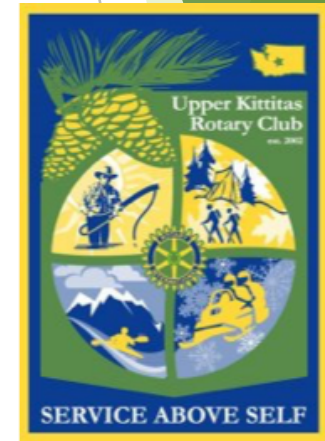


# Upper Kittitas County Rotary Club

Strategic Visioning Summary and Five-Year Plan  
2016/17 to 2020/21

Member Survey November 2015

Club Visioning Session November 19, 2015



## Mission Statement:

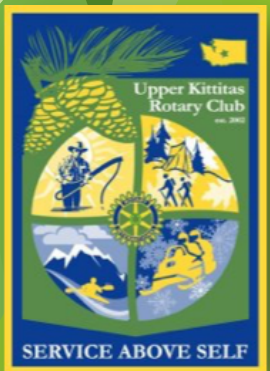
Enhancing communities and citizens, both in Upper Kittitas County and abroad, while inspiring our youth through service projects.

## Vision Statement:

We accomplish our mission as a fun, energetic group of civic-minded individuals who embrace every opportunity to educate through scholarships and financial support.

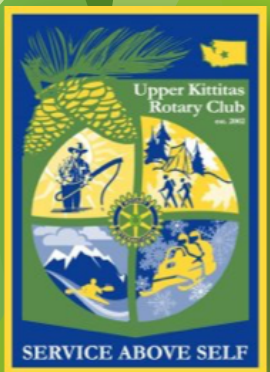
We recognize our community members who share in our passion for service and exhibit the Rotarian "Four-Way Test."

We reach our goals one service project, one scholarship, one fundraiser at a time.



# Why Is Long Range Plan Needed?

- ▶ A vision without implementation is largely a waste of time
- ▶ Tradition of annual cycles is not effective
- ▶ Provides continuity and consistency for five-year club priorities
- ▶ Allows club to be proactive in direction, not reactive
- ▶ Develops consensus among members about club direction
- ▶ Encourages new leaders to step forward



# Rotary Visioning Questionnaire

November 2015: 17 Respondents

## Key Observations

- ▶ Positive about member diversity, keeping members, and developing district leaders. Less certain about orientation/mentoring of new members, member engagement
- ▶ Very positive about weekly meetings and comfortable with amount of club information provided
- ▶ Potential for more career and vocational mentoring
- ▶ Positive about club's direction in Community and Youth Service
- ▶ Generally positive about International Service
- ▶ Members supportive of The Rotary Foundation direction, positive about fundraising and gifting

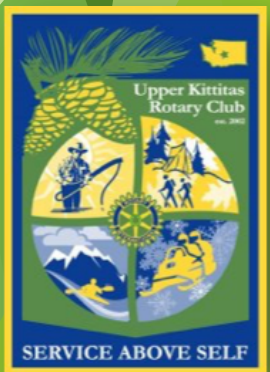
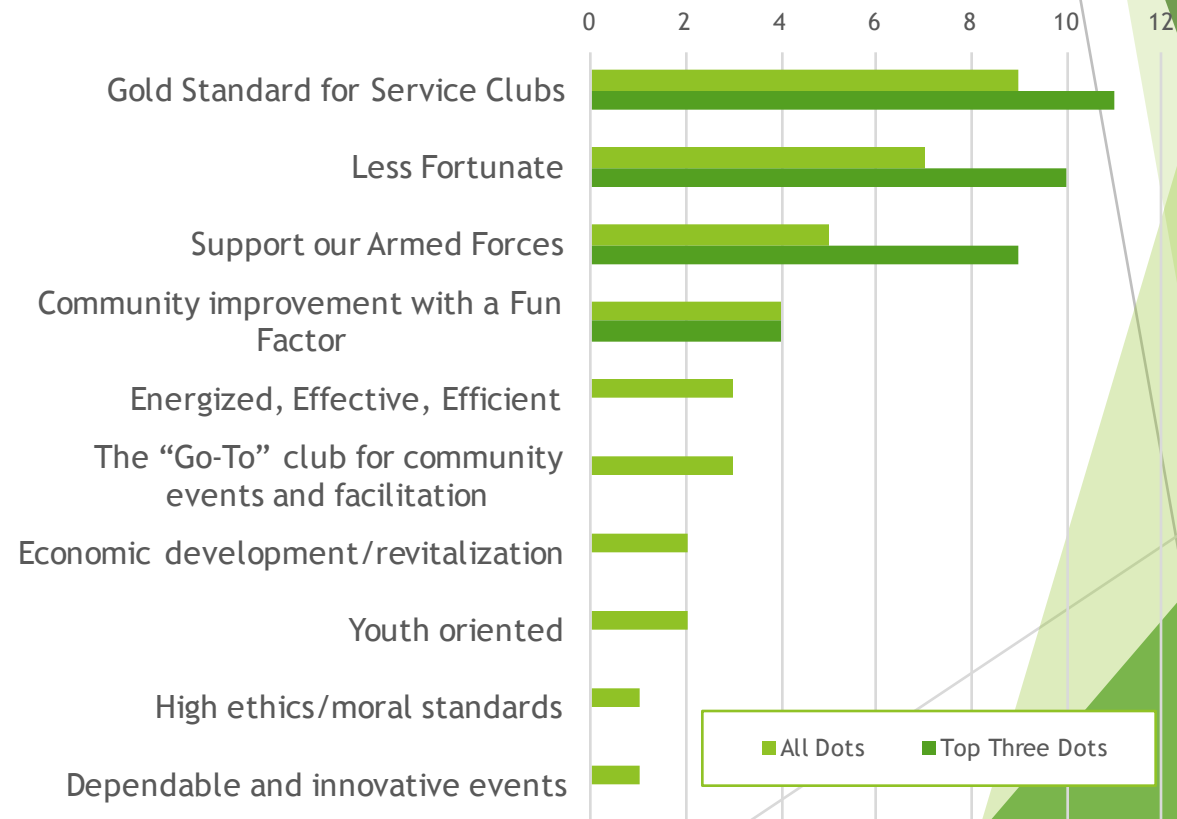


# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

1. The “Gold Standard” for service clubs in our area
2. Support for the less fortunate

### What Does Club Stand For In Your Community? (How Others See Us)

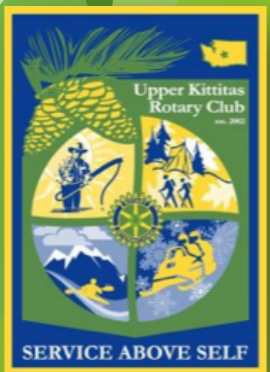
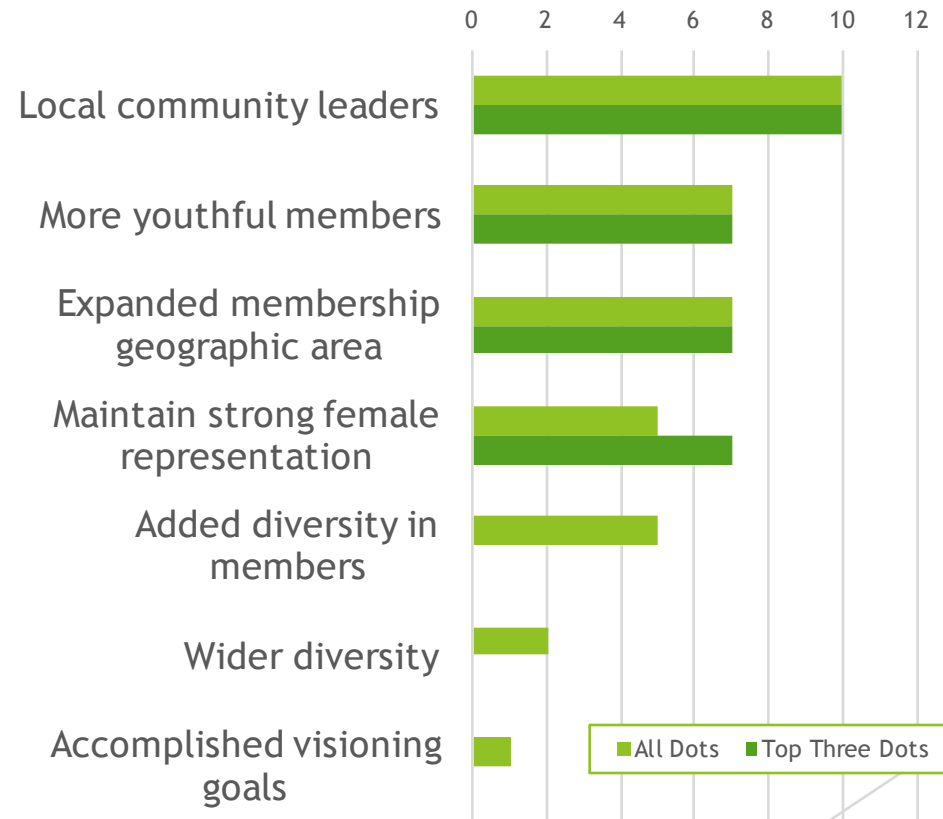


# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

1. We have around 45-50 engaged members
2. We are a group of community leaders
3. We have attracted an increased number of “younger” members
4. Increased membership and geographical area served by our club

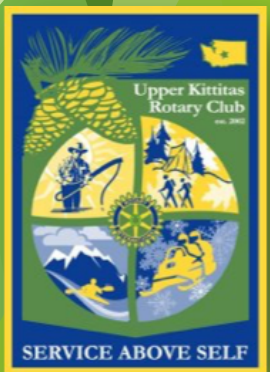
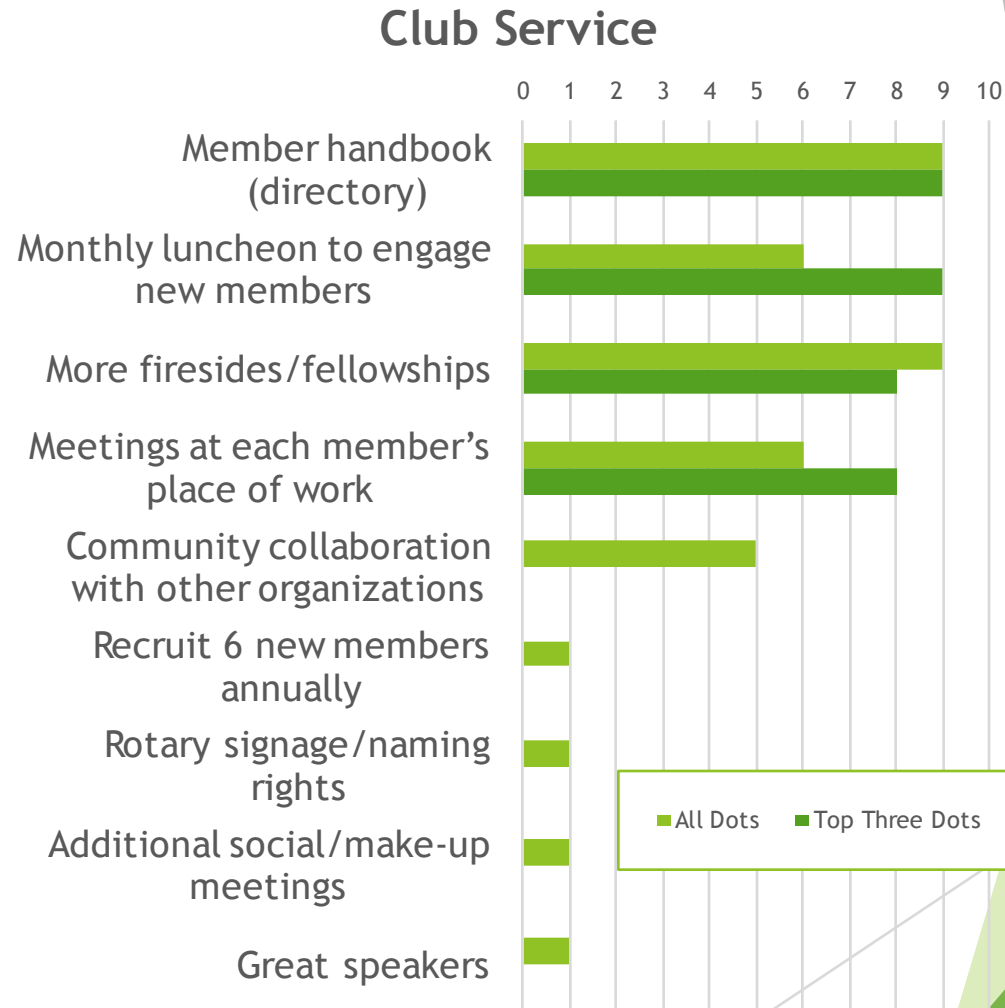
### What Are Our Club's Attributes (Characteristics, Features, or Demographics)



# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

1. Monthly luncheon to attract new members
2. More “fireside” and fellowship events
3. We have distributed a handbook and membership directory
4. Meetings are held at each member’s place of work

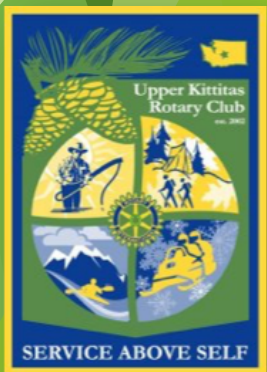
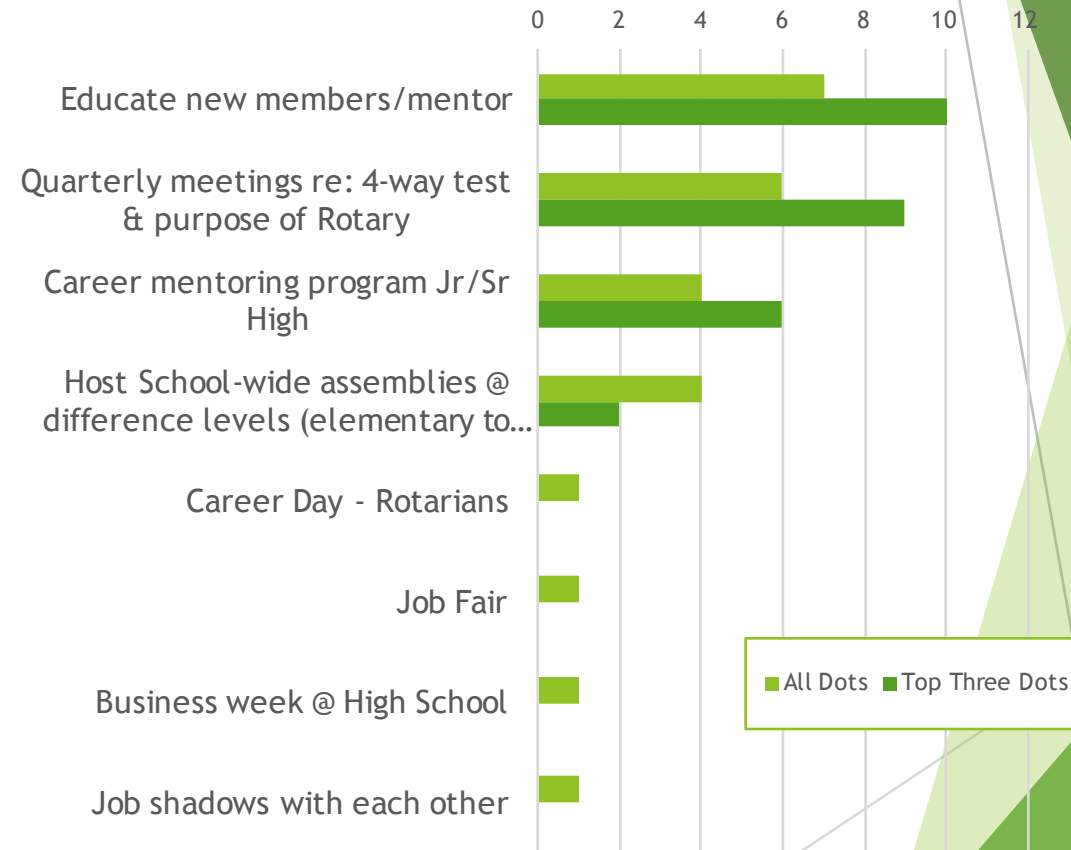


# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

1. We have quarterly meetings to focus on the purpose and Object of Rotary including the 4-Way Test
2. We have a program to mentor new members and inform them about Rotary and Vocational Service
3. We are carrying out a career mentoring program for Junior and Senior High School Students

### Vocational Service



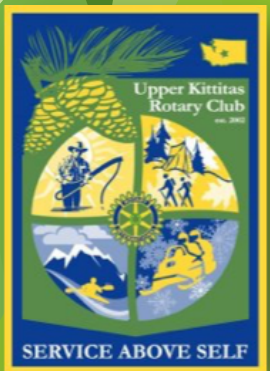
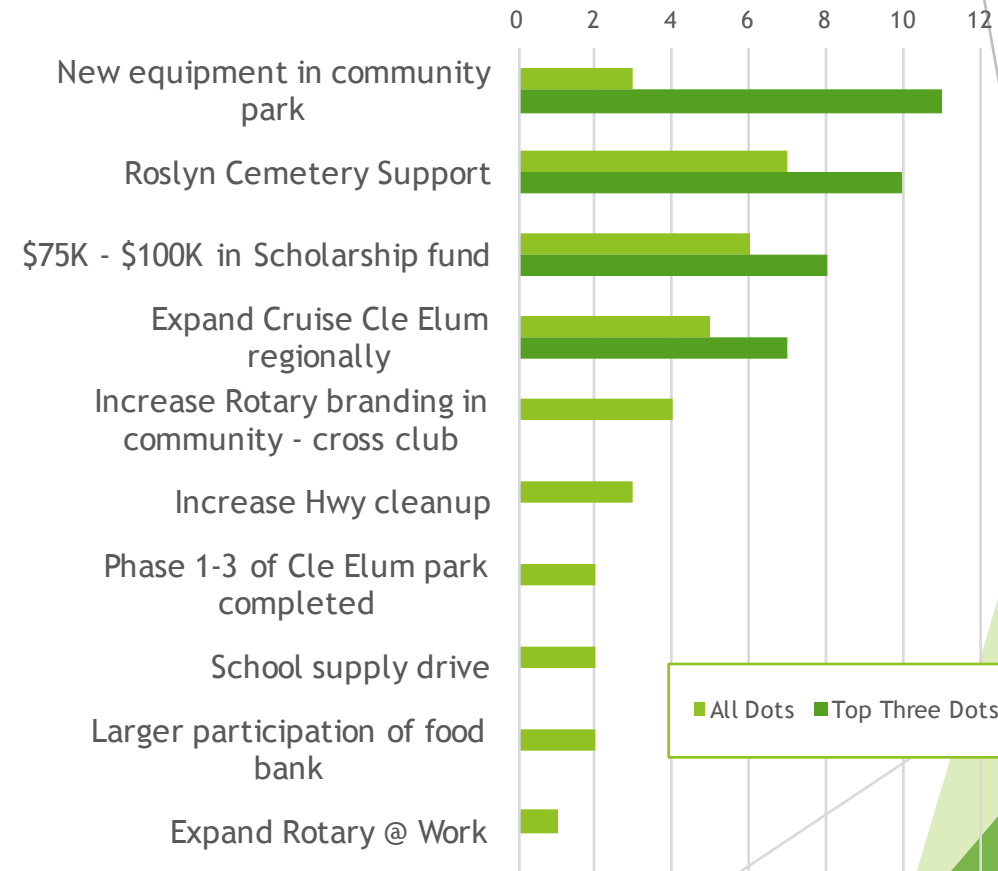


# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

1. We have expanded the “Cruise Cle Elum” event regionwide
2. Scholarship fund has reached \$75-\$100k
3. New equipment has been purchased and installed in Community Park
4. We are active supporters of Roslyn Cemetery

## Community Service

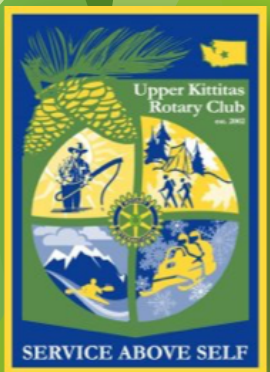
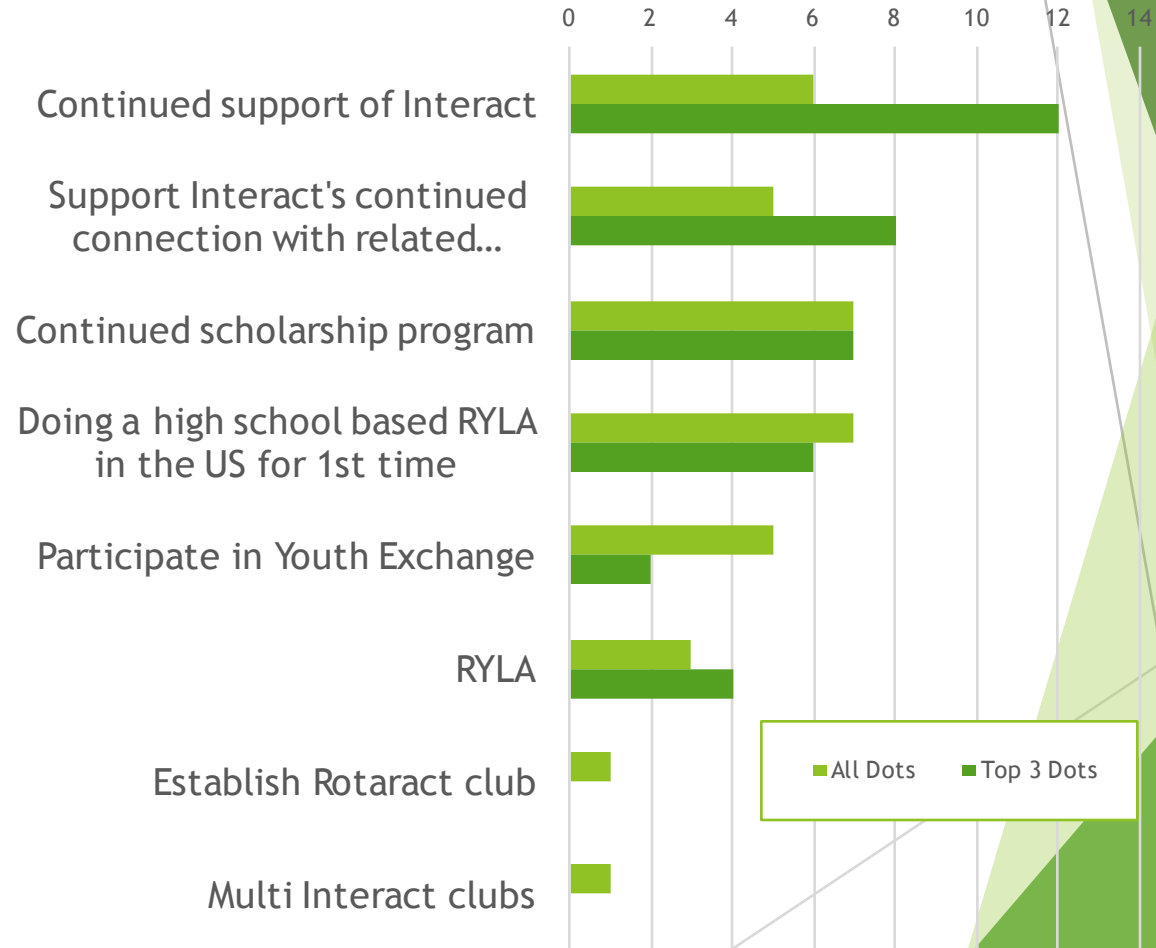


# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

1. We actively support Interact and continued growth/coordination with related initiatives
2. Capability built to manage scholarship program growth and donor expectations
3. Actively promote RYLA in the WA portion of our district

### Youth Avenue of Service

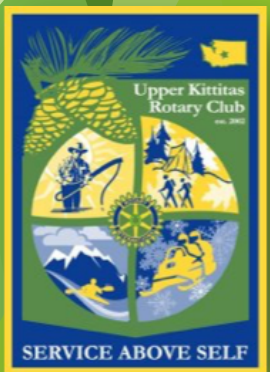
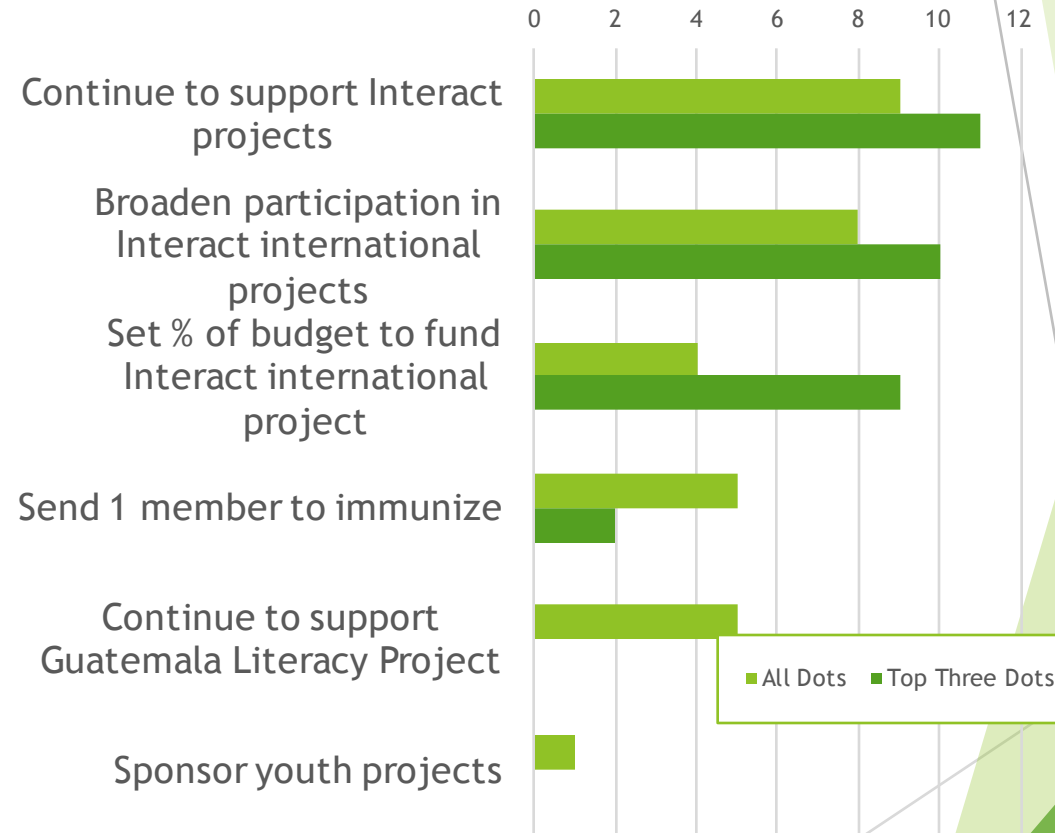


# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

1. Actively support Interact's international service projects
2. Have set aside a percentage of our club budget to support Interact international service projects

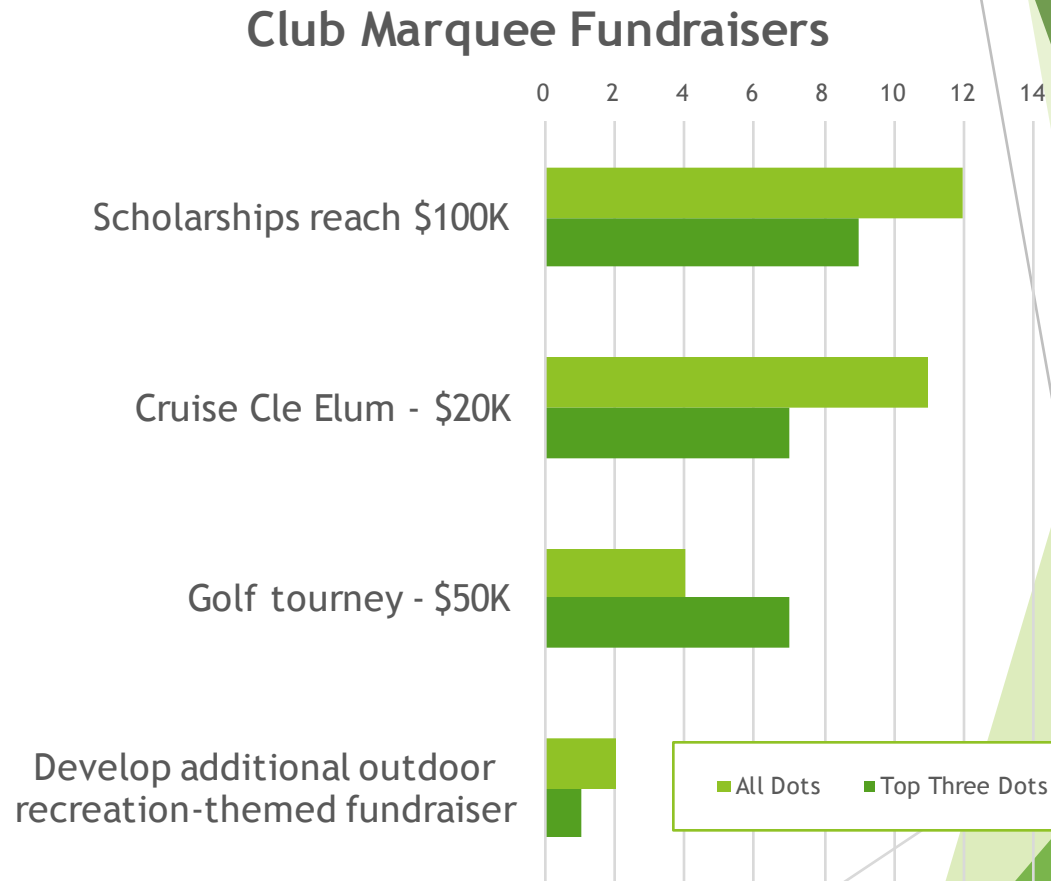
### International Avenue of Service



# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

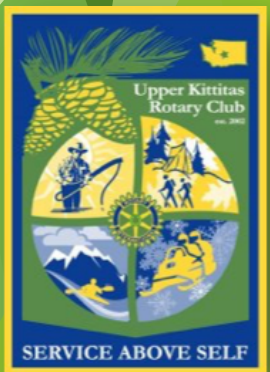
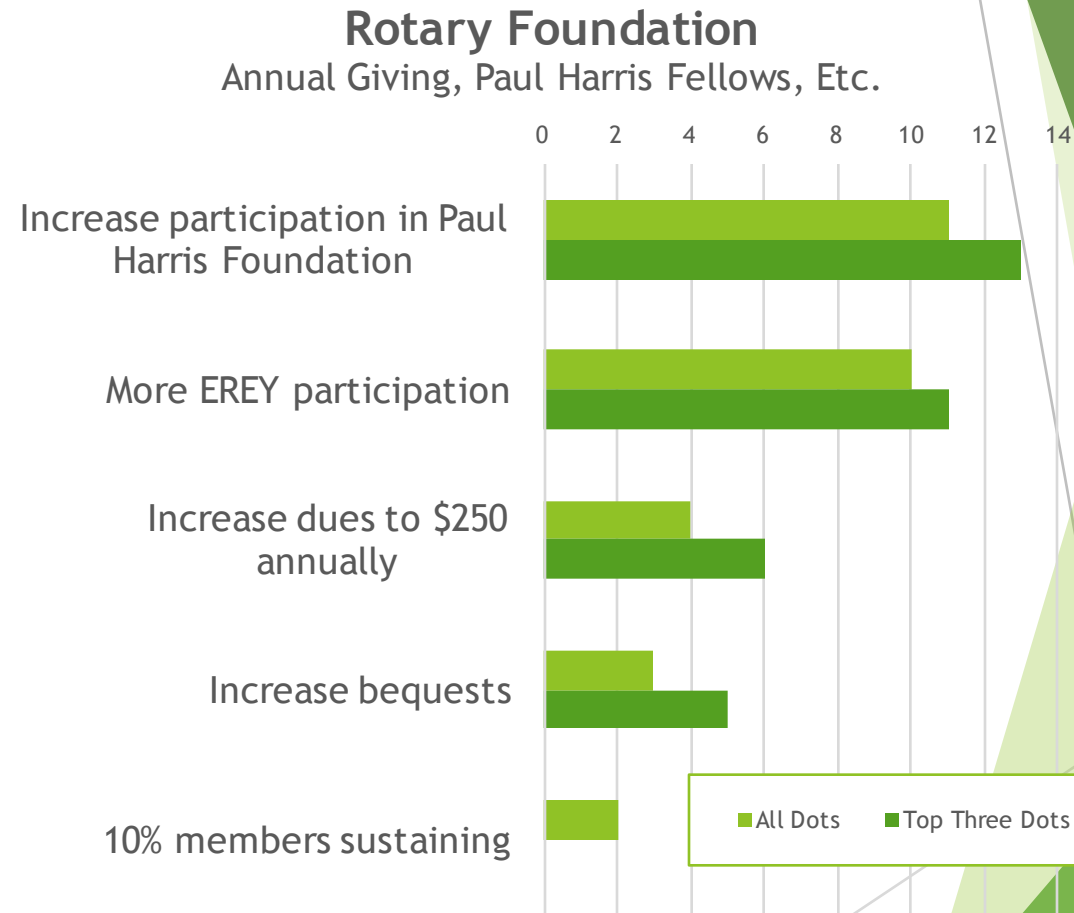
1. Scholarship program grows to \$100k
2. Golf Tournament raises \$50k annually
3. Cruise Cle Elum raises \$20k annually
4. Add outdoor recreation-themed fundraiser



# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

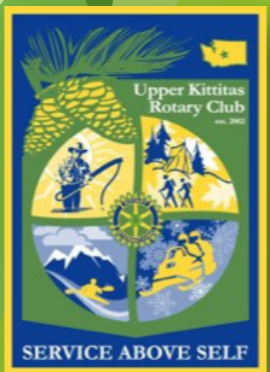
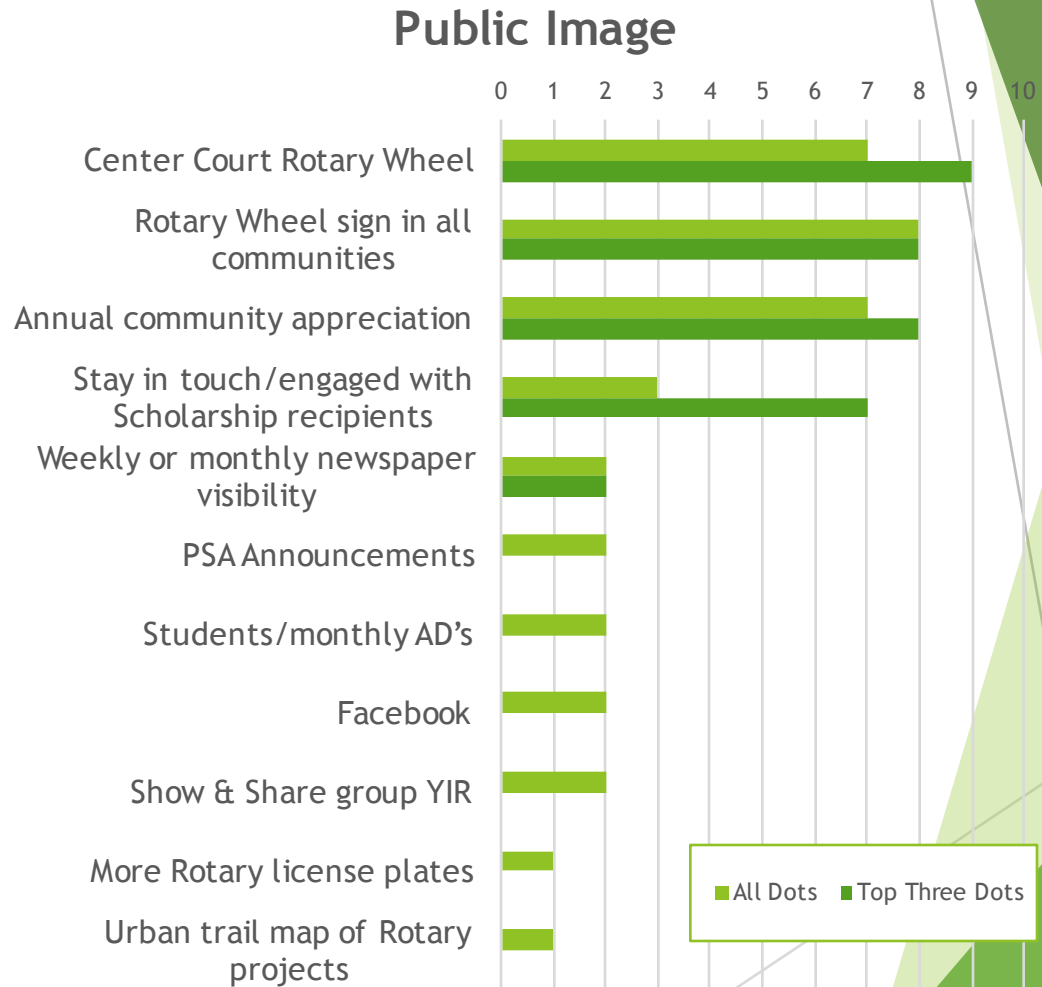
1. Great participation in “Every Rotarian Every Year” club dues
2. Club dues increased to \$250/year annually
3. Increase % of members who are Paul Harris Fellows
4. Members have made bequests to Rotary Foundation (legacy gifting program launched)



# Visioning: What Has Our Club Accomplished in 2020?

## Takeaways

1. Implementing a plan to “Stay In Touch/Engaged” with youths in our community
2. Prominent Rotary Wheel signs in our community
3. Rotary Wheel located at “Center Court”
4. Annual event to show our appreciation to our supporting communities



# Visioning: What Has Our Club Accomplished in 2020?

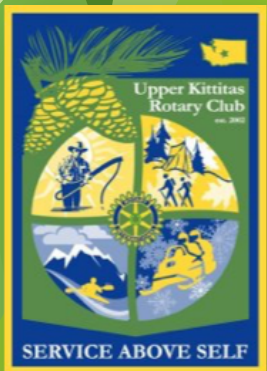
## Takeaways

1. Every member is an active participant in a committee
2. Each committee has a co-chair to facilitate leadership growth, continuity, and succession
3. Have an active program to attract new members



# 30 Distinct Projects Identified

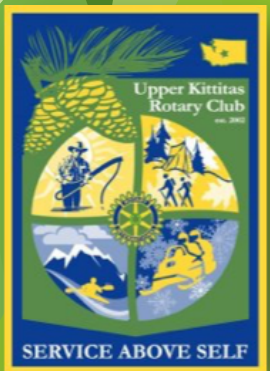
1. Launch monthly luncheon to attract new members
2. Increase number of “fireside” and fellowship events
3. Publish a handbook and membership directory
4. Hold meetings at each member’s place of work
5. Start quarterly meetings to focus on the purpose and Object of Rotary including the 4-Way Test
6. Launch program to mentor new members and inform them about Rotary and Vocational Service
7. Launch career mentoring program for Junior and Senior High School Students
8. Expand “Cruise Cle Elum” event regionwide
9. Scholarship fund has reached \$100k annually, legacy gifting program implemented
10. Fund and install new equipment in Community Park
11. Build support of Roslyn Cemetery projects
12. Support Interact through continued linkage with related experiences
13. Actively promote RYLA in the WA portion of our district
14. Actively support Interact’s international service projects
15. Set aside a percentage of our club budget for Interact international service projects
16. Expand Rotary member participation in Interact international projects
17. Golf Tournament raises \$50k annually
18. Cruise Cle Elum raises \$20k annually
19. Add outdoor recreation-themed fundraiser
20. Boost participation in “Every Rotarian Every Year” club dues
21. Increase Club dues to \$250/year
22. Grow Paul Harris Fellow participation among members
23. Launch member legacy gifting program for Rotary Foundation
24. Mentorship/stay connected with scholarship recipients
25. Fund and install prominent Rotary Wheel signs in our community
26. Rotary Wheel installed and located at center court of Community Park
27. Launch annual event to show our appreciation to our supporting communities
28. Increase engagement so that every member is an active participant in a committee
29. Each committee has a co-chair to facilitate leadership growth, continuity, and succession
30. Launch active new membership program to attract new members, ensure diversity





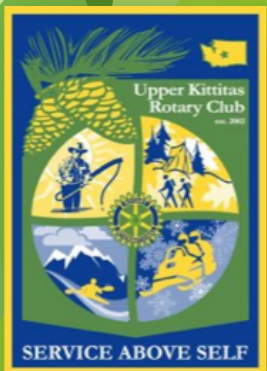
# How Do We Set Priorities?

- ▶ We know what is and isn't working
- ▶ We know what outside influences help and hurt us
- ▶ We have five years to get there



# SWOT Analysis

	Helpful to Achieve Goals	Harmful to Achieve Goals
Internal Driven	<b>STRENGTHS</b> <ul style="list-style-type: none"><li>■ Vibrant membership, passion for service</li><li>■ Successful community projects, positive awareness</li><li>■ Recognized Interact program</li><li>■ Scholarship program, other marquee fundraiser upside</li></ul>	<b>WEAKNESSES</b> <ul style="list-style-type: none"><li>■ Underdeveloped leadership succession and new member onboarding</li><li>■ Engagement narrowed to small few</li><li>■ Challenge executing 30 priorities and fundamentals</li></ul>
Externally Driven	<b>OPPORTUNITIES</b> <ul style="list-style-type: none"><li>■ Growing community as source for new member recruitment and engagement</li><li>■ Credibility as youth program advocate</li></ul>	<b>THREATS</b> <ul style="list-style-type: none"><li>■ Economically depressed area, family and business hardships</li><li>■ Second-home ownership dominates, inhibits capacity for involvement</li><li>■ Balance local needs with Rotary Foundation priorities</li></ul>



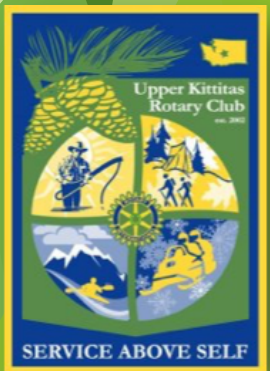
# Virtuous Circle

Engaged members ensure  
successful fundraising  
outcomes

...Which fund vibrant  
programs

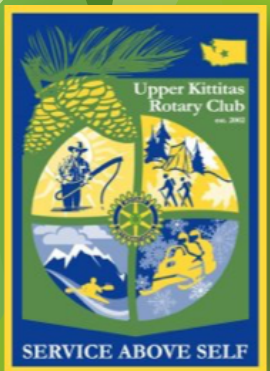
...Which build visibility  
and credibility

...Which attract new  
members!



# Key Questions

1. How can we best leverage our core strengths of engaging youths (through Interact and scholarship programs) to build careers, overcome economic hardship, and grow opportunity for young adults?
2. How can our Club build membership growth, increase engagement among current members, and ensure a succession of leadership?
3. How can we balance our priorities and where can we focus our strengths and capabilities for the best local impact in the next five years?



# Upper Kittitas County Rotary Club

## Mission Statement:

Enhancing communities and **citizens**, both in Upper Kittitas County and **abroad**, while inspiring our youth through service projects.

## Vision Statement:

We accomplish our mission as a fun, energetic group of **civic-minded** individuals who embrace every opportunity to educate through scholarships and financial support. We recognize our community members who share in our passion for service and exhibit the Rotarian "Four-Way Test." We reach our goals one service project, one scholarship, one fundraiser at a time.

## Key Questions:

*How can we best leverage our core strength of engaging youths to build careers, overcome economic hardship, and grow opportunity for young adults?*

*How can we **balance our priorities** and where can we focus our strengths and capabilities for the best local impact in the next five years?*

*How can our Club sustain membership growth, **increase engagement** among current members, and ensure a **succession of leadership talent**?*

## Objectives:

### Leveraging Youth Program Capability

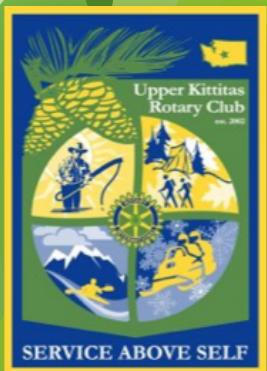
- Expand Interact program
- Develop capability to manage Scholarship Program growth, add legacy gifting
- Add on RYLA, expand club participation in Interact international experiences

### Executing With Excellence

- Implement five-year plan for implementation, layering on new programs with new capacity and capability
- Measure outcomes and track progress

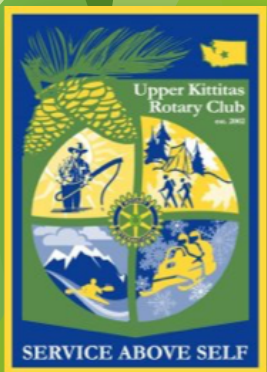
### Building Club Engagement and Talent

- Membership growth as a shared accountability among all club members
- New member onboarding and education programs
- Succession planning and project leadership development



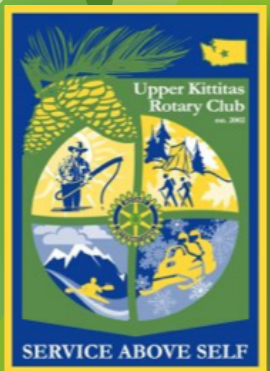
Accountability	Fiscal Year Ending June 31				
	2016/17	2017/18	2018/19	2016/18	2017/19
<b>Leveraging Youth Program Capability</b>					
Fund and implement annual Interact international service project					
Implement Scholarship legacy gifting program, endowment fund					
Formalize program to mentor/stay in touch with scholarship recipients					
Launch career mentoring program for Junior, Senior High School Students					
Fund, purchase, and install new equipment in Community Park		Fund	Install		
Actively promote RYLA in the WA portion of our district					
<b>Executing With Excellence</b>					
Launch quarterly board review of plan status, gaps, progress					
Reach \$100k in annual Scholarship Funds raised	\$70k	\$75k	\$80k	\$90k	\$100k
Golf Tournament raises \$50k annually	\$10k	\$20k	\$30k	\$40k	\$50k
Cruise Cle Elum raises \$20k annually	\$10k	\$12k	\$15k	\$17k	\$20k
Expand "Cruise Cle Elum" event regionwide					
Set aside club budget item for Interact international service project					
Fund and complete Interact international project annually					
Build participation in Roslyn Cemetery projects					
Fund and install prominent Rotary Wheel signs in our community					
Locate Rotary wheel at Community Park Center Court					
Local media visibility for Club	Monthly		Bi-Weekly		
Launch annual event to show our appreciation to our supporting communities					
<b>Building Club Engagement and Talent</b>					
Launch new membership program to attract new members, ensure diversity					
Start quarterly meetings to focus on Object of Rotary, 4-Way Test					
Launch monthly luncheon to attract new members					
Launch new member mentoring program					
Increase number of "fireside" and fellowship events					
Publish a club handbook and membership directory					
Hold meetings at each member's place of work					
45 actively engaged members	15	20	28	35	45
Increase engagement so every member is active participant in a committee					
Each committee has co-chair to build leadership, continuity, and succession					
Increase Club dues to \$250/year (about +9%/year)	\$175	\$190	\$200	\$225	\$250
Grow Paul Harris Fellow participation to 33% of members	15%	20%	25%	30%	33%
Launch member legacy gifting program for our club's Foundation					

DRAFT Gantt Chart



# Next Steps

- ▶ Vision Champions Judy Hallisey, Bev Ganyea confirmed (Jan 31)
- ▶ Board and Vision Champions review accountabilities for completeness, measurability and confirm with Board (Jan 31)
- ▶ Vision Champions identify project leaders, accountabilities, and reporting process (Feb 28)
- ▶ Vision Champions and project leaders confirm accountabilities (Mar 15)
- ▶ All check reasonableness of timing and confirm, finalize Gantt chart (Apr 15)
- ▶ Board approval of Five-Year Vision Plan (May 1)
- ▶ Publication of plan and accountabilities to club membership (May 15)
- ▶ Quarterly progress reporting to Board through Vision Champions (July 1, Oct 1, Jan 1, Apr 1, and ongoing)
- ▶ Board Annual Review of Plan and reporting back to membership (by Jun 30 annually)



# Questions and Feedback

