



## Rotary Club of Westerville Sunrise

### *Strategic Plan: 2011 - 2014*

For Review and Approval by the Board of Directors

January 27, 2011

**FINAL**

# Agenda



- Overview
- Where Are We? – Mission & Member Assessment
- Where Are We Going? – Vision, Goals, & Strategies
- How Do We Get There? – Tactical Framework for Implementation
- Next Steps

# Overview



# Overview – The Charge

The purpose of the Strategic Planning Committee and its overall charge is to:



- ✓ Update the Westerville Sunrise Strategic Plan of 2007 – 2010
- ✓ Conduct a Members' Assessment to support the strategic direction
- ✓ Recommend to the Board of Directors:
  - *Goals and strategic priorities*
  - *A framework for implementation (tactical planning)*
- ✓ Leverage the work of, and align with, the Rotary International Strategic Plan

# Overview – The People

The Strategic Planning Committee was comprised of a well-balanced team of participants representing the Board of Directors, The Foundation, Club management (officers), and the Club members at-large:

- ✓ Julie Friend, *Club Officer (Secretary)*
- ✓ Scott Hrabcak, *Club Member*
- ✓ Larry Jenkins, *Foundation Officer (Treasurer)*
- ✓ Brett Justice, *Club Member*
- ✓ Pat Knott, *Club Officer (President)*
- ✓ Heather Linch, *Club Officer (President Elect)*
- ✓ Joan McKinney, *Board Member*
- ✓ Lee Peters, *Club Member*
- ✓ Rick Rano, *Club Officer (Vice President)*
- ✓ Bob Strasburg, *Board Member*



# Overview – The Process

At its most fundamental level,  
Strategic Planning is a  
3-Step Process:



## 1 - Strategic Assessment

- ✓ *Mission Statement*
- ✓ *Members Assessment*



## 3 - Strategic Implementation

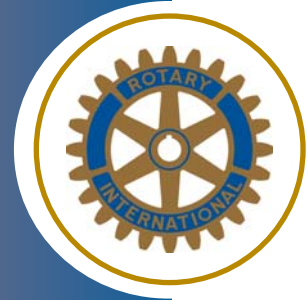
- ✓ *Tactics*
- ✓ *Accountabilities*
- ✓ *Evaluation*

## 2 - Strategy Development

- ✓ *Vision Statement*
- ✓ *Goals*
- ✓ *Strategies*

# Where Are We?

*Mission & Members Assessment*



# Where Are We? - The Mission

The basic purpose of our organization's existence and its alignment with RI.



## Rotary International

We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.

## Westerville Sunrise

Advance the Object of Rotary through energy, involvement, fellowship, and openness in a positive environment.

# Where Are We? – Members Assessment

## Purpose



- ✓ Understand objective Member-perceptions of, and preference for, Westerville Sunrise and its projects
- ✓ Determine key drivers of Members' attraction to the club and their retention
- ✓ Create baseline data to assess future trends
- ✓ Reinforce strategic direction for overall Club strategies including projects and workload

Note: the complete assessment can be reviewed in the final Member Assessment Analysis dated October 21, 2010.

# Where Are We? – Members Assessment

## Methodology



- ✓ Distributed paper survey at the 9/29/2010 meeting and sent via e-mail to all members.
- ✓ Each member was given the opportunity to participate between 9/29/2010 and 10/20/2010.
- ✓ 48 surveys were returned and tabulated.
- ✓ As this was not a random sample to gauge the opinions of the entire club, there is no statistical significance or error margin to calculate.
- ✓ The results are simply a summary of those Members who completed and submitted their answers and opinions.

Note: the complete assessment can be reviewed in the final Member Assessment Analysis dated October 21, 2010.

# Where Are We? – Members Assessment

## Findings & Implications



- ✓ Members have a high opinion of the Club's efforts but may not necessarily understand their alignment to Rotary's "Avenues of Service"
- ✓ Leverage the clubs' best qualities (Dedication to Service and Energy, Fun, & Fellowship) to affect improvements in areas of greatest need: participation by, and socializing among, all members.
- ✓ Rationalize work effort with those projects that present the most value
- ✓ Acknowledge that there are significant differences of opinion between age groups and between years of service in Rotary.

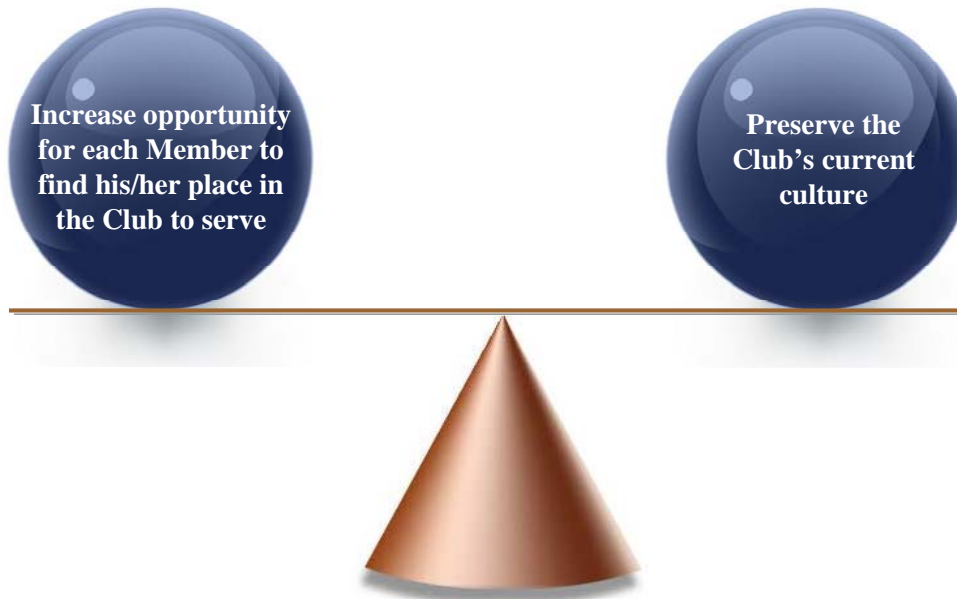
Note: the complete assessment can be reviewed in the final Member Assessment Analysis dated October 21, 2010.

# Where Are We?

## Overriding Theme & Final Thought

The overriding theme from the Assessment and discussions with Strategic Planning Committee members suggests that “Club Members join to serve but stay for the fellowship”.

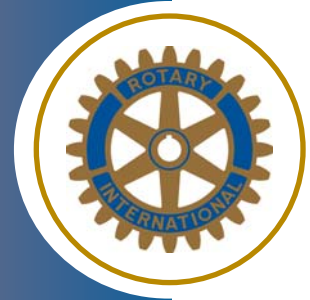
Therefore, the Club’s strategic pursuits should balance its abilities to:



Note: the complete assessment can be reviewed in the final Member Assessment Analysis dated October 21, 2010.

# Where Are We Going?

*Vision, Goals, & Strategies*



# Where Are We Going?

## Establishing a Vision for the Club

Using the Members Assessment as a guide and ensuring alignment with Rotary International, the following Vision for the Club has been recommended:



### Rotary International

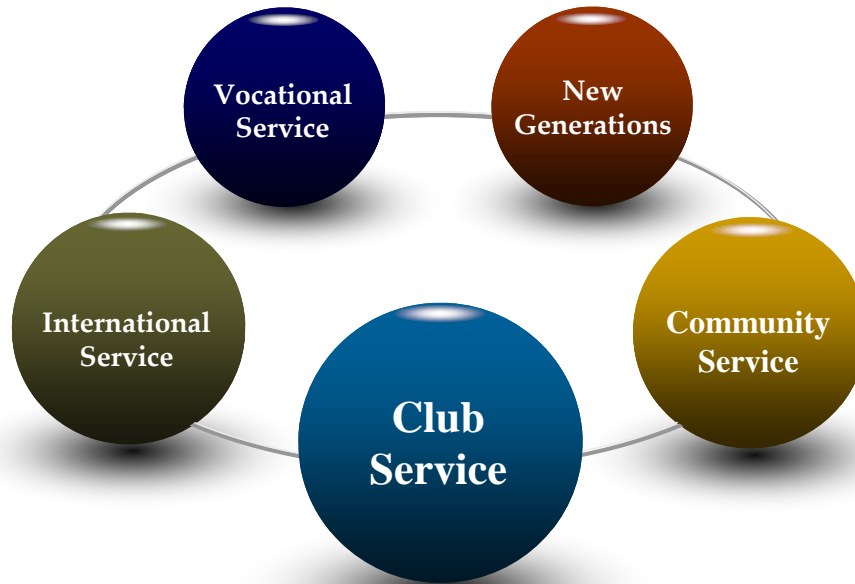
To be the service organization of choice with dynamic, action-oriented clubs whose contributions improve the lives in communities worldwide.

### Westerville Sunrise

To be the service organization of choice in the Westerville area.

# Where Are We Going?

## Rotary's Five Avenues of Service



The Club already has an organizational construct through which we can establish goals, create strategies, and facilitate implementation in achieving our Vision:

Rotary's Five Avenues of Service

# Where Are We Going?

## Avenue: Club Service



### Club Service Goal

To be recognized community-wide as an energetic, fun, and diverse organization making significant, positive contributions to the community.

### Club Service Strategies

- ✓ Develop a comprehensive plan to proactively define the way in which we want to be perceived by others and build awareness of the Club, promote its efforts, and communicate our unique “brand”.
- ✓ Create teamwork opportunities that are visible to the Westerville community and speak to the members’ individual service objectives and passions.
- ✓ Develop consistent methodologies for identifying member participation and monitoring community perception.
- ✓ Continue efforts to enhance fellowship and create “shared experiences”
- ✓ Enhance succession planning of the Servant Leadership by providing opportunities to foster and nurture future Club leaders.

# Where Are We Going?

## Avenue: Community Service



### Community Service Goal

To extend our service responsibly to address needs within our community.

### Community Service Strategies

- ✓ Establish and maintain community connections, business networks, and strategic partnerships to facilitate broader support and leverage resources
- ✓ Align with other Rotary Clubs, where appropriate, to optimize the impact of our efforts.
- ✓ Position the Club as a catalyst for community improvement – serve as the “go-to” / top of mind organization that others come to for help.
- ✓ Pursue “front-line” volunteer projects in which Members and their families can provide a tangible help to those receiving the service.



# Where Are We Going?

## Avenue: New Generations Service



### New Generations Service Goal

To increase our engagement in the development of youth's desire to serve through Rotary.

### New Generations Service Strategies

- ✓ Create programs that inculcate in early teens the desire and joy of contributing to the greater community.
- ✓ Raise Awareness about Rotary, and specifically our Club, within academic institutions, primary to post-secondary, to include not just students, but also administrators, teachers and other staff.
- ✓ Provide opportunities for youth to participate in Rotary service and learning activities that provide exposure to the ideals of Rotary.

# Where Are We Going?

## Avenue: Vocational Service



### Vocational Service Goal

To increase our service to others through our Member's connections and vocations.

### Vocational Service Strategies

- ✓ Continue to recognize community members who excel at serving others through their vocation.
- ✓ Align with New Generations efforts to engage Youth by increasing mentoring opportunities for vocational services
- ✓ Promote ideals and ethics for business that are congruent with the ideals of Rotary
- ✓ Seek individuals with specific talents/vocations that would "fill the holes" in Club activities and responsibilities

# Where Are We Going?

## Avenue: International Service



### International Service Goal

To increase opportunities for our members to make a significant impact on humanitarian causes around the world.






### International Service Strategies

- ✓ Establish and maintain connections, business networks, and strategic partnerships to facilitate broader support and leverage resources
- ✓ Align with other Rotary Clubs, where appropriate, to optimize the impact of our efforts on an international scale.
- ✓ Pursue more opportunities for international service that are visible to the Westerville community and speak to the members' individual service objectives and passions.
- ✓ Collaborate with Club Service to increase awareness and educate the community of Rotary International and the Club's impact around the world.

# Where Are We Going?

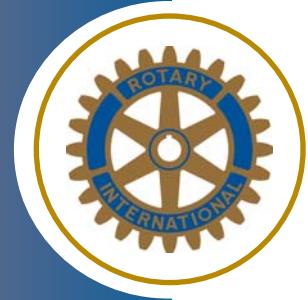
## Summary of Goals & Strategies by Avenue



Avenue of Service	Club Goal	Club Strategies
 <p>Club Service</p>	<p>To be recognized community-wide as an energetic, fun, and diverse organization making significant, positive contributions to the community.</p>	<ul style="list-style-type: none"> <li>✓ Develop a comprehensive plan to define the way in which we want to be perceived by others and build awareness of the Club, promote its efforts, and communicate our unique “brand”.</li> <li>✓ Create teamwork opportunities that are visible to the Westerville community and speak to the members’ individual service objectives and passions.</li> <li>✓ Develop consistent methodologies for identifying member participation and monitoring community perception.</li> <li>✓ Continue efforts to enhance fellowship and create “shared experiences”</li> <li>✓ Enhance succession planning of the Servant Leadership by providing opportunities to foster and nurture future Club leaders.</li> </ul>
 <p>Community Service</p>	<p>To extend our service responsibly to address needs within our community.</p>	<ul style="list-style-type: none"> <li>✓ Establish and maintain community connections, business networks, and strategic partnerships to facilitate broader support and leverage resources</li> <li>✓ Align with other Rotary Clubs, where appropriate, to optimize the impact of our efforts.</li> <li>✓ Position the Club as a catalyst for community improvement – serve as the “go-to” / top of mind organization that others come to for help.</li> <li>✓ Pursue “front-line” volunteer projects in which Members and their families can provide a tangible help to those receiving the service.</li> </ul>
 <p>New Generations</p>	<p>To increase our engagement in the development of youth’s desire to serve through Rotary.</p>	<ul style="list-style-type: none"> <li>✓ Create programs that inculcate in early teens the desire and joy of contributing to the greater community.</li> <li>✓ Raise Awareness about Rotary, and specifically our Club, within academic institutions, primary to post-secondary, to include not just students, but also administrators, teachers and other staff.</li> <li>✓ Provide opportunities for youth to participate in Rotary service and learning activities that provide exposure to the ideals of Rotary.</li> </ul>
 <p>Vocational Service</p>	<p>To increase our service to others through our Member’s connections and vocations.</p>	<ul style="list-style-type: none"> <li>✓ Continue to recognize community members who excel at serving others through their vocation.</li> <li>✓ Align with New Generations efforts to engage Youth by increasing mentoring opportunities for vocational services</li> <li>✓ Promote ideals and ethics for business that are congruent with the ideals of Rotary</li> <li>✓ Seek individuals with specific talents/vocations that would “fill the holes” in Club activities and responsibilities</li> </ul>
 <p>International Service</p>	<p>To increase opportunities for our members to make a significant impact on humanitarian causes around the world.</p>	<ul style="list-style-type: none"> <li>✓ Establish and maintain connections, business networks, and strategic partnerships to facilitate broader support and leverage resources</li> <li>✓ Align with other Rotary Clubs, where appropriate, to optimize the impact of our efforts on an international scale.</li> <li>✓ Pursue more opportunities for international service that are visible to the Westerville community and speak to the members’ individual service objectives and passions.</li> <li>✓ Collaborate with Club Service to increase awareness and educate the community of Rotary International and the Club’s impact around the world.</li> </ul>

# How Do We Get There?

*Tactical Framework for Implementation*





# How Do We Get There?

## Tactical Framework for Implementation



Club Strategies	EXAMPLE Tactics	Accountable Chair	Timeline
Develop a comprehensive plan to define the way in which we want to be perceived by others and build awareness of the Club, promote its efforts, and communicate our unique “brand”.		Barb Gizzo	
Create teamwork opportunities that are visible to the Westerville community and speak to the members’ individual service objectives and passions.		Joan McKinney	
Develop consistent methodologies for identifying member participation and monitoring community perception.		Bob Strasburg	
Continue efforts to enhance fellowship and create “shared experiences”		Joan McKinney	
Enhance succession planning of the Servant Leadership by providing opportunities to foster and nurture future Club leaders.		Larry Jenkins	



# How Do We Get There?

## Tactical Framework for Implementation



Club Strategies	EXAMPLE Tactics	Accountable Chair	Timeline
Establish and maintain community connections, business networks, and strategic partnerships to facilitate broader support and leverage resources.		Dave Wartel	
Align with other Rotary Clubs, where appropriate, to optimize the impact of our efforts.		Club President	
Position the Club as a catalyst for community improvement – serve as the “go-to” / top of mind organization that others come to for help.		Dave Wartel / Barb Gizzo	
Pursue “front-line” volunteer projects in which Members and their families can provide a tangible help to those receiving the service.		Dave Wartel	



# How Do We Get There?

## Tactical Framework for Implementation



Club Strategies	EXAMPLE Tactics	Accountable Chair	Timeline
Create programs that inculcate in early teens the desire and joy of contributing to the greater community.		Glenn Epting	
Raise Awareness about Rotary, and specifically our Club, within academic institutions, primary to post-secondary, to include not just students, but also administrators, teachers and other staff.		Glenn Epting / Barb Gizzo	
Provide opportunities for youth to participate in Rotary service and learning activities that provide exposure to the ideals of Rotary		Glenn Epting	



# How Do We Get There?

## Tactical Framework for Implementation



Club Strategies	EXAMPLE Tactics	Accountable Chair	Timeline
Continue to recognize community members who excel at serving others through their vocation.		Paul Kulik	
Align with New Generations efforts to engage Youth by increasing mentoring opportunities for vocational services		Paul Kulik / Glenn Epting	
Promote ideals and ethics for business that are congruent with the ideals of Rotary		Paul Kulik	
Seek individuals with specific talents/vocations that would "fill the holes" in Club activities and responsibilities		Diane Conley Joe Morbitzer Dave Collinsworth	



# How Do We Get There?

## Tactical Framework for Implementation



Club Strategies	EXAMPLE Tactics	Accountable Chair	Timeline
Establish and maintain connections, business networks, and strategic partnerships to facilitate broader support and leverage resources		Doug Fosselman	
Align with other Rotary Clubs, where appropriate, to optimize the impact of our efforts on an international scale.		Doug Fosselman / Club President	
Pursue more opportunities for international service that are visible to the Westerville community and speak to the members' individual service objectives and passions.		Doug Fosselman	
Collaborate with Club Service to increase awareness and educate the community of Rotary International and the Club's impact around the world.		Doug Fosselman / Barb Gizzo	

# Next Steps



# Next Steps



- ✓ Seek its approval at the January 27, 2011 meeting
- ✓ Incorporate feedback from the Board of Directors
- ✓ Meet with Avenue Chairs to review the approved Plan
- ✓ Establish expectations and initiate implementation planning