




# STRATEGIC PLAN



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## President's Preface

**The Beaufort Rotary Club Strategic Plan, like all good plans, is an evolving thing. I am pleased to be prefacing this as version two of our plan.**

**With the first plan reflecting on what we would like to do as we embarked into the world as a brand new club, we can now present this latest version to reflect on what we actually do. It was gratifying upon review of the original version of the plan to have come, in all honesty, shift our original statements from the future tense 'we will' to the present 'we do'.**

**With this update our shared values haven't changed. We are and will always be a member-driven club. The projects that we take on, the success of our projects and all other endeavours will be determined with the input and engagement of our members.**

**The most important thing that members of Beaufort Rotary Club share is a commitment to our shared values – we value diversity, we value inclusion, and we are a progressive club that is determined to push boundaries in pursuit of positive change through collective action.**

*Alison Dalziel & Phillip Cooper  
Maylands Rotary Club Presidents 2023/24*





**Vision:**

# **POSITIVE CHANGE THROUGH COLLECTIVE ACTION!**

**The meaning of our vision is two-fold. It refers to the amazing outcomes of our projects when we collaborate, share ideas and value each other's input.**

**It also refers to the personal growth and inspiration that comes from being in a room with likeminded people, and taking that inspiration out into the world with you to spark positive change in others.**





# Our values:

**INCLUSIVE**

**PROGRESSIVE**

**DIVERSE**

**ENVIRONMENTAL**

# What *inclusive* means to us

A warm welcome and opportunities for all to contribute, in a non-judgemental atmosphere, with no barriers in the physical and social environment that would limit participation.

Ways we will express this value include:

- We will proactively identify and remove exclusions, and retain an inclusive cost structure.
- Our members and guests will experience a safe space with a sense of belonging and acceptance for all.
- We will treat people as they want to be treated, so that means we will ask rather than make assumptions.
- We will use universal access, co-design and strengths-based approaches in everything that we do.
- We accept that members' contributions may fluctuate according to their circumstances.
- We will continuously self-reflect, be willing to be challenged, and be willing to challenge others.



# What *progressive* means to us

**Leading change and pushing boundaries**

**Ways we will express this value include:**

- **Our Club will adopt a non-traditional structure, and be member-led.**
- **We will be innovative and willing to consider and actively try new things.**
- **We will be open to emerging causes.**
- **We will promote dialogue on ways to address social issues our community faces.**
- **We will engage with people based on their positive impact, not their status.**
- **We will constantly check and review.**





# What *diverse* means to us

**Equality for all, with no discrimination based on: age, gender, ethnicity, country of origin, language, religion, ability, political views, thinking style, socio-economic background, family, education, skills, upbringing, or quirky individual characteristics!**

**Ways we will express this value include:**

- **Our Club will strive to represent the diversity in our community in its membership.**
- **We will respect each other and embrace our differences.**
- **We will ensure everyone has a say and all voices and ideas count.**
- **We will recognise the existence of unconscious bias, be willing to be challenged, and be willing to challenge others.**



# What *environmental* means to us

Environmental is an act of consciousness and consideration that everything we do as a club is environmentally sustainable and of least impact.

Ways we express this value is:

- To leave no waste or rubbish behind following events.
- To recycle and reuse as much as possible.
- To use sustainable products and packaging where possible.



# **Conditions for our Club to thrive**

**Empowered members**

**Building relationships for  
collective action**

**Creating a healthy and safe  
environment for all**



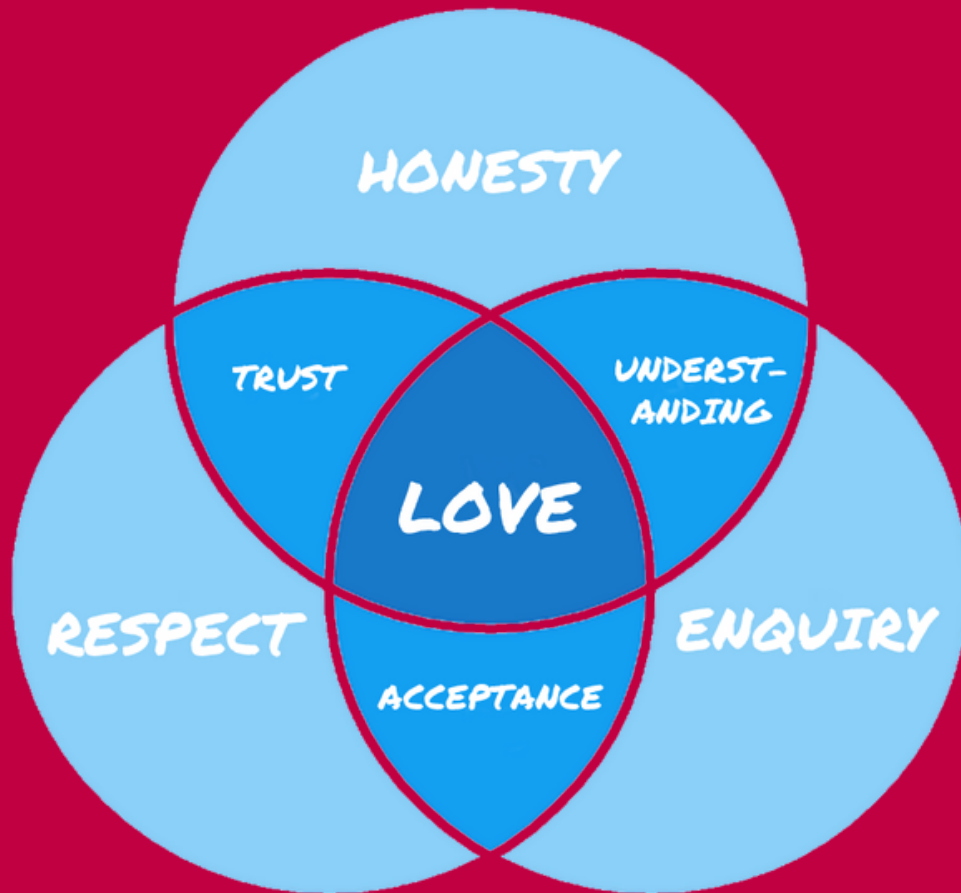
# Empowered Members

**In order to harness our individual and collective strength, our members will be empowered to have:**

- **POWER WITH** in order to find common ground among different interests in order to build collective strength. Based on mutual support, solidarity, collaboration, and recognition and respect for differences, power with multiplies individual talents, knowledge and resources to make a larger impact.
- **POWER TO** in order to express their agency and unique potential. This is based on the belief that each individual has the power to make a difference which can be expanded by new skills, awareness, knowledge and confidence.
- **POWER WITHIN** in order to recognise differences and respect others, grounded in a strong foundation of self-worth and self-knowledge. When we operate from a place of power within, we feel comfortable challenging assumptions and long-held beliefs, pushing against the status quo, and asking if there aren't other ways to achieve the highest common good.



# Building relationships for collective ACTION



**Achieving our vision and living our values is only possible when we approach our relationships with honesty, respect and enquiry.**

**Enquiry is included because it enables us to overcome our assumptions and pre-conceived ideas about others.**

**These three attributes enable us to build trust, understanding and acceptance.**

**Love, which is at the core of Rotary's motto of Service above Self is at the centre.**

# Creating a healthy and safe environment for all

**In accordance with our Club values, we accept and embrace differences, including different points of view, which is essential to healthy dialogue and personal growth.**

**However there are two limits.**

**We do not accept non-acceptance. In other words, if one person's point of view involves a lack of acceptance for another person or group of people based on age, gender, sexual orientation, ability, cultural background or other factors that make up our wonderfully diverse population, this will not be accepted.**

**We do not accept offensive behaviour, such as any form of violence or threats of violence, bullying, belittling remarks or hurtful jokes.**

**In such situations, we will forthrightly defend our values and uphold health and safety.**





# Our six strategic pillars

ACHIEVE A POSITIVE  
COMMUNITY IMPACT

HAVE COURAGEOUS  
CONVERSATIONS

CREATE CONTINUOUS  
CLUB DEVELOPMENT

BE WELL KNOWN  
AND HELD IN  
HIGH REGARD

MAINTAIN FINANCIAL  
SUSTAINABILITY

BE PROUD  
AND ACTIVE  
MEMBERS OF THE  
ROTARY FAMILY

Our values weave throughout these pillars.

**STRATEGIC PILLAR #1:**

**ACHIEVE A POSITIVE  
COMMUNITY IMPACT**



# ACHIEVE A POSITIVE COMMUNITY IMPACT

## STRATEGIES...

- **Reflect members' priorities in the Club's key fundraising and projects (see box).**
- **Engage and partner within and outside Rotary to achieve shared goals.**
- **Maintain a balance of larger and smaller scale opportunities to achieve positive community impact.**

### OUR CURRENT AREAS OF PASSION

- **Our journey to Reconciliation.**
- **Refugees' health and wellbeing.**
- **Young peoples' health, wellbeing and development.**
- **Reducing social isolation and loneliness.**
- **Mental health awareness.**



# ACHIEVE A POSITIVE COMMUNITY IMPACT

## HOW WE WILL MEASURE...

- **Number of non-members involved in Club activities.**
- **Number of non-members benefitting from Club activities.**
- **Number of groups, organisations and businesses we have worked with in pursuit of Club passions.**
- **Number of volunteer hours.**
- **Amount of funds raised in total.**
- **Amount of funds raised for Club passions.**



# STRATEGIC PILLAR #2:

## HAVE COURAGEOUS CONVERSATIONS



# HAVE COURAGEOUS CONVERSATIONS

## STRATEGIES...

- Engage with others based on impact, not status.
- Be willing to expand our comfort zone with perspectives that challenge us.
- Reflect members' priorities in the speaker program (see box).
- Enable the wider community to participate in courageous conversations through well-promoted meeting speakers and relevant special events.

### OUR CURRENT PRIORITIES

- Loneliness in our communities/social isolation.
- Experience of Aboriginal people.
- War on waste.
- Mental health.
- Aged care/dementia.
- Giving visibility and a voice to those who are normally Invisible and voiceless.
- Animal welfare and rights.
- Gender gaps.
- Inclusion of people with disability.
- Impact of low income on opportunities (esp. for youth).



# HAVE COURAGEOUS CONVERSATIONS

## HOW WE WILL MEASURE...

- **Gather insights and impact from participants in our courageous conversations (include provision for fearless feedback in the tool that collects meeting and event feedback).**





# STRATEGIC PILLAR #3:

## CREATE CONTINUOUS CLUB DEVELOPMENT



# CREATE CONTINUOUS CLUB DEVELOPMENT

## STRATEGIES...

- **Ensure our members are empowered (see page nine) and have opportunities to meet their aspirations (see box).**
- **Know our members and how we work best together.**
- **Know our community and proactively seek to engage and attract potential members across the diversity of the community.**
- **Continue to develop a strong and compelling social media presence.**
- **Established Inclusion Champion role in the Club.**
- **Seek expertise and resources outside the Club where needed.**

### OUR MEMBERS' ASPIRATIONS

- **Make a positive difference to the community, each other, and Rotary.**
- **Use our diverse knowledge, skills, abilities and capacity.**
- **Learn and develop deeper/new skills.**
- **Enjoy a sense of belonging and being valued.**
- **Contribute to the ongoing co-creation of the Club.**
- **Experience joy as a participant in Club activities.**

# CREATE CONTINUOUS CLUB DEVELOPMENT

## HOW WE WILL MEASURE...

- Attendance at meetings and events.
- Creating a joy meter for meetings and events.
- Members' satisfaction with making a valuable contribution.
- Members' satisfaction with being valued.
- Number of members.
- Rate of membership growth.
- Rate of attrition of members.
- Diversity of members.
- Number of guests.
- Spread of leadership roles across Club members.
- First time/transferring/returning members of the Rotary family that join our Club.
- Social engagement amongst members online and in person.
- Level of disengagement (as indicated by unexplained absence).



**STRATEGIC PILLAR #4:**

**BE WELL KNOWN AND  
HELD IN HIGH REGARD**





# BE WELL KNOWN AND HELD IN HIGH REGARD

## STRATEGIES...

**Build our profile and reputation within the groups we are focused on (see box) by:**

- **Including a Strategic Partnerships Director in our Club structure to liaise with surrounding and relevant community groups and (potential and established) partners.**
- **Undertaking due diligence before entering into strategic partnerships to ensure our respective visions and values align well.**
- **Developing a public relations strategy, in collaboration with our Club Storyteller.**
- **Maintaining a relationship with guest speakers.**

### OUR FOCUS

- **Local residents.**
- **Local business community.**
- **Other organisations who share our passion.**
- **Guest speakers and visitors.**
- **The wider Rotary family.**
- **Young people.**

# BE WELL KNOWN AND HELD IN HIGH REGARD

## HOW WE WILL MEASURE...

- **Local community/potential members – online survey, include question on perception of diversity.**
- **Other organisations' responsiveness to us.**
- **Guest speakers' and visitors' feedback.**
- **Wider Rotary family invitations to us, accepting our invitations, and engagement with District development.**
- **Local business community's responsiveness to us.**
- **Young people – Rotaractors becoming members**



**STRATEGIC PILLAR #5:**

**MAINTAIN FINANCIAL  
SUSTAINABILITY**



# MAINTAIN FINANCIAL SUSTAINABILITY

## STRATEGIES...

- **The Club's financial management will have regard to our principles (see box).**
- **While having regard to our value of inclusion, ensure our membership and meeting fees cover the costs of running the Club.**
- **We will maintain a financial reserve to enable the Club to take advantage of opportunities that arise.**
- **All income generating initiatives will be subject to feasibility analysis prior to commencement.**

### OUR FINANCIAL MANAGEMENT PRINCIPLES

- **Financial records will be kept to enable timely preparation of reports and analyses of financial activity in a timely manner.**
- **We will responsibly protect the Club's resources with good governance and transparency.**
- **We will clearly distinguish between fundraising for general purposes and fundraising for specific purposes.**
- **We will comply with external regulatory requirements.**



# MAINTAIN FINANCIAL SUSTAINABILITY

## HOW WE WILL MEASURE...

- **Financial records maintained and reconciled on an ongoing basis.**
- **The Club is able to pay its debts and obligations as and when they fall due.**
- **Financial reports presented to the Board at least monthly.**
- **All statutory reports prepared and lodged on time**



**STRATEGIC PILLAR #6:**

**BE PROUD AND ACTIVE MEMBERS  
OF THE ROTARY FAMILY**



# **BE PROUD AND ACTIVE MEMBERS OF THE ROTARY FAMILY**

## **STRATEGIES...**

- **Have regard to Rotary International's (RI's) Guiding Principles at all times (see box).**
- **Monitor and support District and other Clubs' activity, and openly share and welcome participation in our activity.**
- **Link into District and Zone programs.**
- **Establish mutually beneficial relationship/s with Clubs elsewhere in Australia and/or elsewhere in the world.**
- **Encourage members to donate to the Rotary Foundation.**
- **Actively use RI's Rotary Club Central/ District's Club Runner for Club planning, monitoring and management as applicable.**

### **ROTARY INTERNATIONAL'S GUIDING PRINCIPLES**

- **The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise.**
- **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?**
- **Avenues of Service: Club Service, Vocational Service, Community Service, International Service, Youth Service.**



# BE PROUD AND ACTIVE MEMBERS OF THE ROTARY FAMILY

## HOW WE WILL MEASURE...

- **Track involvement in wider rotary projects.**
- **Amount of annual contribution to the Rotary Foundation.**
- **Invitations from other clubs to collaborate**





