

Rotary Club of Vancouver
Strategy Workshop 2011 / 12

June 9, 2011

Vancouver, B.C.

Record of Charts Created

Prepared by DJE Holdings Ltd.
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Roadmap for the Session:

1. Results on 2010-11 objectives
2. Update 2011 – 12 year objectives
3. Next Steps

Participants:

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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 2020

Vision Elements prioritized: (2011)

- We are a professionally managed Rotary Club
- Our projects have significant impact
- We are the most influential club in Vancouver
- We host an RI Convention
- Our foundation has assets of \$10 million
- Business leaders want to belong to the club
- RCV has a very high profile in Vancouver
- The club has grown to more than 200 members
- We support each other as members, in both our businesses and personal lives
- Our use of technology in communications and operations is best in class
- We regularly partner with other clubs and organizations on projects
- We have a lineup of high quality speakers
- We do social activities with other clubs

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 Vancouver Rotary Club 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. RCV 100 Anniversary

By August 2013, the RCV has publicized the club's 100th Anniversary throughout BC, Canada and the world. The Celebration Weekend (April 19 to 21st, 2013) has been a success with an emphasis on sharing with all clubs in BC. New partnerships have been established and existing relationships have been enhanced within our community and Rotary. Visibility for Rotary and RCV has been created and the public educated on what Rotary does locally and around the world.

6. 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)

7. 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 Complete Classification review project and then implement a target at some specific groups for membership, eg. Consulates, architects, hoteliers, retailers, engineering, clergy, Rotary alumni....creating networking and partnership opportunities.
- Membership Committee 2011 / 2012
- M 1.4 Develop a focus on diversity in club membership.
- Membership Committee 2011 - 2012
- M - 2 Continue to build “Friends of Rotary”.
- Mary / Membership Committee 2011 - 2012
- M - 3 Present membership as a topic at regular Rotary meetings, full meeting in September and Annual report of committee in June. Supplement with membership moments and reminders as year progresses.
- Mike / Membership Committee Ongoing
- M 3.1 Promote memberships at meetings and encourage members to invite new prospects proactively. Monthly committee presentation at meetings.
- Franz / Membership Committee 2011-12
- M 3.2 Hold 20 member bios / informational moments at Rotary meetings (and post on website?), both new members and longer time members.
- Don McPhee / Member committee 2011 / 2012

M – 4 Continue to focus on the formal membership retention / mentorship plan. Hold two new membership / mentorship events in 2011 – 2012.

Membership Committee / Verona / Bill Schulz
2011 / 2012

M 4.1 Implement an annual members' survey to receive member feedback re club satisfaction

Membership Committee / Don E. Dec. 2011

M – 5 Develop a networking information event to market Rotary with other downtown organizations.

Membership Committee Spring 2012

M – 6 Participate with District 5040 membership committee to develop membership programs on a wider basis and work to develop a best practices guide on membership. Work to increase interclub participation.

Mike / Maggie Ongoing

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 Vancouver Rotary Club Foundation through direct donations and fundraisers, and to the RHF Hearing Foundation through Bike a Thon.

Key Strategies:

- *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% participation. Target set for 2011 - 2012 contributions is \$100 / Rotarian.

Franz / Foundation Chair

June 2012

F - 2 Grow participation in the Paul Harris Society to 8 members.

Franz / Foundation Chair

June 2012

F – 3 Run the Foundations Campaign for 2011. October to be the month for focus on Rotary charitable giving.

Don E. / Franz / Phil/ Chris M.

Oct. / Nov. 2011

- F 3.1 Deliver club programs on both the RI Foundation and the Vancouver Club Foundations.
- Phil / Don E. / Franz September / November 2011
- F – 4 By 2020, we will have increased the assets of the Vancouver Rotary Club Foundation to \$3.2 million. (Current base is \$1.7 m at June 2011).
- Franz / Terry / Board 2011 – 2012
- F – 5 Implement a Planned Giving package for the Vancouver Rotary Club (club or foundation) and identify qualified members.
- Phil W. / Chris Motion / Angus Campbell July 2011
- F – 5.1 Establish a recognition program for contributions to the Vancouver Rotary Club Foundation. Include donations as well as bequests.
- Phil W. / Chris M. Nov. 2011
- F – 6 Develop and adopt policies and procedures with criteria for designated projects for the Vancouver Rotary Club Foundation as a means of generating new gifts. Review the way that gifts to the foundation and use of foundation funds are handled.
- John Bathurst / Phil Webber / Chris Motion 2011-2012

Administration Objectives

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.

Future considerations:

- *E club or Satellite club*
- *Start work towards hosting an International Convention in Vancouver*

Objectives

A – 1 Continue the Strategic Plan for the Rotary Club of Vancouver and hold progress reviews twice yearly.

Don E. / Planning Team 2011 / 2012

A 1.1 Hold a follow up special strategy meeting with the club's younger members to get a sense of how they would see the club in the future.

Don E. Fall 2011

A – 2 Arrange two off-site meetings (in the community) of the club in 2011 - 2012. (Consider locations such as Hearing Centre and International House, CALS site, Seattle downtown club meeting etc.).

Franz / Program Committee 2011 / 2012

Public Relations Objectives

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.

Future considerations:

- *Look to find other ways to get public awareness*
- *History focus towards 2013 (leverage 100th anniversary)*
- *Plan for a Rotary month*

Objectives

PR – 1 Redesign the Public Relations committee and link more directly to other club committees. Develop a process to ensure input to the PR Committee when presentations are to be made.

Peter C. /

June 2011

PR – 2 Link the Rotary Club of Vancouver's PR Committee and the District 5040 PR Committee effectively. Apply for a \$15,000 PR grant (leverage the 100th anniversary).

Peter C. / PR Committee

2011 / 2012

PR – 3 Work to find a new Rotary Club of Vancouver member from a major Vancouver media player (eg. PR house / advertising field as well as news media)

Membership Committee / member contacts 2011- 2012

PR – 4 Submit Rotary Club of Vancouver events to the District newsletter. Include a media release / at the conclusion of every club project.

PR Committee

2011 – 2012

PR – 5 Set up a RCV distribution for District newsletters through the office to RCV members so District news gets out more effectively.

Franz / Pam

Ongoing

PR – 6 Review and update the club's 100 year history and ensure as many key highlights as possible are included. Hold a round table meeting to access our long term members.

Stu Bird / Blair

Summer 2011

PR – 7 Implement some local video clips onto the Vancouver Club website.

PR Committee / Technology Committee by end 2011

PR 7.1 Create short promotional videos for specific projects, ones presently available would be Bike a thon and Congo projects.

PR 7.2 Develop a promotional video for the Rotary Club of Vancouver .

Tiffany / Mass / Franz

PR – 8 Develop the Rotary club of Vancouver brand, create a short set of words (elevator speech) for use of the club.

PR Committee

2011 - 12

RCV 100 Anniversary Objectives

By August 2013, the RCV has publicized the club's 100th Anniversary throughout BC, Canada and the world. The Celebration Weekend (April 19 to 21st, 2013) has been a success with an emphasis on sharing with all clubs in BC. New partnerships have been established and existing relationships have been enhanced within our community and Rotary. Visibility for Rotary and RCV has been created and the public educated on what Rotary does locally and around the world.

Objectives

RCV100 -1 Maintain an ad hoc 100th Anniversary Advisory Team to oversee the planning for the 100th and advise the Board as needed.

Mary(Chair) and established Advisory Team through May 2013

RCV100 -2 Maintain a 100th Anniversary Project Team to liaise with SPH, RCV, and the RHF re the implementation of the expansion of the Rotary Hearing Clinic at SPH (the RCV Legacy Project) and give frequent updates to the membership.

Wilf (Chair)/Jack/Mary/Dr. Brian Westerberg Aug 2013

RCV100 -3 Plan and implement a "Century of Rotary in BC" documentary in partnership with other clubs in BC.

Blair (Chair)/Mary and established Project Team Aug 2013

RCV100 -4 Plan and implement the 100th Anniversary Gala Celebration Weekend on April 19-21st to showcase the RCV and other BC clubs with an emphasis on FUN and SERVICE!

Heather Baker (Chair)/Mary and established Project Team
April 2013

RCV100 -5 Develop and implement public relations strategies to ensure a high visibility of Rotary's 100th Anniversary events with the media.

Peter (Chair)/Mary and established Project Team April 2013

RCV100 -6 Obtain sponsors for 100th Anniversary events/projects to ensure a successful event.

Mary/Established Project Team April 2013

RCV100 -7 Establish and staff a booth at the 2012 RI Conference to publicize the RCV and BC Celebration in 2013.

Mary and 100th Advisory Team May 2012

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)

- *Create website content around the committees to increase visibility*

Objectives

SP – 1 Review the club's service focus at the board level and conclude our prime focus direction for the next period. Develop criteria for the committees to work with. Form a Task Force to work on this, a long term vision here is needed that aligns both club and RI goals.

Franz / Board / Task Force

2011 - 2012

SP – 2 **Youth Service**

SP 2.1 Support the continuation of the Rotaract Club and look to establish an Interact Club (St. Georges?). Continue integration of activities between their clubs and some of our club's service activities.

Youth Committee (Terry G. / Mary L.)

2011-12

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

John Bathurst / Gordon Bird

Spring 2012

SP – 2.3 Work to inform the club on the wide variety of youth programs in which we participate.

Youth Committee

2011-2012

SP – 3 Community Service

SP 3.1 Review the focus for the Community Service Committee and apply it to projects going forward. Develop criteria for key projects in coming years, and build future projects around this focus.

Gordon / Community Service Committee July 2011

SP 3.2 Plan one hands-on community involvement opportunity event for the club, continue Norquay and Nootka schools and involvement with RHF funds recipients.

Comm. Service Committee

2011 - 12

SP 3.3 Honour commitments on CALS.

Community Service Committee

2011 – 2012

SP – 4 International Service

SP 4.1 Tanzania project (Future Vision) for clean water.

Anne / WCS Committee

2011

SP 4.2 Fight Against Leprosy – continue with exploration of this possible project, plan to access CRCID funding to help with this project.

Anne / WCS Committee

2011-12

SP 4.3 Continue active support and participation with the Rotary World Help Network, ship two containers to Armenia and Ethiopia in 2011 – 2012 as funds permit.

Anne / WCS Committee

2011 – 2012

SP – 5 **Hearing Projects**

SP 5.1 Hold a club meeting at a hearing project (St. Paul's, Children's Hospital, UBC or ?) to highlight the major hearing work that the club does.

Franz / RHF

2011-2012

SP 5.2 Hold a club program on the topic of hearing, share our work and develop greater awareness in the membership, ensure an emotional tie (such as Janel video)

Franz / RHF

2011-2012

SP 5.3 Develop a closer relationship between the club's membership, committees and the disbursement of funding from the RHF Hearing Foundation.

Franz / Board / Committees

2011-2012

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.

Key Strategies:

- *Develop a new feature fundraiser*
- *Funds from beyond Rotarians*
- *Consider corporate support / sponsorships*
- *Hiring a fundraiser*

Objectives

FF – 1 Develop an active fundraising committee with a mandate to find new funding sources from outside the “pockets of our members”.

Franz

2011 / 2012

FF – 2 Develop a 2011 - 2012 fundraising plan for the club, target \$50k in year. Focus on events that appeal to all members of the club.

Franz / Fundraising Committee

Fall 2011

FF – 2.1 Look into a potential new Fall or Christmas season major event / fundraiser.

Fundraising Committee

2011

FF –3 Plan a successful 2011 Bike a Thon and raise \$135k gross for the Rotary Hearing Foundation. Set up committee for the 2012 ride.

Bike a Thon committee July 10, 2011

FF – 4 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

Next Steps:

1. Review the plan with the new board

Franz / Mary / (Don E.)

Summer 2011

2. Post 2011 / 2012 plan on website

Jack Z.

Summer 2011

3. Plan a program / member review of the plan

Franz

September 2011

4. Hold progress review and update session, Set key strategies for next three to five years.

Don / Franz / Mary / Peter

January 19, 2012

Attachments:

- SWOT Brainstorm 2010
- Vision Brainstorm 2011

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

Vision Elements 2020 – brainstorm list, unranked (2011)

- We support each other as members, both business and personal
- A world class video tells our story
- We are a professionally managed organization
- There is considerable flexibility offered in variety of ways in make ups
- We have toasted the end to polio
- We facilitate a District wide event such as a bonspiel
- There is a Rotary International President coming from the club
- We run the best charity golf tournament in Vancouver
- The club has an active party / social committee
- We are a leader in use of technology for our communications
- Our club has a very significant community impact
- Our club is seen as a leader by District 5040
- We share an administration office with District 5040
- The club is active in Rotary activities at the District and International level
- We are successful in fundraising from non Rotarians
- Our membership has diversity that mirrors our community
- Our club has achieved a very high profile in Vancouver
- We regularly engage in social activities with other clubs
- We have merged with some other clubs to strengthen Rotary overall
- The average age of our members has decreased further
- We host an RI Convention in Vancouver
- John Furlong is a member!
- The club has grown to more than 200 members
- RCV is the most influential club in Vancouver (ethics and doing good)
- We are an innovative service organization
- We have lots of family members and family activities
- Newcomers are always made welcome
- We have lots of social activities, we have fun together
- We have a fellowship / social committee
- There is a Rotary House (community facility) in Vancouver
- Rotary has a very highly visible presence in Vancouver

- We have completed a prominent project that is highly visible
- There is a Rotary box for spare change at the airport
- We are a “champagne club”
- The club has no cliques
- We do many projects in partnership with other organizations
- We have many high profile members
- We have active media involvement within the club
- There are more youth programs
- Our club has a clear focus
- All members are active
- We have a satellite club
- We are known for ethics
- Rotary Club of Vancouver is an innovator in the Rotary World
- Our foundation is endowed at the \$10 million level
- We support several Rotaract and Interact clubs
- We are known as the best business based service club in Vancouver
- We are a charity of choice because of the good work we do
- There is a lineup of high quality speakers
- Corporate memberships have grown
- We have an on line store
- We have an e club
- Business leaders want to be members
- We are an active, inclusive and fun group of people

From the Rotary Vancouver Young Members workshop held November 3, 2010:

- More social interaction in the club
- Active involvement on the part of all club members
- Visibly recognized projects
- A much larger club
- A collaborative major project in Vancouver with other clubs as partners
- Good use of Social Media to enhance exposure of our club and its good work
- More PR and visibility in local media
- More hands on projects and events
- More affordable events
- Fewer Rotary Clubs in Vancouver (but bigger clubs that can accomplish more)