

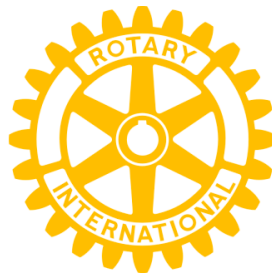
Rotary Club of Perth

Strategic Plan Workbook

Background Information

March 2018

Rotary
of Perth



INTRODUCTION

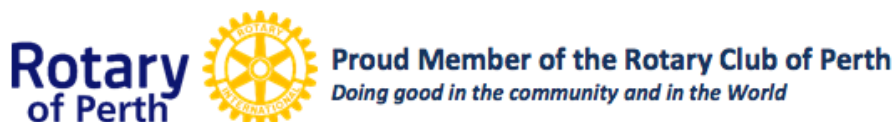
Over the past 90 years the Rotary Club of Perth has provided professional people working and living in or near the Perth CBD area with the opportunity to join together to use their skills and passion to make a difference with their community. The Rotary Club of Perth has achieved much over those 90 years in both the local community and internationally. However, like many service organisations the Club is reaching a watershed moment. While the need for organisations such as Rotary in bringing together people to benefit others is of no lesser importance today than it was when Rotary were first founded, the environment in which service clubs such as Rotary Perth find themselves operating is changing rapidly – and for many clubs this changing environment has seen a decline in membership and a reduced ability to provide service to others. To remain strong and vibrant there is a need to re-imagine how Rotary might operate in the future – this is the journey the Rotary Club of Perth is now on.

On the 23rd March 2018 The Rotary Club of Perth is launching the commencement of a strategic review. The objective is to prepare a strategic plan for the Club for release at the 9455 District Conference in 2019.

To assist with this review, this booklet draws together research, ideas and opinions with the aim of informing and stimulating the debate necessary to ensure the Rotary Club of Perth remains a Club of influence and prominence.

Prepared by Rotarian Rod Evans for President Stephen Inouye, Incoming Presidents Wesley Sim and Vangelis Katsaitis, and the members of the Rotary Club of Perth.

23 March 2018



CONTENT

This booklet is divided into four sections.

- The first section is a plan for developing the Rotary Club of Perth strategic plan.
- The second section provides background on the history of Rotary International and the Rotary Club of Perth, and data and views relating to the operation of Rotary and the environment in which Rotary operates.
- The third section is a collection of ideas on initiatives that the Rotary Club of Perth might consider to better service its objectives.
- The fourth section comprises a number of quotations that have relevance to the strategic planning for the Rotary Club of Perth.

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1. STRATEGY FOR DEVELOPING THE STRATEGY

1.1 Actions to date

On the 21st February 2018 The Board of the Rotary Club of Perth resolved to develop a revised strategic plan.

1.2 Launch of strategic planning process

On the 23 March the strategic plan development was launched at a Club luncheon.

1.3 Proposed release date of the plan

In order to allow adequate time for the development of ideas, the breadth of targeted input and the level of required internal debate the targeted date for the completion of the strategic plan is towards the end of the 2018-19 Rotary year. The Board's objective is to have the plan completed in time for the 2019 9455 District conference.

1.4 Method for submitting ideas and thoughts

An electronic platform will be established to allow members to access background information and current drafts of the strategic plan, and make comments, submissions and engage in debate on the strategic plan. Regular updates will be provided through Club correspondence and at Club luncheons.

1.5 Involvement of people outside the Rotary Club of Perth

The opportunities and challenges facing the Rotary Club of Perth are similar to those facing many other Rotary Clubs and indeed many other service clubs around the world. For this reason, members of other Rotary clubs, both in Australia and internationally, will have access to the electronic strategic planning portal. Their input will be warmly welcomed. Representatives of District 9455 and members of other interested clubs were also invited to the 23 March Perth Rotary Club luncheon.

There will also be a heavy emphasis on involving people outside of Rotary. Research has found that the best ideas arise when there is not only a diversity of *perspective*, such as demographic diversity, but also a diversity of *approach*- the mental framework people use to solve a problem (Page 2008). For this reason every effort will be made to 'cast the net of involvement' as wide as possible. People who have resigned from Rotary, people who might be future potential members of Rotary Perth, and people who have an interest in solving community issues but who have never considered Rotary, will be invited to contribute alongside current members in formulating a strategic plan for the Rotary Club of Perth. There will be a particular emphasis on involving younger people in this debate.

1.6 The opportunity to experiment

The opportunities and challenges facing the Rotary Club of Perth are common across many of the Rotary clubs both in Australia and globally. The opportunity to introduce ideas into the Rotary Club

of Perth as an experiment for Rotary International should not be overlooked. Andrew Leigh (a professor of economics and Australia’s current shadow assistant treasurer) in his book on the value of experiments released in March 2018, identified that “across medicine, business and government, there’s no simpler or more powerful tool for finding out what works than a randomised experiment” (Leigh 2018).

1.7 Radical versus incremental innovation

The need for ‘radical’ or ‘disruptive’ innovation versus ‘incremental’ innovation is likely to be an issue for debate as the plan is being developed. While radical innovation might seem an inevitable requirement for major change, incremental innovations can deliver significant change if there is enough of them. Jan Carlzon (Carlzon 2011) who was the CEO of the SAS Group (Scandinavian Airlines) from 1981 – 1994 and turned around the airline from one of the industry’s worst performers to one using the *rule of one percent* as part of his turnaround strategy. Calzon was often quoted as saying “you cannot improve one thing by 1000% but you can improve 1000 little things by 1%”. David Brailsford, who led British Cycling’s success at the 2012 Olympics, applied this same philosophy to preparing his athletes, an approach he called “the aggregation of marginal gains” (Day 2012).

1.8 Ensuring a workable and effective plan

The shortcoming with many strategic planning processes is that they can absorb large amounts of people’s time, raise high hopes about the future, but then produce a document that gathers dust and has little impact on an organisation’s future performance.

To ensure that the Rotary Club of Perth Strategic Plan achieves meaningful impact the following approach has been built into the strategic planning process.

| Reasons strategic plans fail | RCoP strategy |
|---|---|
| Being unclear about what we are trying to achieve | Early in the planning process there will be a debate on what the Club is trying to achieve (e.g. what are we trying to achieve and for who). |
| Focussing on the wrong things. <ul style="list-style-type: none"> • Having a plan simply for the sake of having a plan. • Spending time laboriously word smithing concepts such as mission, vision and other statements without giving attention to the realities of what is needed and how it can be achieved. | This is a genuine effort to bring about the changes needed to ensure the Club’s success over the next 5 years+. The aim is to prepare a bold and inspirational plan that is also a practical document focussed on what is needed and how it will be achieved. |
| Treating strategic planning as a onetime event. | The club’s strategic plan will not be the end goal but will be the beginning of a process and cycle of strategic review. |
| Lack of belief and buy-in across the organisation. Members within the organisation are unwilling to change. | The plan will be developed with specific reference to the ideas of <u>all</u> members of the club. There will be a program to socialise and debate ideas as the plan is being developed. |

| | |
|--|--|
| The plan is too complicated. | The plan will be no more than 12 pages in length. It will be built around 3 or 4 clear objectives/goals. Each objective will have no more than 6-10 clear strategies and actions plans. |
| The goals are unclear or unrealistic. | The plan will include clear KPIs against each strategy. Each KPI will be rigorously debated for its 'do-ability' before being accepted into the plan. |
| The plan is developed ignoring market place realities and evidence. | The plan will be 'evidenced based'. Each strategy will be supported by research or data. |
| The plan is full of 'great ideas' but there is little or inadequate attention to execution and follow-through. | Each objective will have a clear plan for execution, action and follow through. |
| Lack of leadership in support of the plan. | The development of the plan is being led by the incoming Club presidents. |
| The plan doesn't consider how other stakeholders might be involved / support the strategic outcomes. | The plan will place emphasis on leveraging relationships and collaborating with people and groups outside of the Club. |
| The plan has failed to consider the risks of execution | Each proposed action will be openly debated and considered for risk. |

The intended emphasis in the Club's strategic planning process is to avoid the short-comings identified by Baines (2015) and others, where not-for-profit organisations are seen as having greater acceptance of the status quo, being less questioning, and failing to apply the same strategic planning rigour as is done in the for-profit sector.

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<http://challengingcoaching.co.uk/aggregation-of-marginal-gains-aggregation-of-marginal-decay/>.
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2. BACKGROUND INFORMATION, DATA AND ANALYSIS

2.1 THE CALL FOR INNOVATION WITHIN ROTARY

In 1945 Paul Harris, the founder of Rotary International, made the following observations about Rotary in *The Rotarian* magazine (Harris 1945). "I would like to think that the pioneering days of Rotary have only just begun. There are just as many new things to be done as ever there were. Kaleidoscopic changes are taking place, many of them without our will. Even to hang on to the fringe of this fast-changing world is about all most of us can do. Rotary simply must continue to pioneer or be left in the rear of progress."

These sentiments might equally be Paul Harris' message to us in 2018.



Reference

Harris, P. 1945. The Best Is yet to Be. *The Rotarian*, February, 30.

2.2 MISSION, VISION AND VALUES

This section sets out the mission, vision and values of Rotary.

2.2.1 The purpose of Rotary

The purpose of Rotary is for professional people to join together to use their skills and passion to make a difference in their communities.

2.2.2 The object of Rotary

The object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and in particular to encourage and foster:

- The development of acquaintance as an opportunity for service
- High ethical standards in business and professions
- The application of the ideal of service in each Rotarian's personal, business and community life
- The advancement of international understanding, goodwill and peace.

Rotary is a non-political and non-sectarian organization open to all people regardless of race, color, creed, religion, gender, or political preference.

2.2.3 The core values of Rotary

The core values of Rotary are:

- Fellowship
- Integrity
- Diversity
- Service
- Leadership

Rotarians are encouraged to apply the four way test to everything they 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?

2.2.4 The mottos of Rotary

‘Service above self’
‘One profits most who serves best’.

2.2.5 The five forms of service within Rotary

Rotarians bring benefit to others through five avenues of service. These are:

- Club Service
 - Helping their club function successfully.
- Vocational Service
 - Promoting high ethical standards in businesses and the professions.
- Community Service
 - Improving the quality of life of others.
- International Service
 - Advancing international understanding, goodwill, and peace.
- Youth Service
 - Facilitating leadership development, international service projects and youth exchange programs.

2.2.6 Branding

Rotary International

“Join Leaders, Exchange Ideas, Take Action in your Community”.

Rotary Club of Perth

“Doing good in the community and the world”.

2.3 HISTORY OF ROTARY

This section outlines the history of Rotary International and The Rotary Club of Perth.

2.3.1 Rotary International

The first Rotary Club was formed when attorney (Paul P. Harris) called together a meeting of three business acquaintances in downtown Chicago United States, at Harris's friend Gustave Loehr's office on February 23, 1905. The members chose the name Rotary because initially they rotated subsequent weekly club meetings to each other's offices, although within a year, the Chicago club became so large it became necessary to adopt the now-common practice of a regular meeting place. Rotary quickly expanded and in 1910 the first international club was formed in Winnipeg, Canada. The following year the Rotary Club of Dublin was established as the first club outside of North America. The first Rotary Club in Australia was established in Melbourne in 1921. Rotary has since expanded globally and has more than 1.2 million members in over 35,000 clubs across 200 countries and geographical areas.

2.3.2 The Rotary Club of Perth

The Rotary Club of Perth held its inaugural meeting on 25 August 1926 at the Palace Hotel in St George's Terrace. The meeting was convened by Sir William Lathlain (later Mayor of Perth). Others attending this founding meeting included Archbishop Riley, Sir Talbot Hobbs and Major (later Sir) Norman Brearley.

In its 90 year history the Rotary Club of Perth has been prominent in initiating programs to benefit people in Western Australian and overseas. Some of the Club's projects have included:

- Erecting the statue of Peter Pan in Queens Park as a gift to children of Western Australia – 1927-28
- Constructing a wishing well in King's Park, raising thousands of dollars – 1948
- Conceiving, planning and commencing building of the UWA Perth Medical School – 1954-55
- Originating the Medic Alert Bracelets Programme – 1971-72
- Starting the Operation Livewire project in WA to support young people establishing new businesses - 1978
- Initiating the Bangladesh Cyclone Early Warning System – 1985-98
- Establishing the Vienna Pops Concert – 1988.
- Constructing the Royal Perth Hospital Heliport – 1999.

The Club has also been highly active in supporting Rotary International's global initiatives including:

- The Rotary Youth Leadership Awards – a leadership for young people
- Polio Plus – a program for eradicating polio
- Rotary Youth Exchange Program – an international exchange program for youth in secondary school
- Rotary Peace Centres – centres for international studies in peace and conflict resolution
- Literacy programs – to improve world literacy.

2.4 SWOT ANALYSIS

The following is a SWOT analysis for the Rotary Club of Perth developed by Rod Evans. It is based on personal observation and informal feedback from current and past members.

2.4.1 Strengths

- Long term history of service and community activity
- Core of members with high standing in the community
- Members have a network of local and international contacts/relationships
- Skills and experiences of members
- Strong nucleus of longer-term members
- Number of high quality initiatives and programs
- Established funding base
- Reputational standing of Rotary as inclusive and bipartisan

2.4.2 Weaknesses

- Long term decline in membership.
- Attracting but not retaining members (membership turnover).
- Time commitment.
- Failure of the Club to engage with all members.
- Lack of a deeper cross section of influential business / professional leaders.
- Lack of a strategic plan.
- Revenue not sufficient to take on big projects.
- Aging member base.
- Perceived as 'staid' and not going anywhere.

2.4.3 Opportunities

- Affluent economy, therefore there is potential for fund raising capability.
- Business community sees Rotary as a networking opportunity.
- There is a pool of business leaders that have not been approached by Rotary.
- Opportunity to better use social media and electronic communications.
- Opportunity to introduce new 'signature' projects – there are lots of good ideas out there.
- Gap in the market for service clubs for 30 – 50 year olds.

2.4.4 Threats

- Competing demands on people willing to provide community service time and resources.
- Cost of membership is prohibitive to many people.
- People are increasingly 'time poor'.
- Some members feel they are not needed.
- Rotary is viewed within the community as 'male, pale and stale'.
- Face to face meetings are no longer essential to form networks and service clubs are no longer an essential part of business networking.
- Structure is not appealing to the next generation of leaders.

2.5 MEMBERSHIP

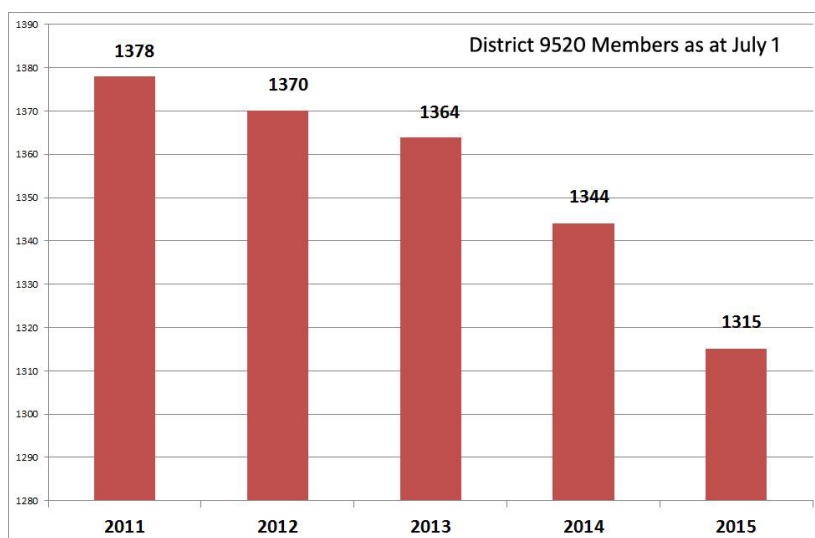
This section is a collation of data and insights relating to factors affecting Rotary membership. The information is collated under five headings:

- The problem
- The ideal club size
- Why people don't join Rotary
- Why people stay in Rotary
- Why people leave Rotary

2.5.1 The problem

Membership growth is emerging as a major issue for Rotary, particularly in developed countries. In the 10 years to 2016, Australia lost 16% of its members with the average age of an Australian Rotarian being 71 (Pulley 2016).

The following table shows the decline in member numbers in district 9520 (made up of 51 clubs located primarily in South Eastern South Australia, Western Victoria and Broken Hill, NSW).



Source: (Huddleston 2015)

Not surprisingly a good deal has been written on how to grow membership numbers. What is of surprise is that within the literature there is a paucity of examples of clubs who have successfully implemented these recommended strategies.

2.5.2 The ideal club size

Charles G. Tennent, RI President 1957-58 (Wittich 2013a) spoke of club growth as an essential requirement within Rotary. "When a tree stops growing – it is ready to die. A Rotary Club is like that; it is moving ahead only when it is growing. When the growth ends, a knife-and-fork club begins".

Membership numbers however vary significantly between clubs and there is a paucity of research or commentary on the number of members clubs should aim to have.

Theoretically the membership of a club should be:

- Large enough to service the mission / objectives of the club
- But not so large as to diminish the potential benefits of membership.

In countenance to the argument of having a large club membership, Fidel Castro, Cuba's former revolutionary leader, is quoted as saying, "I began revolution with 82 men. If I had to do it again, I do it with 10 or 15 and absolute faith. It does not matter how small you are if you have faith and plan of action" (The Famous People).

2.5.3 Why people don't join Rotary

This section looks at why people don't join Rotary.

A failure to focus on youth

Brad Howard, Rotary International Director for Zones 25 & 26 in the United States and Canada, believes the decline in membership is a result of the failure to focus on youth. Howard made the following observations when speaking at a function in Cairns Australia (Pulley 2016):

- "Fifty-two per cent of the world's population are 30 and younger.
- Yet over the last 10 years Rotary in Australia has lost 16% of its members and the average Australian Rotarian is now aged 71.
- We have failed to recognise our customers – the men and women who join our clubs
- The wave of change is coming and Rotary has the opportunity to take this on."
- To attract members we need to compete against all the other things in life.

David Postic, a member of the Rotaract Club of Norman, Oklahoma, USA posted similar sentiments about the need for Rotary to change its attitude towards attracting younger members (Postic 2013):

- First, wake up. If your meetings or service projects are not more exciting than going to the mall, watching the latest episode of American Idol, or even spending an hour on Facebook, young people will not be engaged and they will not join. Get out into the community and serve. Develop innovative projects that truly make a difference. Writing checks is not enough to keep us interested.
- Second, let go of your club. Give up control. People my age want to feel like they are making an impact. Give young members responsibilities. Listen to their ideas. Most importantly, make them the leaders and let them change things. If you make it a habit to continuously evolve as a club, you will continue to engage young people and flourish. And when clubs flourish, Rotary flourishes. It is as simple as that.

Nisha Kotecha, past president of the Golders Green Rotaract Club and a highly enthusiastic supporter of Rotary, posted that she wasn't ready to join Rotary for the following reasons (Kotecha 2015):

- The world is full opportunities – Rotary is just one of them
 - Before joining Rotary I would like to explore the other opportunities available – who knows, I might find one of the other organisations is a better fit for me.
- Absence makes the heart grow fonder
 - I have loved my time in Rotaract, but there are aspects of Rotary that frustrate me (perhaps a topic for another blog post if you like this one!).
- Time Commitments
 - The time commitment to Rotary is not something I am sure I can give at the moment.

Paul Kiser, a former Rotarian, posted in December 2010 that he saw Rotary as being out of step with young people (Kiser 2010)

- Because of Rotary’s close attachment to the business world, the organization is mired in same traditions of hierarchical structures and slow responsiveness to change that currently plague many American industries.
- Younger professionals typically ignore and/or bypass most of the traditional business concepts of leadership and organizational structure that restrict change, which is why many young professionals find Rotary outdated.
- That is why Rotary’s future lies in its ability to adjust to the expectations of younger professionals.

Strategies for attracting younger members

The following recommendations for attracting younger members were made by Jenn McKenzie, a 29 year old who has been in Rotary/Rotaract for ten years and who is now the president of Takapuna Rotary Club in Auckland, NZ D9910 (Scaife 2017).

- Stop just writing cheques to organisations or people with little or no action on the part of the Rotary club.
 - Younger members want to be involved making a tangible difference.
- Embrace younger members with a young perspective and young attitude, try something different and be open to new ideas (that goes both ways)
 - Offer new and younger members opportunities to serve on boards and committees.
- Mix it up, change your membership structure and cost of your meetings
- Try social media advertising its low-cost and high impact.
- Remember why you joined Rotary and remind each other – to serve others. Make this world a better place.
 - Don’t always get “sad” stories as guest speakers younger members want to hear inspiration and motivation – work with other clubs for more joint meetings or use TED talks
- Embrace technology – aim to use technology to minimise the administrative burden. Use social media and the website as the sole Club communication tools. For our target population smart phones dominate.

- I observed younger members using smart phones to book a project venue, complete a risk assessment and create an online sign in sheet. Hence the project was up and running before the meeting ended ... and not a committee in sight. These members expect the administration of the club to be as fast and frictionless as an app can make it. Including paying club dues electronically. I doubt in fact that many of them had cheque books at all.
- Be enthusiastic and passionate about your membership and your club and Rotary – the passion will translate.
 - Wear your Rotary badge with pride and ask like-minded people to join.
- Place strong emphasis on hands on projects and give younger members an early opportunity to lead projects.
- Implement very flexible, appropriately timed club meetings with virtually no formalities, relatively low costs and maybe crèche facilities if we are serious about recruiting working age Rotarians with child care.
- Recruit from RYLA and Student Exchange alumni.

Cathy Chorley (RotaryBlogger 2015) also posted on the need to focus more on doing, and less on cheque writing, claiming that the Rotary Clubs that will thrive in the future are those who give great service in home and international communities and who do more than simply collect funds for other people’s charities.

The following table shows the age diversity in the Rotary Club of Perth as at November 2017.

| Age Group | No | % |
|-----------|----|-----|
| 60 plus | 35 | 44 |
| 50 - 60 | 29 | 37 |
| 40 - 50 | 5 | 6 |
| 30 - 40 | 9 | 12 |
| 20 - 30 | 1 | 1 |
| Total | 79 | 100 |

Making the time commitment worthwhile

In a membership minute to his district, PDG Brent Rosenthal (Rosenthal 2017a) made the following observations:

- People have limited time.
- They will only join and remain in organizations if they perceive the value to be worthy of their time expenditure.
- What your club’s “value proposition” is – what do members receive from being a member of your club? Why should they join?
- Once you understand this you are on your way to growing your club!

Rosenthal (Rosenthal 2017b) also posted that when we make it a priority to find our new members’ passions and fuel them through Rotary our new member drop out problem will be solved.

Strategies clubs have used to successfully attract members

District 5510 achieved a 10% growth in membership in one year by employing the following strategies (Brown 2001):

- Creating excitement
- Answer the question why Rotary: Friendship; Business development; personal growth and development; leadership development; citizenship in the community; and fun.
- Following four key steps:
 - Identify potential candidates
 - Look for service minded people
 - Inform the candidates of the types of projects that Rotary Clubs have undertaken
 - Invite the candidate to a club meeting
 - Make a big deal of the induction

Other thoughts on attracting new members

Bill Wittich (2013b) wrote a book about change and membership in Rotary. He argues that:

- Rotary is not alone, all traditional social groups are struggling to maintain membership.
- Membership is critical for all Rotary clubs and that these new members must include a mix of younger, middle aged and older members.
 - It is this variety in age that increases the quality of a club's membership.
- Many clubs overlook the fact that the majority of their members will be retiring in the next decade and that the generations to follow are radically different from the generations of the past.
- It is critical for all Rotary leaders to understand that what brought them into Rotary may not be the same thing that will bring this next generation into Rotary.
- While the current excitement is finding young people to bring into Rotary, there is a large group of retiring Boomers that could help to increase our membership.
 - They are a vital group of healthy, wealthy and wise potential Rotarians.
 - They are very different from those young prospects in many ways and the attraction process is different for both groups.
- Clubs need to invest in technology and use it to attract new members
- It is not that young people are not volunteering (evidence provided Tufts University).
 - Teen volunteering is twice the adult volunteering rate
 - Young people need activities that fit around their work and family lives.
- Many Rotarians are living in a world where they are not open to change – what they really want is for things to remain the same, but get better.
- The answer is not pushing harder for new members. We need to change to attract new members. We need to figure out why someone might be interested in Rotary.
- We need an outstanding roster of guest speakers.

There are a number of writers who argue that membership will naturally grow in response to the vibrancy of a club.

District 9800, as part of their 2016-2017 president-elect training identified the following requirements for achieving a vibrant club (John 2016):

- Decide where your club wants to be in three to five years' time
- How diverse is the club & does it reflect your community profile
- Ask female members to ask their female friends to events
- Listen to your community on what their needs are
- Set annual goals and enter them into Rotary Club Central on My Rotary
- Develop strong relationships within your club
- Create committees that are practical
- Develop a Membership Recruitment and Retention Plan
- Hold club forums regularly to keep members engaged and involved
- Prepare members for future roles to maintain a smooth leadership pipeline
- Develop members as future leaders in the club

Bill Boyd, President Rotary International, wrote in the August 2006 edition of The Rotarian (Boyd 2006) of the following features that make up a strong club:

- Assess.
 - Listen to each other and find out what members want.
- Emphasize.
 - Accept the social aspects of Rotary. They are the glue that binds us together.
- Market.
 - Don't sell your club as a product – market it. Find out what people want, and do your best to give it to them.
- Induct.
 - Bring new members into your club with dignity and class.
- Involve.
 - Make the whole family part of Rotary. Don't let it be another commitment that takes members from their spouses and children.
- Mentor.
 - Make sure that a seasoned Rotarian helps new members get started and stays involved for at least a year. Newcomers get lost easily.
- Educate.
 - Provide education continuously, but give a little at a time. There's a lot to learn about Rotary and it can be overwhelming.
- Enthuse.
 - Show enthusiasm openly! Rotary should be fun.

Providing financial incentives

District 9800 (which covers part of the Melbourne Metropolitan area, stretching into the north-west to include Bendigo, and reaching as far north as Echuca on the Murray) attracted new members by providing a grant to any club that recruited at least four new members between the period 1 June to

31 October 2016. The grant funds (maximum of \$1,000) over that period were used by the new members on a club project of their choice (John 2016).

Making membership drives a competition

The Rotary Club of Jonesboro, Arkansas, USA, gave a membership drive a competitive twist. Teams vied for glory in recruiting members. The membership drive was set up like a sports league, with captains “drafting” their teams from the active club membership. A leaderboard posted weekly updates, recognizing both teams and top individual performers. During the six-week drive, the club hosted 76 potential Rotarians and inducted 24 members. “It was great fun, especially for a 98-year-old club with a reputation for being somewhat stodgy” (Unknown 2017a)

Are there counter arguments to the argument for not joining Rotary?

The Rotary Club of Phillipsburg posted the following arguments to counter the reasons prospective members might give for not joining Rotary (Faillance 2017):

- I don't have the time.
 - Look at your Schedule. You have to eat breakfast or lunch (we have both clubs) the lunch club is an hour and a half of socializing and networking, which should be good for your business. One half an hour of that time is for the program, which is educational. Our Programs inform our members of social issues, community issues, International Issues, Cultural Issues and anything that intelligent people would be interested in. You come away from our meetings enriched.
- I am constantly traveling.
 - Traveling is not an issue with Rotary, as a matter of fact this is one of the biggest advantages of Rotary, whether it's to another town or another State or another Country, there is always a Rotary meeting nearby in which to do a make-up. This you will find to be most enriching, since every Rotary runs very differently yet very much the same. To see how the Leaders of Business in other Countries socialize during a meeting and their individual customs is a cultural treat. You will have an opportunity to exchange flags and talk about how your club works and meet interesting and influential people.
- I don't work in the same place where my Community is located.
 - This is the advantage of our Sunrise Club, which allows you to attend the meeting at 7:30 AM and is finished by 8:30. If you miss a meeting you can do a lunch meeting in the city where you work, also any of our affairs and projects count as a meeting, so you could get perfect attendance without making all the weekly meetings at our club.
- I don't have the money.
 - The financial obligation of Rotary is not as much as one might think. The bulk of the dues consist of the price of the lunch or breakfast. The other obligations are voluntary and if money is tight one of the most valuable commodities is participation in events and helping whenever needed.
- My business is hurting.

- If your business is hurting, you need to attend to your business, but Rotary is a great business decision to promote your business in the best way. We don't advertise it but when people see that you as a business person are doing things to help the community, then there is a trust that you cannot pay enough money to get in any media. Wouldn't you rather do business with a business that gives back to the Community than someone else who doesn't?
- I already work for a non-profit, which takes up all my time.
 - Rotary is the perfect partner to a non-profit. Where else could you socialize with the type of individuals who could most likely help your organization? Rotary partners with the biggest non-profits. Have you ever heard of the Gates Foundation? Rotary partners with Bill Gates to the tune of 200 Million Dollars.
- I don't know anyone in Rotary
 - One you attend a meeting the members are very friendly they will introduce themselves and all of them are individuals who are giving people, who want you to be comfortable in the club, you will want to bring in other friends so that you can spread the joy of giving back to the Community
- I am not Political
 - There is no Political party in Rotary, we have all variety of parties and active discussion about issues as well as Sports and Plays and Culture.
- I can't make all the meetings.
 - It is not necessary to make all the meetings, you can do make-ups and miss a percentage of meetings, we only expect that you show an interest in the happenings of the Club and participate whenever possible.
- I'd rather give to a Charity
 - Rotary supports many Charities, but the money that we raise that is given to needy people or Charities has no administration cost attached to it, 100% of what we raise goes to whoever we give the money to.
- I don't eat lunch/Breakfast
 - You may have a special plan that omits the cost of Lunch or Breakfast and you will join us and enjoy the company, business and education.
- I'd rather not waste my time socializing every week vs. learning new things
 - Every meeting is a learning experience and a networking experience.
- Nobody has asked me.
 - We are asking you, if you really want to have a special experience and feel good about giving back.

Should we react differently when members leave?

Greg Krauska, who posts insights on how to create thriving, growing, high-impact Rotary clubs, posted the following comments on how Rotary Clubs should manage member resignations (Krauska 2009).

I have yet to see a club that celebrates when a member leaves. What would it be like if we took a few minutes to recognize and honour the service and effort of every member who leaves? What if

we took that moment to recognize the best that the person had to offer, the difference they made and the stories that stand out? What would be the effect on the remaining members?

- How do you create a great experience when members resign?
- Have you had success bringing them back?

Personal research – Rod Evans

In December 2017 I had lunch with a Perth businessman who reflects the potential targeted demographic of an ideal future Perth Rotarian (a business leader, active philanthropist, well connected in the Perth community). I spoke to him about The Rotary Club of Perth’s strategic planning and I asked his opinion on Rotary. His advice was:

- People are time poor. The Club needs to restructure around just one meeting per month if it is to attract people such as himself.
- The image of Rotary is becoming staid. The plan needs to articulate a set of objectives that new members can get excited about and build their interest around.
- The face of fellowship is changing. Meeting for meals is no longer the preferred method for fellowship. Business people now prefer to socialise through activities such as coffee meetings, participating in physical activities such a group bike rides and golf, and via social media.

In January 2018 I met a small group of people in their 30s. I asked them if they had ever considered joining Rotary. They said that joining Rotary was not even on their radar. They simply didn’t see the ‘value proposition’. Their perception was of Rotary as a club made up of older retired men.

In February 2018 I spoke to a group of Perth business people attending a business-based fund raising event. Their view was that Rotary has lost its ‘presence’. They saw joining Rotary as no longer been necessary for networking, progression in employment or as a means for contributing to the community. They cited initiatives such as the Hawaiian Ride for Youth as a much more enjoyable, accessible and effective for achieving the objectives proposed by Rotary.

2.5.4 Why people stay in Rotary

This section looks at why people stay in Rotary.

People stay because they want to be part of something that allows them to exceed the expectations of themselves

Tom Koulopoulos, a global thought leader on the future of business and technology, produced a video in which he spoke on why people join organisations.

“We all want to be part of something — an organization, a team, a community, a relationship — that somehow allows us to exceed our expectations of ourselves. Fulfill that need and you create something that is really magic; something that binds people together like nothing else can.”
(Koulopoulos 2017)

Academic research on why people remain in organisations

Academic researchers have found that retention is maximised where:

- The service activities of volunteers is planned; service activities match people's interests; and mentoring programs are implemented (McBride and Lee 2011)
- There is a proactive management style creating a favourable work environment (Waikayi et al. 2012)
- There is a high sense of well-being that arises from being a member (Hasselkus 2006)
 - Well-being comes from when people can choose and engage in activities in a way that supports their lifestyles and personal meanings. (Doble and Caron Santha 2008)

The reasons clubs give for joining Rotary

Clubs often post reasons for joining Rotary. The following is a post from the Rotary Club of Scarborough, Maine (Unknown 2017b)

- Friendship / Fellowship / Community
- Business Development
- Personal Growth and Development
- Leadership Development
- Citizenship in the Community
- Continuing Education
- Fun
- Prestige
- Citizenship in the World
- Assistance When Traveling
- Public Speaking Skills
- Entertainment
- Development of Social Skills
- Family Programs
- Vocational Skills
- The Development of Ethics
- Cultural Awareness
- Nice People
- Absence of an Official Creed
- Opportunity to Serve

2.5.5 Why people leave Rotary

This section looks at why people leave Rotary.

Results from a study commissioned by District 9455

A study commissioned by District 9455 examined the factors that have led to members leaving Rotary (Milbourn 2017). The study interviewed 64 Rotarians who left Rotary Clubs in District 9455 between 2013 and 2016.

Respondents gave the following reasons for their decision to resign from Rotary:

- Lack of feeling of belonging
 - 63 of the 64 respondents felt a lower than average level of belongingness
 - Respondents joined Rotary in search of fellowship but left because they feel disenfranchised
 - The reasons given were:
 - Club cliques
 - Financial alienation
 - Difference of status within the club and sense of inequality.
- Losing members was affecting the club's ability to get things done
 - Too much work / not enough doers
 - Eventual burn out
- Small club size
 - Larger Clubs can be more vibrant and effective
 - There are too many clubs in the same region
- Loss of protocols and traditions e.g. fine sessions
 - Others respondents reported too many protocols – and that the Club was not sufficiently modernised
- The club and Rotary are overly bureaucratic
- The club was not relevant enough for younger members
- Membership was too expensive – a financial burden
- Being a member was too time demanding
- There was not enough opportunity to have a say in the Club's running
- Individual efforts were not recognised

The report included the following recommendations:

- The appointment of member liaison and support officer to pair new members with club mentors to nurture a sense of belonging for new members.
- Increased communication between the different levels of the Rotary organisation (District, Board and Club) to improve consistency in the running of individual clubs and clarify expectations of members.
- An effort by Rotary to recruit younger members
- District boards to support clubs to facilitate open forums to foster progressive values being absorbed and modified within the clubs.

- Merge clubs.

Rotary Membership Task Force District 1030

A membership task force in district 1030 (Northeast of England) identified the following reasons for people leaving Rotary and provided a list of remedial actions (Dynes 2017?)

Why people leave Rotary

- Poor club leadership.
- Lack of proper screening for quality members.
- Improper induction ceremony.
- Inadequate orientation of the new member.
- No participation or involvement.
- Non-fulfilment of sponsor's responsibilities.
- Insufficient attention to members (new and old).
- Lack of friendship or fellowship.
- Cliques.
- Misjudgment in committee appointments and improper use of talents.
- No meaningful club projects.
- Clubs do not measure up to expectations.
- Boring meetings — too formal and inflexible.
- Wrong meeting time and/or place.
- Poor order, planning and objectives.
- Lack of individual and collective discipline in reaching a common purpose.
- Complacency, indifference and apathy on the part of some members and officers.
- Loss of faith.
- Lack of proper recognition.
- No motivation, enthusiasm or dedication.
- Poor communication between officers and members.
- Excessive cost — too many parties and social events.
- No follow-up on transfer members.
- Lack of encouragement to members to attend district and international events.
- Inadequate publicity to gain community support.
- Lack of continuing membership growth and development programs.

Ways to stop people leaving Rotary

- Have new members immediately involved in a club assignment.
- Follow up members who have been unusually absent.
- Provide each new member with a mentor for his or her first six months.
- Provide leadership training at the club level.
- Concentration on quality members through proper screening.
- Impressive and meaningful induction ceremonies.
- Education or orientation of new member on Rotary history & culture.
- Involvement of all members (new and old).

- Family involvement. Spouse & children should be included club service activities.
- Sponsors should carry out their responsibilities toward the new members.
- Members must feel needed and wanted.
- More emphasis on service and quality fundraising projects.
- A connection with the community.
- Meetings should start on time and close on time.
- Meetings with free, creative spirit; tolerance, flexibility, good will and quick wits.
- Improved attendance through good and interesting programs.
- Better planning and establishment of objectives and goals.
- Proper recognition.
- Reorientation and motivation of old members.
- Improvement on communications between officers and members.
- More teamwork.
- Cost of meals and social events should be low to keep dues reasonable.
- Members leaving the club due to job transfer should be referred to new club.
- Members should be encouraged to attend district and international conferences.
- Prestige and image of the organization should be maintained through good PR.
- Advice from the DG and AG can be sought to assist in solving problems.
- A year-round membership growth and development program should be consistently applied and monitored as a priority.
- Have greeters at the door offering a friendly welcome.
- Club President to periodically sending a brief email keeping all members in the loop.
- Have social functions that include spouse and partners.
- Get involved in regular programs on Rotary at district and international levels. This will help members relate with the bigger picture of Rotary and its impact in the world.
- Have an active membership committee with members who have a passion for Rotary. The committee should meet 6-8 times a year and be one of the most active committees in the club.
- Take part in district meetings and seminars on membership development and retention.
- Produce and disseminate a good, newsy, reader-friendly newsletter. It should contain a liberal dosage of club members' names. People like to see their names in print.
- Make sure members are aware of the district and national goals.
- Have a review meeting with a new member after two months. Establish how they are and how they'd like to develop their membership and act on it.
- Produce a membership directory annually.
- Have new members immediately involved in a community project.
- When a person drops their club membership, have an informal "exit interview" or questionnaire to learn of the reason. There might be some trends that can be detected and avoided.
- Appoint a small "goodwill committee" who will send get-well, sympathy, or congratulatory cards as appropriate.
- Publicly recognize Rotarians who have reached career or family milestones. This pat on the back is well deserved and deeply appreciated.
- Do Rotary profiles on a regular basis so Rotarians get better acquainted with each other.

- Help keep the fun in Rotary by asking members to sit at different tables and participate in Rotary trivia table quizzes, games nights etc.
- Adopt the philosophy “we care about you”. This could be the main focus of one committee. When people feel genuinely cared for and appreciated, they likely will have better attendance and get more involved.
- Keep your club in the media. When the club has high visibility in the community it is more meaningful to be a member of Rotary. Club projects, social events, Paul Harris awards, etc. should have local newspaper and/or radio coverage.
- Extend a personal invitation, rather than make a mass broadcast announcement, to members to attend seminars or district conferences. Some are unsure about district events and sit on the sidelines waiting to be asked. It’s a wonderful opportunity for them to make new friends and get a broader picture and understanding of Rotary. There are several opportunities each year to do this. Have the club pay part of any required registration fee.
- Use your Assistant Governor as a resource person. They have received special training and want to form a bond with your club. Don’t always wait for them to take the initiative.
- Arrange for a few club members to visit nearby clubs and reciprocate by hosting others. This should be done at least twice a year. Get acquainted with your nearby clubs!
- Give club recognition to 10-20-30-40-50+ year members.
- Recognize those with several months of perfect attendance.
- Make personal visits to Rotarians who miss 40% or more of the meetings. Let them know they are missed!
- Offer occasional inexpensive prizes to add fun to the meetings. A bag of M & Ms, a large bar of chocolate or gift card, etc. can add fun and excitement to the club meetings.
- Luncheon meetings sometimes can be a problem for many to attend. Maybe it’s time to explore other options i.e. start a new club or once a month meet at an alternative time.
- Show appreciation for what members do in the club.
- Consider the length of meeting times and how long it takes to make decisions. Try to chair meetings effectively to avoid lots of unnecessary chitchat.
- Ensure the club has a variety of social events for all tastes.
- Keep in close contact with younger club members to see what they want to try and give them the opportunity to try new ideas.
- Have a Rotary minute at each meeting and just give a short fact about a recent success of Rotary International globally. This is to remind members that they are part of a larger and successful organisation.
- Put the fun in Rotary! There is a time for seriousness and a time for fun and laughter. Be sure your club has a good balance.

Studies on retaining people in for-profit organisations

In December 2011 Forbes magazine published an article on the top ten reasons why large companies fail to keep their best talent (Jackson 2011). This article provides an additional and useful insight into why members might leave Rotary. The 10 reasons cited for why large companies fail to keep their best talent were:

- Big company bureaucracy
 - People don't like rules that make no sense to them or they don't feel as if they don't have a say in.
- Failing to find a project for the talent that ignites their passion
 - The organisation doesn't have people going around to their best and brightest asking them if they're enjoying their current projects or if they want to work on something new.
- Poor annual performance reviews
 - The organisation doesn't provide quality feedback to their employees (members).
- No discussion around career development
 - The organisation doesn't engage with their employees about where they want to go in their careers -- even the top talent.
- Shifting whims and strategic priorities
 - There are regular changes in strategic priorities. Top talent hates to be "jerked around."
- Lack of accountability and/or telling them how to do their jobs
 - There is a failure to have regular touch points with their best people as they work through their projects.
- Top talent likes other top talent
 - To keep your best people, make sure they're surrounded by other great people
- The missing vision thing
 - What is the vision you want this talented person to fulfill? Did they have a say/input into this vision? If the answer is no, there's work to do -- and fast.
- Lack of open-mindedness
 - The best people want to share their ideas and have them listened to.
- Leaders influence whether people wish to stay or go.

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2.6 PROJECTS

This section presents

- Strategies for identifying potential projects
- A list of current Club projects.

2.6.1 Strategies for identifying potential projects

The Monitor Institute, Deloitte Consulting LLP's social impact practice, advises programs such as the Bill & Melinda Gates Foundation's Grand Challenges program, the Robert Wood Johnson Foundation's Pioneer Portfolio, and the MacArthur Foundation's Discovery Fund on systems to find and fund breakthrough social innovation.

The methods employed by The Monitor Institute are summarized in Kasper and Marcoux (2014, 2015). The strategies include:

- Make deliberate out-of-strategy grants
 - Dedicate 10 percent of your grant making budget to support projects that seem promising but don't fit neatly into your strategy. Each quarter, hold a meeting to discuss what has been learned from this "out-of-strategy" grant making.
- Ask your grantees.
 - Solicit ideas from your grantees about emerging ideas and who is doing work that is pushing the envelope.
- Tap into your network.
 - Select a small, informal group of advisors, and every six months, ask them to tell you about the most interesting new ideas that they're seeing, whether the ideas are a fit for your grant making or not.
- Host an innovation contest.
 - Through social media and other tools create a competition to find new ideas. Provide rewards (prizes / grants) to the best ideas.
- Bring in a futurist.
 - Invite one of these forward thinkers in to talk with your organisation to see if they prompt new thinking.
- Follow provocative thinkers.
 - Find 10 people who are exploring new concepts and approaches and follow them via Twitter or blog posts, cataloguing the ideas they mention. Then host a discussion amongst members to see what new thinking these ideas might prompt.

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2.6.2 Current Club Projects – at August 2017

| Project | Description |
|---|--|
| Rotary Youth Exchange | www.youthexchange.asn.au Provides for the selection and sponsorship of students aged 15-18 years to travel to another country to spend twelve months attending a secondary school and living with host families in that country |
| Joint events with international community organisations | Enhancing members' knowledge of international understanding, goodwill, and peace through the world fellowship of Rotary |
| Reflections Through Reality | www.rotaryperth.org.au/reflections-through-reality Mesothelioma research |
| Kimberley Dental Team | www.rotaryperth.org.au/KimberleyDentalTeam Providing dental health services to remote communities and teaching about the importance of oral hygiene in the schools |
| Cambodia: Nokor Tep Women's Hospital | www.nokor-tep.net Treats women in desperate need of gynaecological medical care. Education for prevention and when to seek medical care is also available. |
| Rotary Health Foundation | |
| Polio Foundation | |
| Convicts for a Cause | Fundraiser |
| Telemedicine Project | Using mobile phones to deliver medical support to rural poor communities, initially in India |
| Kimberley Dental Team | www.rotaryperth.org.au/KimberleyDentalTeam Providing dental health services to remote communities and teaching about the importance of oral hygiene in the schools |
| 50 Lives/50 Homes (with Rotary Club of Heirisson) | A respite centre and support services for homeless people in Perth. |
| Passages Resource Centre | www.rotaryperth.org.au/Passages A drop in centre for homeless young people, in Northbridge |
| Path of Hope | www.rotaryperth.org.au/path-of-hope A learning centre and outreach services to support survivors of domestic violence. |
| Kimberley Dental Team | www.rotaryperth.org.au/KimberleyDentalTeam Providing dental health services to remote communities and teaching about the importance of oral hygiene in the schools |
| Cambodia: Family Support | www.rotaryperth.org.au/family-support Run by Cambodians for Cambodians, CFS works amongst the rural poor in remote parts of Cambodia. It helps poor Cambodians help themselves achieve a better life. |

| | |
|--|--|
| Helping Hands Cambodia | Fund raiser for Cambodia Family Support |
| Passages Resource Centre | www.rotaryperth.org.au/Passages A drop in centre for homeless young people, in Northbridge |
| Path of Hope | www.rotaryperth.org.au/path-of-hope A learning centre and outreach services to support survivors of domestic violence. |
| Jolly Phonics Literacy Program | Year 1-7 |
| Science & Engineering Challenge | Year 9/10 |
| NYSF | National Youth Science Forum for Year 11/12 |
| RYPEN | Rotary Youth Program of Enrichment for Year 10 |
| 4 Way Test Speaking Competition | Year 10/11 |
| RYLA | Rotary Youth Leadership Award for 18-25 year olds |
| RYLEAP | RYLA Alumni Leadership Programme for 20-30 year olds |
| Partner of Rotaract Club of Perth | For 18-30 year olds |
| Government House Open Day | Devonshire Tea fundraiser |
| Vienna Pops Concert | Charity fundraiser |
| Vocational visits to charitable programs and business networking | www.rotaryperth.org.au/Vocational |
| Sir Wallace Kyle Oration | The Kyle Oration is a free public lecture presented by the McCusker Centre for Citizenship, the Institute of Advanced Studies at UWA and the Rotary Club of Perth |
| Rotary Excellence Awards Program | |
| The House that Jack Built | www.rotaryperth.org.au/rotary-house-builders Working with local communities in Cambodia to build houses. |
| Stitches Project | Making sleeping bags in Cambodia, and donating them to homeless people in Perth |
| Rotary Business Networking | Rotary Means Business International Fellowship – District initiative |
| Elizabeth Quay Wishing Well | Fund raising with MRA |
| Rotary House | Relocation of the Rotary Club of Perth office to 5 th floor at the same address |

2.7 FUNDING

2.7.1 Overview

The section addresses the changing environment of corporate giving and fundraising.

2.7.2 Concern over the high cost of fund raising and amount of charitable dollars spent on administration

Australian charities can spend a significant proportion of the funds they raise on the fund raising effort. The following data was published in the West Australian newspaper on 31 December 2017 (Flint 2017)

- There are 52,000 registered charities in Australia.
- Financial statements filed with the Australian Charities and Not-for-Profits Commission show that some charities spend over 60 cents in fundraising on each dollar they receive.
 - RSPA Western Australia spent \$1.66m to raise \$2.68m
 - Cancer Council Western Australia spent \$12.5m to raise \$17.1m
 - Samaritans spent \$137,711 to raise \$246,968.

There is also growing concern about the high administration costs within some charities. For example neurosurgeon Charlie Teo resigned from the brain cancer charity he founded after falling out with his board over the amount of donations soaked up by administration costs (McDougall 2017).

- Professor Teo is setting up a new low-cost charity which aims to slash the proportion of donations spent on administration, marketing, advertising and staff from 65 per cent to 10 or 15 per cent.
- He said he wanted to shake up Australia's \$100 billion charity industry to ensure that most of the donated monies were spent directly on research and patient care.

2.7.3 The changing nature of corporate giving

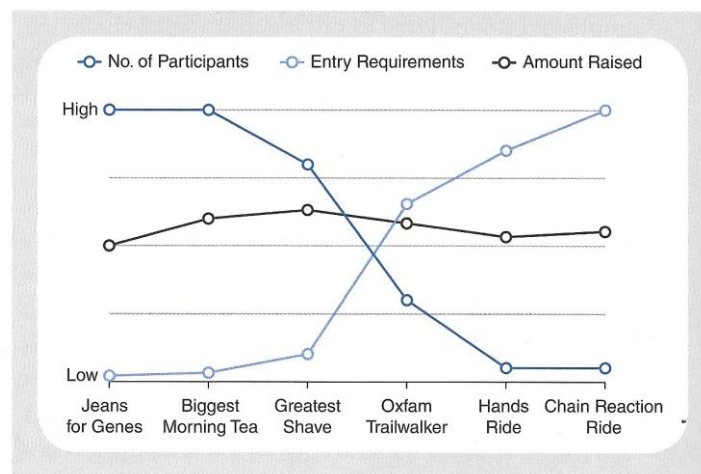
Over the last 10 years there has been a growing emergence of corporate giving not just as an altruistic do-good exercise but as a way for corporations to also improve their bottom line performance. This approach to corporate donating has been termed 'doing well by doing good' or 'doing good by doing good' and it is changing the face of how corporate donors wish to interact with not-for profit organisations.

The concept that the market rewards enterprises' social activities has been around since the 1970s (Margolis and Walsh 2001). Researchers such as Falck and Hebllich (2007) were able to demonstrate a clear economic return to businesses that engaged in corporate social responsibility. Since then the model has been refined and authors such as Australian Peter Baines, the founder of Hands Across the Water – which has raised over \$20m to build homes and provide education for abandoned and

at risk children in Thailand, have increasingly popularised the need for corporations to think beyond just donating money.

The following commentary is drawn from Peter Baines book, 'Doing Good by Doing Good' (Baines 2015).

- There are business people that are making a good profit but their business is not feeding their soul. They are looking for something extra.
- Community Service Responsibility (CSR) can attract the same type of leverage that safety has in the mining sector.
- CSR projects if undertaken in the right way can benefit both society and a company's bottom line.
- Projects don't need a lot of participants to raise lots of money.



- The most successful projects have an emphasis on experiences not just giving.
- Therefore need to look to projects that give corporations experiences for their staff and or customers.
- Giving money to a charity is one of the least valued forms of giving.
- CSR can deepen the level of engagement an employee has with a company.
- Hewitt Associates found that 35 % of those surveyed would take a 15% pay cut to work for a company committed to CSR, 45% agreed to the same pay cut if their job made a positive social or environmental impact while 58% would sacrifice 15% of their income to work for an organisation with values that matched theirs.
- A study at the Tuck School of Business, New Hampshire, found that improving customer perception on a CSR dimension of just one point (on a five point scale) can result in a lift in sales of 12 – 16 %, and there are opportunities to add a price premium of 12 – 16% on brands and products with CSR benefit.
- The advice to a business looking to implement a CSR program is:
 - Create a connection
 - Choose a charity you feel a personal connection with
 - Create certainty
 - Commit to giving regularly (time / money / other resources)

- Create significance
 - Give more than you are comfortably giving. The gift then becomes one of importance rather than something from leftovers.
- If you have the size, layer support across a number of charities
 - This results in greater engagement with staff
- Look for opportunities that don't require a straight cash injection.
- For charities, the traditional way of working was to approach potential funders and make a presentation showing:
 - How much you needed
 - What difference the money will make
 - What you have done in the past
 - How worthy and good you are
 - How little you spend on fund raising (but many will leave this out)
 - How in return for the money you will display their logo
 - How you will produce a newsletter showing the success of the program.
- The new way of working is to present showing:
 - How the work you do connects to the potential supporter's vision and values
 - How partnering will impact their core objectives and outcomes
 - A copy of your marketing and communications plan
 - How without their support the project will not proceed
 - The opportunities that will be created for the supporter's staff and families and how they will be involved
 - Details of the launch – how many will attend and how they relate to the demographic the supporter aims to reach
 - The list of other businesses involved
 - The strategy for reporting back on outcomes for the supporter.
- Application for funding should be less of a 'donation request' and more of a 'business plan'.
- The questions to ask of any program you are involved in:
 - How can I add value?
 - Be clear about why you are doing it?
 - Believe in it or don't do it
 - Become known for it
 - Check that it feeds your soul.
- Good charity partners for business:
 - Are a tax deductible gift recipient
 - Are managed locally
 - Have audited accounts
 - Have a clear strategy
 - Have a professional board.

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2.8 GOVERNANCE

This section looks at theories for the effective governance of not-for profit organisations, gives an example of governance in a local Rotary club where the members are young, and gives an example of a not-for-profit annual report.

2.8.1 Theory of Governance

The section summarizes ideas presented in two books on the management and governance of not-for profit organisations:

- *'Forces for good: the six practices of high-impact nonprofits'* (Leaf 2013)
- *'Engine of Impact: Essentials of Strategic Leadership in the Nonprofit Sector'* (Meehan and Jonker 2017)

Forces for good: the six practices of high-impact nonprofits

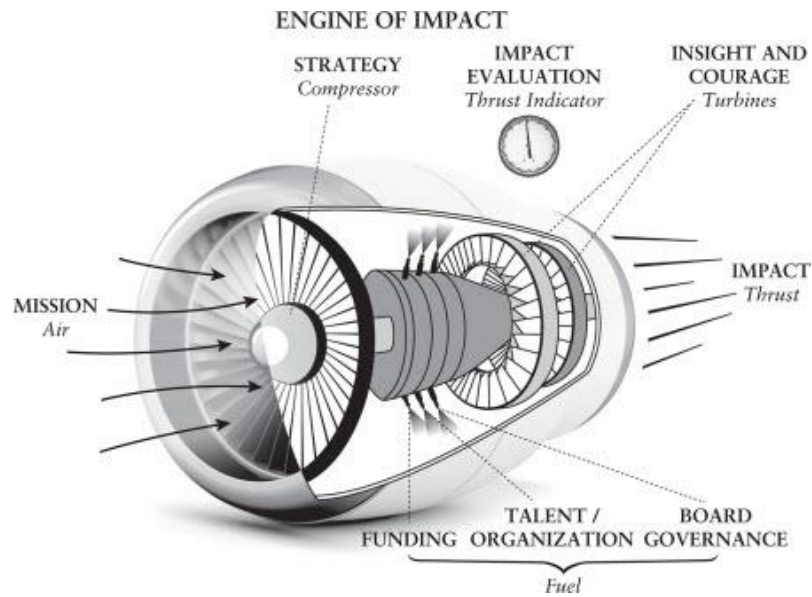
The six practices that high-impact nonprofits use to achieve extraordinary impact are:

- Work with government and advocate for policy change
- Harness market forces and see business as a powerful partner
- Convert individual supporters into evangelists for the cause
- Build and nurture nonprofit networks, treating other groups as allies
- Adapt to the changing environment
- Share leadership, empowering others to be forces for good

Engine of Impact: Essentials of Strategic Leadership in the Nonprofit Sector

- Forward by Jim Collins, author of *Good to Great (Collins 2004)*
 - The best-run, most-impactful nonprofits stand as some of the most impressive enterprises in the world.
 - It is substantially more difficult to build a great social sector organisation that to build a great business corporation of similar scale.
- The creativity and discipline to build a great non-profit substantially exceeds the creativity and discipline required to build a great business corporation.
- The seven crucial pillars for high performance:
 - Your mission must be clear and focused
 - Nonprofits often lack clarity of purpose
 - A clear mission statement should serve to guide all major decisions
 - You must develop a strategy rooted in the few strategic concepts that matter most
 - Must have a planned set of actions that are designed to achieve the mission
 - All nonprofits are competing in a market

- The strategic plan should have a focus on building the organisations capability for strategic planning
 - Don't underestimate the time and effort required for an effective strategic planning process.
 - Don't forget to start with a fact-based, objective situation analysis
- You must figure out how to count what counts to ensure impact
 - Measure what counts
 - If it can't be measured then it mustn't count
 - Qualitative factors need to be assigned quantifiable measures
 - Use evaluation to create a loop to drive strategic thinking
- You must have insight and courage, bringing heart and soul to making and executing on hard decisions
 - It is heart and soul that are often the essential starting points on the road to building paradigm-shifting, high impact nonprofits.
 - Great nonprofits invariably start with a profound insight – a distinct and compelling viewpoint about how social change can come about, including a sense of one's personal role in that change
 - Need to have courage to stand against opposition
- You must build superb organisation, a team of teams, that exemplifies the principles of high-performance organisations
 - You are only as good as your people. Get the right people on the bus.
 - A team of teams structure is where teams come together around specific goals with a single coordinating executive team at the centre, and the composition of each team shifts as needed over time. Teams and team members work together in constantly changing, fluid ways.
 - The team of teams approach provides exciting on-the-job leadership development opportunities.
 - Focus on fact-based decision making
 - Plan for succession
- You must attend to money, as cash is like oxygen to breath, by crafting a strategic revenue machine that includes the right donors
 - Non-profit leaders who want to increase their impact must redouble their commitment to fund raising.
 - Look at opportunities to attract earned revenue – do something that earns money.
 - Prioritise major gifts
 - Emphasise proper stewardship of funds raised
- You must achieve exceptional governance, building a nurturing a strong board that works.
 - Ineffective non-profit boards are not an inescapable fact of life
 - The board's focus should be on mission and strategy.
 - Board members of top-performing nonprofits are deeply engaged with the mission



Source: Engine of Impact

2.8.2 Example of governance in a club with younger members

The Rotary Club of Elizabeth Quay was formed in 2015 and comprises members who are in their 20s and 30s. This is how they have chosen to set up the governance of their club:

- Board / Leadership Group
 - Comprises: President; Vice President; President-Elect; Immediate Past President; Treasurer; Secretary; Director Partnerships; Director Member Experience; Director Marketing and Comms; Director Projects; Director Strategy and Innovation.
- Meetings
 - They have a meeting once per month devoted to a guest speaker and two meetings a month devoted to projects.
 - Their meetings have done away with the formalities commonly associated with Rotary – there are no prayers, singing or sergeant sessions.
- Projects
 - They get involved in innovative projects. In July they were involved in a 10 day Social Impact Festival with the University of Western Australia. In August they ran an 'Inspiring Social Change Through Design' program in collaboration with Ernst and Young. Both events had strong social media presence.
- Marketing and communications
 - They have a trendy web site <https://www.rotaryeq.org/> and make heavy use of social media
- Reporting and KPIs
 - They produce an annual report (REQ 2017)

2.8.3 Annual reporting

The Australian Futures Project provides an example of a not-for-profit organisation that produces a well-structured annual report (Australian Futures Project 2016-17).

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3. POTENTIAL INITIATIVES FOR THE ROTARY CLUB OF PERTH – THOUGHT STARTERS

This section sets out a range of ideas that might be included in the Rotary Club of Perth’s strategic plan. These ideas are provided merely as thought starters.

3.1 MEMBERSHIP

3.1.1 Goal

The goal is to grow and maintain a membership base of 200 active members with membership reflecting a club made up of past, current and future leaders in business, the professions and the community; and who represent a diversity of ages, views, cultures, backgrounds, skills and experiences.

3.1.2 Strategy

Creating a club people want to join

- To attract and retain members there needs to be a clear ‘value proposition’ for being a member of the Rotary Club of Perth (what members receive for the time and cost they invest).
- The value proposition for membership in The Rotary Club of Perth is that as a member there is a unique opportunity to:
 - Be involved in projects of impact and significance that make a real difference to other peoples’ lives
 - Develop a deep and varied network of contact with people within the city who become valued and long lasting friends rather than just ‘business acquaintances’
 - Meet and hear from people that would not normally be part of your network of contacts with political, business and community leaders, sports people, adventurers, and thought leaders.
 - Take on roles that may not be a normal part of your profession.

Headhunting

- Attracting new members has traditionally been the responsibility of individual members, coordinated by a membership committee
 - While this approach will be retained, the emphasis in future will be on identifying and ‘headhunting’ people who are seen as meeting the ideals of a Rotarian and who might be able to contribute to the Club’s mission.
- This ‘head hunting’ strategy will involve:
 - The Club identifying 100 Perth-based Western Australians who are considered to be past, present or future leaders in business, a profession or the community; who reflect the Club’s objective of diversity, and who are believed to reflect the qualities of a future Rotarian.

- These people will be formally contacted by the Club in writing with a member known to them or someone of relevance to them as a point of personal contact.
- They will be advised that they have been specifically chosen by the Club and the reason for this choice
- They will be provided with a summary of the Club's 5 year strategic plan and an explanation of why they are seen as important to the execution of this strategy
- Follow up will be in person by a club representative.

Promotion and advertising

- 'Open' club meetings
 - The Club will conduct an 'open' meeting once per month where a speaker of outstanding quality will speak.
 - The speaker will be of a standard that is likely to attract interest from a variety of people outside of Rotary.
 - The meeting will be open to all members of the public and attendance can be without invitation (non-members will be charged additional for the lunch)
 - This meeting will have limited Rotary formality but will include minor elements of club business as a demonstration of the Club's activities and its community role.
 - These events will be actively promoted through social and other media.
- Engagement through projects
 - The Rotary Club of Perth will be involved in projects that include the extensive engagement of non-Rotarians
 - These projects will give non-Rotarians an opportunity to work alongside Rotarians and see Rotary in action.
- Social media
 - A quality web and LinkedIn site will be developed and maintained.
 - The Club will be actively promoted through social media

Vibrancy

- Striving to achieve the Club's goals will create energy and excitement
 - The objectives within this strategic plan will create a central core of endeavour and excitement within the Club.
- Club activities:
 - Club activities will be structured to reflect the broad diversity of interests of younger and incoming members, while still serving the interests of older members (refer to Governance).

Matching members with their interests

- Member survey
 - Members will be surveyed annually to establish their project interest and how they would like to contribute to the objectives of the Club.
- Member initiated projects
 - Members will be encouraged to initiate projects.
 - A format for communicating new project ideas to the club has been developed.

- Assignment to projects
 - Members will choose to self-appoint or be appointed by the Board to project teams.
 - There will be fluidity during the year between and within these teams as project requirements wax and wane.

Mentoring and development

- Participation
 - There will be an annual review of the Club strategy involving all members.
- Mentoring
 - Younger members will be provided with a panel of club mentors who they can call on for advice and guidance.
- Leadership
 - Members of the Club will be provided with opportunities within the Club to fill board and leadership roles
 - The Club will promote its members as potential board members for other organisations.

Time commitment

- Club meetings will be restructured to reduce the time commitment placed on members and to make attendance at meetings more time attractive. (Refer to Governance.)

Cost

- Membership
 - The cost of membership will be reviewed annually.

Other membership attraction innovations

- Membership development initiatives successfully implemented in other districts and clubs will be explored. These include:
 - A member who recruits at least four new members in a Rotary year will receive a grant of \$1000 which can be used by the new members on a community project of their choice. (This is an adaptation of an idea successfully implemented in District 9800.)
 - Members will be drafted into teams and compete in a 'sports league' to attract new members. (This initiative was successfully implemented The Rotary Club of Jonesboro, Arkansas, USA and was described as great fun, especially for a 98-year-old club with a reputation for being somewhat stodgy.)

Honouring departing Rotarians

- The Club will invite back departing Rotarians and take a few minutes to recognize and honour the service and effort of every member who leaves.
- A 'Goodwill Committee' will focus on the care of a member during the term of their membership, will send members get-well, sympathy, or congratulatory cards as appropriate, and honour membership milestones.

The merging of Clubs

- The Club will explore opportunities to merge where the merge brings benefit to Rotary and its members.
 - Surveys within other Rotary districts have identified a sentiment that there is currently too many clubs in some regions.

3.2 PROJECTS

3.2.1 Goal

The goal is for the Club to be a catalyst for large scale impactful projects that do good in the local and international community.

The Club will support a clearly defined set of innovative projects that benefit the community. It will do this by providing skills, networks, knowledge and passion that extend beyond simply been a source of funding.

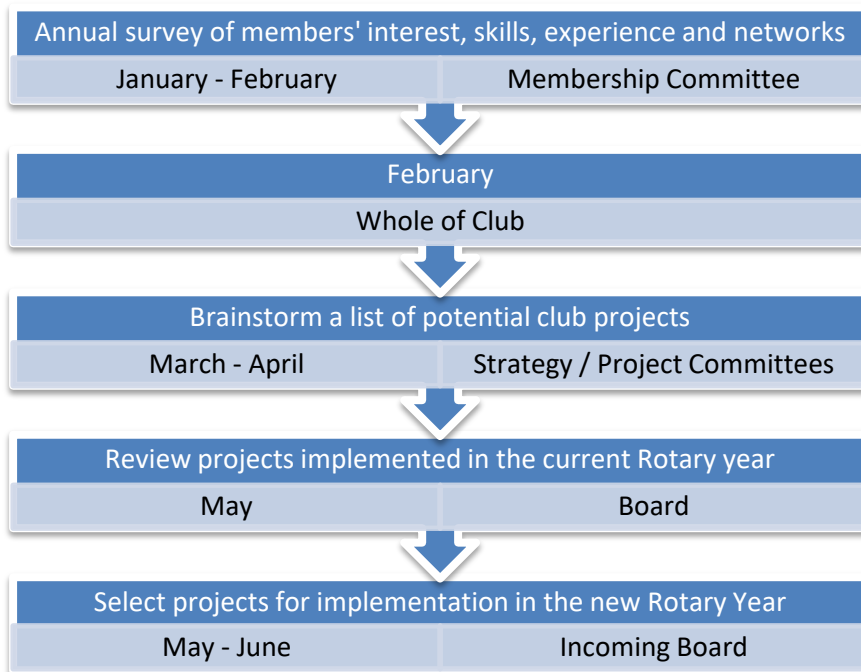
3.2.2 Strategy

Project involvement

- The Club will focus on being a *catalyst* and *enabler* within the community rather than just a source of funding.
 - The emphasis will be on where and how the Club can apply its unique collection of skills, networks, knowledge and passion.
 - Funding will only be applied to projects where a project:
 - Reflects the passion and interests of members within the club
 - Leverages Rotary as a source of skills, networks and knowledge
 - The Club will seek to pursue projects where partnering with other Rotary Clubs also adds value through additional skills, networks or economies of scale.

Finding projects

- Systematic Search
 - The Club will conduct an annual program for systematically identifying through members projects to be conducted and/or supported for the Club.
 - Input will be obtained from members through a club survey and project proposals



- The club will implement an innovation competition aimed at finding high quality but underfunded and under developed projects that might significantly benefit people and communities in Western Australia
- Opportunistic search
 - Through the networks of Club members it is inevitable that members will also become aware on an ad hoc basis of projects to which Rotary Perth can add value.
 - This opportunistic search will continue to be a valuable means for identifying projects that are potentially suitable for club involvement.

Selecting projects

- Co-ordination
 - The selection of projects will be co-ordinated by the Club Director of Projects together with a committee appointed by the Board.
- Project Proposals
 - Project proposals will be developed by the sponsoring members or by a team of Rotarians.
 - A pro-forma for this proposal initiation has been developed by the Club.
 - This pro-forma seeks details of the intended outcomes, project rationale and resource requirements of the project.
 - It will assist in communicating to all members an understanding of the project
 - It will allow individual members to consider how they might personally add value to a Club project

- Decision making
 - No single member of the Club will have the authority to approve a project for support by the Club. For a project to be adopted by the Club there will be a requirement for unanimous support by the Board.
 - Where there is a dissention of views amongst board members, the selection of a project will be placed before the Club for debate, and put to an online vote of all members.

Incubating projects

- The Club will also identify project ideas and concepts for further development and refinement during the Rotary year.
- These will be projects that might form high impact projects for the Club in the future.
- This approach of having projects in incubation will create a centre for innovation within the Club.

Reviewing projects

- As part of the Club's annual cycle of review and membership survey all projects will be reviewed annually and future involvement and management amended as required.
 - This review will occur in April / May of each year.

3.3 FUNDING

3.3.1 Goal

The goal of the Club is to grow The Sir Norman Brearley Trust and create the Trust as a foundation of significance and profile within the Perth community. The aim is to grow the trust to \$5m in 5 years.

3.3.2 Commentary

The Sir Norman Brearley Trust provides a unique opportunity for the Rotary Club of Perth to establish a Western Australian based foundation of significance and profile. Sir Norman Brearley was a founding member of the Rotary Club of Perth and a club member from 1926 until his death in 1989. He was a commercial and military pilot and one of the pioneers of the airline industry within Australia. He was a leader in the Perth community and involved in many projects in service to others. The Sir Norman Brearley Trust was established in 1999. The Trust is a registered charity, with tax exempt status.

3.3.3 Strategy

Donation attraction

- The Club will each year form a committee of members to develop and implement a strategy for attracting donations
- The Club will target people who are seeking to provide a legacy that leverages the initiation and implementation of programs that benefit the local community.

Trust Management

- The Club will continue to ensure that the Trust is managed appropriately.
- The target will be to set a benchmark standard and for the costs of operating the Trust to be less than 2% of total funds raised.

3.4 GOVERNANCE

3.4.1 Goal

The goal of the Rotary Club of Perth is to operate the Club in a manner that exemplifies best governance practice.

3.4.2 Commentary

Research has found that the best-run, most impactful non-profits have a clear and focussed mission, have a clear strategic plan for action, adapt to the changing environment, work with others, turn their supporters into evangelists, measure their performance, make hard decisions, build great teams, attend to the money aspects of the organisation, have strong leaders and boards but with shared leadership. These attributes are the logical governance targets for the Rotary Club of Perth. In targeting younger professional members the conduct of the clubs activities also needs to fit the lifestyle requirements and individual goals characteristic of this new generation of members.

3.4.3 Strategy

Corporate structure

- The structure of Rotary in Perth will be re-examined.
- This re-examination will include the possibility of creating a central Perth club (through the merger of Perth clubs) with the merged clubs becoming branches where meeting are held once or twice a month and provide a meeting place for members of similar interests or meeting attendance preferences.
- The central club would generate synergies and strength through numbers.

Club meetings

- The Club will conduct two Friday lunch time meetings each month.
 - On the first Friday of each month the Club will hold a formal club meeting
 - This meeting will only be open to Club members, members of other clubs and invited persons.
 - The focus of the meeting will be on club project and club business. (In instances where there is a guest speaker, this person will be a club member; otherwise there will be no guest speaker.)
 - All members will be expected where possible to attend this meeting
 - The format of the meeting will be regularly reviewed to maximise the benefit to and the interest of members.
 - On the third Friday of each month the Club will hold an 'open meeting'.

- This meeting will have a guest speaker of outstanding quality
 - Someone who is likely to attract interest from a variety of people outside of Rotary.
- The meeting will be open to all members of the public and attendance can be without invitation (non-Rotarians will be charged additional for the lunch)
- This meeting will have limited Rotary formality but will include minor elements of club business as a demonstration of the Club's activities and its community role.
- These events will be actively promoted through social and other media and will specifically aim to attract non-Rotarians. They will also invite attendance by Rotarians from other clubs.
- Other meetings of Club members can be scheduled on the remaining Friday lunch times or at times to suit members.
 - Members can also use the remaining Fridays to attend other non-Rotary Friday commitments.

Board structure

- The board will comprise the following positions:
 - President, Vice President, President-Elect, Immediate Past President, Secretary, Treasurer, Director of Projects; Director of Membership Growth; Director of Communications and Marketing; Director of Strategy and Innovation.
- There will be a restructuring away from the President being the central co-ordinator within the Club.
- Where there is more than one nomination for President-Elect the Club will vote on the appointment to that position.
- All other positions will be appointed by the incoming President.
- The Club will consider the option of 2 year periods for the President where members see this to be desirable. (Often Presidents don't 'hit their stride' until towards the end of their year in office. Often they are still keen to step down because of the drain of the position, which is why a structure creating a wider spread of workload is required.)

Teams

- The core of the clubs business will be conducted by teams.
- Project teams will replace formally year-of-term service committees.
 - This will create an environment fluidity and one that focuses on outcomes rather than administration
 - The structure and duration of these teams will be fluid during the year.
- Project team chairs will conduct their projects autonomously in a manner they see as best fitting the need of the project

Member involvement

- Members will self-nominate or be appointed to teams during the year
 - Each member will be assigned to one or more projects depending on their interest, potential to contribute to the delivery of the project, and their time availability.
 - This will allow each member to have an opportunity to contribute directly to a project in which they have a personal and emotional interest and commitment.
 - The emphasis will be on spreading the work load across all members and giving all members an opportunity to take leadership of projects of personal interest.
- Members will have the opportunity to provide annual input into the direction and activities of the Club through an annual survey.
- Members will have the opportunity to initiate projects that they believe will serve the objectives of the Club.
- The progress of these initiatives will be self-regulated by the interest generated amongst other members within the Club.

Collaboration

- The focus of the club will be on leveraging collaboration with other clubs and organisations.

Finances

- The Club will form a finance committee to examine and manage the finances of the Club.
- All club activities will be required to 'pay their way' however there will be an emphasis on reducing the cost of membership and attendance at Club events.

Strategic Planning

- The Club will maintain a 5-year strategic plan
- The plan will be reviewed in May of each year.

Reporting

- Club reporting
 - Reporting of key project milestones will be made to members at club meetings and through electronic reports from the President.
 - Reports will be 'the 30second elevator pitch'.
- Board reporting
 - Project teams will provide monthly reports direct to the board
 - A format for board reporting has been developed.
- Annual Reporting
 - The Club will produce an annual report
 - The report will be brief and succinct.

4. FINAL THOUGHTS

“We ourselves feel that what we are doing is just a drop in the ocean. But the ocean would be less because of that missing drop” - Mother Teresa.

“If one is lucky, a solitary fantasy can totally transform one million realities. “I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel” – Maya Angelou.

“Try not to become a man of success, but rather try to become a man of value. “The value of a man should be seen in what he gives and not in what he is able to receive.” - Albert Einstein.

“The definition of insanity is doing the same thing over and over and expecting different results” – Albert Einstein (although, despite the popular use of this quote, there is no evidence that he actually said this).