

**ROTARY**  
**CHARITIES**  
*Resources for change.*

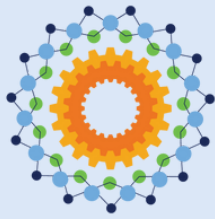
# 2024-2027 **STRATEGIC PLAN**

For over four decades, Rotary Charities of Traverse City has partnered with changemakers to **foster resilient and thriving communities** across northwest lower Michigan.

As we chart our course for 2024-2027, **we reaffirm our commitment** to addressing systemic challenges, supporting local changemakers, and investing in the social, economic, and environmental **well-being of our region.**

This strategic plan update represents our **evolving approach** to equity, partnership, and impact, **building on our legacy** while embracing **new opportunities for transformative change.** In it, we focus on four key areas of our work: Funding, Learning, Connecting, and Equity Culture & Operations.

Even as we evolve, one thing remains constant: our commitment to being a reliable, steadfast partner. **Our community can count on us** to be there—adapting, improving, and working alongside them **to create a thriving and equitable region.**



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# 2024-2027 STRATEGIC PLAN

## OUR MISSION

Working in partnership with changemakers, Rotary Charities provides funding, learning, and connections to address our region's complex problems and create community assets for all.

## OUR VISION

We envision adaptive and equitable communities where everyone has the opportunity to thrive.

## OUR CORE VALUES

### Generosity

We believe we can contribute to the greatest possible impact for all by generously leveraging all forms of our capital – financial, knowledge, connections, and our reputation.

### Learning

We believe our work must consistently adapt to changing community needs. We approach our work with humility and curiosity, respecting diverse perspectives and ideas.

### Respect

We foster trusted partnerships with openness and a willingness to change.

### Relationships

We believe our communities are made stronger through connections and collaborations in which people put service above self.

### Equity

We believe in the right of all people and places to thrive and we commit to learning and evolving our practices to advance equity and inclusion in everything we do.

### Impact

We strive to support initiatives that make a lasting positive impact in the lives of individuals, organizations, and communities.



# Areas of Strategic Focus and Objectives

## FUNDING

**Examine and adapt our grantmaking strategy to ensure that our resources are accessible and better meet the diverse needs of the communities we serve.**

- Explore and consider our funding priorities and categories to align with Trust Based Philanthropy and meet community needs
- Evaluate and improve grantmaking processes and practices to reduce barriers for applicants
- Explore ways to add resources to the scope and quality of our work

## LEARNING

**Exemplify what it means to be a learning organization and adapt our external learning strategies in response to changing community needs**

- Assess and create processes to build institutional knowledge
- Fully implement new evaluation and learning processes
- Assess, clarify, and articulate the purpose of our learning strategies
- Adapt learning methods and offerings to address equity-related needs

## CONNECTING

**Implement engagement strategies to increase awareness of our resources, amplify changemaker voices, and cultivate stronger community partnerships**

- Broaden and deepen our relationships throughout our region and beyond to achieve higher levels of awareness, engagement, and collaboration
- Enhance our communication strategy to highlight the impact of Rotary Charities' initiatives and amplifies the voices of changemakers through compelling storytelling
- Expand DEI efforts by improving communication, enhancing digital accessibility, and deepening relationships with underrepresented groups and organizations

## EQUITY CULTURE & OPERATIONS

**Build and articulate our philosophy and practices of centering equity into our values, priorities, and practices**

- Establish baseline relationships and knowledge base to advance E&I resources and networks
- Examine our organizational structure, policies and practices to strengthen our equity culture
- Explore ways for Rotary Charities to adopt more inclusive involvement and decision-making practices