



# ROTARY'S STRATEGIC PLAN

## Research Methodology & Presentation of Findings

### Research Methodology

Over the course of two years, a comprehensive set of research activities was conducted to inform the development of Rotary's new vision statement and strategic plan. Throughout the 2016-17 Rotary year, we invited current and former Rotary members, Rotaract members, alumni, Youth Exchange students, Rotary staff, and members of the general public to participate in surveys and focus groups. In total, we gathered responses from **77,947 people** during the first phase of the research.

This data guided the development of Rotary's new vision statement, which articulates what we want to achieve: Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.

The data also informed the development of goals and priorities for a new strategic plan that will help us achieve that vision and help us strengthen clubs and the club experience, expand membership and participation in Rotary, build greater support and impact within our causes, and grow our public image.

Phase two of the research took place during the 2017-18 Rotary year. We gathered additional feedback on the strategic plan priorities from Rotary and Rotaract members as well as Rotary staff and conducted 74 in-person focus groups and interviews at district conferences, PETS, Rotary and Rotaract club meetings, Rotary's international offices, and other settings. In total, these phase two focus groups and interviews included feedback from **582 people from 28 countries**.

### Findings

There was overall support for the vision and four strategic plan priorities. Most participants agreed that these priorities are the right direction for Rotary and saw the strategic benefits of increasing our impact, expanding our reach, enhancing engagement with participants, and increasing the organization's speed and ability to adapt. While participants generally acknowledged that the organization will have to evolve in significant ways in order to survive, some Rotarians were concerned about the impact these changes will have on them and their club experience.

## **FEEDBACK ON THE STRATEGIC PLAN PRIORITIES**

### **Increase our impact and create lasting change**

Rotarians supported benchmarking and measurable objectives so long as the burden of collecting data was reduced significantly across Rotary clubs. They also believed that measuring the impact of projects aligned with this priority, although there was concern that these activities would interfere with service and fellowship activities that may take precedence among Rotarians. These issues should be considered more thoroughly to address the capacity of Rotary clubs and Rotarians to carry out measurement and evaluation requirements and to align more appropriately with the objectives of Rotary clubs.

### **Expand our reach & unite our participants & Enhance engagement for all who participate in Rotary**

While there was overall agreement that these two priorities are necessary to move Rotary into a stronger position for the future, these priorities are perceived to have the biggest implications for what it means to be a Rotarian. By expanding our reach and exploring new engagement models, some are concerned that the prestige of Rotary membership will be diminished and the traditions of Rotary will be compromised. In addition, there is some concern that these priorities will mean that RI will require Rotary clubs to change in ways that are uncomfortable for club members. On the other hand, many Rotarians and Rotaractors were optimistic about the opportunities that these priorities afford. Many envisioned service as a way to increase engagement with current members and expand our reach with new participants.

### **Increase our speed and ability to adapt**

The focus group feedback provided insight into the need for additional groundwork within the Rotary community and attitudes toward a new organizational hierarchy. Further work is needed to define organizational changes in more detail and to determine how those changes will increase transparency and communication, empower Rotarians to make decisions, and maintain their autonomy.

## **Update**

At their June 2018 meetings in Toronto, Rotary's Board of Directors and The Rotary Foundation Board of Trustees voted to approve the proposed strategic plan priorities and objectives (see "Rotary International's Strategic Planning Priorities and Objectives").

## **Acknowledgements**

Rotary would like to gratefully acknowledge everyone who contributed to the development of Rotary's new vision statement and strategic plan. The time, effort, and feedback received during this process played a large role in the development of the new strategic plan.