

Rotary Club of St. Catharines South Strategic Plan

At a club assembly held May 14, 2012 the Rotary Club of St. Catharines South voted unanimously to accept the draft strategic plan presented at the meeting. This document provides a background on the steps taken in the development of the strategic plan along with the plan. As with any strategic plan, this is a living document, which means that each President and each Board should review the plan every year with the membership and make adjustments as required in order to ensure its continued relevance.

1. Background on the Strategic Planning Process

Under the leadership of President John Teibert, a strategic planning committee was formed in 2010. Membership included President John Teibert, President Elect Sheila Bristo and the Club's Secretary Roseanne Morissette. Using the strategic planning resources of Rotary International, the committee met to discuss the following:

- Where is the club now? Describe its current state.
- What are the strengths of the club?
- What are the weaknesses of the club?
- Where do we want the club to be and key characteristics of the future state?
- Next steps in the strategic planning process.

A document was developed and posted on Clubrunner. The document was shared at the August 2010 board meeting and shared with the membership at a weekly meeting. Input was provided by both the membership and the board, and the document was updated to reflect the various discussions. (Appendix A).

In addition to using the resources of Rotary International (RI), Rotary District 7090 was engaged to assist and advise in the development of our plan. The above noted document was shared with the District and advice gratefully received on the process.

It was decided early on that in order to engage the membership as much as possible, the plan would be developed through discussion and consultation at regular meetings and club assemblies.

2. Developing a Vision, Mission, and Next Steps

In keeping with the strategic planning process of RI, a visioning session was held at the Club Assembly in January 2011. In exchange for a donation to a charity of choice, the visioning session was lead by a facilitator from the community. The decision to engage a facilitator allowed for the strategic planning committee to fully participate in the discussion. The discussion included small group work as well as developing a consensus on a vision by the larger group. The visioning session allowed for a number of ideas and views to be shared regarding the future of the club as well as the importance of taking stock of the club and developing a strategic plan. A draft vision statement was developed with the assurance that the club would be able to review the statement and make further revisions if required.

Along with developing a vision statement, the membership agreed that the mission of RI would be the mission of the club. We also reviewed strategic plans from RI and other local Rotary clubs and decided that the format of the strategic plan of Brantford Ontario would be used to guide the committee and club in its future work. Two additional club members, Keith Shaver and Jim Howes, volunteered to join the strategic planning committee.

Rotary Club of St. Catharines South Vision:

We are the service organization of choice providing a friendly forum for members to use their skills and talents to serve the local, national, and international communities.

Rotary Club of St. Catharines South Mission

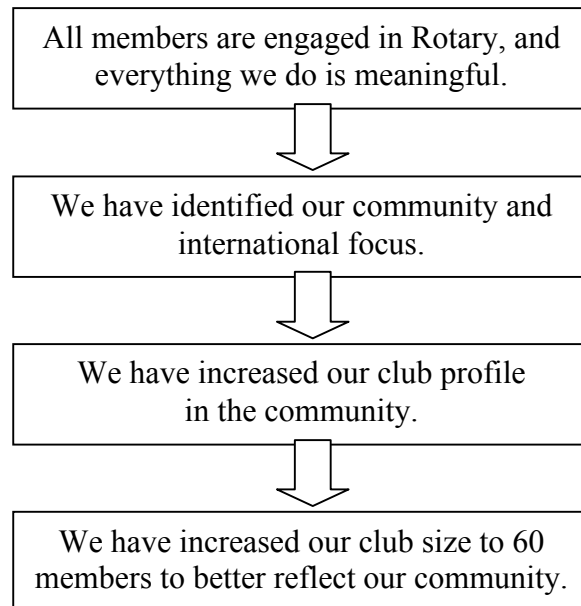
We provide service to others; promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.

3. Objectives

Following the RI process and using the Brantford Rotary Club model, the next step in the club's strategic planning process was to develop our objectives. At the July 11, 2011 weekly meeting, members were divided into three groups and discussed potential objectives.

Each group reported back to the larger group and it became quickly evident that there were common themes. These common themes became the clubs objectives.

Objectives of the Rotary Club of St. Catharines South:



The objectives were posted on Clubrunner and the club was once again invited to provide further input.

Over the course of the next several months a regular meeting was dedicated to discussing each of the individual objectives and identifying the tasks to be implemented to meet the objectives.

In addition to the discussions focusing on our objectives, a membership survey was conducted by the membership committee (Appendix B). The survey focused on membership, meetings, communications, charitable support, and overall content/understanding of Rotary. The results from the survey were presented to the Board of Directors and the membership. The survey also was a valuable resource during the membership discussion.

4. The Strategic Plan for the Rotary Club of St. Catharines South

The Rotary Club of St. Catharines South strategic plan is attached in Appendix C. As previously indicated this plan was accepted unanimously at the May 14, 2012 assembly and is intended to guide the club. Each President should dedicate time each year to ensuring that the plan remains relevant to the membership and our community.

Respectfully Submitted:

Sheila Bristo, Jim Howes, Roseanne Morissette, Keith Shaver, John Teibert.

Appendix A

Strategic Planning Committee Meeting July 26, 2010

Present: Sheila Bristo, Roseanne Morissette, John Teibert.

The focus of the meeting was to discuss a draft Strategic Planning Worksheet

1 Where is our club now?

Describe Your Current State:

- 41 members
- Good age demographic
- Attendance is good
- Dues are paid
- Financial health is sound
- High level of accountability
- Solid committee structure in place
- Donations are ad-hoc outside of literacy, polio, dental project, Take it To Heart. Hospice Niagara
- Board is committed

Club Strengths

- Members are close and are knowledgeable of each other and their skills
- Good succession plan
- Friendly club, good cross section of men and women
- High level of financial accountability
- Recent new members are younger
- Mix of younger and older members

- Meeting Presidential Citation goals
- People can be involved as time permits
- Members can have their ideas implemented with support of the club
- Public relations is strong
- Open to innovation

Club Weaknesses

- Need to improve diversity of members
- Knowledge transfer from Presidents could be better. Some documents are missing (central/ongoing storage?)
- Need to get more involved
- Need a common long term goal or target that brings the club together and brands the club i.e. focus on children/or other target group fundraiser or an event (similar to Ribfest, TV auction—something that is automatically associated with the club for the long term)
- Not at optimal size. Target is 60 with 50 active
- Could have a closer connection/commitment to international work
- Need to get more members to District Assembly and events outside our club
- Education need on youth projects such as RYLA , interact, Rotaract

2. Where Do We Want to Be?

Key Characteristics of the Future State:

- 60 members+
- Significant signature event or cause (international or local)
- Increased diversity
- We are friendly warm and caring
- Have a strong accountability structure
- Financially viable with one year reserve
- Open to innovation and new ideas
- Supportive of members ability to volunteer more or less over the years

Should we be thinking bigger? i.e. 100 members

Next Steps:

- Share draft at August Board Meeting and post on club website, share at future regular meeting
- Forward to Nan as a background to the vision session
- Meet with Nan to review work to date and plan for October Visioning session
- Facilitate Visioning session at October Assembly with target of having a solid draft vision at the end of the meeting.

Appendix B

ROTARY CLUB OF ST. CATHARINES SOUTH MEMBERSHIP SURVEY SUMMARY 2011

- ✓ **Survey issued to 44 Active and Honorary Rotary Members with email addresses.**
- ✓ **24 Respondents**

Membership

- 75% male members with the majority in the age group of 51-70; female age bracket is 41-60.
- Most members joined our club because of its size, our welcoming nature, and age profile.
- Most members joined as a result of friends or family inviting them and/or to give back to their community and to enjoy professional contact.
- More than one third of respondents have more than 20 years service; 18% have 11-15 years.
- Our orientation overall is good.
- A disturbing 48% of respondents replied NO or Sometimes to the question of feeling engaged; with their reasons being time commitments, burn out, work schedule and interestingly the age gap.
- Only 57% indicated they are very likely to remain for the next 3-5 years.
- Fellowship opportunities question indicated overall satisfaction; however there is a thread of resentment about too few members carrying the load for bingo.

Meetings

- Attendance should be addressed – 68% indicate they often attend with 37% indicating the seldom or never attend.
- 73% indicate they miss meetings due to work load/schedule, however 18% said it was due to lack of interest/engagement.
- Satisfaction with meeting location is completely satisfied at 68%; however food and agenda rated significantly lower on the completely satisfied scale at 27% and 23% respectively; and both length of meeting and speakers rated 36% for completely satisfied.

- Suggestions for improvement include more info about other clubs and international news, involve members more, less pomp and more content, more fun speakers, switch things up by having different things other than regular meetings, don't make weekly meetings mandatory.
- The top 3 speaker topics were City or Regional Highlights at 68%; Greening/renewable energy at 59% and New & Emerging Businesses at 50%

Communications

- 91% of respondents receive South Mouth; however a large majority seldom if ever visit the website or the Facebook page.
- Suggestions for easier communication indicate that simple email is best along with South Mouth.
- 2/3rd of our respondents indicate they have read about or participated in visioning/strategic planning exercises.

Charitable Support

- Varied responses ranging from supporting one or two major causes to needing to distribute our support in a broader way.
- Concern about stretching our resources too thin.
- Need to find events that generate entry fees and possibly of more interest to younger citizens of the area.
- Multiple causes identified (see summary notes of responses).

Overall content/understanding of Rotary

- 81% believe we have enough Rotary content.
- 77% are aware of Rotary District 7090 its role and clubs connection.
- 91% indicate they have an understanding of the Rotary Foundation.
- More than 2/3rd do not attend the Annual District Conference – we should probe as to why.

Appendix C
Rotary Club of St. Catharines and South Strategic Plan

Rotary Club St. Catharines South Vision Statement:

“We are the service organization of choice providing a friendly forum for members to use their skills and talents to serve local, national and international communities.”

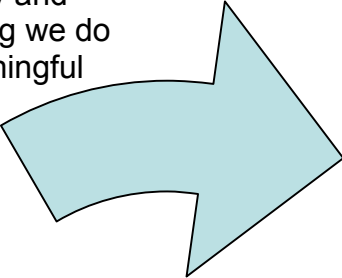
Rotary Club of St. Catharines South Mission Statement:

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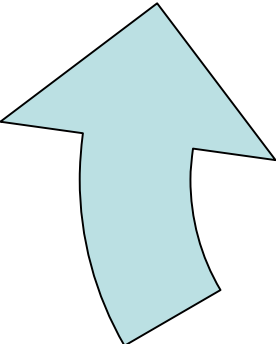
Motto: ***Service Above Self***

We have increased our club size to 60 members to better reflect our community.

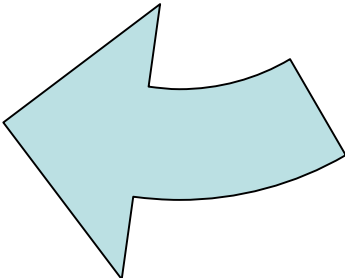
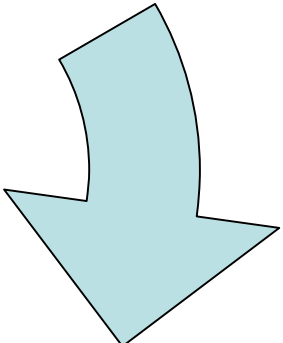
All members are engaged in Rotary and everything we do is meaningful



We have increased our club profile in the community

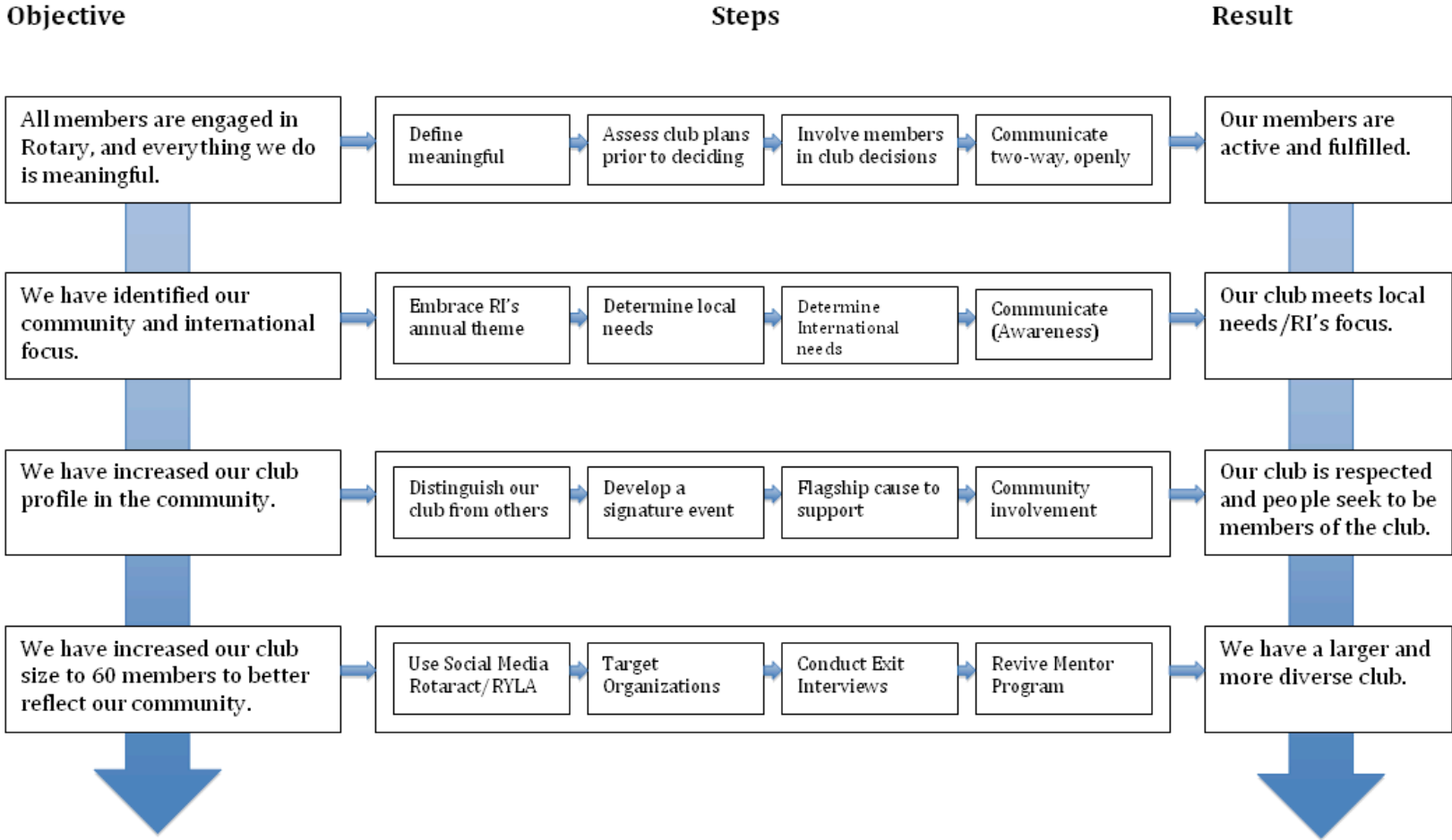


We have identified our community and international focus



Rotary Club of St. Catharines South Strategic Plan

Implementation Structure



Rotary Club of St. Catharines South Strategic Plan

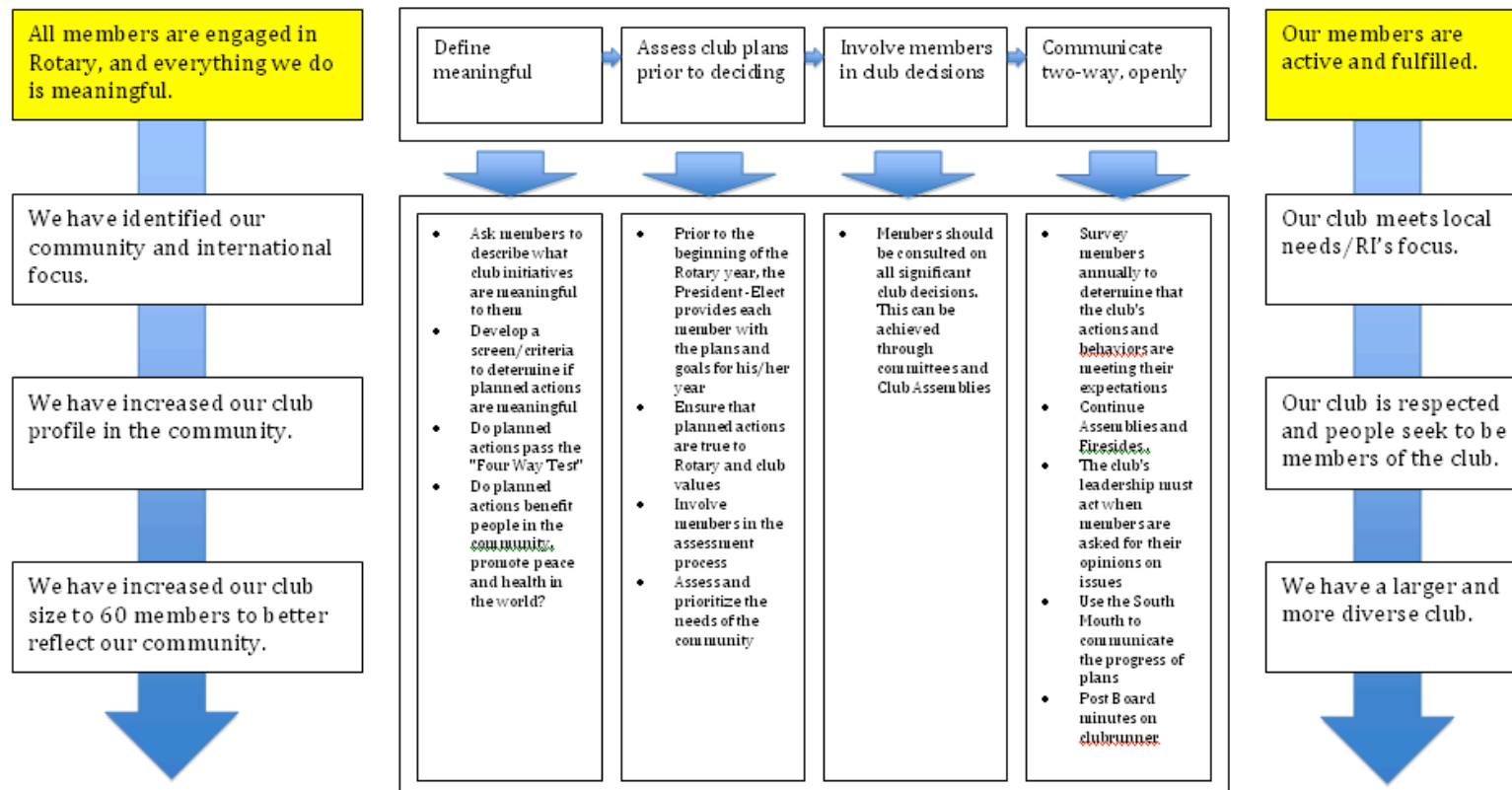
How do we engage our members and ensure everything we do is meaningful?

Implementation Structure

Objective

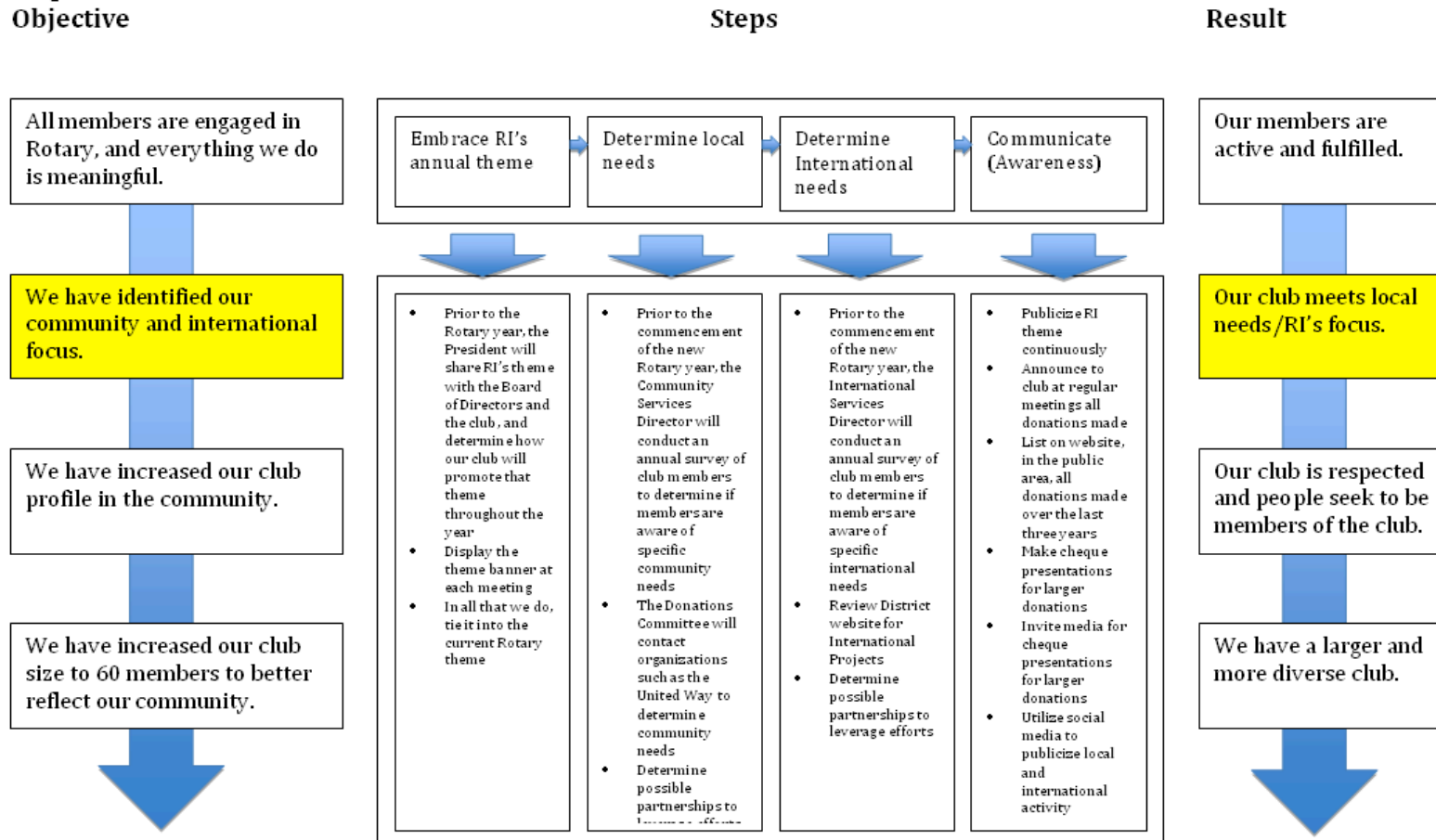
Steps

Result



Rotary Club of St. Catharines South Strategic Plan

**How do we identify our club's community and international focus?
Implementation Structure
Objective**



Rotary Club of St. Catharines South Strategic Plan

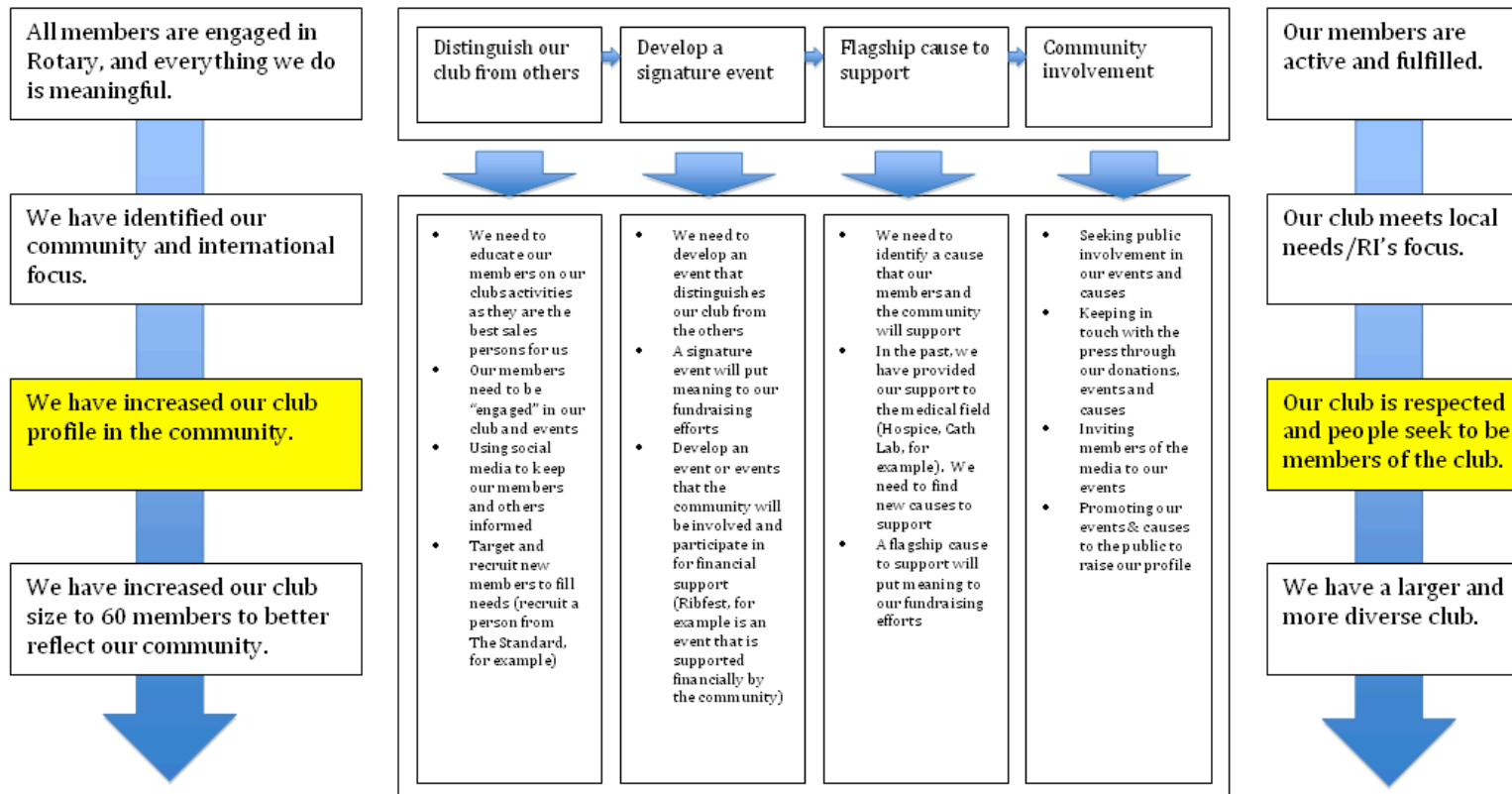
How do we increase our club profile in the community?

Implementation Structure

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Result



Rotary Club of St. Catharines South Strategic Plan

How do we increase our club size to 60 members to better reflect our community?

Implementation Structure

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Result

