

Rotary



Club of Cranbrook Sunrise



Strategic Plan 2015 to 2020





FROM THE CLUB EXECUTIVE

The members of the Rotary Club of Cranbrook Sunrise are a group of individuals from all walks of life who have a few things in common: they want to help make a world a better place for all people, they have unlimited ideas about how to achieve that ideal, they have great energy and enthusiasm for any project they take on, they share a spirit of camaraderie, they enjoy fellowship, and they like to have fun. This plan captures the collective thoughts of our club, where we have come from, where we want to go.

Much like a grain of sand in an oyster, the aim of this strategic plan is to provide the seed around which our club can grow. Just like the members in our club, this plan is dynamic and will change over the years. It will be our joint responsibility to ensure it remains relevant and true to our vision for the club.

By necessity, the strategic plan is relatively vague. The people called on to take the lead on individual objectives will need to recruit others to bring things into focus. While it may not sound exciting, work plans, budgets, timelines and regular progress reports will be vital to the plan's success. We call upon future executives to build the objectives into their annual plans and keep an eye on things.

We cannot tell for certain exactly what our club will look like in 2020, but when we achieve everything in this plan we know it will be something great.

Ursula Brigl
2014-15 President



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PURPOSE OF THE PLAN

Since it came into being, the Rotary Club of Cranbrook Sunrise has undertaken ambitious projects, engaged with youth, actively participated at the district level, and managed to have lots of fun while doing it. It has grown into a vibrant club that has grown rapidly, especially in the past 5 years. Through this growth, questions came up that made it clear that our club needed to spend some time thinking about its future so that we could remain a strong club.

Members provided insight into our club's current strengths and weaknesses; the opportunities of which it could take advantage; and potential threats that could hinder our efforts. The strategic planning committee also spent time researching the bigger picture—our community, other groups that impact what we do, and the overall Rotary framework.

This plan is the result of our collective thinking. It charts the course on which the club plans to head over the next 5 years by focusing on 5 strategic goals that will get achieved because the entire membership pitches into make things happen.

Strategic Goals

The fact-gathering process revealed five key areas of focus for the club to concentrate on over the next 5 years:

- ⚙ Welcoming new members
- ⚙ Undertaking projects and social activities
- ⚙ Increasing club visibility in the community
- ⚙ Enhancing communication
- ⚙ Planning effective succession



CLUB FOUNDATIONS

Mission

The Rotary Club of Cranbrook Sunrise strives to improve the lives of people within our community and throughout the world in a spirit of fellowship.



Vision for the Future

An active family united through service.

Values

The Rotary Club of Cranbrook Sunrise consists of individual members who have come together through a desire to provide *Service Above Self*. These are the values which underlay all we do:

- ⚙ Fellowship
We become actively involved in community and international service through our fellowship and talking with each other.
- ⚙ Active involvement in the community
We act as a catalyst for projects that add value and enhance our communities.
- ⚙ Commitment to service
We achieve camaraderie through doing projects.
- ⚙ Passion and fun
We always strive to exceed our own targets and have lots of fun doing it.



STRATEGIC ISSUES

Our Environment

The Rotary Club of Cranbrook Sunrise came into being in 1998, the second Rotary club in Cranbrook, BC. About 25,000 call Cranbrook and the surrounding area home and contribute to its diversified, service-centred economy.

The groups that most directly influence our club are:

- ⚙ Our members
- ⚙ Rotary District 5080
- ⚙ Rotary Club of Cranbrook
- ⚙ Rotary International
- ⚙ Residents of Cranbrook and the surrounding area
- ⚙ The Rotary Foundation

Strategic Issues

Club members offered their thoughts about our values, strengths and weakness, opportunities for development, and things that could hold us back. This, plus a review of the bigger picture, led to questions that this plan seeks to address:

- ⚙ How do we make new members feel welcome and included?
- ⚙ How can we make it easier for members to get the information they need to know about the club?
- ⚙ How do we increase our visibility in our community?
- ⚙ What projects and social activities do we undertake to keep existing members engaged?
- ⚙ How do we keep members from burning out?

To learn more about what's mentioned in this section, take a look at The Rotary Framework, The Big Picture and the SWOT Analysis in the appendices.



GOALS

Goals

- Welcoming new members
- Undertaking diverse projects and social activities
- Increasing club visibility in the community
- Enhancing communication
- Planning effective succession

How to Read the Goals

- | | |
|------------|--|
| Goal | What we want to achieve through the objectives. |
| Objectives | Specific, measurable, attainable, relevant and time-bound statements that lay out how we will go about achieving a goal. These will be evaluated and revised on a regular basis. |
| Tasks | The actual steps undertaken to make things happen. |
| Range | The time in which we actively work on an objective. |
| Lead | The position that makes sure work on the objective is on track, not necessarily the person doing the work. |



Timeline

All the goals and objectives are important. While it is tempting to try to do everything right away, we are more likely to achieve success when we focus on selected activities at certain times over the next 5 years.



WELCOMING NEW MEMBERS

Develop the role of the sponsor so they can help new members become part of the club

Tasks

- ⚙ Develop a list of responsibilities and guidelines for sponsors so they can better support new members.
- ⚙ Investigate establishing a mentorship program to provide additional support to new members and their sponsors.
- ⚙ Arrange the new member's vocational talk within 4 months of joining.

Range July 2015—June 2016

Lead Membership Chair

Fine-tune the new member induction process

Tasks

- ⚙ Make a new member induction a program.
- ⚙ The new member receives their name tag at their induction ceremony.
- ⚙ Ensure that the family of a new member gets invited to the induction ceremony.
- ⚙ Have the new member and sponsor act as greeters at the regular meeting the week following their induction.

Range July 2015—June 2016

Lead Membership Chair

Enhance the new member orientation package

Tasks

- ⚙ Finalize the club brochure that outlines current activities and projects.
- ⚙ Revise and standardize the new member registration form.
- ⚙ Conduct an annual review of the orientation package in the fall of every year

Range July 2015—June 2016

Lead Membership Chair

Strengthen the welcome process so new members can become actively involved in the club

Tasks

- ⚙ Enhance the membership committee's role in welcoming new members.
- ⚙ Encourage new members to sit at a different table each week.
- ⚙ Encourage committee chairs to invite new members to 'come join us' for a committee meeting to learn what it's all about.

Range July 2015—June 2016

Lead Membership Chair



UNDERTAKING DIVERSE PROJECTS AND SOCIAL ACTIVITIES

Build a membership founded in fellowship

Tasks

- ✿ Develop an outline of an all-member mentorship program in place.
- ✿ Revitalize the social activities committee.
- ✿ Promote a range of social activities on a regular basis.
- ✿ Coordinate joint social activities with the noon club.
- ✿ Reinstitute the Sunshine Committee.

Range April 2016—June 2017

Lead Community Services Chair

Advance local service projects that address the community's needs

Tasks

- ✿ Outline 3 or more of the community's needs.
- ✿ Identify at least 2 potential community projects.
- ✿ Revise the community projects assessment tool.
- ✿ Assess existing projects to determine their scope and impact in the community.
- ✿ Apply for District Designated Funds to support community projects.

Range September 2015—June 2015

Lead Community Services Chair

Outline and advance an international service project

Tasks

- ✿ Use RI resources, and club members, to research ideas for international projects.
- ✿ Develop an international projects assessment tool.
- ✿ Assess existing projects to identify opportunities and gaps.
- ✿ Select a new hands-on international project.
- ✿ Utilize Rotary Foundation grants to support international projects.

Range January 2016—March 2017

Lead International Service Chair

Create an overview of all club activities, projects and events

Tasks

- ✿ Create a master calendar that shows all of the club's projects and social activities throughout the year.
- ✿ Complete project summaries for all existing and past projects and activities.

Range July 2015—December 2015

Lead Vocational Service Chair



INCREASING VISIBILITY IN THE COMMUNITY

Participate in selected community events

Tasks

- ✿ Assess existing public awareness activities to determine their community impact.
- ✿ Develop further targeted public awareness activities to stage regularly during the year.
- ✿ Coordinate general Rotary awareness building activities with the noon club.

Range July 2015—June 2017

Lead Community Service Chair

Utilize a consistent image for our club at community events

Tasks

- ✿ Maintain the purchasing of official club shirts for all new members to wear when volunteering at events and activities.
- ✿ Create a club banner and portable sign that can be used at club community projects.

Range July—December 2015

Lead Community Service Chair

Develop a public relations strategy to coordinate local media coverage throughout the year

Tasks

- ✿ Create a master communication plan.
- ✿ Work with committees to ensure their media releases fit with the overall club public relations strategy.
- ✿ Increase the visibility of youth services and the scholarship program.

Range January 2016—June 2018

Lead Public Relations Chair

Redesign the public side of our website to make it easier for people to find out about what's going on

Tasks

- ✿ Create a social media committee.
- ✿ Assess what information should go on the public website.
- ✿ Post information about all community and international projects.
- ✿ Create a centralized location for public-interest forms.

Range July 2016—June 2019

Lead Website Chair

Construct a community giving plan

Tasks

- ✿ Establish a community giving committee.
- ✿ Refresh the community giving grants criteria and application form.
- ✿ Refine the application review process.
- ✿ Determine a budget for all community giving grants.

Range July 2015—June 2016

Lead Community Service Chair



ENHANCING COMMUNICATION

Convey information to club members in a timely manner

Tasks

- ✿ Create an internal club communication strategy that applies to the executive, service directors and committees.
- ✿ Provide regular updates throughout the year to the membership on the progress of strategic plan initiatives.
- ✿ Conduct an in-depth annual review of the strategic plan.

Range July 2015—June 2018

Lead President

Increase the visibility of our club's activities and connections to other clubs during weekly meetings

Tasks

- ✿ Build a mobile banner display cabinet.
- ✿ Display a project board that highlights current and upcoming events.
- ✿ Post an annual calendar of activities.
- ✿ Develop an effective club assembly meeting structure.

Range July 2016—June 2017

Lead President & PR Chair

Build a one-stop location online for all the club's documents

Tasks

- ✿ Acquire a secure cloud-based location for the club's documentation.
- ✿ Upload detailed committee information.
- ✿ Create an image archive.
- ✿ Build a searchable archive of *The Sunriser* editions.

Range January 2018—December 2019

Lead Website Chair





PLANNING EFFECTIVE SUCCESSION

Write job descriptions for all executives, directors and committee chairs

Tasks

- ✿ Identify tasks commonly done by executive members, service directors and committee chairs.
- ✿ Review RI documentation to determine possible gaps.
- ✿ Determine the average time commitment during the year, including periods of peak activity.
- ✿ Draft a job description for each position.

Range September 2015—June 2017

Lead Past President

Build a succession plan for all executive, director and committee positions

Tasks

- ✿ Strike a succession planning committee.
- ✿ Propose succession strategies for executive, service director and committee chair positions.
- ✿ Encourage individual committees to draft their own succession plan for positions other than the chair.

Range April 2016—August 2017

Lead Past President

Gather detailed fact sheets for all committees and club positions

Tasks

- ✿ Capture detailed information about committees.
- ✿ Align the information gathered with RI reporting requirements.
- ✿ Update committee information annually.

Range July 2015—August 2016

Lead Vocational Service Chair

Write the next strategic plan

Tasks

- ✿ Evaluate the effectiveness of the current strategic plan.
- ✿ Undertake a strategic planning process to draft the next plan.
- ✿ Adopt the next plan so it comes into effect as soon as the current plan expires.

Range July 2019—June 2020

Lead President



TIMELINE

This timeline shows when work on each objective is planned, based on equitable distribution of work over 5 years. This does not mean that work cannot start sooner if there is a member who wants to take something on right away.

Timing Key

❄ January to March

💧 April to June

☀ July to September

🌊 October to December

Objective	2015		2016		2017		2018		2019		2020	
	☀	🌊	❄	💧	☀	🌊	❄	💧	☀	🌊	❄	💧
Sponsors												
Induction												
Orientation												
Welcome												
Social												
Community												
International												
Overview												
Events												
Image												
PR Strategy												
Website												
Giving Plan												
Information												
Meetings												
One-Stop												
Job Descriptions												
Plan												
Fact Sheets												
Strategic Plan												



FINANCES

Future budgets need to be designed with the strategic plan in mind.

When doing this the president-elect and treasurer should consider the following points:

- ⚙ The club is accountable for all its projects, even if these have separate accounts.
- ⚙ Committees need to provide detailed budgets to integrate into the club's projects budget.
- ⚙ Show how money generated through fundraising supports specific projects and activities.
- ⚙ Use the structure provided by the RI goals to guide the budgeting process.
- ⚙ The success of the club's projects depends on the overall health of the club. A portion of any money raised through fundraising activities should be allocated to support club service activities. Ensure these are realistic, not token, amounts.
- ⚙ Many of the objectives in this plan have a financial impact. The exact amounts are not defined because the scope of the work will only become clear once work begins.
- ⚙ Review upcoming strategic objective tasks and estimate the funds to allocate towards these activities.
- ⚙ Gather additional information from objective leads on costs associated with implementation of specific tasks.
- ⚙ In the spring of each year, the president, president-elect and treasurer need to review the current budget to identify issues to consider during the next budget process.



STAYING ON TRACK

Evaluating Successes and Failures

- ⚙ This plan is not written in stone, it is a living document that will change over its lifetime.
- ⚙ The executive will review the entire plan annually in the spring so that the president-elect can move forward with the next phase when their term starts.
- ⚙ The outgoing executive will report to the membership on the strategic activities undertaken, what worked and what didn't.
- ⚙ Each objective will have specific measures and outcomes associated with it so we can assess how well we do:
 - Outputs
These are things we can count—how many riders registered in the Gran Fondo, how much money the film festival made, how many gifts were distributed for Angel Tree.
 - Outcomes
These are the stories of how projects impacted people's lives—youth exchange students sharing their stories, meeting a fellow Rotarian from another country at the District conference, the experience of putting a drop of polio vaccine in a child's mouth.



Appendices





THE BIG PICTURE

Rotary International is 1.2 million individuals in 34,000 clubs world-wide who have come together through a common desire to provide service to create a positive, lasting change within their community and the world.

Four-Way Test

Of the things we think, say or do:

1. Is it the TRUTH?
2. Is it FAIR to all concerned?
3. Will it build GOODWILL and BETTER FRIENDSHIPS?
4. Will it be BENEFICIAL to all concerned?

Five Avenues of Service

1. Community Service
2. Club Service
3. International Service
4. Vocational Service
5. Youth Service

Six Areas of Focus

1. Promoting Peace
2. Growing Local Economies
3. Fighting Disease
4. Saving Mothers and Children
5. Providing Clean Water
6. Supporting Education

Object of Rotary
To encourage and foster the ideal of service as a basis of worthy enterprise.

Environmental Scan

The Rotary Club of Cranbrook Sunrise is located in Cranbrook, a city located in the southeastern corner of British Columbia. It is part of the world-wide Rotary family.

Key Stakeholders

- ⚙ Rotary District 5080
- ⚙ Rotary International
- ⚙ The Rotary Foundation
- ⚙ Members and organizations in our community
- ⚙ Rotary Club of Cranbrook Sunrise (noon)

Club Snapshot

The Rotary Club of Cranbrook Sunrise consists of individuals who have come together to undertake a range of projects and activities at a local and international level to provide others with opportunities to expand their horizons and improve their lives.

- ⚙ Chartered in 1997
- ⚙ A society governed by a constitution and bylaws
- ⚙ Its members represent a broad spectrum of professions and ages, and come from the city and surrounding region
- ⚙ Members get involved through participation on the executive, as service directors, committee chairs, committee members, or take on specific roles

Community Snapshot

Population

Cranbrook – 19,319
 RDEK Area C – 6,434
 * 2011 Census

Economic Drivers

Public Sector

Education
 East Kootenay Regional Hospital
 College of the Rockies

Resources

Forestry

Services

Retail & Hospitality



THE ROTARY FRAMEWORK

Rotary International

- ⚙ There are 1.2 million Rotarians in 34,000 clubs worldwide. This network of clubs makes up Rotary International.
- ⚙ Rotary International's mandate is to support Rotary club members worldwide in their activities to serve the betterment of humanity.
- ⚙ Every member of a Rotary club is a member of RI and pays annual dues. RI provides resources, training and programs to help clubs run effectively.
- ⚙ The Rotary Foundation uses donations to fund projects by Rotarians and our partners in communities around the world.

Districts

- ⚙ Helps clubs connect to each other and access Rotary resources.
- ⚙ Our club is in District 5080, an international district with about 60 clubs located in BC, Idaho and Washington.

Zones

- ⚙ Districts are organized into 34 zones.
- ⚙ Each zone has about the same number of Rotarians.

Rotary is a group of individuals who have come together through a common desire to provide service to create a positive, lasting change within their community and the world.

Clubs

- ⚙ Every club shares a similar constitution and operates within the strictures of RI's constitution and bylaws.



SWOT ANALYSIS: STRENGTHS & WEAKNESSES

Strengths

FUN!	Welcoming to new/prospective members
Camaraderie	Tegucigalpa Market Children
Enthusiastic	Dedicated to the Rotary Foundation
Positive	Welcoming of international people
Friendly	District involvement with governors and committees
End Polio campaign	Rotary's long term international reputation
Fellowship	Youth Exchange
Active/hands-on	RYLA
Good work ethic	Support from everyone for international students
Caring/belonging	Excellent student program and involvement
Acceptance	Interact
Vibrant, booming	Sweetheart sponsorship
Teamwork	Scholarships
Meetings well organized	Flexibility in member involvement
Not many knife and forks	Angel Tree
Good programs	Community projects
Good Attendance	Sam Steele Days
Membership growth	Skilled members involved in other community areas
Diverse membership	Alco train restoration
Reputation in community	Film Festival provides quality to community
All try to live the 4-Way Test	Community Service in a quiet manner
Member volunteerism	Moir Park field house
Generous of time and money	Parks
Great members	Gran Fondo
Ethics & Values Program	Book sale
International projects	

Weaknesses

Place of meeting	Not enough input from membership
7:00 am start time	Time lapse for new member inductions
Attendance reporting	Attendance at youth events is not strong
Book sale	No process to select the president-elect
Care for those in club	More philanthropy at international level
Too many jokers in 50/50	Spouse/partner/children involvement is low
Greeter at door is needed	Loss of small scale projects
Too few activists, too much process, too	More community service projects to help
Succession + transition from person to	More participation of members on smaller
Growing too fast	Investigate Rotary club organization
High average age	Breakfast – quality of food/lack of diversity
Promotion of club	Over emphasis on student exchange program
Low PI profile	Better orientation for new members
Poor use of DDF funds	Costs for club
Clarity of who is doing what	Need to display banners from other clubs
Need to highlight the many positives	Lack of documentation of committee/director
More fellowship	New project needed
Need international project	More people to do morning smile
Planning strategic	Too much of a corporate structure
Community service	Financial transparency on projects
Continuity of leadership	Recognizing guests at our meeting
Low interaction out of club/Low	Need more member-led morning agenda/
Rotation of project chairman	Use of microphone is cumbersome
Partnership with Noon club	Inclusion: especially new members
Lack of communication between board and membership/info from executive meetings	Running out of time at meetings for people who need to go to work



Opportunities

Assign 2 mentors (other than the sponsor) to new members	Encourage existing and new members to rotate tables
Word-of-mouth	Community projects
Have a greeter – perhaps this is a new member's first duty	Chamber of Commerce, Downtown Business Association
Engage whole club with a new member	Fireside chat
Invite member's family (to induction?)	Mentors for new and existing members
Have name tag ready at induction	Join Rotary noon club socials
New member give classification talk soon after joining	Local philanthropic projects (Salvation Army men's shelter)
Give them a meaningful token/gift	Ask people personally to get involved
Standardize the registration form	More variety of social events
Have a sponsor's list of responsibilities	Variety of long and short-term projects
Project board at morning meetings	Local and international projects
Ride-sharing to events and/or meetings	Set how funds are allocated to various projects
Copy of strategic plan to each member	More/regular social events
Follow-up by members	Ask new members to host informal social evening
Business meeting reports by committees	Christmas party
Cloud-based storage for documents	Summer event
Some announcements while people eat breakfast	Term limits for committee and executive positions
Website – updates	Connect with noon club
Demonstrate how to use the website	Learning, doing, mentoring
Newsletter – include links to website	2 or 3 year terms
Make sure everyone gets <i>The Sunriser</i>	Strategic plan
Programs about club projects	Committee manuals

SWOT ANALYSIS: OPPORTUNITIES & THREATS

Facebook page	Vice-chairs for committees
Email	Larger multi-member committees
Birthdays and anniversaries once a month	Organizational chart
Float	Committee chair mentors next chair
Signage at all events	Keep committee meeting notes
Sponsor community events	Everyone pitches in
Newspaper articles – SNAPD, Thursday Townsman, eKnow, etc./Media coverage	Have a process for recruiting new committee/executive members
T-shirts	Reporting to membership

Threats

Acronyms	Some people don't want to go alone
Find their own jobs	Hesitancy
Shyness	Finding an activity for all
Overwhelmed	Doing the same thing, not moving forward
Lack of interest	Spread the work around
Status quo	Not following strategic plan
Lack of engagement	Burnout
Acronyms	Chaos
Website inscrutable	Things missed because not documented
Not doing anything people who are not computer savvy	Wasted time
Facebook is passé	Lack of interest
Not working more with the noon club	Too much responsibility for new member
Not tooting our own horn	Tradition
Non-action	One-man committees
Wrong message	



CLUB STRUCTURE AND POSITIONS

Executive Positions

President (1 year)	President—Nominee (1 year)
Treasurer (1 year, renewable)	President—Elect (1 year)
Secretary (1 year, renewable)	Past President (1 year)

Executive Meetings

The president sets the date and time for these monthly meetings.

Regular Attendees

President, President-elect, Secretary, Treasurer (may submit a report), Service directors, Foundation chair

Any member of our Rotary club can attend an executive meeting, but agenda items come from members and committee directors.

Committees

The work of the club is divided into 5 areas of service, overseen by a director, under which the work of individual committees happens. Depending on the project, committees can range in size from two individuals to many people.

The chart below lists some of the positions, projects and activities undertaken by the club in each of the avenues of service. It is not meant to be a comprehensive list.

Club Service

- ⚙ Public relations
- ⚙ Social activities
- ⚙ Rotary Foundation
- ⚙ Sergeant-at-Arms
- ⚙ *The Sunriser* bulletin
- ⚙ Website
- ⚙ Weekly meeting organization
- ⚙ Weekly programs

Community Service

- ⚙ Adopt-a-Highway
- ⚙ Train restoration*
- ⚙ Angel Tree
- ⚙ Book sale
- ⚙ Film series & festival
- ⚙ Gran Fondo
- ⚙ Moir Park fieldhouse*
- ⚙ Rotarians at Work community clean-up
- ⚙ Sam Steele concession

International Service

- ⚙ Books to South Africa*
- ⚙ End Polio Now campaign support
- ⚙ Kiva Dollars
- ⚙ Medical equipment
- ⚙ Shelterbox

Vocational Service

- ⚙ Classification talks
- ⚙ Scholarships—ambassadorial, Pat Casey Memorial, general
- ⚙ Values and ethics program

Youth Service

- ⚙ Rotaract/Interact sponsorship*
- ⚙ Rotary Youth Leadership Exchange
- ⚙ Youth Ambassador program (Sweethearts)
- ⚙ Youth Exchange

* indicates a completed project



THE ROTARY YEAR

This calendar shows only key administrative and reporting activities throughout the Rotary year, which runs from July to June. This is to provide an overview of the basic functions that need to happen in a given year to assure the continued existence of the club. That is why it does not include any club projects, activities or social events.

July Start of Rotary year First semi-annual dues payment Executive meeting	August Executive meeting	September Executive meeting Club assembly	October Executive meeting
November Executive meeting	December Remit donations to the Rotary Foundation Club assembly Executive meeting	January Second semi-annual dues payment Executive meeting	February Executive meeting President Elect Training Seminar (PETS) - <i>could also be in March</i>
March Club assembly Executive meeting Plan next year's goals and budget	April Executive meeting Plan next year's goals and budget	May Remit donations to the Rotary Foundation Plan next year's goals and budget Executive meeting	June Ratify goals and budget Installation night for incoming executives and service directors Annual general meeting Executive meeting