

Rotary Club of Vancouver
Strategy Workshop 2010 / 11

July 13, 2010

Vancouver, B.C.

Record of Charts Created

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Roadmap for the Session (July 13, 2010)

1. Presentation – RI’s Strategic Plan Highlights
2. Re do SWOT
3. Finalize 2010 – 2011 Objectives
4. Next Steps

Participants:

Doug Bevan
Bill Dauphinee
John Hayto
Tess Lawson
Terry Miller
Carolyn Newton
Mike Steele
Mindy Tulsi-Ingram
Phil Webber

Stu Bird
Franz Gehriger
Mary Laing
Anne Lippert
Chris Motion
John Richardson
Fran Thompson
Don Taylor
Jack Zaleski

Facilitator:

Don Evans

Strengths / Weaknesses / Opportunities / Threats
Exercise (SWOT, 2010)
(brainstormed lists attached)

Strengths (Priority ranked)

1. Great meeting location
2. Strong fellowship
3. Our foundations
4. Great projects that involve many
5. Our broad spectrum of programs

Weaknesses (Priority Ranked)

1. Low public and media profile, low visibility
2. Lack corporate leaders
3. Expensive to belong
4. Don't use technology (website / social media) as much as we could

Opportunities (Priority Ranked)

- To improve Rotary's visibility in Vancouver
- To create strong new partnerships
- To unify our image (brand)
- To educate young people about Rotary

Threats (Priority Ranked)

1. Not keeping current with technology
2. Losing Rotary knowledge by not transferring it to younger members
3. Not partnering with other organizations
4. The increasing cost of lunch

**Vision Without Action
is merely a dream....**

**Action Without Vision
just passes the time....**

**Vision With Action
can change the world.**

Joel Barker

Rotary Club of Vancouver

VISION

In 2016, the Rotary Club of Vancouver is recognized by the community and in the media for its active participation and involvement in local, international and youth service projects.

The club has grown to have 250 active members, whose makeup reflects the diversity of our community.

The Rotary Club of Vancouver's leadership has continuity, driven by sound strategic and operational plans.

Service Above Self.....

Actions delivering a message of hope.

Statements of Strategy

1. Membership

By 2012, the Rotary Club of Vancouver has grown to 150 members who are representative of the diversity of our community. Our members value giving back to their community, and are active in support of Rotary goals. There is continued support for the corporate membership program. Retention and mentorship are active and have improved member retention rates. A family membership plan has been introduced.

2. Foundations

By 2012, all Rotary Club of Vancouver Rotarians support Rotary as a charity - to the Rotary Foundation of Rotary International with 100% participation in Every Rotarian Every Year, to the Rotary Club of Vancouver Foundation through direct donations and fundraisers, and to the RHF Hearing Foundation through our Bike a Thon.

3. Club Administration & Technology

By 2012, the Rotary Club of Vancouver is supported by a strong and consistent Strategic Plan. The club offers a weekly program with outstanding speakers, and holds two meetings a year at different sites. Our office administration supports club members and aids in our adherence to Rotary International and Club policies. The club uses current technology effectively to communicate and our website has been redeveloped to current standards.

4. Public Relations

By 2012, the Rotary Club of Vancouver's Public Relations Committee works actively with the District 5040 committee and Rotary is regularly in the news. The Rotary Club of Vancouver has taken a leadership role with community events and local media of all types.

5. Service Projects

By 2012, the Rotary Club of Vancouver's service approach is towards projects that increase member participation and direct involvement, and yield sustainable results to the beneficiaries. The club remains active in local, international and youth work. (The club's focus on projects includes hearing, as well as literacy, water and youth to align with RI's strategic direction)

6. Finance / Fundraising

By 2012, the Rotary Club of Vancouver operates at least four successful fundraisers each year that support all aspects of our club's work. RCV's financial operations remain sound, with increased communications for member clarity and incentives for participation and contribution.

- M 1.3 Target some specific groups for membership, eg. Consulates, architects, hoteliers, retailers, engineering, clergy , Rotary alumni....creating networking and partnership opportunities.
- Membership Committee 2010 / 2011
- M – 2 Develop and implement “Friends of Rotary”.
- Mary / Membership Committee June 2011
- M - 3 Present membership as a topic at regular Rotary meetings, full meeting in September + membership moments and reminders as year progresses.
- Mike / Membership Committee Ongoing
- M – 4 Continue to focus on the formal membership retention / mentorship plan. Hold two new membership / mentorship events in 2010 – 2011.
- Membership Committee / Verona / Bill Schulz
2010 / 2011
- M 3.1 Hold 20 member bios / informational moments at Rotary meetings (and on website?), both new members and longer time members.
- Don McPhee / Member committee 2010 / 2011

Foundations Objectives

By 2012, all Rotary Club of Vancouver Rotarians support Rotary as a charity - to the Rotary Foundation of Rotary International with 100% participation in Every Rotarian Every Year, to the Rotary Club of Vancouver Foundation through direct donations and fundraisers, and to the RHF Hearing Foundation through our Bike a Thon.

Future considerations:

- *Increased communications re the foundations and what they do to better educate our club members*
- *Increase foundation recipient presentations to make projects real*

Objectives

F – 1 Grow participation in the ***Every Rotarian Every Year*** program of Rotary International towards 100%. Target set for 2010 - 2011 contributions is \$100 / Rotarian.

Terry / Foundation Chair

June 2011

F - 2 Grow participation in the Paul Harris Society to 6 members.

Terry / Foundation Chair

June 2011

F – 3 Run the Foundations Campaign for 2010. October to be the month for focus on Rotary charitable giving.

Don E. / Terry / Phil

October / November 2010

- F 3.1 Deliver club programs on both the RI Foundation and the Vancouver Club Foundations.
- Phil / Don E. / Terry September / November 2010
- F – 4 Double the assets of the Rotary Vancouver Foundation over ten years, starting from 2010 base of \$1.6 million.
- Terry / Board 2010 - 2011
- F – 5 Implement a Planned Giving package for the Rotary Club of Vancouver (club or foundation) and identify qualified members.
- Phil W. / Chris Motion September 2010
- F – 6 Look at the possibility of designated projects for the Rotary Club of Vancouver Foundation as a means of generating new gifts.
- VRF Board 2010 / 2011
- F – 7 Consider establishment of a recognition program for contributions to the Rotary Club of Vancouver Foundation. Include donations as well as bequests.
- VRF Board / Phil W. 1Q 2011

Mel Endelman

draft by June 2011

- PR – 5 Develop a major media event around the Rotary Club of Vancouver’s 100th anniversary. Establish a media partner. Develop both a book and video documentary on 100 years of Rotary in BC.

Mary

2010 – 2012

- PR – 5.1 Create a Marketing & Communications Plan for the Rotary Club of Vancouver built around the 100th anniversary.

Mary / Mike / Don E. / Peter C.

4Q 2010

- PR – 6 Implement some local video clips onto the Vancouver Club website.

PR Committee

2010 - 2011

- PR 6.1 Create short promotional videos for specific projects, ones presently available would be Bike a thon and Congo projects.

- PR 6.2 Develop a promotional video for the Rotary Club of Vancouver .

Tiffany / Mass / Terry

Service Projects Objectives

By 2012, the Rotary Club of Vancouver's service approach is towards projects that increase member participation and direct involvement, and yield sustainable results to the beneficiaries. The club remains active in local, international and youth work. (The club's focus on projects includes hearing, as well as literacy, water and youth to align with RI's strategic direction)

Future considerations:

- *Interact revitalization*
- *International project country*

Objectives

SP – 1 Review the club's service focus at the board level and conclude our prime focus direction for the next period and develop criteria for the committees to work with.

Terry / Board

Fall 2010

SP – 2 Youth Service

SP 2.1 Support the continuation of Rotaract Club and look to reestablish an Interact Club. Continue some integration of activities between their clubs and some of our club's service activities.

Youth Committee

2010 – 2011

SP 2.2 Look at expanding the Stay in School Program by partnering with other clubs / organizations.

John Bathurst

Fall 2010

SP – 3 Community Service

SP 3.1 Plan one hands-on community involvement opportunity event for the club (such as UGM, Sal. Army, Telethon, Norquay volunteering etc.?)

Don Taylor / Narv 2010 – 2011

SP 3.2 Find a local community service project or focus that partners with another Rotary Club (s) or other organization (s) and captures a high profile need in the community.

Don Taylor / Narv / Community Service Committee
2010 -2011

SP 3.3 Continue the project on literacy (CALs), developing a coordinated partnership with other clubs.

Fran T. / Community Service Committee 2010 - 2011

SP – 4 International Service

SP 4.1 Complete work on the water project in Congo that is underway, look for new partners that can take it forward.

Anne / Committee 2010 / 2011

SP 4.2 Look to establish a new project that fits with Future Vision.

Anne / Committee 2011

SP 4.3 Continue active support and participation with the
Rotary World Help Network.

Anne / Committee

2010 – 2011

Finance / Fundraising Objectives

By 2012, the Rotary Club of Vancouver operates at least four successful fundraisers each year that support all aspects of our club's work. RCV's financial operations remain sound, with increased communications for member clarity and incentives for participation and contribution.

Future;

- *Develop a new feature fundraiser*
- *Funds from beyond Rotarians*

Objectives

FF – 1 Repeat the 2010 fundraisers - Chocolates fundraiser in November 2010, the Auction Gala Dinner in 2010 / 2011.

Mel / John / Claude 2010 / 2011

FF –2 Plan a successful 2011 Bike a Thon and raise \$135k gross for the Rotary Hearing Foundation.

Jack & Bike a Thon committee July 10, 2011

FF – 3 Continue the process annually to get Direct Access (Gaming) funds in appropriate activities and establish the base needed to successfully grow the proceeds in future years.

Bill D. / Claude. March 2011

FF – 4 Support an active fundraising committee with a mandate to find new funding sources from outside the “pockets of our members”.

Stu B.

2010 / 2011

Attachments:

- SWOT Brainstorm 2010

Strengths – Brainstorm list, unranked(2010)

- Well established, long history
- Our club foundations
- Our diversity of membership
- Our growth in younger members
- Strong member participation
- An energized membership
- Our office with staff
- Great food for lunch
- Great meeting location
- Deep cross section of business experience
- String reputation
- Our membership numbers are holding now
- We are willing to change
- Our strong traditions
- Great projects
- We get lots of visitors
- Our members' strong personal values
- Improvement in member retention
- We have good leaders
- There is improving intergenerational membership
- The commitment of our members
- Our aging population
- Our mentorship program
- We run a broad spectrum of programs
- The nest kept social secret in Vancouver
- Well organized
- A good website

Weaknesses – Brainstorm list, unranked(2010)

- No clear focus
- Lack a single theme
- Communications overall
- Our events and projects are not known outside of Rotary
- Our traditions
- We don't brag – (too humble)
- We don't attract large corporations
- We don't develop strategic alliances with others
- Low public and media profile

- We fear controversy
- Aging population
- Not enough available funds
- Lack non receiptable funds
- Lack corporate leaders as members
- Low visibility
- Expensive to belong
- Some perceived negative image
- Many inactive members
- Lack District level involvement
- Declining membership
- Lack interest in community projects
- Don't make enough use of member experience
- Our mentorship program
- We run a broad spectrum of programs
- Not using technology (website / social media) as much as we could

Opportunities – Brainstorm list, unranked(2010)

- To improve Rotary's visibility in Vancouver
- To increase our involvement in District 5040
- To create a new non- receiptable fundraiser
- To start a for profit business (to support the club)
- To revitalize our youth committee
- To get sponsorships
- To create a charitable society for our youth projects
- To create strong new partnerships
- To draw members from other local clubs
- To enhance the business activities in the club
- To double foundation funds in ten years
- To unify our image (brand, focus)
- To educate young people about Rotary
- To use social media
- To create a charity based around literacy
- To create a strong value add for corporate members
- To increase our involvement in international projects
- To create active networking opportunities for new members
- To incorporate and use Future Vision with the club
- To rekindle the Rotary spirit in inactive members
- To create a product that raises funds
- To partner with schools o Bike a Thon
- To celebrate our 100 years of history and service with our members
- To align strategically with the media
- To develop "Friends of Rotary" and involve in events and celebrations
- To implement planned giving for our foundations

Threats – Brainstorm list, unranked(2010)

- The increasing cost of lunch
- Smaller and less expensive clubs
- The cost of parking
- Letting up on membership recruitment efforts
- Complacency
- Move by District to create more Rotary clubs
- Losing Rotary knowledge by not transferring it to new generations
- Not keeping up with technology
- Current economic conditions
- Inability to interact using social media
- Confidentiality issues with social media
- Reducing levels of discretionary funds
- Seeing other service organizations as competitors
- Not partnering with other organizations
- Inability to appeal to a diverse cross section of potential members