

Introduction

In April, 2013, Cody Rotary participated in the Rotary visioning process sponsored by District 5440. At that retreat, over 30 club members provided feedback on the activities and direction of the Club. The results of the visioning process became the basis for this plan and the recommendations of the Planning Committee.

Visioning Retreat Results

The Visioning retreat covered eleven major categories of club activities. These activities and the major outcomes the club wanted to focus on were:

- 1) What does our club stand for
 - Known for a strong presence in the community
 - The Gold Standard for service clubs in our region
 - Prepares and trains leaders in Rotary and the Big Horn Basin
 - Known for community service
- 2) Club size
 - 100 to 120 members
- 3) Attributes of the Club
 - All members are active and share in the workload
 - Focus on new members
 - Generational diversity
 - Members achieve 90% attendance
 - Vocational diversity
- 4) Club internal service attributes
 - All members active one at least one committee
 - Make membership affordable
 - Change meeting time and place
 - More social gatherings
 - Cooperate with other service clubs
- 5) Vocational Service Attributes
 - Four-way-test business project
 - Continue dictionary project
 - High School job shadowing project
 - Honor and recognize community members who demonstrate service above self
- 6) Community Service Attributes
 - Build a Rotary bike path
 - Lead suicide prevention project

- Medicine on wheels project
 - Partner in a community needs assessment
- 7) International Service Attributes
- Send club members to participate in a polio eradication project overseas
 - Continue our part in Polio eradication project (polio Plus)
 - Support a nurse training project in Guatemala
- 8) Rotary and Club Foundation Success Attributes
- Every Rotarian contributes to the International Rotary Foundation (Every Rotarian Every Year)
 - Every Rotarian contributes to the Club Foundation every year
 - 80% of club members are Paul Harris Fellows
 - Club Foundation grows by \$16,000 each year
- 9) Focus on young people through New Generations activities
- Annual in-bound and out-bound exchange students
 - Contribute \$10,000 in scholarships annually
 - New Generations (younger members) are a focus of club activities
 - Partner with Powell Rotary and NW College on a Rotaract program
- 10) Club Fundraising Activities
- Explore the idea of a new fundraising event focused on a summer festival
 - Expand Rotary Show to make more money and attract new families
 - Rotary show nets at least \$100,000 annually
- 11) Public Image Attributes
- Four-way-test Burma Shave style signs in community
 - Develop a Rotary Float for the Fourth of July Parades
 - Develop a sign program for local businesses on the theme “A Rotarian Works Here”
 - Help club members be ambassadors of rotary and the Club (pins, signs, decals, talking points)
 - Enhance rotary signage at community entrances
 - Advertise Rotary at the Airport and on the radio

Mission Statement

The visioning process established two committees responsible for the development of the Strategic and Tactical plan. The first committee was responsible for developing a mission statement for the Club. That Committee was composed of 5 club members and was Chaired by James Klessens. They developed a mission statement for the Club as follows:

Cody Rotary is diverse servant leaders fulfilling the needs of people in our community and the world. We live the motto “Service Above Self”.

The mission statement as presented represents a description of the Club that emphasizes the fact that our membership is composed of leaders of our community dedicated to solving problems in the Cody region and the world. It establishes our place in both local and world wide activities to solve problems and further emphasizes our dedication to the rotary motto of Service above self. The mission statement helps establish our club as a major force within our community.

Cody Rotary Club 2013-2016 Strategic and Tactical Plan

The Purpose of the Strategic Plan is to focus the Clubs energies on the major areas the members articulated during the Visioning process. The Strategic Planning Committee composed of Joel Hunt, Bruce Eldredge, Zan Lilligren, Dan Stevens, Dave Treick and Jan Eldredge met three times over the course of a month to review the visioning process and to develop the strategies and tactics that would be necessary to move the club in the direction the members want.

During the Committee discussions it was obvious that the visioning process surfaced many more potential goals, objectives and activities than the Club could actually undertake. For this reason, the Committee decided to recommend that the Club concentrate most of its efforts on only a few major goals and to complete them quickly rather than to spread efforts out over a longer period. The inclusion of the new Club President and the President Elect on the Committee provided some assurance the major goals recommended by the Committee would be addressed over a two year period. The Committee strongly recommends that the Visioning process be repeated at least every two years to ensure that the efforts of the Club are being directed into areas that members wish it to go.

Since the Visioning process surfaced many more potential goals and objectives than the club could undertake, the Committee strongly recommends that each of the regular and special committees of the Club review the visioning results and attempt to make progress on the actions outlined in the visioning process pertaining to each committee during the regular course of planning for the year's work. This allows the Club Board and the membership to focus on the Strategic goals while still making progress on the other areas outlined in the Visioning process. This also means that the Strategic Plan can be more focused rather than a laundry list of action items. In addition, the Club Board should prioritize the activities of the Club's committees and provide committee chairmen with direction for the 2013/2014 year.

The Strategic and Tactical Plan assigns work to individual committees of the Club and to individual club members responsible for those committees. Two special retreats are recommended to be held over the next 6 months. The first retreat is focused on the Cody Rotary Show (format, ticketing, effort and activities) and is scheduled to be held in August to enable the Show Committee to focus efforts before major work is begun on the next show. A

second retreat in the fall is scheduled to review Club meetings (meeting time, place, format and programs). This retreat is scheduled to allow for any potential changes to be implemented in January of 2014 at a time when food and meeting place contracts can be easily renegotiated.

The four major goals are stated below:

Strategic Goals – Three Year Plan				
	Goals	Committee Responsible	Committee Chairperson	Completion Date
1.	Grow club membership to 100-120	Board	President	6/30/2016
2.	Undertake a major, visible club service project centered around recreation in Cody	Board	President	6/30/2016
3.	Raise \$100,000 Net for Charitable Giving	Board	President	6/30/2016
4.	Club Board to review visioning documents and select additional goals and objectives	Board	President	6/30/2016

Grow Club Membership to 100-120

A retreat to gather opinions and information on Club meeting, days, times, places and format is the major activity covered by this goal. From that retreat, the Strategic Planning Committee hopes to have enough information to recommend changes to the Board to make meetings livelier and to hold them at times, places and in formats that are more attractive to members and thus would enable more members to participate regularly. The Committee believes that current member participation will increase and the Club will be attractive to new members if changes are made. Changes can only be made with the support of the club so a retreat to gather information is an important step in this process.

Coupled with the retreat is a greater emphasis on the Membership Committee of the Club. The Strategic planning Committee seeks an active membership committee to focus on developing an engagement process for existing members, develop a new member recruitment, orientation and follow-up process and to educate new and existing members on attendance and Club participation requirements. The Strategic Planning Committee believes that these steps will help club energize exposing members and recruit new members. The Strategic planning Committee would recommend that 85 members should be the membership target for the 2013-2014 year.

As part of the above efforts, the Program Committee will need to focus on developing a series of highly engaging programs that members and guests will want to hear and that will provide value to those in attendance. The Strategic Planning Committee believes that more help needs to be provided the Program Committee and its Chairman to ensure that programs are engaging and informative and calls for greater emphasis in this area.

Tactical Goal #1				
	Grow Club Membership to 100-120	Committee Responsible	Committee Chairperson	Completion Date
1.	Recruit active Membership Committee	Board	Joel Hunt	7/1/2013
2.	Arrange more-engaging programs for	Program	Val Walsh-	7/1/2013

	meetings		Haines	
3.	Develop an engagement process for existing members	Membership		8/30/2013
4.	Revamp new member recruitment, orientation and follow-up process	Membership		9/30/2013
5.	Educate membership on attendance and club participation requirements	Membership		Quarterly
6.	Hold a retreat to discuss meeting day, time and format	Board	Joel Hunt & Bruce Eldredge	10/30/2013
7.	Set membership target at 85 members	Board	Joel Hunt	6/30/2014

Undertake a major, visible club service project centered around recreation in Cody

During the Visioning process, the Club members present were highly energized around a service project that called for the creation of bike paths within our community. As the Strategic Planning Committee discussed this project, it was obvious that the Club will have to work with the City's recreation department to undertake such a project. In addition, the City (or County) might have different priorities that they would wish an outside group to help with. The Strategic planning Committee recommends that the incoming President and president Elect meet with City and or County officials and discuss recreational service projects with them. The Committee also recommends that a major service project be highly visible, hands-on for members and be distinctive and large enough to garner major community recognition. The service project should also be viewed as a multi-year project

Tactical Goal #2				
	Undertake a major, visible club service project centered around recreation in Cody	Committee Responsible	Committee Chairman	Completion Date
1.	Meet with recreation leaders in Cody to identify needs and develop plan	Board	Joel Hunt & Bruce Eldredge	8/1/2013
2.	Recruit task force members to make a service project proposal to the club <ul style="list-style-type: none"> • Project should be hands-on for club members • Project should be very visible and one we can put our name on • Club needs to have extensive PR coverage on the project 	Board	Joel Hunt & Bruce Eldredge	10/1/2013
3.	Review by club of proposal and Board vote to proceed	Club/Board	Joel Hunt & Bruce Eldredge	12/31/2013
4.	Implement project plan	Club/Board	Joel Hunt & Bruce Eldredge	6/30/2014

Raise \$100,000 net for charitable giving annually

Many ideas expressed during the Club visioning process centered around the need to review the Cody Rotary Show and to potentially look at another type of fund raising event, either to

replace the show or to supplement the show from a fund raising standpoint. The Strategic Planning Committee recommends that a retreat be held to review the status of the current show to develop broad support for continuing it for the 2013-2014. The Committee believes that the retreat will also develop support for needed changes to the show and will provide the Show Chairman and Show Committee with the information necessary to go forward with the show for 2013/2014 (this year).

As part of the efforts to review the show, the Strategic Planning Committee urges the President and President Elect to poll the Club to find members willing to investigate a summer festival activity that might either replace the show or provide additional fund raising for the Club to reach the \$100,000 annual goal for fundraising for charitable purposes. The \$100,000 goal moves the Club substantially forward over time to meet the scholarship, exchange student and community and international charitable goals as expressed in the visioning process.

Tactical Goal #3				
	Raise \$100,000 Net for Charitable Giving Annually	Committee Responsible	Committee Chairman	Completion Date
1.	Review 2014 Show format at an all-club retreat <ul style="list-style-type: none"> • Show should increase net dollars raised • Show should decrease effort 	Board	Joel Hunt & Bruce Eldredge	8/20/2013
2.	Establish a task force to investigate a Summer Festival as alternative or additional fund raising activity	Board	Joel Hunt	7/1/2013

The Club Board to review visioning documents to select additional goals and objectives

The Club Board should spend time at a meeting early in the 2013/2014 year to select additional goals and objectives that should be implemented over the course of the year. The Strategic Planning Committee cautions that these additional goals must be supportive of the three major goals as outlined in the plan. The President and President Elect must ensure that additional goals can be accomplished during their years and will support the major goals outlined above. There is danger in trying to accomplish too many activities and doing none well. The Committee recommends concentrating efforts rather than diluting efforts.

Tactical Goal #4				
	Club Board to review visioning documents and select additional goals and objectives	Committee Responsible	Committee Chairman	Completion Date
1.	Review visioning documents and propose other goals and objectives	Board	Joel Hunt	9/30/2013
2.	Club review additional goal and objectives	Club	Joel Hunt	10/30/2013
3.	Implement additional goals and objectives as approved	Board	Joel Hunt	11/30/2013

4.	Review additional goals and objectives for progress and success	Board	Joel Hunt and Bruce Eldredge	3/31/2014
5.	Review additional goals and objectives for progress and success	Board	Joel Hunt and Bruce Eldredge	6/30/2014

Conclusion

The Strategic Planning Committee urges the Club Board to hold a major discussion on the Strategic Plan and to seek formal approval of the major goals as outlined in this document. From there, the Board can help the Club Committees and the members focus on the changes and activities as outlined in the plan. If the three major goals can be substantially accomplished during the next two Rotary years, the Club will be well on the road to becoming a much greater force for good within our community and the world. We must live our motto of **Service Above Self**.