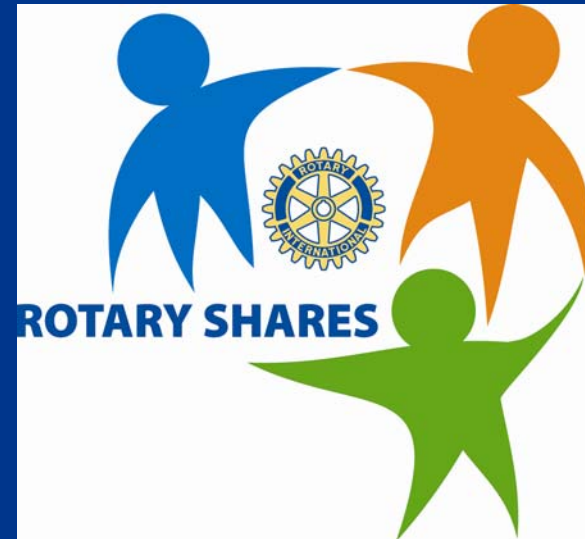




Shaping the Future of Rotary International 2007-2010

Rotary Institute
Convener's Name
Date





Today's Objectives

- Why do a Strategic Plan?
- Brief History and Bylaws' Requirements
- June 2007 Board Actions for 2007-2010 Plan
- Endorsed Mission, Vision, Motto, Core Values, and Priorities
- Benefits of Realizing our Plan
- Next Steps & Process
- Impacts on Clubs/Districts



Why Do a Strategic Plan?

- Emphasizes long-term planning
- Creates a more dynamic organization
- Provides tools for improvement
- Establishes vision for the future of Rotary International
- Failing to plan means planning to fail



History of RI Strategic Planning

■ RY 2003

- Embarked on strategic planning initiative
- Membership widely surveyed
- Board adopted the proposed plan and goals

■ 2004 COL

- Endorsed strategic plan
- Approved standing committee to oversee process

■ 2004-06 Actions

- Volunteer/staff action teams developed
- Implemented plans to achieve goals

■ 2007

- Aligning strategic plan and future vision plan
- Hired Strategic Planning Manager
- COL mandated various changes/endorsed FV Plan
- Board adopted updated plan



Terms of Reference (Bylaws)

- Board
 - *adopt strategic plan*
 - *report to each COL*
- President—perform duties consistent with strategic plan
- Strategic Planning Committee
 - *develop, update, and recommend*
 - *survey Rotarians and clubs (3 years)*
 - *counsel RI President-elect on upcoming year's program for consistency*
 - *other duties as assigned*



June 2007 Board Action

- Reviewed new plan elements
- Adopted motto, mission, vision, core values, priorities, and goals
- Agreed to distribute approved components to Rotary world
- Requested presentation to Rotary Institutes
- Requested a comprehensive communication plan by October 2007



Why Core Values?

- Organizational culture comprises the attitudes, experiences, beliefs and values
- Values are the heart of the organizational culture
- Shared by all
- Performance and strategy must align with organizational culture
- Aligns with Four-Way Test and Object of Rotary



Approved Core Values

- Service
- Fellowship
- Diversity
- Integrity
- Leadership



Mission Statement

The mission of Rotary International, a worldwide association of Rotary clubs, is to provide service to others, promote high ethical standards, and advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders



Vision Statement

The vision of Rotary International is to be universally recognized for its commitment to Service Above Self to advance world understanding, goodwill, and peace.



Motto

Service Above Self



Priorities

- Eradicate polio
- Advance recognition and public image of RI
- Increase capacity to serve others
- Expand membership globally (numbers and quality)
- Emphasize unique vocational service commitment
- Optimize leadership talents within RI
- Implement strategic planning process throughout organization



Progress To Date

- Conducted public image survey for benchmark data
- Identifying measurable outcomes to monitor performance
- Coordinating with TRF Future Vision
- Creating more strategic direction philosophy
- Addressing Rotarian needs
- Studying strategic planning models for clubs and districts
- Emphasizing vocational service in Rotary



Benefits of Realizing Our Plan

- Key themes of plan are still relevant
 - *Membership*
 - *Service*
 - *Leadership*
- Aligns with Club Leadership Plan
- Clubs can help by using the CLP framework



Summary of Process

- Three-year review cycle
 - *Review Priorities and Goals*
 - *Refine mission and vision (if necessary)*
- May—SPC counsels Pres. Elect/Nominee
- October—Board establish annual goal plan
- Every Meeting—Board monitors progress
- RI SPC—Meets 1-2 times per year



Next Steps (Aug – Oct 2007)

- Create/review high-level action plans
- Adopt mechanisms for Board monitoring
- Adopt communication and transition plans
- Adopt strategic planning process philosophy
- Promote strategic planning models for clubs and districts
- Coordinate with TRF Future Vision Plan



Keys to Successful Planning

- Board/Volunteers understand and support the plan
 - *Leadership owns the plan*
- Staff/Volunteer responsibilities clearly defined
- Outcome-focused
 - *Clearly defined deliverables and results*
- Scheduled reviews and updates
- Plans to implement, transition, and communicate



Impacts on Clubs and Districts

- Provides guidance on global strategic priorities
- Does not mandate—only a tool for planning locally
- Future RI assistance with planning models, tools, and guidelines
- Consistency and continuity in Rotary



Food for Thought

- Is your club or district involved in strategic planning?
- Is it or would it be beneficial?
- What are some of the key issues that Rotary should be addressing in the next three years?
- Is the RI strategic plan bringing more continuity at the international level?
- Is this evident?



Thank You

For more information and updates,
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