

Vision & Strategic Planning Facilitators Guide

Six Learning Objectives: (Quickly acknowledge the six learning objectives) **2 minutes**

- **How Rotary's Vision & Action Plan contribute to our legacy**
- **Aligning your club's strategic plan to Rotary's Action Plan**
- **How is your club doing now?**
- **What do you want your club to be like?**
- **How can you achieve your vision?**
- **What are the critical issues or concerns your club should be addressing?**

More than a century ago, RI pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that span the globe-bridging cultural, linguistic, generational and geographical barriers-and share the vision of a better world. As People of Action, we understand that fulfilling our vision requires a **plan**.

- 1. How Rotary's Vision & Action Plan contribute to our legacy:** (Take this time as an opportunity to talk about RI's current Vision & Action Plan as so the group has a sense of RI's pathway. **(10 minutes)**
 - a. Rotary's Vision Statement: Together** we see a world where **People** unite and take action to **Create** lasting **Change** across the globe in our communities and in ourselves. (Pass out and utilize the "How to Talk About Our Action Plan" handout for discussion points and talk about the importance of each club having its own Vision, see attached.)
 - b. Rotary's Action Plan through 2024:** (Use same handout and utilize the content as a few discussion points for each priority)
 - i. To increase our impact
 - ii. Expand our reach
 - iii. Enhance participant engagement
 - iv. Increase our ability to adapt
- 2. Aligning your club's strategic plan to Rotary's Action Plan:** **(20 minutes, which would include 15 minutes in workgroup, 5 minutes to report out & discuss as a group)**

Great opportunity to break the class up into smaller groups and ask them to think about and discuss the following questions, then have one person from each group report back as so the assistant facilitators can use flip charts to scribe.

a. Why is it important for each club to have a strategic plan? Ex.as follows:

- Clear path and action steps to align with club's vision
- Succession planning
- Align with RI's action plan
- Move away from "We've always done it this way"

b. What's the pros and cons of having you club constructing or updating an action plan?

The following are examples of each:

Cons:

- Deeply entrenched traditional Perspectives
- Mission not relevant to community needs
- Limited member involvement to determine club programs and service projects
- Member complacency
- No succession planning for leadership
- Lack of member trust in club leadership

Pros

- Provides a clear focus on key critical objectives
- Renew energy, create excitement & restore commitment
- Improve decision-making
- Define goals to set better priorities
- Achieve goals with less time
- Better use of clubs finances
- Retain members thru richer engagement
- Attract new members, skills & resources
- Actions become proactive and not reactive
- Service projects become more relevant
- Identify possible threats to club growth and organizational health
- Transform a club from simply average to EXTRAORDINARY

c. In what ways can you foster open and ongoing discussions in your club to shape your own strategies to align those of RI's plan? Think about RI's action plan below and seek examples for each action:

- Increase your club impacts on your community
- Expand you clubs reach
- Enhance participant engagement
- Increase your clubs ability to adapt

3. How is your club doing now?

- Club experience
- Members
- Club & Rotary Image
- Service & Social
- Business & Operations

As a group, ask the audience the following questions one at a time and solicit responses while co-facilitator(s) writes the answers on flip chart(s) (15 Minutes)

4. What are the critical issues or concerns that your club should be addressing now?

5. What do you want your club to be like?

6. How can you achieve your vision?

Break (5 Minutes, knowing it will take at least 10 minutes)

Breakout Session: (30 minutes, 20 minutes to discuss in groups and ten minutes to report out a few points)

Break the class up into groups as so they experience what may go into an Action Planning Workshop for their club. Each group can utilize RI's Strategic Planning Guide to see what it entails and potentially the facilitator and co-facilitators can be available for each group to help guide them through the four phases. They are not expected to create a plan, but to go over each section and the steps needed to put a plan together.

[file:///C:/Users/rfmackenzie/Downloads/strategic_planning_guide_en%20\(1\).pdf](file:///C:/Users/rfmackenzie/Downloads/strategic_planning_guide_en%20(1).pdf)

In addition, groups can discuss the three remaining questions/learning objectives. A scribe can take down the main points for all three questions and be prepared to share with the larger group when they come back together.

3 Minute wrap up to include any final questions