

Value of Strategic Planning

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Rotary Fellowship of Lead - March 2024





Session Goal

How to create and execute a
3-5 year Strategic Plan

STRATEGIC PLANNING PROCESS OVERVIEW

PHASE 1 —
DETERMINE YOUR
STATUS: HOW IS OUR
CLUB DOING NOW?

PHASE 2 —
DEVELOP A VISION:
WHAT DO WE WANT
OUR CLUB TO BE LIKE?

PHASE 3 —
MAKE A PLAN: HOW
CAN WE ACHIEVE OUR
VISION?

PHASE 4 —
TRACK PROGRESS:
HOW CLOSE ARE WE
TO OUR GOALS?

Getting Started

- Assemble a team including past, present, and incoming club leaders to develop the plans.
- Nominate someone not in a leadership position to facilitate strategic planning meetings.
- Involve club members who have diverse backgrounds and experiences.
- Make sure it reflects Rotary's official strategic vision.
- Align Club goals reflect the district and Rotary's strategic plan.

Phase 1 -

DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?

01 Identify strategic issues to address

02 Determine club's strengths and weaknesses

03 Assess member satisfaction and needs

04 Identify opportunities and challenges in the community

01 Identify strategic issues to address

- What are the critical issues or concerns?
- They are critical unknowns that drive the strategic planning process
- These issues are looking for a solution or decision
- Reviewing your club's past strategic plans and using the Rotary Club Health Check can help give you direction.

01 Identify strategic issues to address: Potential Questions

- How will we increase our membership?
- How to increase membership engagement our club?
- How to attract members with more diverse backgrounds?
- How can we include more community members in our club activities?

02

Determine the club's strength and weaknesses



S

Strength

List what your club does well



W

Weaknesses

List what your club could improve

03

Assess Member Satisfaction and needs

This survey focuses on your day-to-day experiences in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers; we simply ask for your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with your membership in our Rotary club?

- Satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Dissatisfied

2. Considering our club's **culture, members, and meetings**, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Club meetings are a good use of my time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job involving new members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club's members care about one another	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club reflects the demographic profile of our area's business, professional, and community leaders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

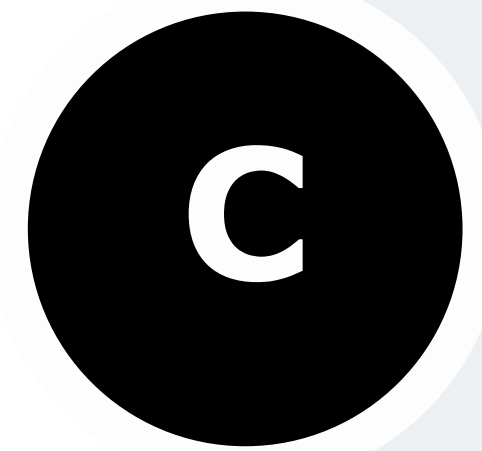
04

Identify opportunities and challenges in the community



Opportunities

List opportunities in your community that your club can act on



Challenges

List challenges in your community that your club can help address

Phase 2 -

DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?

01 List five to seven characteristics you want your club to have

02 Create your own vision statement

DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?

Club Characteristics

List five to seven characteristics you want your club to have within three to five years that will help realise that vision

DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?

Vision Statement

Potential questions to consider:

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

Phase 3 -

MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?

01 Set strategic priorities

02 Set annual goals

03 List the activities, timeline,
and resources you'll need

01 Strategic Priorities

Consider the following when you develop strategic priorities:

- The Rotary vision statement and strategic plan
- Your club's strengths and weaknesses
- Your district's goals
- Your community's opportunities and challenges
- Your club members' opinions
- What you can achieve in three to five years

Annual Goals

Effective goals state:

- What,
 - When,
 - How,
 - Who
- and are
- Measurable.



03

List the activities, timeline, and resources you'll need

STRATEGIC PRIORITY 1: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

Phase 4 -

TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?

01 Monitor progress toward your annual goals

02 If you missed your targets, determine why

03 Adjust your action plans

01

MONITOR PROGRESS

Consider the following when monitoring progress:

- How often should we measure progress toward our goals?
- How should we communicate our progress to club members?
- Who should approve changes to action plans or annual goals?

02

Review and Adjust

Consider the following when identifying and listing your missed targets:

- What goals were met?
- What goals were not met?
- What are the top reasons we fell short of those goals?
- What adjustments need to be made to help us achieve those goals?

03

Adjust your action plan

STRATEGIC PRIORITY 1: _____

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN



Summary

STRATEGIC PLANNING is a tool to help Clubs:

- Identify goals,
- Re energise the Club
- Retain & attract members,
- Serve the community better
- Achieve & boost Rotary Image

All while respecting RI values



Thank You!

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