

# Rotary Club of Waynesboro Strategic Plan January 10, 2018

## Introduction

All strategic plans are inherently a navigational problem asking the questions:

- Where are we?
- Where do we want to go?
- How do we get there from here?

This Strategic Plan briefly covers all three questions. At our College of President's meeting in June 2017 those assembled suggested updating the club's Strategic Plan based on material presented and discussed. In the months since then we've attended to a number of suggestions arising from that meeting. However, we've not documented these assessments and recommendations in a Strategic Plan format, nor have we consulted with the broader membership. By preparing this Strategic Plan we'll do both and make suitable changes accordingly.

## Where Are We? Club Assessment

The club is healthy and dynamic.

We have a **membership** of 84 which somewhat surprisingly puts us in the "large club" category according to District 7360 people. This membership has grown slowly but steadily over recent years and we take the need to replace routine departures seriously.

We have a lean formal **organizational structure** consisting of an eight-member Board of Directors with five annually elected officers and three representatives of a large College of Past Presidents which meets monthly. We have **standing positions** for Secretary, Treasurer, Sergeant at Arms, Membership Chair and a club Foundation Chair. We've also initiated action to enhance Public Relations. Elected officers have generally attended Rotary Leadership Institute (RLI) courses to improve their awareness of broader Rotary capabilities and how they might enhance the club.

**Club administration** is accomplished in accordance with written Bylaws. Operating financial reports are submitted at monthly board meetings, and club Foundation funds are reported at least once per year. We use DacDB, an online club administrative system, to maintain membership records. We periodically take steps to update DacDB information. We also make this information directly available to all members.

Our **structure is inherently sustainable** as we traditionally elect officers who occupy positions in a regular progression: International Services, Community Services, Vocational Services, Club Services, and President. The first four of these officers also solicit weekly speakers for one quarter per year as they progress through the positions.

Beyond the formal club structure, we have an impressive list of **ongoing activities and projects** (atch 1) with chairs and members who do a great job of planning and executing these projects year after year. We promise these activity chairs to get them help when inevitable conflicts arise, and we make a consistent effort to replace departing chairs and members in a timely fashion as the need arises. We are also blessed by having members of the club who initiate action or respond to requests to address specific "one time" projects. The effort to prepare for our Centennial Anniversary in under two years and the Rotary Sign replacement are examples.

**Financially**, the club is in excellent shape. Routine operating expenses (meals, dues, etc) are covered by quarterly fees to members. Income in excess of quarterly operating expenses are transferred to the club Foundation. That Foundation consists of three main components. First and second are our club scholarships. The Thompson Scholarship is needs based and is financed from an endowment of approximately \$256K from contributions and investment earnings over many years. The club's Rotary Scholarship is merit based and financed from an endowment of approximately \$30K from member contributions and investment earnings. Remaining foundation funds (approximately \$105K) are used for a range of community needs (eg, Rotary Park playground equipment and the Rotary Sign replacement). We've initiated action to invest all remaining funds to grow these assets over time. Our main fund raiser, Battle of the Minds, routinely earns the club over \$10K per year while directly benefiting a worthy local organization with an equal amount.

Our club has also maintained fairly consistent **contributions to Rotary International (RI) Foundation funds**. In recent years members sent in the vicinity of \$7K per year to a variety of funds, and in the current year the club contributed over \$1K to PolioPlus. The club encourages contributions to RI Foundation funds for those members who are able and is taking steps to better inform club members so that their contributions are well informed. We've also added a short list of donation opportunities to the bottom of the quarterly billings to make it easy for members to add a few dollars for the opportunity of their choice.

Our organization has remained nimble and **responsive to changing circumstances** and has created new projects (eg, Broken Spoke) when proposed and supported by the membership. We've taken steps in recent years to update our online presence via the club website at [www.rotaryclubofwaynesboro.com](http://www.rotaryclubofwaynesboro.com) and our FaceBook page. The website includes a calendar for which we've taken steps to get scheduled club activities routinely recorded, and a password protected section allowing members to download copies of the club membership roster with contact information. We also have several

members who post material on weekly speakers directly to our FaceBook page including pictures / videos and small synopses. For some club activities (eg, Battle of the Minds) we've also created additional websites to support their projects.

We also have excellent **relations with external organizations**. With the Borough of Waynesboro we co-wrote a successful request to the Pennsylvania Office of Economic Development (OECD) to partially fund Rotary Park enhancements. We have an Interact Club at the Waynesboro Senior High School which doubles as a Future Business Leaders of America (FBLA) Club. We collaborate with the Waynesboro Chamber of Commerce on the Rotary Sign on Main Street, and reach out to other organizations in the community where there are objectives that can benefit from mutual action.

The discussion above supports the overall assessment that our club is healthy and dynamic. Nonetheless, it is worth reviewing the club's internal strengths and weaknesses, and our external opportunities and threats.

Among our **greatest strengths** as a club are great members who step up to take on projects. They routinely do a great job organizing activities, or joining and actively supporting these activities when the time comes. Active engagement in activities is also the club's main retention effort because it creates achievement shared among members. Nonetheless, there are limits to what club members can give. Club leadership recognizes this strength and its limitations by adopting practices to support members engaged in projects. This includes our promise to back them up when needed, adequately finance their efforts, and get them well deserved recognition. It also includes our continuing efforts to recruit quality new members from the community we serve.

We do not have "substantial" **weaknesses**, but we are susceptible to all the usual downside trappings that can accompany success. These are things that can develop over time if not identified early. Chief among these is complacency. We are not complacent now, but the signs of developing complacency are insidious. As we transition leaders and activity chairs we fail either to pass on lessons learned or things we normally do (eg, forgetting to plan for Associates Day every five years or so). We might lose contact with activity leads until the last moment when it is most difficult to recover a faltering situation. We could easily begin to respond to attendance problems in an impersonal manner without finding out if there are underlying health, work or family problems. We could allow our face to the community - website, FaceBook, Rotary Sign, et al - to become stale, outdated or broken and allow them to stay that way. We could keep what we do to ourselves, not advertising accomplishments, and eliciting a shrug when we ask good people to join us. You get the idea. Mainly just a lot of little details that go unattended. Fortunately, to the extent we are able, we are not currently guilty of getting complacent and sloppy about what we do and how we do it.

Collaboration with organizations outside the club is perhaps our greatest **opportunity**. This can serve several purposes. First and foremost, it extends the size and range of worthy purposes to which we can contribute. Our ongoing efforts to work with the Civitan, Vision 2035 and the District Attorney on the local drug problem is the best example. Collaboration on the right projects also helps reduce the number and time needed of existing members. Finally, to the extent we can successfully compete for grants and donations from outside Rotary, we extend our resources so we're able to persist in achieving selected objectives.

**Threats** are those things that could cause us trouble. From the list of activities at attachment 1 it is clear we do a lot of work with kids. From Financial Literacy to Read Across America, we benefit from the active support of school district leadership, and the tremendous efforts of teachers and staff at the schools to help us help them. We do not perceive any immediate danger in this regard. Still, we need to be conscious of the terrific relationship we have with the school district and others, and take steps to preserve these relationships.

## Where Do We Want To Go? Vision for the Future

Ask any of the last few presidents who've had an opportunity to evaluate us and they'll tell you we don't share a lot of problems many clubs encounter.

That is not to say there is nothing to be done, but much of what needs to be done we're already doing. We are growing. We have a large number of members who attend regularly and routinely engage in club activities. We have funds to do most anything we want to do, within reason. We have members who contribute generously both locally and to RI. The overall approach of our club just seems friendly, welcoming and inclusive. Above all else, we're successful at achieving stated objectives.

On the other hand, there are things we can do. "Balanced" is a term we might use to describe our club, and balance is what we need to maintain to sustain our club's performance. For example:

- At our last Past President's Meeting a "100 by 100" objective was mentioned for membership. This referred to a possible objective of achieving 100 members by our club's 100th anniversary in just under two years. While likely achievable, more than one member noted growth needs to be balanced with a focus on gaining talented members of the community.

- There are plenty of needs throughout the Waynesboro area - drugs, human trafficking, hunger, shelter. It is easy to overlook how we reflect problems in the greater nation. Attacking any of these would be a worthwhile effort. To be successful, however, would likely require some balanced combination of one or more of three

things: grow the club to provide additional people to work these efforts, collaborate with other organizations, or scale back some existing club activities and redeploy members.

- Continue taking steps to enhance club communications and use automation and online capabilities to reduce the amount of labor required to accomplish activities. While those might be worthy pursuits, it sometimes takes time to create automated systems, and it frequently takes additional time to maintain them once created. A balance must be struck such that "back office" and activity improvements result in less labor vice more. Making the club calendar "the place to go" to find out what's going on, when and where, is an example.

With this as preamble, suggest the following alternative vision statements.

Focus on the community

Keep rolling

Maintain the best team in town

. . . or maybe a combination of all three. The board can determine specific language.

## **How Do We Want to Get There?**

As navigational problems go, this one is pretty straight forward. If one accepts the assessment above, what needs to be done is a lot of attention to detail to sustain existing activities and the members who make them happen. Leadership and membership need to watch for new opportunities to help with community problems within existing resources.

Attention to detail encompasses a number of things mentioned in the Club Assessment.

- Maintain and enhance existing board and activity operating procedures
- Continue efforts to enhance and simplify administrative procedures
- Grow the club with the same high caliber people who've joined in the past
- Continue performing all existing club activities
- Pay attention to club activities planning as well as execution, and continue ensuring each activity chair has the support they need to succeed.
- Expand publicizing club activities and give members credit for great work

- Continue to solicit contributions to the club Rotary Scholarship to make this endowment self-sustaining.
- Continue action to invest cash contributed to the club foundation
- Encourage club officers and members in administrative positions to attend RLI
- Encourage members to contribute to club and RI funds if able. Provide members with material to better educate them concerning the alternatives available.
- Continue taking steps to enhance and expand communications among the membership, and with the membership concerning club activities.
- Maintain strong relations with existing organizations, and look for opportunities to collaborate with others. Actively look for relationships that will magnify club contributions with matching funds or coordinated action.

The question that arises is "how will we know we've succeeded". The answer may be as simple as picking a date, or as nebulous as maintain a continuing vigil. In any case, it is incumbent on officers to periodically review and adjust this plan, assess where we are, and take action to keep the club operating successfully.

## Conclusion

We've got a great club. The objectives we pursue and problems we need to address tend not to be fundamental issues. Rather they are characteristic of a successful organization. While that should be a source of some pride for all members of the club, it should also carry with it a warning with a smile - don't get cocky ;-). Our performance is based on consistent effort from many members who talk to one another, attend meetings, and are kept informed by club officers and activity chairs.

This level of success can be sustained by adhering to several broad guidelines

- Use the organization - let activity chairs work their tasks and give them support
- Make sure all who want to make a difference have what they need to do so
- Monitor activities and in case of emergency, intervene where necessary
- When in doubt, stay on the side of Angels

With these simple guidelines, and details addressed above, we'll continue to do well.

## **Rotary Club of Waynesboro List of Current and Recurring Activities**

Rotary Park

Rotary Sign

Movies in the Park

Adopt a Highway

Toys for Children

Financial Literacy Course

Scholarships

- Thompson Scholarship

- Rotary Scholarship

Read Across America

Dictionaries

4 Way Test Speech Contest

Interact / Future Business Leaders of America (FBLA)

Battle of the Minds

Mock Interviews

Rotary Youth Leadership Assembly (RYLA)

Broken Spoke

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