

國際扶輪策略規劃

RI Strategic Plan

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國際扶輪策略規劃—前言

RI Strategic Plan —Introduction

緣起

國際扶輪在 2001-02 年度裡展開一種策略規劃的發展以便導引我們的社團進入其服務的第二個世紀。在國際扶輪社長的指派下成立了一個與顧問公司、互動事務系統 IBS 一起合作的並為扶輪規劃了七個重要的目標。這些目標是在該組織之領導階層、職員及基層針對扶輪在未來十年內所要面對的重要的議題與挑戰經多方收集仔細思考過的資訊所研發出來的。

願景

對於一個策略規劃關鍵在於是否有能力注意到我們的組織的未來以及會成為什麼形象？以下為扶輪的願景說明：

- 扶輪將被表彰其於根除小兒麻痺等疾病內的領導與成功。
- 扶輪將在全世界人們心目中有舉足輕重的地位。
- 扶輪透過一種以增加及多元化的社員堅強的組織，將會獲得更多的友誼及服務的機會。
- 扶輪經由社員在服務方面的結合將促進它高道德標準的理念、國際了解、親善及和平。

教育扶輪社員們有關扶輪的策略規劃將會是扶輪正在運作方向廣泛了解與接受的關鍵。為促進此一目的，你能觀看策略規劃微軟的簡報軟體 (.ppt) 的簡報或 Adobe Portable Document (.pdf) 文件檔。請各位儘量在扶輪社或地區的教育目會議上使用上述的工具。在下載這些簡報軟體檔到你的硬碟時，按你的滑鼠右鍵並選“另存目標 SAVE TARGET AS”同時你也可與 Kathy Kessenich 聯絡從國際扶輪請求一片簡報的光碟片。

Genesis

In 2001-02, Rotary International launched the development of a strategic plan to guide our association as it prepared to enter its second century of service. Working with the consulting firm, Interactive Business Systems, a Strategic Planning Committee appointed by the RI President outlined seven major goals for Rotary. These goals were developed after careful consideration of data collected at the leadership, staff and grassroots levels of the organization as to the important issues and challenges that Rotary faces in the coming decade.

The Vision

Key to a Strategic Plan is the ability to look out into the future and imagine what our organization will look like in the future. Following is Rotary's vision statement:

- Rotary will be recognized for its leadership and success in the eradication of polio.
- Rotary will have a strong and visible presence worldwide.
- Rotary will achieve enhanced capacity for friendship and service through a strong organization with increased and diverse membership.
- Rotary will advance its ideals of high ethical standards, international understanding, goodwill, and peace through a membership united in service.

Educating Rotarians on Rotary's Strategic Plan will be key to widespread understanding and acceptance of the direction that Rotary is taking. To assist with this, you can view the Strategic Plan as either a Microsoft PowerPoint (.ppt) presentation or Adobe Portable Document File (.pdf). Please feel free to utilize the presentation at club and district meetings for educational purposes. To download the PowerPoint file to your hard drive, use your right mouse button and select "Save Target As." You also may request a CD of the presentation from Rotary International by contacting Kathy Kessenich.

國際扶輪策略規劃—目標及目的

RI Strategic Plan —Goals and Objectives

目標一：根除小兒麻痺

目的：

1. 扶輪基金會及全球的夥伴們承諾為根除成果的完成去倡導資金及人力資源。
2. 在扶輪社員及大眾間維持一種扶輪參與根除小兒麻痺努力之高度體認。
3. 參與全球策略規劃儘量早日能達成根除小兒麻痺之證明。

目標二：凝聚計畫重點

目的：

1. 設計一種程序以尋找、發展、執行與評估出一個持續多年的服務計劃，並經每次立法會議(COL)通過，而省去國際扶輪社長/或理事會每年計畫重點所帶來的改變。
2. 設計一種計畫重點讓扶輪社於其努力下聯合在一起，並對各自的扶輪社提供機會、彈性與鼓勵而讓該扶輪社對其社區的需求有所反應。
3. 尋求與其他組織機構合作的機會以更易達成我們的計劃目標。

目標三：選擇新的組織計畫重點

目的：

1. 研擬出準則以便用於選出一個未來組織計劃，包含一套成功的標準衡量。
2. 研擬出一種程序以便尋找一個未來組織計劃。
3. 研擬出一個計畫以建立有關選擇組織計劃組織上的共識。

目標四：調整管理與領導結構

目的：

1. 研擬出一個計畫及程序將更有效運用該組織的管理資源以獲得更有效力去對扶輪社服務。
2. 針對已通過之組織重點、計畫、方案與費用去準備立法提案以訂定該組織之社長、理事會及領導幹部的權限。
3. 準備立法提案額外為該組織的計劃提供持續的重點並同樣提供策略規劃委員會每年準備一份理事會的報告，同時在開會時必須依序向立法會議報告。

Goal 1: Eradicate Polio

Objectives

1. Advocate for funding and human resources for completion of the eradication effort are committed by The Rotary Foundation and global partners.
2. Maintain a high level of awareness of Rotary's involvement in the polio eradication effort among Rotarians and the general public.
3. Participate in global strategic planning to achieve certification by the earliest possible date.

Goal 2: Sharpen Program Focus

Objectives

1. Create a process for identifying, developing, implementing and evaluating a consistent multi-year program of service, for endorsement by each COL, and eliminate the annual change of program focus by the President and/or Board of RI.
2. Create a program focus that unites clubs in their efforts and provides opportunity, flexibility, and encouragement to individual Rotary clubs to respond to the needs of their communities.
3. Pursue opportunities for cooperating with other organizations to better achieve our program objectives.

Goal 3: Select New Corporate Program Focus

Objectives

1. Develop the criteria that will be used to select a future corporate program, including a standard measure of success.
2. Develop a process to identify a future corporate program.
3. Develop a plan to build organizational consensus for the selected corporate program.

Goal 4: Refine Governance/Leadership Structure

Objectives

1. Develop a plan and process that will more effectively utilize the organization's management resources to achieve greater efficiency in service to Rotary Clubs.
2. Prepare legislative proposals that define the authority of the organization's president, Board and leadership in regard to approved organizational focus, plans, programs and expenditures.
3. Prepare legislative proposals that provide sustained focus over time for the organization's programs and that also provides for the Strategic Planning Committee to prepare a report annually for the Board, which in turn must report to the Council on Legislation (COL) when in session.

4. 找出例如有關管理方面的事宜之國際扶輪的核心價值，並將這樣的價值列入扶輪章程文件及政策彙編。
5. 訂定那些參與所有階層管理之各自的角色任務。

目標五：改善各層級的訓練與教育

目的：

1. 作一種深入的分析以決定所有扶輪社、地區及資深國際的領導職務所需之知識及技巧並同時要評估目前訓練計劃之效能。
2. 研擬訓練計劃以提供所尋找出來之知識及技能。

目標六：擴展全球的社員人數與整合社員

目的：

1. 設計與實行一種計畫以提供該組織內文化的多元性的表彰及維護。
2. 根據現行實施的評估研擬出並實行一種廣泛的社員發展及防止社員流失計劃。
3. 研擬出並實行一種廣泛的扶輪擴展計劃至所有的國家及社區使其能支持一個扶輪社。
4. 強調每週例會的重要性，它會提供社員實業及個人成長的機會。

目標七：提昇公共形象

目的：

1. 研擬出一個復審步驟以決定目前公共形象運動的成功。
2. 有效運用所有機會來與百週年紀念的目標及於 2004-05 年度內在芝加哥區域特別重點強調的事務結合在一起來提昇扶輪的公共形象。
3. 確保一種各種公共關係方法來運用所有媒體及表彰地域之差異。

行動計劃的擬定及實施：

立法會議 COL 通過成立「策略規劃常務委員會」(Strategic Planning Standing Committee)長期監督策略規劃過程。理事會已授予該委員會審查所有由行動規劃團隊所規劃之提案在提送交理事會通過前是否與原先指定之目標及目的相符合。每一個目標行動規劃團隊是由每年 RI 社長所指派之義工及秘書長所指派之職員所組成的。此外，邀請與主要目標相關之任何國際扶輪委員會所有的主委、工作小組或資源小組擔任適當團隊的職務之成員。

4. Identify the core values of RI as they pertain to matters of governance, and incorporate such values into the constitution documents and the code of policies.
5. Define the respective roles of those involved in governance at all levels.

Goal 5: Improve Training and Education at all Levels

Objectives

1. Make an in-depth analysis to determine the knowledge and skills necessary for all club, district, and senior international leadership positions and also assess the effectiveness of the current training program.
2. Develop training programs to provide the knowledge and skills identified.

Goal 6: Expand and Integrate Membership Globally

Objectives

1. Create and implement a plan that provides for the recognition and preservation of cultural diversity within the organization.
2. Develop and implement a comprehensive plan for membership development and retention based on assessment of current practices.
3. Develop and implement a comprehensive plan for the extension of Rotary to all countries and communities able to sustain a club.
4. Emphasize the importance of relevant weekly meetings that provide members with opportunities for business and personal development.

Goal 7: Enhance Public Image

Objectives

1. Develop a review process to determine the success of the current public image campaign.
2. Optimize the opportunities to enhance the public image of Rotary in conjunction with centennial objectives, with particular emphasis on the Chicago area in 2004-05.
3. Ensure a diversified approach to public relations utilizing all media and recognizing regional differences.

Action Plan development and implementation

COL approved a Strategic Planning Standing Committee to oversee the strategic planning process on a long-term basis. The Board has charged this committee with reviewing all proposals developed by the Action Planning Teams to meet the stated goals and objectives of the plan prior to submitting them for Board action. There is one Action Planning Team for each goal comprised of volunteers appointed on an annual basis by the President and staff members appointed by the General Secretary. In addition, all chairs of any RI committees, task forces or resource groups related to the main goals are invited to participate as ex officio members of the appropriate team.

國際扶輪策略規劃—進度報告

RI Strategic Plan — Progress Report

以下為國際扶輪策略規劃的 2005 年 3 月目標進度報告

Following is the March 2005 progress report on the goals of the RI Strategic Plan.

目標一：根除小兒麻痺

繼續尋求支持性的訪問以協助確保從西班牙、瑞典及歐盟國家而來的大量捐款。國際家庭計劃協會 IPPC (International Planned Parenthood Association) 主席與基金保管委員會主委參加了 2005 年一月及二月日內瓦所舉辦的世界衛生組織 WHO (World Health Organization) 的部長會議上討論根除小兒麻痺等疾病之進度及最終的根除證明。

Goal 1: Eradicate Polio

Continued advocacy visits have helped to secure significant contributions from Spain, Sweden and the EC. IPPC chairman and Trustee chairman attended ministerial meetings in January and February of 2005 at WHO/Geneva to discuss progress toward eradication and eventual certification.

目標二：凝聚計畫重點

研擬之調查是於 10,000 個扶輪社中以分散隨機抽樣來找出扶輪社層級目前國際扶輪計劃所執行的適當性及有效性。調查也擴及由扶輪社於網上輸入資料，這並不包括在隨機抽樣中。

Goal 2: Sharpen Program Focus

Surveys were developed and distributed to a randomly selected sample of 10,000 clubs to identify relevance and efficacy of current RI programs at the club level. Survey is also available on the web for input from clubs that were not in the random sampling.

目標三：選擇新的組織計畫重點

採用選擇一個新的組織計畫重點之準則是與尋找一個未來組織計畫步驟一起研發的。兩者同時提交策劃規劃委員會加以檢討。

Goal 3: Select New Corporate Program Focus

Criteria to be used in selecting a new corporate program focus were developed along with a process for identifying a future corporate program. Both were submitted to the Strategic Planning Committee for review.

目標四：調整管理與領導結構

在章程文件中有關國際扶輪理事會及國際扶輪職員(除總監外)都加以複審並建議修改之處皆已研擬。此外，關於國際扶輪委員會及委員會架構相關文件之複審亦都在進行中。在 2004 年的立法會議上通過成立策略規劃委員會為一個國際扶輪委員會。

Goal 4: Refine Governance/Leadership Structure

Review of and suggested revisions to the constitutional documents pertaining to the RI Board and RI officers (except governors) have been developed. Additionally review of the same documents is underway with respect to RI committees and the committee structure. Legislation was adopted at the 2004 Council which established the Strategic Planning Committee as an RI committee.

目標五：改善各層級的訓練與教育

50 個扶輪領導職務的 6 個業已被分析出確定要有必要的知識及技巧，以及目前這些職務訓練的效果已被評估過。其餘的職務分析的步驟現在正在進行中。

Goal 5: Improve Training and Education at all Levels

Six of 50 Rotary leadership positions have been analyzed to ascertain necessary skills and knowledge, and the effectiveness of current training for these positions has been assessed. The process of analyzing the remaining positions is underway.

目標六：擴展全球的社員人數與整合社員

經由一個差異調查資料並研擬出一份推薦計畫。起草準則要思考到的是個社團整體的社員發展與防止流失計畫。持續強調有意義的每週例會之重要性，它經由所有社員的資訊及活動來提供社員在實業上及個人成長的機會。

Goal 6: Expand and Integrate Membership Globally

Analyzed data from a survey on diversity and developed a recommended plan. Drafted criteria to be considered in an overall membership development and retention plan for the association. Continue to emphasize the importance of relevant weekly meetings that provide members with opportunities for business and personal development throughout all membership materials and activities.

目標七：提昇公共形象

2005 年 1 月研擬出人道行動運動的創意資料並提供給所有的扶輪社，以便讓它們在它們的百週年紀念中用於當地，以獲取扶輪之媒體曝光率。與當地挑選的扶輪社一起合作以資料區域化並將其刊載。策略性地於有成本效益之場所張貼公益廣告，例如電影院以及國際主要航線上。

Goal 7: Enhance Public Image

Developed and provided creative materials for the Humanity in Motion campaign to all clubs in January 2005 for use locally in gaining exposure for Rotary during its 100th anniversary. Worked with selected clubs locally to regionalize materials and obtain placements. Strategically placed public service announcements in cost-effective venues such as movie theaters and on major airlines during in-flight programming internationally.



策略規劃委員會是被指派為領導與監督策略規劃過程。2002-03 年度委員會包括來自八個國家的 13 位具有扶輪廣泛知識與經驗之資深領導人。

A Strategic Planning Committee was appointed to lead and oversee the strategic planning process. The 2002-03 committee consisted of 13 Senior Leaders from 8 different countries who possessed extensive knowledge and experience about Rotary.



2002 年八月該策略規劃委員會於主委前國際扶輪社長比爾·韓德立主持下召開了一個綜合性三天的規劃會議。

The Committee met in August 2002 for a comprehensive 3 day planning session under the chairmanship of Past RI President Bill Huntley.



該策略規劃委員會是藉由外部之顧問公司引導以達理想之成效。

The planning sessions were facilitated by an outside consulting firm to achieve optimal results.