

#1. Strategic Plan on a Page - 2024-29

VISION STATEMENT

We are recognised as a service club with a strong, happy membership actively engaged with the local community and making a positive difference in people's lives, both locally and internationally, serving as a source of inspiration and collaboration within the District and Australia.

CORE OBJECTIVES

1. Energise Our Club / 2. Deliver Our Service Programs / 3. Enhance Our Public Image

CORE VALUES

Rotary International Guiding Principles

- Development of social contacts & friends as an opportunity for service.
- High ethical standards within Club, undertaking community projects and dealing with business and professions.
- The ideal of service in personal, professional, business, and community life.
- Advancement of international understanding, goodwill, and peace.

The Four-Way Test

- Is it the truth?
- Is it fair to all concerned?
- Will it build goodwill and better friendships?
- Will it be beneficial to all concerned?

STRATEGIC INITIATIVES

1. Build our Membership	2. Grow Our Public Image	3. Undertake Service Projects	4. Support the Rotary Foundation	5. Support Youth Services	6. Ensure Good Governance
<p><u>Strategic Goal:</u> Grow a younger, more diversified membership base, fostering an inclusive environment where all individuals can contribute and thrive.</p> <p><u>Strategic Actions:</u></p> <ul style="list-style-type: none"> • Membership Strategy • Mentorship & engagement • Friends of Rotary • Meeting Format • Retention Strategies • Diversity & Inclusion Initiatives 	<p><u>Strategic Goal:</u> Enhance the visibility of our Rotary Club, solidifying our reputation as a positive force in both the local and international communities.</p> <p><u>Strategic Actions:</u></p> <ul style="list-style-type: none"> • Public Relations Campaign • Club Website Enhancement • Branding Consistency • Community Events • Joint Meetings 	<p><u>Strategic Goal:</u> Execute local & international service projects that align with Rotary's areas of focus & demonstrate measurable improvements in the lives of individuals & communities.</p> <p><u>Strategic Actions:</u></p> <ul style="list-style-type: none"> • Project Partnerships • Project Planning & Implementation, RCE • Committees: <ul style="list-style-type: none"> ○ Community ○ Environmental ○ Festival ○ Art Show ○ International • Project Funding 	<p><u>Strategic Goal:</u> Contribute to the sustainability of the Rotary Foundation's mission by increasing awareness and fundraising for global humanitarian efforts including polio + eradication.</p> <p><u>Strategic Actions:</u></p> <ul style="list-style-type: none"> • Annual Fundraising Goals • Rotary Foundation Awareness Campaign • Matching Donations • Global Grants Participation 	<p><u>Strategic Goal:</u> Foster leadership and development in youth by providing opportunities for engagement and personal growth through Rotary programs.</p> <p><u>Strategic Actions:</u></p> <ul style="list-style-type: none"> • Consider establishing / supporting Interact & Rotaract Clubs • Youth Leadership Camps (NYSF, RYLA & RYPEN) • Scholarships and Mentorship • Community Engagement • Japanese Exchange Program 	<p><u>Strategic Goal:</u> Maintain transparent, ethical and effective governance practices to foster accountability, streamline decision making, and ensure the sustainability of club operations</p> <p><u>Strategic Actions:</u></p> <ul style="list-style-type: none"> • Develop a Strategic Plan • Ensure Risk Management processes in place • Develop Succession Plan for Board Members & key personnel • Ensure all compliance requirements are in place, WWCC, Food Handling, insurance, alcohol, privacy • Nominating Committee • Member Consultation

REFER - DRAFT ANNUAL OPERATING ACTION PLAN 2024 - 25

2. Detailed Strategic Plan 2024-29

A 5-year period

A 5-year period has been incorporated into the Strategic Plan because of the turnover of leadership and it is considered the longer term strategic initiatives will need to be consistent for this period to ensure meaningful progress by the Club.

Changes can still be made annually if desired, as this will ensure an immediate focus while maintaining long term aspirations. This approach will provide a longer term vision with lasting impact, stability in a roadmap for sustained growth, consistency in leadership handover, and long term alignment with Rotary International priorities and needs.

Vision Statement

We are recognised as a service club with a strong, happy membership actively engaged with the local community and making a positive difference in people's lives, both locally and internationally, serving as a source of inspiration and collaboration within the District and Australia.

Core Objectives

1. Our Club:

- Develop friendships and skills and make a difference through active participation in Rotary.
- Contribute personal and collective skills, expertise, and resources to create a lasting impact.
- Welcome new members from diverse backgrounds, fostering inclusivity and unity.

2. Our Service Programs:

- Within our capacity and skills prioritise and support projects that demonstrate tangible positive impact, both locally and internationally.
- Forge partnerships with local businesses and community organisations to enhance service delivery.

3. Our Public Image:

- Be a well-known and respected organisation in the local community.
- Leverage the Rotary brand and values to promote our successes and achievements.

Core Values

We adhere to the following guiding principles of Rotary International and the Four-Way Test:

1. Rotary International Guiding Principles:

- Development of acquaintances as an opportunity for service.
- High ethical standards in business and professions.
- The ideal of service in personal, professional, business, and community life.
- Advancement of international understanding, goodwill, and peace.

2. The Four-Way Test:

- Is it the truth?
- Is it fair to all concerned?
- Will it build goodwill and better friendships?
- Will it be beneficial to all concerned?

5 Year Strategic Initiatives and Actions 2024-29

1. Strategic Initiative - Build Our Membership

Strategic Goal: Grow and diversify our membership base, fostering an inclusive environment where all individuals can contribute and thrive.

Strategic Actions 2024-29:

- **Membership Strategy Plan:** Develop a plan to increase total membership by at least one new member per year. Consideration also be given to corporate membership.
- **Mentorship and Engagement:** Develop a formal mentoring program for new members, ensuring they feel welcomed, supported, and involved in meaningful projects. Identify the strengths and skills of new members.
- **Friends of Rotary:** Build the Friends of Rotary (FOR). Increase their membership by at least one per year. Encourage additional FOR members to supplement specific projects, e.g. Festival.
- **Meeting Format:** Vary the format of our meetings so meetings are less formal and more flexible and attuned to the needs of a broader cohort of younger members.
- **Retention Strategies:** Regularly check in with members to gauge satisfaction and engagement. Build an inclusive and caring meeting format; include fellowship activities in the program, monitor attendance and assist Rotarians who are unwell or experiencing difficulties.
- **Diversity and Inclusion Initiatives:** Promote the Rotary Club as open to all individuals, regardless of background, gender, or ability.

Metrics:

- Total active membership at the end of each year, showing growth in comparison to previous years.
- Percentage of members who remain active in the club year-over-year.
- Average satisfaction and engagement scores from regular member check-ins or annual surveys.
- Percentage of members who attend fellowship and social activities throughout the year.
- Number of community outreach events or initiatives aimed at diverse groups to promote the club's inclusiveness.

2. Strategic Initiative - Grow Our Public Image

Strategic Goal: Enhance the visibility of our Rotary Club, solidifying our reputation as a positive force in both the local and international communities.

Strategic Actions 2024-29:

- **Public Relations Campaign:** Grow the use of digital and social media to promote and communicate the function of Rotary.
- **Club Website Enhancement:** Develop the Club website to be a key first step to exploring the Club. Enhance access to relevant information, including integration of the Art Show and Eltham Festival websites. Use existing ClubRunner features for stories.
- **Branding Consistency:** Ensure that the Rotary logo and values are consistently used in all public-facing materials (website, social media, newsletters, etc.).
- **Community Events:** Host or participate in local events to showcase the club's projects and impact. These could include fundraisers, volunteer days, or awareness campaigns for global causes.
- **Joint Meetings:** Undertake joint activities or meetings with local Rotary clubs – (at least one each per annum).

Metrics:

- Increase in followers, likes, shares, and comments across club's social media channels (tracked monthly).
- Monthly increase in website visitors, including a baseline comparison with the previous year.
- Number of community events hosted or participated in per year, aiming for steady growth.
- Satisfaction levels from members and partner clubs regarding joint meetings or activities (measured through post-meeting surveys).

3. Strategic Initiative - Undertake Service Projects

Strategic Goal: Execute impactful local and international service projects that align with Rotary's areas of focus and demonstrate measurable improvements in the lives of individuals and communities.

Strategic Actions 2024-29:

- **Project Partnerships:** Explore international and local project possibilities with other clubs that align with members level of interest, capacity and commitment.
- **Project Planning and Implementation:** Develop detailed plans for service projects, including timelines, goals, resources, and team responsibilities. Ensure projects are sustainable and scalable.
- **Project Funding:** Be proactive and utilise Rotary and other grants for key projects; especially in our immediate global neighbourhood; locally and in Oceania and Asia.

Metrics:

- Feedback from organisations, partner clubs/beneficiaries on collaboration quality and outcomes (measured through post-project surveys).
- Level of member participation in service projects.
- Community feedback on project outcomes and relevance, collected through surveys or interviews with beneficiaries.
- Percentage of projects funded through Rotary or external grants, with a target for increased funding each year.

4. Strategic Initiative - Support the Rotary Foundation

Strategic Goal: Contribute to the sustainability of the Rotary Foundation's mission by increasing awareness and fundraising for global humanitarian efforts.

Strategic Actions 2024-29:

- **Annual Fundraising Goals:** Set clear fundraising targets for the Rotary Foundation and engage the club in targeted campaigns, such as auctions, donations, or local events.
- **Rotary Foundation Awareness Campaign:** Educate club members about the Foundation's global initiatives and the importance of their contributions.
- **Matching Donations:** Encourage members to participate in donation matching opportunities or sponsor donations to increase total contributions.
- **Global Grants Participation:** Actively seek opportunities to apply for global grants to support both local and international projects.

Metrics:

- Total funds raised for the Rotary Foundation each year.
- Number of members contributing to the Rotary Foundation.
- Number of successful global grants secured.

5. Strategic Initiative - Support Youth Services

Strategic Goal: Foster leadership and development in youth by providing opportunities for engagement and personal growth through Rotary programs.

Strategic Actions 2024-29:

- **Interact & Rotaract Clubs:** Consider establishing/supporting local Interact and Rotaract clubs as feeder programs for future Rotary members, providing young people with leadership opportunities and community service involvement.
- **Youth Leadership Programs:** Sponsor youth leadership training programs such as RYLA (Rotary Youth Leadership Awards), RYPEN, NYSF and Japanese Exchange Program to build skills in the next generation.
- **Scholarships and Mentorship:** Offer scholarships, internships, and mentorship programs to young people involved in Rotary initiatives, helping them pursue their education and career goals.
- **Community Engagement:** Involve youth in planning and executing service projects to instil a sense of civic responsibility and leadership.

Metrics:

- Number of youths engaged in Rotary programs (Interact, Rotaract, RYLA).
- Success of youth in leadership roles (measured by progress and involvement).
- Number of scholarships and mentorship opportunities offered.

6. Strategic Initiative - Ensure Good Governance

Strategic Goal: Maintain transparent, ethical, and effective governance practices to foster accountability, streamline decision-making, and ensure the sustainability of club operations.

Strategic Actions 2024-29:

- **Strategic Plan:** Develop a Club Strategic Plan and report against the achievement of these goals at the Annual General Meeting (AGM).
- **Risk Management:** Ensure all appropriate risk management processes for all club activities and Rotary Insurance requirements are in place.
- **Succession Plan:** Develop a succession plan for Board Directors and key meeting personnel.
- **Compliance:** Ensure all members have a Working with Children certificate and Youth Volunteer Declaration, and organise courses such as Food Handling and Responsible Service of Alcohol for members as required. Encourage partners where appropriate to hold the necessary compliances.
- **Consultation:** Members are engaged in the process of Club donations and services, with final approval being determined by the Board.

Metrics:

- Percentage of goals in the Club Strategic Plan achieved or on track by the AGM.
- Percentage of identified club activities with documented risk management plans in place.
- Percentage of key roles (Board Directors and meeting personnel) with a designated successor each year.
- Percentage of members completing at least one compliance training course per annum (e.g. Food Handling or Responsible Service of Alcohol).
- Member satisfaction level regarding their involvement and transparency in decision-making with respect to funds allocation (measured through an annual survey).

Implementation and Monitoring

Timeline:

This plan will be implemented over the period July 2024 to June 2029, with annual reviews to assess progress toward achieving goals.

Key Performance Indicators (KPIs):

Each initiative has measurable outcomes, which will be tracked quarterly through club reports, surveys, and meetings. The President, Board of Directors, and committees will oversee implementation and adjustments.

Review Process:

An annual review meeting will be held to assess progress, celebrate achievements, and adjust the strategy as needed to ensure continued alignment with the club's vision and mission.

Conclusion

This strategic plan will guide our Rotary Club in enhancing membership, increasing our community visibility, executing impactful service projects, supporting the Rotary Foundation, and fostering youth leadership and good governance. Through collective effort, we will achieve our vision of being recognised as a dynamic, inclusive service club that positively impacts lives locally and globally.