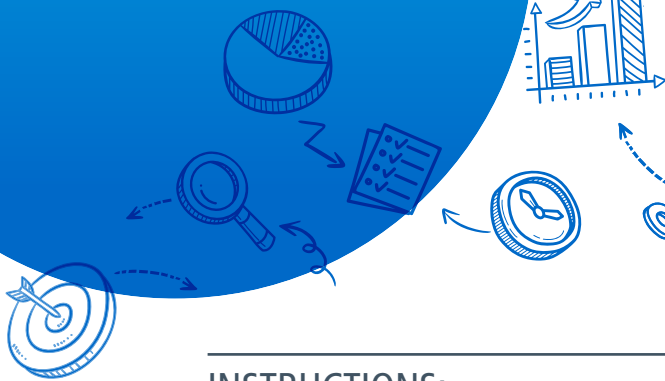
The purpose of this session is to set the club's long-term priorities using the framework of the Action Plan and to identify goals that will support the club's strategic vision.



STRATEGIC PLANNING PROCESS

PHASE 1

DETERMINE YOUR STATUS: HOW IS YOUR CLUB DOING NOW?



FACILITATED ACTIVITY TO IDENTIFY CRITICAL ISSUES

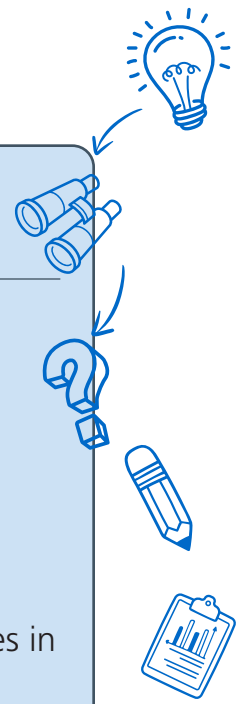
TYPE: Small-group discussions (three to five people in each group)

MATERIALS: Action Plan flyer, [Strategic Planning Guide](#)

TIME: 20 minutes

OBJECTIVE: Identify critical issues in the club

DESCRIPTION: Facilitating discussions about critical issues



INSTRUCTIONS:

Introduce the Action Plan as the framework for long-term planning that will help the club offer an experience that members and participants want. Ask people to work in small groups to discuss the critical issues the club is facing.

Ask each group to use these questions to guide the conversation:

- What do members and participants want that the club doesn't currently provide?
- What does our community need that the club could address through service projects?
- If the club isn't attracting and engaging a diverse group of members, why is that?
- Who are the community members the club should be including in its activities, and why?
- What are some club processes and procedures that the club can end?
- What are some innovative ideas the club can test, and how could it do that?

Elicit answers from each group and identify key issues for the club to focus on. Determine which priorities of the Action Plan they most align with and ask people to complete the corresponding section in the Strategic Planning Guide.

Next, ask each group to use 10 minutes to list the strengths and weaknesses of the club, writing each idea on a sticky note. Repeat this activity for the opportunities and challenges in the community. Encourage groups to use the questions and critical issues from the previous activity to guide their discussion.

Note: If you have survey results or have collected other data, provide that information to every group and encourage them to refer to it when they list items for each section.

After the groups complete both parts of this activity, display four posterboards around the room, each with its own title: Strengths, Weaknesses, Opportunities, and Challenges. Tell people to place their sticky notes on the appropriate poster. Then, ask people to walk around the room and place an asterisk on any sticky note that they strongly agree with.

Ask the whole group to identify the top three to five ideas from each category and complete the corresponding section of the Strategic Planning Guide.

FACILITATED ACTIVITY TO DETERMINE STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND CHALLENGES

TYPE: Small-group discussions (three to five people in each group)

MATERIALS: [Strategic Planning Guide](#), sticky notes, markers, four posterboards

TIME: 35 minutes

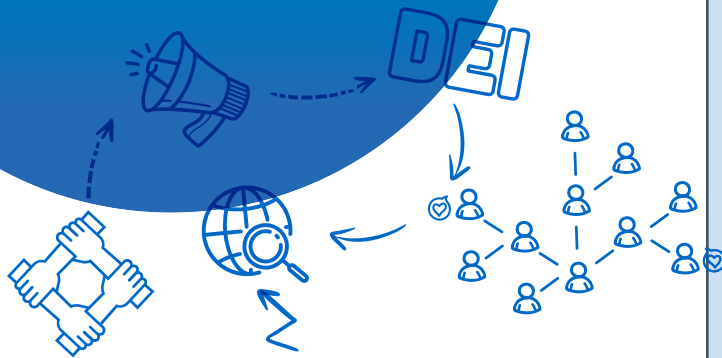
OBJECTIVE: Determine the club's strengths and weaknesses and the community's opportunities and challenges

DESCRIPTION: Brainstorming activity in small groups



PHASE 2

DEVELOP A VISION: WHAT DO YOU WANT YOUR CLUB TO BE LIKE?



FACILITATED ACTIVITY TO LIST CHARACTERISTICS MEMBERS WANT THE CLUB TO HAVE AND TO CREATE A VISION STATEMENT

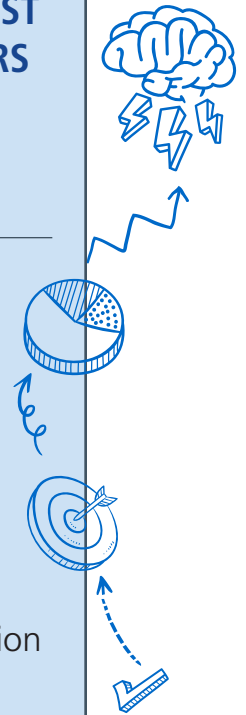
TYPE: Small-group discussions (three to five people in each group)

MATERIALS: [Strategic Planning Guide](#), sticky notes, markers, whiteboard

TIME: 25 minutes

OBJECTIVE: Create the club's vision statement, using answers from the first activity as a base

DESCRIPTION: Small-group brainstorming activity



INSTRUCTIONS:

Part 1: Ask each group to use sticky notes to list characteristics that they want the club to have and be known for, basing their answers on the responses from the first activity. Place the sticky notes on a wall or whiteboard and ask people to place an asterisk next to the characteristics they feel most strongly aligned with. Discuss with the entire group and agree on five to seven main characteristics.

Part 2: Tell participants that a vision statement defines their desired future and provides direction toward what they want the club to be. Explain that, together, the group will compose a one-sentence vision statement, using the characteristics that reflect what they want for the club.

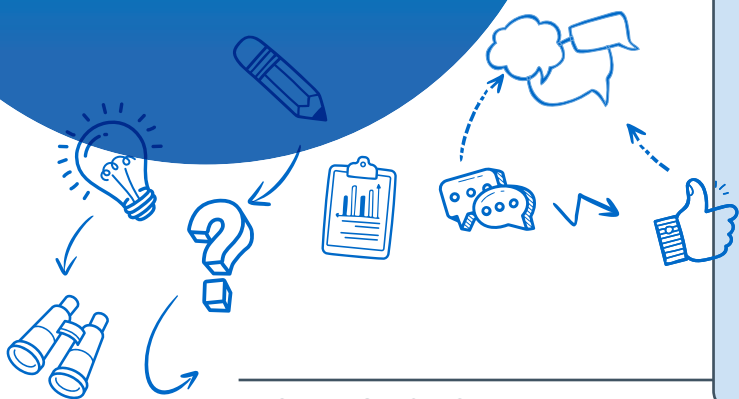
Ask participants to consider these questions in developing the vision statement, and urge them to be ambitious in their answers:

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

Ask participants to add their vision statement to the Strategic Planning Guide.

PHASE 3

MAKE A PLAN: HOW CAN YOUR CLUB ACHIEVE ITS VISION USING THE ACTION PLAN PRIORITIES (IMPACT, REACH, ENGAGE, ADAPT)?



FACILITATED ACTIVITY TO DEVELOP THE CLUB GOALS

TYPE: Individual activity, then full-group discussion

MATERIALS: [Strategic Planning Guide](#), sticky notes, markers, whiteboard

TIME: 25 minutes

OBJECTIVE: Develop goals to help the club achieve its vision and advance the Action Plan

DESCRIPTION: Full-group brainstorming activity



INSTRUCTIONS:

Explain that goals are specific to the challenges the club is working to address and that they should align with the four priorities of the Action Plan. Remind people that effective goals are measurable and clearly state what, when, how, and who. Give each participant a small stack of sticky notes and ask them to list the goals that the club should focus on over the next few years.

Tell people that when they list goals they should consider:

- Rotary's vision statement and the Action Plan
- The club's strengths and weaknesses
- The community's opportunities and challenges
- What the club members and participants need and want
- What the club can realistically achieve in three to five years

Place the sticky notes on a wall or whiteboard and ask people to place an asterisk next to the goals they most strongly agree with. Discuss these with the full group and agree on what goals the club will focus on. Ask people to complete the goal chart with the specifics in the Strategic Planning Guide.

PHASE 4 TRACK YOUR PROGRESS: HOW CLOSE ARE YOU TO YOUR GOALS?

FACILITATED ACTIVITY TO DECIDE HOW TO MONITOR PROGRESS

TYPE: Full-group discussion

MATERIALS: [Strategic Planning Guide](#)

TIME: 20 minutes

OBJECTIVE: Determine how the club will track its progress

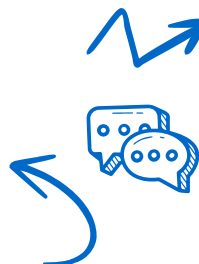
DESCRIPTION: Group discussion

INSTRUCTIONS:

Lead a discussion with the full group to decide how the club will track its progress on the goals the participants have set. Ask them to use these questions as a guide:

- How often should we measure progress toward our goals?
- What indicators will we measure, and what is our baseline?
- How should we communicate our progress to club members?
- Who should approve changes to our strategic plan or annual goals?

When participants have agreed on answers to these questions, ask them to add their plan to the corresponding section of the Strategic Planning Guide.



CLOSING

Remind the group to save a copy of the completed [Strategic Planning Guide](#) in a place that's accessible to club members. Tell them they can use the last section of the guide periodically to monitor their progress toward the club's goals. Mention the chart, and note that, if they miss a target, they can determine why and adjust the plan if necessary.

Thank people for participating in this session and tell them what will happen next. This can include:

- Assigning a task force or leader for each goal
- Sharing the plan with the club or community
- Scheduling a meeting to assess progress toward the goals
- Sharing and discussing the plan with incoming club leaders as soon as they are selected

