

**THE ROTARY CLUB
OF
POINT WEST**



**STRATEGIC PLAN
2007-10**

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The Object of Rotary

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

- **FIRST.** The development of acquaintance as an opportunity for service;
- **SECOND.** High ethical standards in business and professions, the recognition of the worthiness of all useful occupations, and the dignifying of each Rotarian's occupation as an opportunity to serve society;
- **THIRD.** The application of the ideal of service in each Rotarian's personal, business, and community life;
- **FOURTH.** The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

The Rotary Club of Point West would like to thank the following members for their work in developing this Strategic Plan

President Bud Ackerman

Mr. Dave Abbott

Mr. Mark Copeland

Mr. Robert Ellis

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Mr. John DiGiusto

Ms. Charlene Drabant

Mr. Robert Ellis

Ms. Trish Harrington

Mr. Richard A. Prater

Dr. Dan M. Haverty

Mr. John Koogle

Mr. Robert Willet, Jr.

Ms. Sandy Thompson

Mr. Buzz Wiesenfeld

**A special thanks to Board Member Dr. Dan Haverty
for his work and expertise in guiding us through this process.**

Introduction

Rotary International undertook a strategic planning process and developed an overarching strategic plan for Rotary International's worldwide efforts in 2007. The Plan is intended to run through 2010. However, just like our Plan, each year it needs to be examined to ensure it reflects the direction, environment and priorities of the Rotary International leadership.

President Bud Ackerman initiated the strategic planning process for the Rotary Club of Point West as a result of his exposure to the effectiveness and guidance that strategic plans provide other clubs in the U.S. when he attended the International Conference in Salt Lake City, Utah. Under his leadership our Club accepted the challenge of developing a strategic plan in the fall of 2007.

For our Club, strategic planning helps us determine where our organization is going over the next few years, how we plan on using the assets and behaviors our Club embodies and whether or not we achieved our purpose. To compare our Club's Strategic Plan to that of a business, our plan is connected to and supports our parent organization, Rotary International, it focuses mostly on the entire organization, rather than on specific programs, and is loose enough to allow for the priority preferences of new presidents.

There are a variety of perspectives, models and approaches used in strategic planning. The Strategic Planning workgroup chose to use an outcomes-based planning process. This is also known as a goals-based process. The focus of this approach is on accomplishment by recognizing the assets and behaviors of an organization. Then, planners compare those assets and behaviors to the outcomes to identify any gaps or needs which need to be developed. Two elements often seen in strategic plans are performance indicators and timelines or milestones. The workgroup decided that as a volunteer organization with an annual change of leadership it would be most appropriate to allow program managers the development of these two items.

Far more important than the strategic plan document, is the strategic planning process itself. It is imperative that subsequent Presidents and Boards review the past Strategic Plan, update it annually and refer to it regularly throughout the year to *determine if the ship is still on course*.

Purpose, Vision and Values

Just as an organization has a hierarchy from CEO or “boss” to mid management to front line supervisor to workers, strategic plans develop a hierarchy of concept. That is, the plan established direction, from general to more specific by describing where and how the organization, our Club, wants to go. The first question to be asked and answered is “Why does this Club exist?” The answer is our *Purpose*. The next question is “Where to we want to go?” The answer is our *Vision*. And then, of these “big questions, “What do we stand for?” There are several answers to that question, but in sum they describe our *Values*.

Since the Rotary Club of Point West is a daughter club of Rotary International, it is important that our Club’s Purpose, Vision and Values are both aligned with and support those of the International. The Purpose, Vision and Values statements below reflect that continuity, but also characterize our Club’s unique qualities.

OUR PURPOSE

The Purpose of the Rotary Club of Point West is to provide service to others, to promote high ethical standards, and to advance community understanding, goodwill, and peace through its fellowship of business, professional, and community leaders... *and have a good time doing it!*

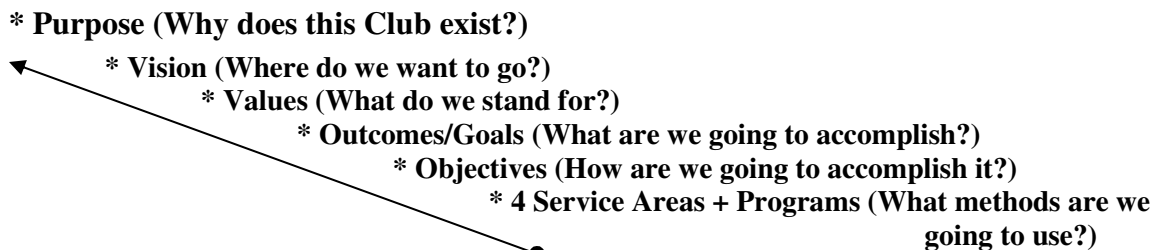
OUR VISION

Others will recognize our commitment to Service Above Self to advance world understanding, goodwill, and peace

OUR CORE VALUES

Service, fellowship, diversity, integrity, leadership and joy

The last three elements of this Plan include the Desired Outcomes, sometimes known as the Goals, the Objectives and the Programs. The illustration below identifies the linkage and hierarchy between these planning concepts.



Assets driven by Behaviors consistent with Core Values= Outcomes

The following two categories of assets and behaviors are similar to an inventory of capabilities of an organization. Organizations have human skills, financial capital, tools, raw material, and so on. In other words, what does our Club have to work with to make our Purpose and Vision actually happen? Those capabilities, in terms of our own inventory are identified below.

Recognizing the Club is blessed with tremendous assets and positive behaviors, the challenge is for the Club's leadership and membership to put the two together in the correct mixture, at the most opportune time to achieve the desired outcomes.

Club Assets

Member Families	Event Contributors	Community Activities
Tremendous Members	Member Talents & Experience	Camaraderie
Leadership	Growth Of Community Awareness	Growth
Project Processes	Positive Culture Of Fun	Diverse makeup
Active Women Members	Core Of Long-Time Members	Financial Stability

Club Behaviors

Proactive	Generous	Fun-Loving	Caring
Down-To-Earth	Hard Working	Versatile	Direct Involvement
Volunteer Spirit	Giving	Humble	Energetic
Friendships	Recognition	Irreverence	Compassion

The Desired Outcomes, or goals, are the items this Club wants to achieve to make the Purpose of our Club become reality. We could choose from a multitude of actions, however these Outcomes are aligned with Rotary International, as well as our Club's Purpose, Vision and Values.

THE ROTARY CLUB OF POINT WEST

Desired Outcomes

- 1. Develop and Maintain a strong public relations campaign that will indirectly drive membership and fundraising.**
- 2. Emphasize Quality, Diversity and Youth in new member recruitment rather than quantity as presented in the New Member Policy.**
- 3. Increase the capacity to support our community's most needy children and their schools.**
- 4. Increase the PWR Foundation to \$750,000 by the end of 2010.**
- 5. Maintain sustaining memberships in the Rotary International Foundation and the Point West Rotary Foundation by 100% of our membership.**
- 6. Maintain the culture of fun, camaraderie and interesting programs in all of our meetings.**
- 7. Increase International service by partnering with other Rotary and non-government organizations by contributing to ongoing international programs.**
- 8. Develop PWR's leadership & encourage involvement in District and RI programs.**
- 9. Fully implement the strategic planning process to ensure continuity and consistency throughout our Club.**
- 10. Develop a Policies and Procedures manual so there is continuity.**

OUTCOMES

- Develop and Maintain a strong public relations campaign that will indirectly drive membership and fundraising.
- Emphasize Quality, Diversity and Youth in new member recruitment rather than quantity as presented in the New Members Policy.
- Increase the capacity to support our community's most needy children and their schools.
- Increase the PWR Foundation to \$750,000 by the end of 2010.
- Maintain sustaining memberships in the Rotary International Foundation and the Point West Rotary Foundation by 100% of our membership.
- Maintain the culture of fun, camaraderie and interesting programs in all of our meetings.
- Increase International service by partnering with other Rotary and non-government organizations by contributing to ongoing international programs.
- Develop PWR's leadership & encourage involvement in District and RI programs.
- Fully implement the strategic planning process to ensure continuity and consistency throughout our Club.

ASSETS

Member families, event contributors, community activities, financial stability & growth, tremendous members, member talents & experience, core of long-time members, active women members, positive culture of fun, camaraderie, leadership.

BEHAVIORS

Proactive, generosity, fun-loving, caring, down-to-earth, hard working, versatile, direct involvement, volunteer spirit, giving, humble, energy, friendships, recognition.

The four central areas of the Rotary Club of Point West Strategic Planning

Four Avenues of Service

The four Avenues of Club service form the central activities of our Club. These service areas support the Club's Purpose, Vision and Desired Outcomes.

Club Service

This "Avenue" promotes the development of acquaintance as an opportunity for service. It involves the activities necessary to make the Club function successfully and achieve its goals.

Vocational Service

This area represents the opportunity that each Rotarian has to represent the dignity and utility of one's vocation as an opportunity to serve society. Rotarians promote and foster high ethical standards in business and professions and promote the recognition of the worthiness of all useful occupations.

Community Service

This "Avenue" relates to the activities that Rotarians undertake to improve the quality of life in their community. Particular emphasis is given to helping children, needy families, the aged, the handicapped, and those most in need of assistance. Rotarians strive to promote the ideal of service in their personal, business, and community lives.

International Service

In this area, Rotarians strive for the advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service. International Service Projects are designed to meet the humanitarian needs of people in many lands, with particular emphasis on the most underprivileged children and families in developing countries.

The four key service areas are expanded in the Club into several service programs, as identified on the next page.

Programs

Each of the Avenues of Service are expanded into related Programs. Program managers are encouraged to ensure they are in concert with and supporting the objectives of their parent Avenue of Service as a program is planned, developed, implemented and evaluated.

Service Areas Expanded

Club Service I

California Brewfest
Speakers Committee
Cocktail Party
Club Historian
Bowling Bash
Demotion Party

Club Service II

Festa Di Vino
Newsletter
Golf Tournament
Softball Team
District Conference
Member 2 X2 's

Publicity & Membership

Public Relations
Membership Committee
Roster & Website Updates
Greeters Table/Invocators
Fun Committee

Community Service I

Salvation Army Bell Ringing & Food Drive
Benevolent Giving Committee
Blood Bank/Organ Donations
Community Service Awards – Public Safety

Community Service II

PWR Foundation
Rotary Youth Leadership (RYLA)
Sunshine Committee
California Eagle Golf
Paint the Town

Vocational Service I

HOSTS Program
Encina Mentoring
Ambassadorial Scholarships

Vocational Service II

Community Service Award - Teachers
Academic Scholarships
Tours of Business
Speech Contest

International Service

RI Foundation
Rotary Youth Exchange (RYE)
Matching Grants
Group Study Exchange (GSE)
PWR International Project

ROTARY INTERNATIONAL STRATEGIC PLANNING

At its June 2007 meeting, the RI Board approved a new mission, vision, and set of core values for Rotary International, reaffirmed that Rotary's motto is **Service Above Self**, and adopted the priorities and goals established in the organization's 2007-10 Strategic Plan.

ROTARY'S NEW MISSION READS

The mission of Rotary International, a worldwide association of Rotary clubs, is to provide service to others, to promote high ethical standards, and to advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders.

THE VISION OF ROTARY INTERNATIONAL

To be universally recognized for its commitment to Service Above Self to advance world understanding, goodwill, and peace.

ROTARY'S GUIDING PRINCIPLES

Service, fellowship, diversity, integrity, and leadership.

"These core values are all reflected in The Four Way Test," said 2007-08 RI President Wilfrid J. Wilkinson. "By adopting a specific set of core values in the strategic plan, we can provide Rotarians with more explicit standards to guide and evaluate their actions."

ROTARY'S SEVEN PRIORITIES

- Eradicate polio
- Advance the internal and external recognition and public image of Rotary
- Increase Rotary's capacity to provide service to others
- Expand membership globally in both numbers and quality
- Emphasize Rotary's unique vocational service commitment
- Optimize the use and development of leadership talents within RI
- Fully implement the strategic planning process to ensure continuity and consistency throughout the organization

Each priority is supported by a set of goals and success indicators to measure progress being made. Look for brochures, presentations, plan implementation progress reports, strategic planning models and guidelines for clubs and districts, and other information on the strategic plan in RI publications and on the Web site in upcoming months.

Contact the Strategic Planning Office with questions or requests for additional information at spo@rotary.org.

ROTARY INTERNATIONAL Strategic Plan 2007-10

Board Approved June/July 2007

Mission and Vision

The mission of Rotary International, a worldwide association of Rotary clubs, is to provide service to others, promote high ethical standards, and advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders. The vision of Rotary International is to be universally recognized for our commitment to Service Above Self to advance world understanding, goodwill, and peace.

Core Values

Rotary's core values represent the guiding principles of the organization's culture, including what guides members' priorities and actions within the organization. Values are an increasingly important component in strategic planning because they drive the intent and direction of the organization's leadership.

Service

We believe that our service activities and programs bring about greater world understanding and peace. Service is a major element of our mission. Through the plans and actions of individual clubs, we create a culture of service throughout our organization that provides unparalleled satisfaction for those who serve.

Fellowship

We believe that individual efforts focus on individual needs, but combined efforts serve humanity. The power of combined efforts knows no limitation, multiplies resources, and broadens our lives and perspectives. Fellowship leads to tolerance and transcends racial, national, and other boundaries.

Diversity

We believe Rotary unifies all people internationally behind the ideal of service. We encourage diversity of vocations within our membership and in our activities and service work. A club that reflects its business and professional community is a club with a key to its future.

Integrity

We are committed to and expect accountability from our leaders and fellow members, both in the results of our efforts and in the processes we use to accomplish our goals. We adhere to high ethical and professional standards in our work and personal relationships. We are fair and respectful in our interactions, and we conscientiously steward the resources entrusted to us.

Leadership

We are a global fellowship of individuals who are leaders in their fields of endeavor. We believe in the importance of leadership development and in leadership as a quality of our members. As Rotarians, we are leaders in implementing our core values.

All of these core values are reflected in the Object of Rotary and The Four-Way Test, which we use in our daily lives. They inspire us to foster and support the ideal of service for developing and maintaining high ethical standards in human relations.

The plan includes seven priorities, each supported by a set of goals. To determine these priorities, RI surveyed grassroots Rotarians and senior leaders from many parts of the world, asking them what issues would be most important to Rotary in the coming years.

Eradicate polio	<ul style="list-style-type: none"> a) Support the plans and goals of the International PolioPlus Committee b) Maintain and promote Rotarian participation in PolioPlus Partners c) Continue to focus our collaborative relationships on the ultimate goal of polio eradication
Advance the internal and external recognition and public image of RI	<ul style="list-style-type: none"> a) Conduct internal and external public information campaigns to deepen global awareness of Rotary International and its programs b) Engage leadership at all levels in telling the world about Rotary commitments and outcomes
Increase Rotary’s capacity to provide service to others	<ul style="list-style-type: none"> a) Emphasize the four Avenues of Service as a way to expand service opportunities b) Provide special emphasis on supporting the improvement of clubs that need assistance c) Refine current training to include innovative ideas d) Expand strategic cooperative relationships at all levels to enhance RI’s mission and in a way that protects RI’s integrity e) Improve RI’s efficiency and effectiveness in all operational areas
Expand membership globally in both numbers and quality	<ul style="list-style-type: none"> a) Develop and implement a comprehensive plan to strengthen responsibility at the club level for membership development and retention based on best practices b) Extend Rotary to all qualified localities c) Increase the number of young members and those in emerging occupations d) Enhance and emphasize the family of Rotary throughout the Rotary world

Emphasize Rotary’s unique vocational service commitment	<ul style="list-style-type: none"> a) Influence ethical decision-making by encouraging Rotarians to join and take leadership roles in business and vocational associations b) Find new ways to develop vocational skills of others, especially people without jobs, by fully utilizing Rotarian expertise and experience c) Develop more vocational forums for learning and information exchange to encourage professional development
Optimize the use and development of leadership talents within RI	<ul style="list-style-type: none"> a) Expand leadership development opportunities at all levels to fully use talents and skills of Rotarians b) Cultivate leadership opportunities for young people c) Periodically assess governance procedures to ensure best practices
Fully implement the strategic planning process to ensure continuity and consistency throughout the organization	<ul style="list-style-type: none"> a) Evaluate and update the RI Strategic Plan every three years to align with Rotarian needs and expectations b) Ensure that The Rotary Foundation Future Vision Plan and the Secretariat’s operating plan align with the RI Strategic Plan c) Disseminate the RI Strategic Plan throughout the organization, including districts and clubs, and provide opportunities for input from the membership d) Develop and implement a strategic planning model for Rotary clubs and districts

The eradication of polio is the highest priority of the RI Strategic Plan and the other priorities of the RI Strategic Plan collectively are of equal importance.

Why these priorities?

The RI Board of Directors considered feedback from Rotarians, senior leaders, and the Strategic Planning Committee, actions of the 2007 Council on Legislation, and historical and cultural factors in developing the plan’s priorities.

Polio eradication is Rotary’s number-one priority as reaffirmed by the 2007 Council on Legislation. Ensuring that every child is immunized against this devastating disease will remain the organization’s corporate focus until the goal of a polio-free world is reached.

Recognition and public image was cited as one of the organization's highest priorities by a majority of Rotarians surveyed. Agreeing that the public perception of Rotary depends largely on the outcomes of grassroots service efforts, the Board will continue to provide public relations grants to help clubs and districts deliver the message about their good work.

Service is the heart of Rotary. The Rotary Foundation, which plays a key role in supporting Rotary service, is developing new models that emphasize the benefits of Rotary service to the world and measure its results. Together, the RI Strategic Plan and the Foundation's Future Vision Plan can enhance and promote the service achievements of clubs and districts.

Expanding membership is a key priority for Rotary and for all clubs. The Board encourages members to share Rotary with others by seeking out qualified men and women from all demographic groups who will bring new talents and enthusiasm to clubs. Vocational service is a unique feature of Rotary membership. Recognizing that as leaders in their professions, Rotarians can influence ethical decision making, the Board encourages members to use their expertise to help students, the unemployed, and other job seekers develop vocational skills.

Leadership talents abound in Rotary. To optimize these talents, the Board encourages clubs and districts to expand opportunities at all levels and especially for young leaders that keep them involved and ensure a strong future at the club, district, and international levels.

What impact does strategic planning have on clubs and districts?

The Board encourages all Rotarians, clubs, and districts to think strategically because planning throughout the entire organization will lead to far greater successes, both locally and internationally. Clubs and districts can use the priorities in the RI Strategic Plan as a basis for developing their own plans, tailoring them to their size, the varied skills of their membership, and the needs of the communities in which they serve. Clubs and districts can start their long-term planning process simply by asking their members the following three questions:

- Where are we now? The answer will help clubs identify their purpose (or mission), as well as their strengths, weaknesses, opportunities, and threats (competitive advantages and disadvantages).
- Where do we want to be? By answering this question, clubs can identify their expectations, vision, and strategies.
- How do we get there? The answers will address the gaps between mission and vision and help the club develop specific goals, objectives, tactics, and actions to achieve that vision.