

FACULTY GUIDE

Part II: Strategic Planning & Analysis

Prior to the session:

1. Collect materials for activities – index cards, small buckets, or other containers for Strategic Planning Exercise, newsprint, markers
2. Create chart that depicts Strategic Planning Process
3. Add questions to index cards for Strategic Planning Activity
4. Mark five (5) small buckets with labels Financial, Membership, Service, Publicity, Foundation
5. Prepare fun, unique ways to create partners and groups

Begin session:

- Introduce self and session
- Orient participants to the materials
- Review Session Goals and where this course fits into the Leadership curriculum of RLI
- Point out referenced materials and where they can be found
- Quickly review Insert: SPA-1 “Good to Know for Strategic Planning and Analysis”

NOTE: There are a lot of resources included in the participant materials for this session. Some of them will be used here but others are for the Rotarians to take back to their clubs and do some assessment and planning. There is some reformatting and technique suggestions that are different than the previous facilitator guide, but they will use the same resources.

PARTNERS - Warm-up: Think of a Time When...

- Invite participants to form partners
- With their partner, ask the group to reflect on a time when they went through a self-evaluation process
- Each partner has two (2) minutes

Prompt 1 – Think of a time when you went through a self-evaluation process.

- **What was it like?**
- **What was the process?**
- **What was the result?**

- **Was it successful?**
- **Why or Why not?**

When they return from the breakout – ask for one or two examples

OPEN DISCUSSION – Why is a self-evaluation of a Rotary club important?

Prompt 2 - Rotary clubs and Rotarians can get in a rut, doing (or not doing) certain things out of habit. The process can give all involved an opportunity for readjustment or a fresh start. Participants may bring in their own experiences from work, education, or other organizations to engage in evaluation processes and the importance of those experiences.

The exercise reinforces that the club leadership cares, their time is being used effectively and their core mission of fellowship and service is important. Let's explore the questions 1) Why is a self-evaluation of a Rotary club important to the club and 2) Why is it an important exercise within the club?

Discussion should include:

- Is the club meeting members' needs and expectations?
- Is it effective in engaging the community?
- Is it involving its members?
- Is it using the Rotary menu of service opportunities?
- Does it look and act like a Rotary club?

Exploring the Strategic Planning Process

- Draw the group's attention to the visual depicting the Strategic Planning Process. (Refer the group to page 8 of the participant manual)
- Review the Strategic Planning Process including the following points:
 - Goals
 - Desired Outcomes
 - Strategies
 - Measures and Outcomes
 - Results



- Process – develop a plan for identifying and implementing long-term organizational goals
- Conduct an analysis to look at External and Internal Environment in which the organization (Rotary club) finds itself
- Formulate objectives and strategies based on an assessment of these environments
- Develop procedures to implement and evaluate the strategic plan

Strategic Planning Activity:

- Distribute index cards that have the following questions on them:
 - FRONT – What is your club’s best asset? What is best about your club?
 - BACK – What is your club’s greatest liability? What is the club’s greatest challenge?
- Direct participants to find a partner and share what they recorded on their card.
- Give them two (2) minutes
- Ask participants to place their card into one of five buckets – Finance/Administrative; Membership; Service: Publicity; Foundation.

Prompt 3 – The first step in the strategic planning process is to determine where you are. With the limited time we have today we will simulate a simple assessment. These index cards contain questions on both the front and back. Respond to the questions about one of you club’s assets and challenges. Share them with a partner. You have two minutes.

Now decide in which category your club's CHALLENGE falls – Financial; Membership; Service; Publicity or Foundation. Place your "Challenge" card in the appropriate bucket.

- Using the Strategic Planning Worksheet, briefly review the steps involved in strategic planning as articulated on Insert: SPA-3.
- Form groups of 3 – 4 people
- Have each group choose one of the buckets and then a card from the bucket. Using the challenges/liabilities indicate on the card.

Prompt 4 – In your group, describe where you (this club) are regarding that one issue. Brainstorm where you would like to be in one year regarding that one issue. Make a plan that lays out how you will get there. You may consider the asset indicated on the opposite side of the index card to determine the action plan for this issue. You will have 10 minutes

NOTE: If the number of participants in this session is small, consider dividing the group in half with each group taking a card from one bucket or choose one and have the whole group work together on it.

Debrief:

- Ask for a volunteer or two to share their plan.
- Point out that the Strategic Planning Process often takes commitment on the part of leadership and should involve as many members as possible.
- Direct the group's attention to Insert SPA-2 Rotary Club Self-Evaluation
- Explain that it is a self-evaluation tool that can be used with individual clubs to review current operations

Rotary International's Strategic Plan

- Compare the RI Strategic Plan (Insert SPA-4) to a club's strategic plan (or what you think your club's strategic plan might include)

Prompt 5 – The mission of Rotary International is to provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional and community leaders.

The Rotary International New Strategic Plan has Four (4) Priorities

- 1. Increase Our Impact**
- 2. Expand Our Reach**

3. Enhance Participant Engagement

4. Increase Our Ability to Adapt

Each priority has several objectives (<https://my.rotary.org/en/document/strategic-plan>)

Almost everything “Rotary” does is done by the clubs. However, RI’s mission is to help support clubs, focus, and increase humanitarian service and enhance public image and awareness. These are shared emphases meant to make Rotary clubs stronger and more effective individually and thereby make Rotary stronger by their collective action and unified focus. The RI Strategic Plan can be used as a resource in the club strategic planning process, so that the planning club can do those things that Rotary International believes will make them successful and add to the success of the “Rotary Movement” worldwide.

- **Conclude by brainstorming with participants how they can use this information in beginning the strategic planning process in their home clubs.**