



**Rotary Club of Gilbert, Arizona Strategic Planning and Visioning Session
Saturday May 13, 2017 8 AM until 12 noon
7440 East Tahoe Avenue Mesa, Arizona 85212**



George Pettit, President Elect Curt Ward, Current President Rex Albright, District 5510 Governor Tonya Watson (Moderator), Terry Hanvey, President Nominee Scott Jones, Michael Kilzer, Penny Bollinger, Donna Backhaus, Carla Rowe-Malcolm, Brandon Holt, Bill Nuzbach, Diana Tacey, John Ficker and District 5510 AG Jay Jones

This is OUR club effort...OUR plan

It was an informal time to discuss objectives, budget, and refine our focus and projects.

Strategic Planning focuses on where we want to be 3-5 years down the road.

We began with a survey. Next came a SWOT analysis and we ended with 3 statements of vision (3 areas of main focus).

It is still unknown what DG Nancy Van Pelt's goals will be with our merger into District 5490, but Tonya Advised that most likely RI and the District would focus on increased membership and increased giving.

What IS GILBERT ROTARY and EACH MEMBER going to personally commit to?

Strategic Plans most often focus on:

- Current Condition
- Vision Statement
- Align vision statement with current condition
- Priorities
- 3-5year goals
- A way to track progress

Curt compiled the results of the survey we took and summarized the following:

- **Membership** – scores were LOW We need to do something differently to stop the attrition of late. What is really meant by membership? Do we strike too soon? How do we educate them and retain them?
- **Attendance** –Lax - attendance drives make-ups; meet others and see what other clubs do differently.
- **Committees:** reports are not timely and communicated well. Other items discussed were: expansion of website, timely board minute distribution, Foundation reports, membership, budget, PHF giving and history, agendas for meetings and committee assignments
- **Fireside Chat** – attendance is discouraging and the present way is not effective
- **RI Website** – more education on how to manage accounts
- **New District 5495 in July** – converting to Club Runner

It is UP to US to determine what type of Club WE are! It's our club

Characteristics we want for our club:

- “you need to check us out”
- Ethnically diverse
- Making a difference
- New younger members
- Strong connections to youth
- Having FUN
- A community asset
- Multiple ways of plugging in
- Networking – Personal and Business
- Good “tooters” of our own horn
- Strong online presence

Strategic Planning – 2

- Active
- Larger than now
- Have movers and shakers of the community
- “Must Be” club
- Have signature event
- Prestigious club with quality members
- An honor to be a member
- Visible in the community
- Have a large community presence

SWOT

Strengths:

- We have Penny 😊
- A welcoming club
- Fellowship
- Programs/speakers
- Energy
- Diversity
- Creativity
- Consistent brand
- Emphasis on helping
- Consistent projects
- Active club
- 2 Interact clubs
- Youth connections
- RYE student x 2 years
- Generous club
- 33 years of history in the community
- Committed and Dependable core
- Location – Meeting
- A community asset

Strategic Planning – 3

Weaknesses:

- Fundraising
- Not enough fellowship/fun
- Lack of communication within club
- New member orientation
- Lack of mentorship
- Lack of guidance for new-bee's or structured follow-up
- Sometimes too creative or not focused enough
- Retention – especially new members
- Sharing new member expectations
- Wide range of contributions
- Don't share Rotary experiences enough
- Don't know each other well enough

Opportunities

- Potential for growth of new clubs
- Increase public branding
- Inclusion in new resident materials
- Utilize Chamber of Commerce
- Focus on particular businesses and niches and organizations
- Part for parents of Interactor's, RYE and RYLA
- Targeted marketing
- Partnering with various organizations
- Off-site mobile meetings
- Participate in community events
- Find fundraising activities; improve fundraising skills
- Use other people's money not just Rotarian's \$\$
- Create annual signature event(s)
- Youth promotions

Strategic Planning – 4

Challenges (Threats)

- New location for meetings; larger space
- Lack of community awareness of club
- Cultural resistance to joining
- Millennials
- Perception that all civic organizations are the same
- Very fast growth of Gilbert
- Competition/comparison with Church's and other organizations
- Problem with government regulations
- Finding venues to activities/events
- Young families are overscheduled
- Economic challenges for members
- Mobility (winter visitors)

Strategic Priorities (Areas of Focus)

- Youth
- Membership/Club Growth
- **Revenue/Fundraising**
- **Internal Organization (member orientation, committee work, ongoing expectations)**
- **Service Projects**
- **Public Image / Branding**
- Personal Growth and Satisfaction
- Building Friendships

Next Steps

- Whittle down a project list Champion: Curt, Scott and Board
- Complete goal list Champion: Brandon
- Appoint Strategy Czar to follow up Champion: Michael
with this process
- Personal Action Items Champion: ALL MEMBERS
Write down YOUR personal action items and YOUR priorities

Strategic Planning -5

Besides coming to breakfast on Thursday morning, how much time and support can we count on from you)?

Be honest and tell the truth