

STRATEGIC PLANNING & CONTINUITY

MidWest PETS

March 2018

Rotary Coordinator: Nicki Scott



LEARNING OBJECTIVES

By the end of this session, you should be able to:

- Be able to articulate the need for planning
- Work with your club to create or refine a strategic plan
- Understand the basics of managing change and key components to a successful outcome

WHY PLAN?

PLAN AHEAD

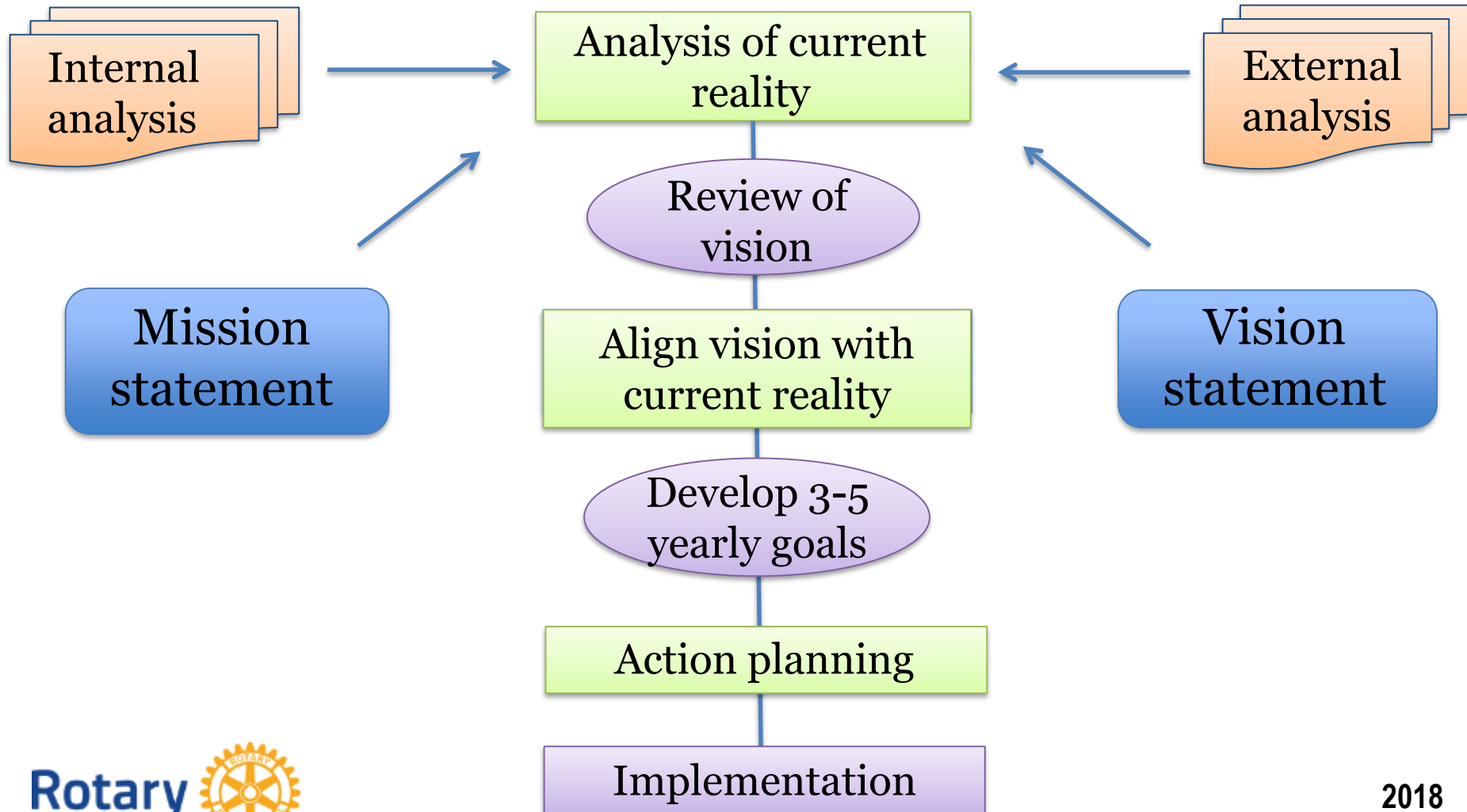
THE BENEFITS OF PLANNING

- Balancing long and short term objectives
- Knowing where you want to lead the club to
- Having a way to communicate that
- Creating buy-in
- Getting everyone on the same page

THE LACK OF VISION?



STRATEGIC PLANNING MAP



STEP 1: WHERE ARE WE NOW?

- **Mission statement: What is our purpose?**
- **Values/principles: What do we stand for?**
- **SWOT: Assessment of current reality**



ASSESS THE CURRENT CONDITION: SWOT Analysis!

**What are our
strengths?**

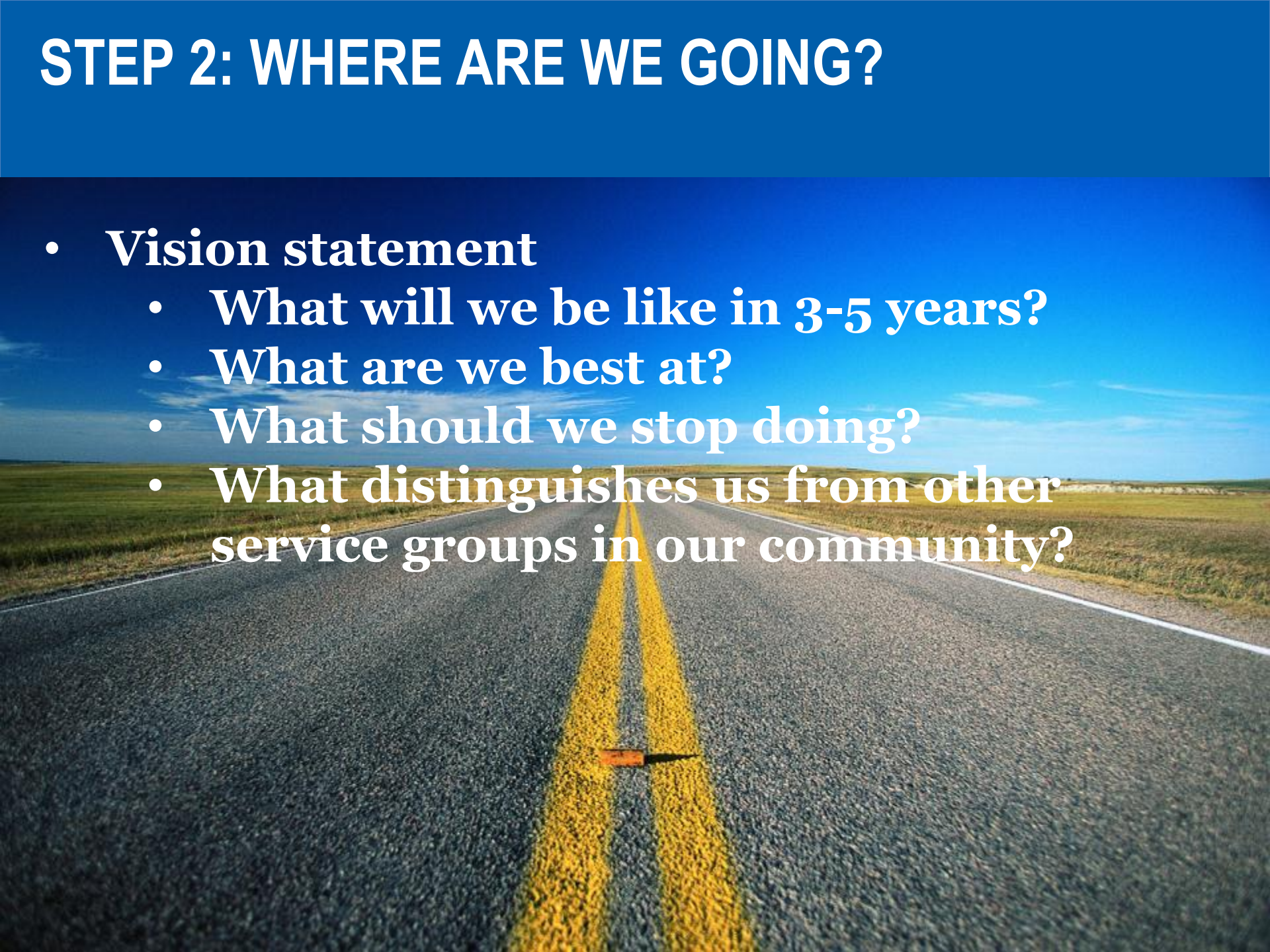
**What are our
weaknesses?**

**What are our
opportunities?**

**What are our
threats?**

STEP 2: WHERE ARE WE GOING?


- **Vision statement**
 - What will we be like in 3-5 years?
 - What are we best at?
 - What should we stop doing?
 - What distinguishes us from other service groups in our community?



ROTARY'S NEW 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.

STEP 3: HOW DO WE GET THERE?

- Strategic priorities: Long-term
 - Goals: Short-term
 - Action items: Plans for implementing goals
 - Score card: Measures and manages the plan
 - Implementation: Who manages, communicates, and supports the plan?
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- The background of the slide is a textured, light-colored surface, possibly stone or wood. In the upper left, there is a wooden gavel with a dark head and a light handle. In the center, a pair of metal compasses is laid out. In the lower left, a dark, circular object, possibly a lid or a small bowl, is partially visible. The overall aesthetic is that of a workshop or a place of craftsmanship.

PRESIDENTIAL THEME & CITATION



**BE THE
INSPIRATION**



BARRY RASSIN
2018-19 President
Rotary International



2018

TO LEAD OR TO MANAGE?

- Management
 - Doing things right
- Leadership
 - Doing the right thing!

On Becoming a Leader: Warren Bennis

LEADING & MANAGING CHANGE

CHANGE PLANNING FRAMEWORK

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN
Articulate what the change will look like when fully implemented. What would people do differently?	What skills will be needed to be successful? Do key people have those skills? How would they get them?	Express the "what's in it for me?" What are the benefits and, if any, what incentives or activities can be offered to encourage adoption?	What tools and resources will be available to tell the story? Who will assist in providing support and info to encourage adoption?	What are the steps to be taken to communicate and implement the desired change?
Vision statement, group meetings, repetition across communication vehicles	Training, best practices, stories, lessons learned, job aids	Contest, recognition, teambuilding	Ambassadors, consistent, available support	Roadmap, performance planning, success stories

Adapted from Dolores Ambrose, 1987

OVERCOMING RESISTANCE TO CHANGE

CHANGE PLANNING GAP CONSEQUENCES



Adapted from Dolores Ambrose, 1987

KEY RESOURCES

- Strategic Planning Guide
- Rotary Club Central goals
- Membership Assessment Tools
- Be a Vibrant Club
- Rotary coordinators
- Assistant governors
- Your club members!!



TAKE ACTION!

1. What are three key takeaways / action steps you will take towards establishing or updating your **Club** Strategic Plan?
2. How will you embrace being a champion for change?