

# 2015/16 Strategic Plan for the Rotary Club of Sidney by the Sea

## Where do we want to be?

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The club undertook a Future Vision exercise in February or 2013. Members were invited to express their thoughts about our club's attributes, and to identify what they thought should be our priorities in each of Rotary's areas of service. A committee was formed to develop a Mission Statement for the club based on the input received at the visioning session, and then to subsequently develop a multi-year strategy to make those priorities into realities. The resulting three year plan commencing in 2014/15 was updated during that year and extended to 2017/18 in this version.

The Mission statement was developed based on the type of profile club members wished our club to have in our local and global communities and on the priorities expressed for each of the different areas of service.



### OUR MISSION

*The Rotary Club of Sidney by the Sea is a dynamic and engaged volunteer service organization dedicated to taking a leadership role in meeting the needs of youth and seniors in our local community, and promoting health, literacy and economic self-sufficiency in communities in need around the world.*

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Club members clearly expressed a desire to have a higher profile for the club in the local community, to be seen as a respected and dynamic (and fun!) organization, and to have a focused approach to where we are choosing to place our efforts. In particular, club members placed great value on projects that serve youth and seniors locally, and promote the advancement of girls and women globally. We also want to be more proactive than we currently are in identifying the needs of our local community, and to be quicker to react effectively to humanitarian crises at home and abroad, club size, retention, recruitment and attributes

# Club size, retention, recruitment and attributes

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Members indicated that the ideal membership for our club should be somewhere between 50-60 members. Over the past three years current membership has oscillated between 46-51 members, with membership being skewed towards an older age range. The gender balance over the past few years (2/3 male, 1/3 female) is not reflective of our community. Most members have many years of service within Rotary.

Recruiting and retaining younger members is challenging, not because of a lack of service-mindedness among the younger demographic but rather because of the competing demands in terms of career demands and both the time and money involved in raising a young family.

The club will focus more on improving the indoctrination and education of new members through orientation chats, mentorship and assigning new members to committees upon joining. The club will resurrect fireside chats for current members.

The club will explore strategies to recruit younger members. To expand the diversity of membership the club will pursue corporate memberships as well as target specific occupations within the community.

## PLAN: Club size retention, recruitment and attributes

| Strategic Priority   | 2015-16  | 2016-17 | 2017-18 |
|--|--|---------|---------|
| Target for membership key local corporations and organizations from the community.   | Pursue corporate memberships.<br><br>ID and target niche occupations.  | Ongoing | Ongoing |
| Increase the diversity of club membership by developing recruitment and retention strategies that target both women and the under-45 age demographic.  | Expand use of social media to increase awareness of our club and its activities to aid in recruitment.<br><br>Investigate sponsoring an INTERACT club in a high school   | Ongoing | Ongoing |
| <p>Improve the coaching of new members, maintain the interest of current members and ascertain why members leave.</p> <p>Broaden the involvement of individual members in the activities and management of the club through the development and implementation of a succession/mentorship program.</p> | <p>Implement an orientation chat for prospective members.</p> <p>Revitalize fireside chats for existing members.</p> <p>Develop an exit interview to ascertain reasons for departure.</p> <p>Upon joining, assign all new members to a committee.</p> <p>Develop a leadership succession plan.</p> <p>Implement a mentorship program for new club members.</p> | Ongoing | Ongoing |

# Club activities & club administration

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Most club activities have fallen under the direction of the Club Administration umbrella. Club activities have included monthly socials, annual club events (installation, Christmas party and family breakfast, guest speakers, etc. Much of the coordination for these activities goes on in the background and often the workload associated with it is often not understood or appreciated. It continues to be difficult to recruit club members to take on the overall responsibility for this area of club management.

Succession planning is needed to ensure that every recurring project/initiative leader or committee chair has another club member working alongside them as an understudy. Some of the committees, such as membership, are understaffed. The club will attempt to have each club member involved with a committee. New members will be assigned to a committee when they join.

Key board positions are now vacant or will be vacant in 2016/17. The club needs to find a President Nominee for the 2015/16. We also need to succession plan 2016/17 replacements for the positions of treasurer and secretary.

Socials and meetings attended concerning club business will count as attendance. By diversifying the types of meetings we have, this may contribute to achieving a higher rate of attendance.

DLTA attendance will continue to be promoted, especially for new members and committee chairs.

A calendar that highlight key dates of social activities and major fundraisers for the next year will be developed to assist members in avoiding personal conflicts for key events.

This year marks the 20th anniversary for our club. A social will be planned for November and all former members will be invited to attend.

## PLAN: Club Activities and Club Administration

| Strategic Priority  | 2016-17  | 2017-18 | 2018-19 |
|---------------------|--|---------|---------|
| Member education    | <p>A minimum of 20% of membership attend DLTA. Club executive and new committee deputies attend DLTAs.</p> <p>Committee chairs consider appropriate times to educate members on key projects/issues that affect their portfolio and the club.</p> <p>Continue DLTA subsidy for first-time attendees and for members who must attend specific sessions on behalf of the club.</p> | Ongoing | Ongoing |
| Meeting attendance  | <p>Include attendance at social events and meetings as qualifying attendance.</p> <p>All members should be assisting in the search for interesting speakers.</p>   | Ongoing | Ongoing |
| Succession planning | Seek a President Nominee. Commence succession planning for Club treasurer and Secretary. Committee chairs develop a succession plan by identifying and coaching their future successors.   | Ongoing | Ongoing |
| Social activities   | <p>Maintain a minimum of one club social activity a month.</p> <p>Continue Pub nights, guess who's coming to dinner, the June Installation dinner, and Xmas breakfast and dinner.</p> <p>Hold a social in November to celebrate the 20th anniversary of our club. Invite all former members.</p>   | Ongoing | Ongoing |
| Club Calendar       | To permit personal planning, develop an event calendar that extends at least one year.   | Ongoing | Ongoing |

# Vocational service

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Concerning scholarships, the club has successfully approached Stelly's and Parklands' administrators to facilitate the identification of deserving students for scholarships. Scholarship candidates will be interviewed and assessed by a club committee. Scholarships of \$1,000 will be awarded to the most deserving candidate from each school based on merit. Trade school and university oriented candidates will be given equal opportunity. Scholarships will be given directly to the student. Successful candidates will be expected to attend a Rotary meeting with their parents to expand upon their achievements and ambitions.

Literacy projects will be revitalized. The executive will consider suggestions for worthy avenues and present them to the club.

## PLAN: Vocational service

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| Strategic Priority   | 2015-16   | 2016-17 | 2017-18 |
|--|---|---------|---------|
| Continue the club's focus on supporting youth in our community | <p>Select at least one student from both Parklands and Stelly's for a \$1,000 scholarship.</p> <p>Expand the sourcing of deserving local youth for RYLA and other opportunities from just the schools to include Cadet and other local youth organizations.</p> | Ongoing | Ongoing |
| Literacy   | Club executive to research and present a Literacy project to the club for approval.   | Ongoing | Ongoing |

# Community service

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Over the past couple of years, we have certainly seen a number of local and international disasters or emergency fundraising campaigns that club members were interested in supporting in one way or another but for which we had no organized and easily implemented means of reacting. A mechanism is needed to ensure that we can respond in a timely manner. This can be tied to Shelterbox as well as to other specific fundraisers.

The club has annually selected a worthy community project to serve as our prime focus for the year. The water spray park at Iroquois Park and funding the development of portions of the North Saanich Free Ride Bike Park were past successful community projects.

In 2013-14, the club chose the ORCCA Dental Society to be the focus of its fundraising efforts. Our club was a major contributor to the start-up. This clinic has now opened and is providing dental services to the children of low income local families. ORCCA will remain a key priority for 2015/2016 and will be the key organization we will headline for local support when we hold our Monte Carlo fundraiser in May 2016.

The club will continue to support the Panorama Play in the Park Program as well as the local Sea and Air Cadet organizations.

The club will continue to serve the community through sweat equity in such areas as staffing the Salvation Army Christmas kettles and carwashes benefiting the Sidney Lions Food Bank.

The club will examine funding another service dog, with a preference stated for a service dog that meets the needs of a military veteran.

The club will attempt to develop a mechanism to identify local hardship cases that require support.

Early in Rotary Year 2015/16 there will be a survey to proactively identify local community needs and determine the project the Club members feel passionately about having as the focus for the year and Monte Carlo.



## PLAN: Community service

| Strategic Priority   | 2015-16  | 2016-17                      | 2017-18                      |
|--|--|------------------------------|------------------------------|
| Be aware of and be able to respond to individual emergencies in the community. | Investigate a mechanism to identify local hardship situations (perhaps through Beacon Community services).<br>Create an emergency short-term response team.  | Ongoing                      | Ongoing                      |
| Invest in projects that meet community needs.                                  | Continue to work with the ORCCA Dental Society to implement the Oral Care for Children and Adolescents program.<br><br>Hold a club survey to identify community needs and develop a focus project for 2015/16 as well as other possible projects for future years. | Ongoing                      | Ongoing                      |
| Service dog project  | Initiate discussions with Service Dog organizations to fund a service dog for a local resident. All things being equal, priority should go to a veteran with a possible PTSD focus.  | Review and reassess criteria | Review and reassess criteria |
| Youth support  | Continue to support the Panorama Play in the Park program<br><br>Continue to support the local Air and Sea Cadet organizations.  | Ongoing                      | Ongoing                      |

# International service

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The top three International Service project areas of interest to members are Rotary Youth Exchange; the education of girls and women in developing nations; and micro-financing. Our club continues to support the Youth Exchange, although in recent years it has become very challenging to recruit students to participate (see “New Generations” later in this document), as well as families to host them.

During this past year the club has supported sanitation and health projects in Africa as well as the Thrive Malawi concert. Club members continue to express a desire to support Mercy Ships (which is now a strategic partner with Rotary International), but in what capacity is to be determined. Our positive relationship with this organization is strengthened by having the Executive Director of Mercy Ships Canada as a member of our club.

Several members are already privately involved in international micro-financing (through the KIVA organization), and this type of initiative dovetails very well with Rotary ideals and with our club’s mission statement. Members have expressed an interest in international opportunities for micro-financing. The club also has regularly budgeted funds for non-specified international projects, generally low-cost contributions to small projects often brought to our attention by guest speakers (primarily by other Rotarians) at our club. Many of our members also privately support the APU School for girls in Malawi. Many members also regularly provide sweat equity support to the Compassionate Resource Warehouse which regularly ships container-loads of medical and school equipment and supplies to the Third World.

The club will continue participation in micro-credit. The club will continue to support African projects as well as continue to support the Thrive Malawi event in the fall.

## PLAN: International service

| Strategic Priority                   | 2015-16   | 2016-17   | 2017-18  |
|--------------------------------------|---|---|--|
| Respond to international emergencies | Develop an emergency short-term fundraising mechanism/team.   | Ongoing   | Ongoing  |
| International micro-financing        | Evaluate success of initial micro-financing projects and if results are good, continue to use micro-credit as a tool in our international service.  | Consider expansion  | Ongoing  |
| Support international needs          | <p>Continue to support the APU School for girls and link with the Thrive Malawi fundraiser in the fall.</p> <p>Continue to support African health, literacy, infrastructure projects.</p> | Ongoing   | Ongoing  |
| Mercy ships                          | Research opportunities for both capital investment and support for Mercy Ships operations   | <p>Prepare Global Grant application for a Mercy Ships' project</p> <p>OR</p> <p>Implement a plan for a recruitment of a volunteer to be funded by the club.</p> | <p>Implement Global Grant</p> <p>OR</p> <p>Fund a volunteer on Mercy Ships</p> |

# Fundraising

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Fundraising has been a continual challenge for the club. The current focus is on one major fundraiser (Monte Carlo), with other smaller targeted events/fundraisers (WCS potlucks, car washes to benefit food bank, Thrifty Smile Cards, poinsettia sales, Saanich Fair. Our major fundraising events are evenly spread through the year ... May for Monte Carlo, the Labour Day weekend for the Saanich Fair and November for poinsettia sales.

The club will be participating in a greater Victoria Rotary fundraising effort that the Victoria club has organized. The goal is a significant improvement in food bank services in the region and has the potential to greatly increase the visibility of Rotary in the community. Following that program, the club will reassess the desirability of further collaborative efforts.

Many members are uncomfortable in promoting and selling tickets to our major fundraisers. The club is exploring the Gold Mine ... an additional initiative that has the potential to be largely self-sustaining with minimal but efficient effort required by the club membership to maintain.

This past year saw us cancel the Monte Carlo event. That cancellation had a significant impact on the budget and led to the reduction of donations to worthy causes as well as the need to eat into the club financial reserves.

The club will continue to hold the Monte Carlo event as a major annual fundraiser. The event will occur annually in May. The focus will be to make it more an event and less a high power fundraiser, letting attendance be a greater element of the fundraising. **Club members are encouraged to plan their vacation time around this event. The club expects that all members will make the effort to support this event through participation in the planning, the event execution or both. The committee required to plan the event will form at least 9 months prior and a critical path timeline will be drawn up.**

Where feasible and logical, the club will draw upon manpower to assist us in our efforts from organizations we support such as Cadets.

Our club will continue to assist the Sidney club with the operation of their games of chance at the Saanich Fall Fair. We will continue to operate and man the Ice Cream trailer at the fair. The intent is to continue to staff the trailer with youth volunteers and to dedicate funds raised through sales to Rotary programs that benefit youth both at home and abroad.

The club will partner with the Thrive Malawi fundraising event in the fall, using our portion of the proceeds for the APU School.

## PLAN: Fundraising

| Strategic Priority  | 2015-16  | 2016-17  | 2017-18 |
|---|--|--|---------|
| Planned annual major fundraising events   | Saanich fair - Labour day<br>Poinsettia Sales - November<br>Monte Carlo - May  | Asses existing fundraising activities and part of 2106 strategic planning.                                       | Ongoing |
| Planned annual minor fundraising events   | Thrifty card program<br>Car washes for the food bank<br>WCS potluck dinners<br>APU School/Thrive Malawi                                  | Asses existing fundraising activities and part of 2106 strategic planning.                                       | Ongoing |
| Obtain manpower assistance for fundraising  | Source organizations we support for labour at various events.  | Ongoing  | Ongoing |
| Develop new fundraisers that are self-sustaining year-to-year, with minimal effort required by club members to achieve fundraising goals. | Implement the "Gold Mine" lottery.<br>Explore new alternatives for fundraising.  | Conduct an assessment of the club's new fundraising initiatives to make an informed decision on continuing them. | Ongoing |
| Participate in joint fundraising efforts with other Greater Victoria Rotary clubs   | Participate in the Greater Victoria car raffle organized by the Rotary Club of Victoria.<br><br>Assess the desirability of future events | Ongoing  | Ongoing |

# Rotary Foundation

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One of the key obstacles to progress in achieving our club's goals in the Foundation is education. Although there have been many attempts made at educating members about the Foundation, many remain somewhat confused by what comes under the Foundation, how their donations get distributed and/or recognized, how Polio Plus relates to the Foundation, and what exactly IS a Paul Harris Fellowship!.

Rotary International recognizes education as an endemic club issue and is taking steps to improve communications beginning with the website, which has undergone significant revision. At the local level, the club will ensure that a briefing to the club will occur during the Foundation month.

There has been considerable debate within the club concerning the desirability of setting a goal for individual donations to the Foundation for club members. Some have proposed a goal of \$200 per member per year. Others have pointed out that some join the club to contribute sweat equity rather than cold, hard cash.

The club is attempting to expand membership to younger people in the community. Existing obstacles to recruitment and retention are the significant time and fiscal commitment to becoming a Rotary member. Therefore additional pressure throughout the year concerning expectations for additional donations to Rotary could be viewed as a demotivator for new members. Therefore the executive had decided that donations to the Foundation will remain an individual decision that will not be accompanied by "goal setting", but simply facilitated through annual education.

The club will attempt to hold two Foundation fundraising evenings per year. Proceeds from those events will be earmarked to EREY for attendees.

Members of the club who wish to use their personal Paul Harris points to assist other members to obtain a Paul Harris fellowship may do so. However, club points will not be used for that purpose.

Last year the club began to use the club's accumulated Paul Harris points to honour deserving non-club members in the community with Paul Harris Fellowships. This practice will continue.

## PLAN: Rotary foundation

| Strategic Priority                          | 2015-16   | 2016-17 | 2017-18 |
|---|---|---------|---------|
| Educate members about the Rotary Foundation | <p>Increase educational activities during Foundation month and at Foundation fundraising events.</p> <p>Recruit additional club members to the Foundation committee.</p> <p>Increase the number of members who participate in Foundation and Grants sessions at DLTA.</p> | Ongoing | Ongoing |
| Paul Harris Fellowships                     | <p>Utilize club points to award Paul Harris Fellowships to deserving non-Rotarian members of the local community</p> <p>Make the award part of an annual event.</p>   | Ongoing | Ongoing |
| Foundation Donations                        | <p>Educate members how to donate monthly through small automatic payments, and facilitate the set-up of this through one-on-one assistance in the process.</p> <p>Include as part of new member orientation.</p>  | Ongoing | Ongoing |
| Foundation Dinners                          | <p>Hold two Foundation dinners per year.</p> <p>The foundation chair will develop the process to ensure proceeds from the event will be earmarked to EREY for attendees</p>   | Ongoing | Ongoing |

# Public image

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Raising the profile of Rotary in our community was the major theme of the priorities members identified during the Visioning exercise two years ago. Those priorities remain. In particular, club goals include getting greater media coverage when we ask, increasing our presence in the Peninsula News Review and increasing Rotary signage in the community (targeting travellers).

The executive has increased and dedicated a budget for Public Image initiatives. The club is an active participant in the regional PR committee. One of the goals this year will be to attempt to get all Greater Victoria Rotary clubs to collaborate in creating a major events calendar. That would facilitate the scheduling of our own events in which we might desire other club participation/support.

The executive believes that the club would benefit from a higher profile. Increasing our visibility will require more use of social media (already in progress with the club's Facebook and Twitter accounts), exploring active electronic wall opportunities (e.g. such as is offered at Serious Coffee, etc., or advertising on the Star Cinema screens), expanding our database of sponsors and donors, using it more effectively, and ensuring that our donors and sponsors are recognized/acknowledged/stroked as often as possible (e.g. in articles and ads, Christmas cards, letters of thanks, discounted event tickets/corporate rates for events, etc.).

Our Sidney by the Sea ClubRunner page is not considered user-friendly or particularly appealing to outsiders. The club will attempt to get a feel for other club web page examples to see if there is a better mouse-trap out there.

The PR committee will require more members if these goals are to be realized.



## PLAN: Public image

| Strategic Priority             | 2015-16   | 2016-17 | 2017-18 |
|--------------------------------|---|---------|---------|
| Fund Public Image initiatives  | Maintain the dedicated budget for Public Image for the foreseeable future.<br>Feature club achievements on the screen at Star Cinema and Serious Coffee.      | Ongoing | Ongoing |
| Expand PR committee            | Increase the number of members assisting with the PR committee - particularly members who are skilled at social media.  | Ongoing | Ongoing |
| Improve our ClubRunner website | Find a better mouse-trap. Implement it. Access Rotoract help. Include social media tags. Keep the website current.  | Ongoing | Ongoing |
| Social Media                   | Increase the club's use of social media to raise the club's profile in the community and among acquaintances of club members.                                 | Ongoing | Ongoing |
| Media coverage                 | Develop an annual public image media strategy that is proactive and strategically linked to club projects.<br><br>Provide more media releases to local press. | Ongoing | Ongoing |

# New generations

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The top three New Generations project areas continue to be Youth Exchange, RYLA, and the Short-term youth exchange. A possibility for the future is a Rotoract club at Camosun.

Scholarships for youth are covered in the Vocational section of this plan.

While the club has been successful in recruiting participants for RYLA, Adventures in Citizenship (Ottawa and BC), Interact and Rotary Youth Exchange it has become more challenging each year. It is difficult to find champions for Rotary programs on the staffs at Parkland and Stelly's Secondary Schools. As a result, the club is looking towards other youth organizations such as cadets to source appropriate candidates for youth programs.

Our club is committed to continuing the annual youth exchange programs. However, there have also been challenges in recruiting new host families for RYE students.

The development of a critical path timeline is necessary so that all club members are aware of deadlines for the various Rotary youth programs.

Review, table and promulgate our Youth protection guidelines to ensure they are in accordance with Rotary regulations.

## PLAN: New generations

| Strategic Priority   | 2015-16   | 2016-17       | 2017-18       |
|--|---|---------------|---------------|
| Ensure the club compliance with youth protection guidelines  | Develop club policies to ensure they are in accordance with Rotary guidelines. Post them on our website.<br>Annually, the Executive shall approve the Club's approach to the necessary Abuse and Harassment Prevention Policy.  | Annual review | Annual review |
| Continue Youth Exchange, RYLA and Adventures in Citizenship (Ottawa and BC), and improve our recruitment process for students.           | Develop a youth "speakers' bureau" of former participants in Rotary youth leadership programs to speak to students as part of an enhanced student recruitment program.  | Ongoing       | Ongoing       |
| Strengthen the relationship with local schools.  | Investigate corporate memberships for Stelly's and Parklands.   | Ongoing       | Ongoing       |
| Lever the relationship with the youth organizations we currently support to benefit our selection process for the club's youth programs. | Expand recruitment for youth programs beyond the schools to include other youth organizations, such as Panorama and the Air and Sea cadets.<br>Determine the feasibility of working with Panorama Recreation as a strategic partner for youth-oriented projects, and develop multi-year project/program.  | Ongoing       | Ongoing       |
| Increase the visibility of youth programs.   | Develop and post on our website a summary of critical dates for nominations and selection of candidates for RYLA, Adventures in Citizenship and youth exchange.<br>Develop a short brochure for the youth programs we support. It would provide descriptions and key dates.<br>Notify the Parent Advisory Councils for Stelly's and Parklands of opportunities. | Ongoing       | Ongoing       |