

January 23, 2016

# *Vision and Strategic Plan*

Compiled for

**Lake Oswego Rotary Club**

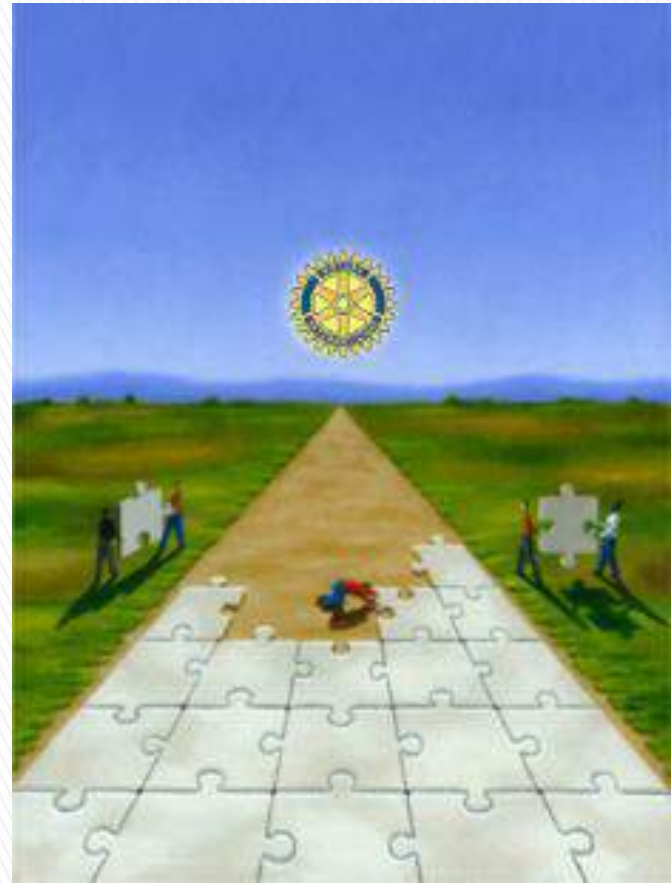
by the

**Rotary District 5100 Vision Facilitation Team**

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# Vision Facilitation Is:

- Taking our Rotary Club
  - where it wants to go and
  - envision where it can go
- Creation of a 5 year Plan with core elements
- Formation of Ideas
  - (Brainstorming -reality vs. fiction)
- Who does what and by when to achieve goals?





# Why & How We Plan



To all pull in the same direction

To identify a targeted destination

Continuity, Consistency, and Consensus (Unanimity)

To provide continuity year over year with changing leadership teams.

Planning steps

- Vision
- Long Range Plan
- Actions, Tactical Club Plan and Programs to be Instituted

# Rotary's Greatest Strength: The Club



Effective Clubs:

Sustain and grow Membership

Conduct relevant Service Projects

Support the Rotary Foundation

Develop leaders beyond the club level



# At the 1/23/16 Facilitation



We explored...

Who are we?

Where are we?

Where do we want to be?

How will we get there?

How will we know when we arrive?

# Vision Exercise

We wrote a letter as if it were **2021** to the Rotary International President explaining why the **Lake Oswego Rotary Club** deserves the distinguished Gold Medal as recognition for being “***the best of the best.***”

This became the basis for creating the Vision that our club might have for itself three to five years from now!





Every vote counted to reach  
consensus.



# What our Club Stands For

- Leading Service Organization in LO, sustainable projects nationally and internationally
- Successful Local and International partnerships
- Premier group of developing leaders in the community





club size

175-200

# Club Attributes

- Known as a welcoming Club with friendship and community. Ethnically diverse.
- Strong intergenerational club
- Forward-thinking anticipating trends, and needs in the community





# Club Service



- Fun fellowship, transparency of member attributes, talents well known
- Strong mentorship program within the club
- Outstanding innovative Speakers' Bureau

# Vocational Service



- Making sure each Rotarian is in a committee, vocational in nature/mentoring talent and skills
- VOC award will have premiere status in the community
- Assist younger members through intergenerational mentorships



# Community Service



- Established signature project that benefits the local community
- Leading resource for constructive community dialogue
- Regular needs analysis of community



# International Service



- Have signature international project
- High rate of member travel and site visits for projects
- Joint project consensus with other Clubs



# Youth Services

- SASEE to become premier program
- Host international student exchange on a regular basis
- Engage with local high schools around service



# Fund Raising



- One million endowment fund (build)
- Education about why we fundraise
- Net 150K (Rotary) Lobster



# The Rotary Foundation

EVERY  
ROTARIAN  
EVERY  
YEAR



- 100% Every Rotarian Every Year
- The Rotary Foundation 100% Paul Harris
- Use Paul Harris points

# Our Club Foundation



- Four year scholarship of 10K per year
- Fully funded meals on wheels and nutrition programs
- Every family in the area to have adequate food resources





# Public Image

- Monthly ad featured in LO review
- One Website
- Have a well trained marketing and communications team
- Rotary Day



# Leadership Development



- Mentor program for all new members
- Succession planning process
- Intentional process for leadership development



....and then what happened?

Action	By Whom	By When:
<b>Compile the wall charts</b>	<b>Nell</b>	1-Feb
<b>Develop an Elevator Speech (Mission/Vision Statement)</b>	<b>Craig, Mike</b>	8-Feb
<b>Present plan at Club Assembly to Share the Vision</b>	<b>Bob, Nell</b>	April, 2016
<b>Pull together a Club Development Team</b>	<b>Rob, Bill, Craig</b>	May, 2016
<b>Identify a Club Vision Champion</b>	<b>Mark</b>	Ongoing!
<b>Schedule a Vision to Action Plan Session</b>	<b>Nell and Development Committee</b>	June, 2016

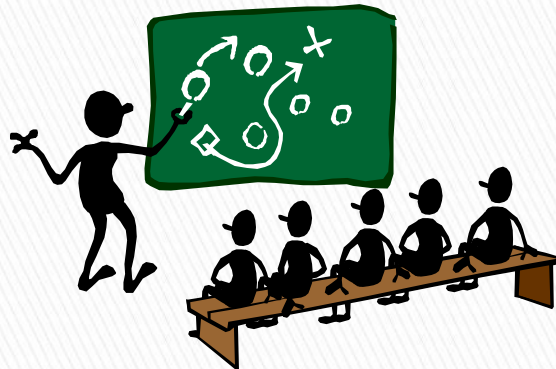
# What Follows Today



Actions & Programs



Vision



Long Range Plan



# Next Steps

- Break into small groups by subject area in the vision
- Review the selected items in each area.
- Prioritize and determine specifically: who, what, and when for each listed
- Report back to club on how you will focus on the top identified items.
- Club Champion continues to review progress quarterly, semiannually, or at least every year.

# Embracing the Vision



“There are risks and costs to a program of action, but they are far less than the long-range risks and costs of comfortable inaction.”

*--John F. Kennedy*





Thank you Rotarians

