



STRATEGIC PLANNING AND EMPOWERMENT

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Let me begin today by asking you a question: How many of you would rely solely on luck or instinct to guide your business and professional operations?

I don't see many hands raised, which is probably a good thing for your businesses. Because even if we have great instincts, we all need a plan to guide us in setting goals and working to achieve them. That's especially true in today's world, where a rudderless organization can find itself in the perilous situation of having to "change or disappear."

No one wants to be in that situation, which is why Rotary has prioritized the need for a forward-looking strategic plan. Some of you may have helped to develop our current plan by completing a survey or participating in a focus group. Our strategic plan did not simply come down from the top. It wasn't a product created by the RI Board and imposed on the members. It was formulated from the input of Rotarians at every level and in every geographic region.

Our current plan has three priorities:

- Support and strengthen clubs
- Focus and increase humanitarian service
- Enhance public image and awareness

It seems that the creators of that plan did a good job, because a 2014 survey found that most of our members agree that these are the right priorities for Rotary.

But even the best plans can't remain static. What was a great plan in 2010 may not be entirely adequate in 2017 and beyond. Emerging trends, advances in technology, and demographic shifts will all play a significant role in Rotary's future, and we need a strategic plan that anticipates the effects of these outside forces.

I am so honored to be the chair of Rotary's Strategic Planning Committee, which is made up of eight members from various parts of the world, along with a liaison director and a liaison trustee. Our work is supported by both the RI Board and the Foundation Trustees, who have charged the committee with the great responsibility of developing a new plan over the next two years.

But before we can begin to establish new priorities and goals, we — and by we, I mean all Rotarians — need to have a clear vision of Rotary in the future, and that vision should be both aspirational and achievable.

We don't have to look too far back in Rotary history to see the value of starting the planning process with a clear vision. In 2004, The Rotary Foundation realized it wasn't operating as efficiently as it could, so the Trustees brought in a consultant to study the situation. Their findings provided new information and also confirmed the Trustees' observations that our Foundation was directing a disproportionate share of resources toward small projects with limited impact or lasting power. They weren't bad projects, but the Foundation could accomplish much more by supporting larger, sustainable projects. So out of this study and much Rotarian input, the Future Vision Plan was born. Of course, not every Rotarian was happy about the changes mandated by the plan, but today, most members have come to see its value and to appreciate the Foundation's higher level of impact.

The successful launch of the Future Vision Plan relied heavily on a three-year pilot that allowed 100 districts to test-drive the plan. Their feedback was vital to developing the grant model we have today. And the same holds true for our new strategic plan. To make it work, we need input from as many stakeholders as possible.

I'm sure that our committee could put together a serviceable plan in a relatively short period of time. But that plan would reflect the thinking of only a handful of members. We want a plan that Rotarians will be happy and proud to execute. And we could never create that kind of plan within the confines of a conference room.

The creation of our new plan begins here, today, with all of you. In your breakout sessions, you'll be asked to think about what success looks like for the Rotary of the future. Then after the breakout session, you'll receive an online survey to complete. The survey will be open for a month, but we encourage you to fill it out while you're here in San Diego and the ideas are still fresh in your mind.

We want to know where you think Rotary will be 10 years from now. What will Rotary be doing once polio has been eradicated? Will our membership be essentially the same, or will we have grown and become more diverse? Because once we answer those questions, and others, we'll have a clear vision that can form the foundation of our plan. And only then can we begin to set the priorities and goals that will help us realize that vision.

Our committee has already been considering many big questions that we'll share with the rest of the membership through surveys, interviews, and focus groups. For example, do we want to be a membership organization benefitting members or a service organization benefitting communities? Can we be both? And should we position ourselves as thought and community leaders as well as a humanitarian service organization?

We know that Rotarians hold diverse opinions on these and other subjects, and our goal is to learn more about their views.

But even then, we know that not everyone will be happy, because a new vision involves change. It will require us to think about a new way of doing things and create a new definition of success.

I believe that change also energizes us and helps us to grow — both as individuals and as an organization. Change offers us new opportunities and opens up possibilities. Yes, it pushes us out of our comfort zone, but I think that most of us do our best work when

we're feeling at least a little bit challenged. Personally, I have always found life to be much more interesting on the other side of "yes."

Although it may be a challenge, if you decide to make exciting changes for Rotary, you will never be alone. Next up, you will hear from General Secretary John Hewko about how Rotary staff worldwide will support you to achieve your goals.

So I hope that all of you will agree that change can be exciting and fun and that you will say yes and help us create the best possible road map for Rotary's future.