

# Rotary Club of Pemberton Centennial

## Strategy Workshop 2011-12

May 14, 2011

Pemberton, B.C.

## Record of Charts Created

Confidential

Prepared by DJE Holdings Ltd.  
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# Roadmap for the Sessions

1. Introduction to Strategic Planning
2. Strengths / Weaknesses / Opportunities & Threats Activity
3. Vision Elements Activity
4. Strategies and Objectives
5. Next Steps

## Participants: (to be completed)

Jasper Balsamo  
Seija Evans  
Lizz Kelly  
Richard Megeney  
Liz Scroggins

Daniel Cindric  
Steven Hitchen  
James Linklater  
David Midgley  
Marnie Simon

## Facilitator:

Don Evans

## Graphic recording:

Erin Stewart Elliott



## **Strengths / Weaknesses / Opportunities / Threats Activity (SWOT, 2011)**

### **Strengths (Priority ranked)**

1. We are doers, we take action
2. We partner with other groups
4. Our Interact club
3. We are a committed and energetic group

### **Weaknesses (Priority ranked)**

- 1 Not enough members
- 2 Lack executive
- 3 Lack a vision
- 4 Lack alignment in direction, no sound committee structure

### **Opportunities (Priority Ranked)**

1. To grow energy through new members
2. To better use our members skill and experience
3. To work more with other Sea to Sky Rotary Clubs
4. To show that we have a vision for the future

### **Threats (Priority Ranked)**

1. Competition for charitable funds
2. Pemberton is a small community
3. Not growing our membership
4. Our community is young people
5. Lack charitable status

**Vision Without Action  
is merely a dream....**

**Action Without Vision  
just passes the time....**

**Vision With Action  
can change the world.**

Joel Barker

## **Rotary International's Vision**

**Rotary's vision is to be the service organization of choice with dynamic, action-oriented clubs whose contributions improve lives in communities worldwide.**

## **Rotary's Mission Statement**

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

## **Rotary's Core Values**

- Service**
- Integrity**
- Leadership**
- Fellowship**
- Diversity**

# **Rotary Club of Pemberton Centennial**

## **VISION ELEMENTS 2016**

1. Our club is made up of active and involved members
2. Our club has grown in size (towards 45 members)
3. We are known for our signature community event
4. We operate with full transparency
5. We respond to the needs of our community – both local and international – and are active working in both
6. We do a hands-on project every year
7. We support the Rotary Foundation with an annual event
8. We work collaboratively with the other Sea to Sky Rotary clubs
9. We have active and focused fundraising
10. We have charitable status
11. We are a vibrant club

# Membership Strategy and Objectives

## Key Strategies

- Grow membership to 25 by 2013
- Grow membership to be more representative of the businesses that make up Pemberton
- Focus on mentorship and retention
- Look for opportunities to add flexibility to membership
- Members are active and engaged with the club, share their experience

## Objectives

M – 1      Establish the club’s membership committee with at least three members.

Marnie / Jasper / Suzanne

July 2011

M – 2      Develop a membership growth strategy for the club.

M 2.1      Determine the community demographics and compare to club demographic; choose first sector to target for new members.

Jasper / Membership Committee

Dec. 2011

M 2.2      Consider new membership options to fit with the chosen sector.

Membership committee

Dec. 2011



M – 3 Update the new member recruitment and orientation package with current newsletters, the strategic plan etc.

Membership Committee

June 2011

M – 4 Implement a new member mentoring and retention process.

Membership Committee

Summer 2011

M 4.1 Send RCV's mentor checklist process

Don

May 2011

# **Club Administration and Leader Development Objectives**

## **Key Strategies**

- Develop club structure with succession for all key positions and committees
- Ensure full transparency in financial and club operations
- Increase participation in Rotary training and District events
- Enhance internal communications
- Develop a board structure after club size grows to 20 members

## **Objectives**

CA – 1 Put together a one page club structure chart that shows the core committees and club officers.

Liz

May 2011

CA 1.1 Maintain succession for all key club positions

James / Liz

Ongoing

CA – 2 Share club information openly, including financial and key operating items – monthly or quarterly.

Club Leadership

Ongoing

CA – 3 Three club members to participate in Rotary Leadership Institute (RLI), one grad from level 3.

Liz / club

2011 – 2012

CA – 4 Keep club’s website and Facebook page current....

Liz / Dan / James

2011 – 2012

CA 4.1 Develop a distribution to “Friends of Pemberton Rotary” to expand the “reach” of the club.



- P 3.3 Partner with the Chamber of Commerce to implement a coordinated community calendar and see it maintained as a community resource.
- Liz Summer 2011
- P 3.4 Consider sponsorship of an annual community event by Rotary, coordinate with the calendar development and identification of a gap in community activity
- P – 4 Charter the Interact Club and then support it as it builds.
- James June 2011
- P 4.1 Involve the Interact club with the Rotary club activities.
- Pemberton club 2011-12

# Public Relations & Communications

## Strategy and Objectives

### Key Strategies

- Every project or donation made has a press release and recognition installed
- Increase Rotary visibility at events, club table for example
- Add signage and Rotary identity around the community wherever possible
- Members “fly the Rotary flag”

### Objectives

PR – 1      Establish the club’s PR Committee.

Lizz / Dan / Steven

May 2011

PR – 2      Issue a press release to the District and local media with event project and activity the club undertakes and completes, also post on website.

PR Committee

Ongoing

PR – 3      Regularly recognize partners and supporters.

PR Committee

Ongoing

PR – 4      Increase and the visibility of Rotary in Pemberton:

PR 4.1      Members wear Rotary identity whenever possible  
– clothing, pins, stickers on vehicles / member  
businesses

All club members

Ongoing

- PR 4.2 Host a Rotary Table at community events:
- Promote the club and use to interest prospective members.
  - Get cards to build friends of Rotary list
  - Seek input on types of projects needed by the community

PR Committee

2011 - 2012

## Foundation / Fundraising Objectives

### Key Strategies

- Develop a “Signature Fundraiser” event for the club
- Hold an annual event to benefit the Rotary Foundation
- Increase funds raised for the club and Rotary through active and focused fundraising

### Objectives

F – 1      Develop a “Harvest Festival” event for fall 2011, consider inclusion of farmers produce, wine, local chefs specialties as a new community event:

- Consider a powerful fundraising hook
- Tie into the community kitchen
- Assess as a possible repeat event

Steven / club

Fall 2011

F – 2      Develop a Rotary Foundation event for 2011 – 2012, meet or exceed Every Rotarian Every Year.

Richard / Seija / David (Foundation Committee)

FR – 3      Continue ongoing community fundraisers including August fest, Winterfeast, Flower Baskets etc.

Fundraising Committee

Ongoing



## Next Steps

1. Send completed document to the club.

Don

May 2011

2. Share the plan to the club - post on the club website

James

May / June 2011

3. Review plan highlights (vision) briefly at each monthly club business meeting.

James / Liz

Monthly

4. Review progress on objectives

Liz / Club

August 2011

5. Hold a 6 month progress review electronically

Don /

October 2011

6. Hold annual review and set 2012-13 objectives.

Don / Planning team

May 2012

### Attachments:

- SWOT brainstormed lists
- Vision Elements brainstormed list

### **Strengths (Brainstormed list, unranked 2011)**

- Energetic
- Passionate
- We know local needs
- We work in partnership with other groups
- We have young people in the club
- Action oriented, we are doers
- We are willing to do hands on work
- The diversity of our membership
- Enthusiastic
- We have a good reputation
- We have empathy for the needs of others
- We are responsive
- Volunteerism
- Strong community contacts and resources
- A strong core membership
- We accomplish a lot
- Our interact club
- We get great speakers
- Our new website

### **Weaknesses (Brainstormed list, unranked 2011)**

- Not enough members
- Lack signage – Rotary awareness
- Low visibility, not much marketing
- Internal communication
- Lack a vision
- We don't have a signature event
- We need more funding
- Succession planning
- Lack a committee structure
- Many vocations in town are not represented
- Foundation participation
- Members reluctant to take ownership
- Not great in supporting the Foundation

### **Opportunities (Brainstormed list, unranked 2011)**

- To increase energy through new members
- To work more with other Sea to Sky Rotary clubs
- To increase our Rotary awareness
- To collaborate more with other organizations
- To take ownership of Rotary and show it proudly
- To innovate on ways to grow membership
- To take advantage of the fact that our community is young people
- To leverage our international project and do more, learning as we go
- To continue to grow as we gain credibility
- To better use our members experience
- To be more open and flexible to new ideas
- To embrace longer term thinking
- To leverage the strength of the Pemberton community
- To show that we have a vision for the future

### **Threats (Brainstormed list, unranked 2011)**

- We are in a small community
- The current economic situation
- Strong competition for charitable funding
- Lack of Rotary understanding
- Not growing our membership
- A seasonal base of employees, many come and go
- Our community is young people
- Not leveraging our skills and experience
- Environmental issues
- Lack of charitable status
- Not caring about long term community perspectives
- Not increasing community involvement
- Not having a coordinated community calendar

## **Vision Elements 2016 (Brainstormed list, unranked 2011)**

- Our diversity mirrors the community
- Members want to be club secretary
- We are active in youth exchange
- We support a strong interact club
- We do at least one hands on project every year
- Our interact clubs participates in our international work
- We have charitable status
- Our meetings are structured to the needs of the club
- We have clear and strong communications
- We have full transparency in our operations and finances
- We are active in RLI and other District training initiatives
- We do both local and international projects
- We are known for an annual signature event
- We have grown, have a around 45 members
- All our members are active and engaged
- We support the RI Foundation through an annual event
- We are well structured, have committees built with succession
- We are recognized as Pemberton's premier service club
- People line up to join our club
- We have fun together, great fellowship
- We are active with District 5040
- We work collaboratively with other Sea to Sky Rotary clubs
- We make good use of our skills and expertise
- We have a great meeting place
- We have a formalized mentorship process
- We recognize community supporters – friends of Rotary
- We have a formal member recognition process
- We have focused and active fundraising
- We respond to the needs of our community and the world
- We win "Rotary Club of the Year"
- Someone from this club is on the District team
- We are a vibrant club
- We have some first nations members
- We inspire others to act by what we do
- Every Rotary project has Rotary identification