



# ROTARY CLUB of WESTERVILLE SUNRISE

## *Strategic Plan: 2015 - 2017*

### **Mission**

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

### **Vision**

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

### **Guiding Principles**

#### The Club will:

- Align with RI's strategic priorities and initiatives
- Maintain a balance of big and small projects
- Preserve our open and inviting culture
- Protect against individual roles from becoming "jobs"
- Ensure responsibility and accountability among all members
- Embrace technology to support all we do
- Sustain our relevance to the community through evolution and flexibility
- Encourage growth and diversity of membership through organic means



### GOALS TO ENGAGE MEMBERS ARE:

- ✓ Connect new members (1-3 Years)
- ✓ Re-engage veteran members (10+)
- ✓ Energize fading members
- ✓ Develop joint social and service opportunities with our Youth Programs

### GOALS TO LEAD WITH PURPOSE ARE:

- ✓ Maintain term limits within leadership
- ✓ Reinforce recruiting and training for succession
- ✓ Create governance opportunities for new members (1-3 years)
- ✓ Accelerate member participation in District and RI events

### GOALS TO REPOSITION OUR IMAGE ARE:

- ✓ Position the Club as “THE service organization of choice in Westerville”
- ✓ Utilize personalized approaches to promote Rotary
- ✓ Leverage RI imaging and branding efforts
- ✓ Extend networking opportunities beyond the member base

### GOALS TO IMPROVE THE EXPERIENCE ARE:

- ✓ Refine core communications and administrative infrastructure
- ✓ Expand social interactions among members
- ✓ Assist in each Member's personal path through Rotary



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*Strategic Plan: 2015 - 2017*



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## *Strategic Plan: 2015 - 2017*

April 24, 2015



# AGENDA

- ✓ Overview
- ✓ Mission, Vision, Guiding Principles
- ✓ Strategic Priorities & Goals
- ✓ Next Steps



# OVERVIEW: THE CHARGE

## THE PURPOSE OF THE STRATEGIC PLANNING COMMITTEE AND ITS OVERALL CHARGE IS TO:

- ✓ Update the Westerville Sunrise Strategic Plan of 2011 – 2014
- ✓ Refresh the Members' Assessment to inform and shape our 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 IS COMPRISED OF A WELL-BALANCED TEAM OF PARTICIPANTS:

- ✓ Julie Colley
- ✓ Diane Conley
- ✓ Kip Fetchero
- ✓ Scott Hrabcak
- ✓ Larry Jenkins
- ✓ Brett Justice
- ✓ Pat Kemmer
- ✓ Gretchen Kiehl
- ✓ Pat Knott
- ✓ Heather Linch
- ✓ Walter Lundstrom
- ✓ Kurt Pritz



# OVERVIEW: THE PROCESS

## 1 - Strategic Assessment

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



## 3 - Strategic Implementation

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

## 2 - Strategy Development

- ✓ *Vision Statement*
- ✓ *Guiding Principles*
- ✓ *Goals & Strategies*



# CLUB MISSION & VISION

## Mission

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## Vision

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## The Club will...

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# STRATEGIC PRIORITIES

WITH OUR MISSION, VISION, AND GUIDING PRINCIPLES AS A STRONG FOUNDATION, THE ASSESSMENT RESULTS AND COMMITTEE DELIBERATION SHAPED OUR STRATEGIC PRIORITIES – SUPPORTING ONE CENTRAL THEME: *PERSONALIZING OUR APPROACH*





# STRATEGIC PRIORITIES & GOALS

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IMPROVE THE EXPERIENCE

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