

Rotary District 5040

Strategy 2018 - 19

Update Feb. 9, 2019

Richmond, B.C.

Record of Charts Created

Update Feb. 13, 2019
Marni F. / Don E

Roadmap for the Session (Feb. 9, 2019)

1. Re-do the District Vision Elements Activity
2. Progress on 2018 - 2019 objectives
3. Add Preliminary 2019 - 2020 Objectives
4. Next Steps

Participants:

John Bathurst
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Darcy Long
Bala Naidoo
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Facilitators:

Marni Fraser, Don Evans

Strengths / Weaknesses / Opportunities / Threats
Exercise (SWOT) (from 2016)
(brainstormed lists attached)

Strengths (Priority ranked)

1. District leadership
2. Active PDGs
3. Youth programs
4. Attendance at, and commitment to, PETS

Weaknesses (Priority Ranked)

1. Small clubs
2. Not enough members
3. Communication with clubs
4. Not enough diversity

Opportunities (Priority Ranked)

1. New changes – Council on Legislation changes to flexibility and attendance
2. Grow membership
3. Increase awareness of the scope of Rotary
4. Leverage RI's focus on young professionals

Threats (Priority Ranked)

1. Declining membership
2. Cost of membership
3. Not bridging the age gap
4. Rotarian burnout

ROTARY INTERNATIONAL VISION & PRIORITIES

Together, we see a world where people unite and take action to create lasting change - across the globe, in our communities and in ourselves.

Rotary International Strategic Priorities 2018

- 1. To enhance participant engagement at all levels*
- 2. To better understand, measure and increase our impact with a balanced perspective on global, local community and personal*
- 3. To understand and pursue opportunities to improve the culture and structure of our organization*

ROTARY 5040 VISION ELEMENTS for 2025

(Prioritized, Feb. 2019)

1. Our clubs have strong community relations
2. Rotary is well known for great leadership development
3. Our District and clubs have strong succession in place
4. We have built First Nations relationships and participation
5. Rotary is well known, strong public image, people of action
6. Together, we are positive and inspiring
7. Our clubs collaborate, work well together
8. Rotary is the go to organization for youth leadership
9. Rotary improves lives of those in our communities
10. Rotarians are well trained
11. We use technology to bridge our wide geography

District 5040 Vision for 2020 (developed 2010)

In 2020, District 5040's Rotary Clubs are the recognized service clubs of choice in our communities. We exemplify strong leadership with integrity and success in all we do.

Our district consists of active clubs, working with both Rotary International (RI) and The Rotary Foundation (TRF). We address the needs of and add value to local and international communities, resulting in visible recognition of Rotary projects and accomplishments. TRF is a respected community charity of choice.

Our variety of club formats appeals to the diversity of our communities. The number of active Rotarians in our clubs has shown consistent growth.

**Vision Without Action
is merely a dream....**

**Action Without Vision
just passes the time....**

**Vision With Action
can change the world.**

Joel Barker

Leadership is not about being in charge.....

It is about taking care of those in your charge.

Membership / Club Growth

Key Strategies

- Major focus on member retention - 93% goal
- Grow membership 15% over 5 years
 - Net + 5% annually
- Focus on strategic planning for all clubs
- Develop fully active and engaged members, target growth in both young professionals and the newly retired sectors, target for gender parity
- Support different approaches to membership, trial regional membership with collaboration of many clubs in an area working together (Rotarian first / club second)

Objectives

M – 1: Continue focus on strategic planning and goal setting using the Vibrant Clubs approach and Club Health Check worksheet.

AG's / Don

Ongoing

M 1.1 – Work to achieve 100% of the District's clubs with a strategic plan – provide report from Strategic Planning team. Follow up with clubs for renewal of the strategic plans and status report to the AGs and DG semi-annually. Follow up with clubs for renewal of the strategic plans and status report to the AGs and DG semi-annually.

Update list of clubs with strategic plans and dates of review

Marni / AG's / Don

Ongoing

M 1.2 – Have club representation in every area of the Rotary Citation and increase the number of clubs qualifying for the Rotary Citation to 35 clubs.

Darcy / AG's

Ongoing

M –2: Grow the number of Rotarians in District 5040 to a total of 1,575 by June 30, 2019. Shirley-Pat and the AGs will work together to set area goals. Include in pre-PETS session Feb 2019. (The 2019 membership goal is set based on +5% from July 1, 2018 numbers).

Darcy / Membership Committee

June 2019

Currently 1,460 total (-1 from year start)

Action: Membership Committee and AGs to complete.

M 2.1 – Continue to operate an active membership committee for 2018 -19, roll out District support and plan to the clubs. Continue Membership Matters 2.0. Hold two Priority #1 Membership Seminars (north and south).

Shirley-Pat / Membership Committee

2018-2019

On Track

M – 3: Retain current clubs and add new clubs in District 5040, for a total of 53 Rotary clubs by June, 2019.

Darcy / AG's / Membership Committee

2018-19

Currently 50 clubs at February 9, 2019.

by Jun. 2019 - New Club Possibilities:

- Vanderhoof - in progress
- Work with young professionals to yield a new Rotary Club
- **Consider a Passport Club - set criteria for a district 5040 Passport club (Bala / Dave with Membership Committee)**

M 3.1 – Focus on retaining clubs currently at risk:
Review clubs in the District that might be at risk and require some extra support and focus. *(Two clubs are currently being actively supported)*

Work to increase visits to all clubs, whether formal or informal, by District leaders.

AG's / Membership Committee Ongoing

M 3.2 – Support the new clubs of Lillooet and the Dragon Club of Greater Vancouver for their charter nights and establishment of club operations.

Dragon - Nancy / Bala / Burnaby Metrotown/ *Jim Ling*
Lillooet - Liz S./Lori M./ Whistler/ Jan 2018 - 19

Lillooet strategic planning day set for May 2019, in progress

M 3.3 – Increase Rotary's visible participation at community events to increase membership. *Used District display 14 times, Northwest display has also been well used. Encourage clubs to have display at club events*

Tom Smith / Brian Downie / PR Ongoing

New People of Action banners added

M – 4: Retention (engagement) rate, measured through Rotary Club Central. Goal of 90% by June 30, 2019. Work to ensure that

all clubs formally implement a member retention process (including mentorship).

Shirley-Pat/ Tom / DG / AG's

2018 -19

July 2018 - 91.24% retention ytd (Membership Viability report)

M – 5: Support our clubs in using innovative ideas built around new club flexibility to spark new interest in our clubs, as well as other membership options. Use Rotary Club Central as the base for all goal entry / measurement, support clubs in use of this tool.

AG's / Membership Committee

Ongoing

M – 6: Work on increasing member diversity in clubs, goals:

- Diversity to 55% male / 45% female as a base target
- Diversity that reflects the demographics of our communities

Shirley-Pat/ Membership Committee / AGs

2018-19

Currently 61% male / 39% female

M – 7: Actively work with the RI Lead Generation process

Shirley-Pat / AG's

Ongoing

Improvement over last year, but still work to be done

Youth Objectives

Key Strategies

- **Continue to be active in Youth Exchange, RYLA, Rotaract and Interact - start RALA**
- **Cross promote between youth programs to encourage participants to progress in their Rotary knowledge and activities, build integration and succession**
- **Support the clubs in the area of risk management through provision of policy and support resources, encourage full due diligence**
- **Hold youth conference sessions at each District Conference**

Y – 1: Involve youth at the 2019 District Conference, goals for participation Youth Exchange plus:

- *50 Interactors*
- *15 Rotaractors*

Lyn / Carina / Rick / Joan / Tanya

May 2019

Y – 2: Hold two 2018 – 2019 seminars on Rotary Youth for 5040 training / showcase. Rotaractors willing to help with Interact training.

Joan / Rick / Lyn

2018 - 19

On track

Y - 3: Establish a network of club youth chairs to work with the District Youth Committee and build the District - Club support network.

Youth Committee / AG's 2018 - 19

Ongoing

Y – 4: District 5040 Rotary clubs sponsor and actively support 12 Rotaract Clubs.

Joan / Lyn / Carina 2018 - 19

Currently 8 active Rotaract Clubs

Y 4.1 – Increase number of Rotaractors registered in online platforms to 50%

Lyn / Joan / Carina 2018 - 19

Y4.1.1 - Set up club type "Rotaract" in online platforms

Murray 2018 - 19

Structure completed - to be populated with data

Y 4.2 – Continue to involve and include Rotaract leaders in District events, activities and partnerships and bring Rotaract (and Interact) into increased activity with the District. Increase awareness as part of the Rotary family.

District Leadership/ Joan / Carina / Lyn Ongoing

Y 4.3 – Make DG and AG visits to Rotaract clubs and Interact clubs.

Darcy/ AGs Ongoing

Y 4.4 – Continue the focus to help Rotaractors move towards

becoming Rotarians and ensure their future with Rotary.
Focus on Rotaract community clubs here. Work to develop a
Rotary Youth mindset.

Membership Committee / Carina / Joan Ongoing

Y – 5: District 5040 Rotary clubs sponsor 32 Interact Clubs.

Rick / Lyn 2018-19

Currently close to or at this number

Y – 6: Support 6 EarlyAct clubs by June 2019.

Lyn / Scott June 2019

Currently 3

Y 6.1 – Establish EarlyAct Committee with succession
planning

Lyn / Rick / Scott 2018-19

Completed, committee in place

Y – 7: Youth Exchange student target – 14 in / 11 out for the 2018-
19 Rotary year. Longer term objective to grow bigger in future
years.

Gina R. 2018 - 19

13 in / 11 out for 2018 - 2019

Will be 9 in / 9 out 2019 - 20

Y – 8: Develop the short term youth exchange program (*STEP*), target 10 of these for 2018 - 19 year. Increase awareness with all constituents to help this program grow in future years through presentations & outreach.

Liz Scott

2018 - 19

Ongoing

Y – 9: Continue with the Youth Exchange certification and compliance agreements and all the required forms with the clubs that are participating, and ensure compliance through audits to meet RI policy.

Gina R/ Ron D/ District Board

Ongoing

Y 9.1 – Train the Youth Committees / Club Presidents, Counselors etc. in the Youth Protection and Risk Management policies and their importance. Reviewing committee structure and training going forward.

Gina R / Maryam

Ongoing

Y – 10: Establish a New Generations Exchange (19+)

Gina R.

2018 - 19

Not at this time

Y – 11: Continue with three RYLA's for 2018 - 19 year. Plan toward more Rotaract / RYLA joint involvement going forward.

Lynda / Lyn

2018 - 19

On track, three will run this year

Y 12: Support the Adventures programs, particularly those in District 5040.

Lyn / Ron Davis/ AGs

2018 - 19

On Track

The Rotary Foundation

Key Strategies

- **Achieve every Rotarian supporting the Foundation**
- **Broaden foundation giving to include non-Rotarians**
- **Share stories of foundation grants and their results / impact - increase club level understanding**
- **Leverage the current matching opportunities for Polio-Plus, support Countdown to History Campaign**
- **Club collaboration to increase impact of grants / projects**
- **Encourage clubs to nominate candidates as Peace Scholars**

Objectives

F – 1: Support TRF Programs through fundraising. This is very critical to the success of future District funding and club support.

F 1.1 – 100% of clubs give to TRF, clubs to focus and support of every Rotarian participating with donations to the Annual Fund or Polio.

Darcy / Garry / Foundation Committee by June 2019

46 clubs have given to date

F 1.2 – DG Goals for 2017-18

- 100% District Leaders & Club Presidents (as listed on the District Website) contribute by June 30, 2019.
- Increase number of Rotarians who support the Foundation by 10%. from 688 in 2018.

Darcy / Garry

2018-19

F 1.3 – Grow the Paul Harris Society to 100 members by June 2018.

Foundation Committee 2018-19

Was 90, currently 38 qualified in 2018 - 2019

F 1.4 – Total annual fund \$300,000US - \$200 per capita (AF) giving for District 5040; total programs giving at the \$300US per capita level. (District Goal)

Garry / Foundation Committee June 2019

Currently at \$121,341

F – 2: Continue to increase the awareness of The Rotary Foundation; provide simple and understandable messages and “sell” participation to both clubs and Rotarians.

- Foundation credible - use speakers (current donors, benefactors, alumni etc.) – put a “real face” to the foundation
- Use club specific projects and examples of how funds used
- Provide specific Club data re Foundation Participation
- Communicate the benefits of participating in the Foundation
- Use Club Foundation chairs in clubs
- Hold three full day Foundation Seminars in 2018 - 19
- Recognize clubs that achieve foundation goals

Darcy / AG's / Foundation Team / Training Team Ongoing

F – 3: Hold regional foundation fundraising events around the District, target to hold at least 9 events (plus Rotaract / Interact) in 2018 - 19. (Goal - 100% of net proceeds from these events to go to The Rotary Foundation / TRF projects). - publish scheduled dates.

Foundation Committee / Darcy / AGs / Clubs 2018-19

Ongoing

F - 4 – Every club in the District contributes something to the End Polio Now - Countdown to History. Leverage the matching from Canada + Gates Foundation. Encourage community events and projects to stimulate donations from non Rotarians. Total Polio goal from 5040 (\$100,000 US)

Garry / Brian F. / Darcy June 2019

Currently \$73,420 from 33 clubs

F 4.1 Contribute 10% from DDF (as last year)

Garry 2018-19

F 4.2 Encourage clubs to hold fundraisers for Polio Plus and to support the Countdown to History campaign. Encourage Polio events for World Polio Day October 24, 2018.

AGs / Brian 2018-19

Ongoing

F – 5: Publish list of historical district and global grants around the District. Get stories of successful grants from the clubs and integrate with Rotary Showcase.

Darcy / Garry / Foundation Committee 2018-19

In progress

F 5.1 – Promote the Canada matching for Global Grant applications

Garry / Foundation Committee

Ongoing

Ongoing, will be done a Foundation seminars

F – 6: Have a Successful education VTT April / May 2019

Darcy / Don / John A. / AG's / VTT Committee

Ongoing

In progress

Peace Strategy

Key Strategies

- **Become and maintain status as a Peacebuilder District**
- **Increase number of Peacebuilder Clubs**
- **Be active in a global peace projects**

Objectives

Peace – 1: Continue to support clubs in 5040 to nominate candidates for Peace Scholars and other peace initiatives.

Peace1.1 District became a Peacebuilder District in 2017 - 2018. Continue to support if funds available.

Peace 1.2 Continuing focus on increasing number of Peacebuilder Clubs - 3 peace builder clubs confirmed in 2017-2018

John A./ Gloria / Edwin / Peace Committee 2018-19

Three Peacebuilder clubs so far in 2018 - 2019

Peace - 2: Maintain network of Peace Champions to work with Peace Committee

John A./ Gloria / Peace Committee / AG's / Clubs Ongoing

Currently 12 Champions

Peace - 3: Murray to work with John A. and Gloria to create Peace Committee on website

Murray/John A./Gloria 2018 - 19

Ongoing

Peace - 4 District 5040 to be an active partner in the Positive Peace Workshop Colombia project in 2019.

John A / Chris O. / Don

2018-2019

In progress, workshops started week of February 4 in Colombia

Finance and Administration

Key Strategies

- **Operate District 5040 Inc. in a professional way**
- **Build ongoing succession on a rolling three year basis**
- **Comply with all necessary regulations**
- **Conduct regular financial review of district operations**
- **100% club goals on Rotary Club Central**

Objectives

FA – 1 Continue to improve financial reporting from Youth Exchange, RYLA to District 5040 Treasurer, review all the same way. Implement an official external annual review for RYLA and continue for Youth Exchange. Integrate RYLA and youth exchange finance into District finance.

Finance Committee / Gina / Lynda / Chris W / Lyn 2018-19

Ongoing

FA 1.1: We may become a GST registrant. Looking at how this impacts us and how we show our financials. Finance Committee is talking with accountant

Finance Committee 2018-19

GST Registrant as of September 2017 - GST now will be collected on some activities including RYLA, YEX & District Conference - fully resolved and implemented

FA – 2 Continue the request to committee chairs for scheduled reports to the board and - Invite committee chairs to attend a board

meeting to report on progress to the Strategic Plan. Build succession in board and committee chair positions.

Darcy / District Board

Ongoing

Ongoing

FA - 3 Establish Finance Committee section on website to publish documents pertaining to District finance information (reports, forms, etc) - September 30, 2018.

Finance Committee / Murray

Ongoing

In progress

FA – 4: Rotary Club Central - target 100% of clubs inputting and tracking membership, foundation and PR data through RCC. Encourage learning on use of RCC by all Rotarians. All 2018-19 PE's to enter goals. Focus also on reporting progress, support structure in place. Target for each club to have at least ten goals entered in RCC by June 1, 2019.

Darcy / AG's

2018-19

Ongoing, but not at 100%

FA – 5: District Conference full registration - goal of 250 registrations.

Darcy / Magdalen / Conference Committee

May 2019

Ongoing

FA - 5.1 Each club to name a District Conference Champion to promote and support the conference.

Conference Committee

Fall 2018

Completed

FA - 6: Continue to "Recognize the value of Rotary" - Track volunteer hours and contribution and input monthly to RCC

Darcy / AG Team

2018-19

Ongoing

FA - 7: Develop a District policy for data and document storage

Penny/ G Team

Dec 31 2018

Pending

Public Relations (active in community) and Public Image (result of activity)

Key Strategies

The Public Relations & Public Image Committee seeks collaboration and teamwork with District and club leaders in achieving these shared goals.

1. Rotary members in the District are loyal champions of the valuable impact, of Rotary's service and fellowship, on communities and the world.
2. Residents of communities are committed to supporting Rotary for its community and international service.
3. The Rotary reputation or brand is developed and maintained and applied through consistent and effective use of the logo in keeping with visual identity standards.
4. Clubs are supported in growing membership and attracting funds through advice and networking in marketing communications.

Key Priorities

1. Provide requested training to club leaders in planning and implementing of Public Relations and Public Image systems, for members and our communities.
2. Advise club and the District leaders on the frequent and consistent application of the current Rotary logo and value of the Rotary brand.
3. Assess the use of club and District websites and social media and recommend action.

Objectives

PR - 1 Help clubs understand the importance of sharing information about what we do in Rotary in order to better build their clubs, increase membership growth, and donor and volunteer support for their activities.

PR - 1.1 Continue District PR/PI area representatives.

Peter/PR Committee

2018 - 20

- Include a PR/PI item on the agenda at DG and AG club visits, club assemblies, training events etc.

District Governor, Assistant Governors, trainers *In progress*

PR - 2 Work with Club leaders and Committees in all clubs as they develop their PR initiatives for 2019 - 20

- *Club PI / PR self assessment project launched Jan. 2019*
- *Providing consulting services to RC Kitimat*

PR 2.1 Publicize PR/PI activities around the District to Clubs

In Progress

PR 2.2 Continue rapid response communication approach for District Clubs and Leaders

Peter R.

Ongoing

PR - 3 Further develop the PR/PI presence for District 5040 on website and social media.

- Update PR/PI page on District Website with current information and links to RI resources and stories

Peter R./ Murray W.

Ongoing

- Continue to promote use of the District 5040 and club Facebook pages, using the new look and voice of Rotary, strengthen use of Social media

Peter R /

Training Committee

Ongoing

PR - 4 Advise club and District leaders to increase Rotary PR/PI

- Further train club leaders in developing PR/PI strategy and implementing it for members and communities
- Continue to provide consulting services for club and District leaders and committees
- Support and promote People of Action campaign

Peter/PR Committee

Ongoing

PR - 5 Develop a Communications plan for 2017 - 2020 to include Youth area

Peter / Lyn / Darcy/ PR Committee

Fall 2018

Not yet

Action: shift to youth committee (PR/PI in support of Youth Committee)

PR - 6 Continue to encourage Clubs to adopt the current branding and
utilize RI brand centre tools

Darcy / Peter / PR Committee / AGs

Ongoing

Leadership Development & Learning Objectives

Key Strategies

- **Focus on benefits of Rotary training to Rotarian's personal development and business success**
- **Identify future leaders and prepare them for District leader roles (through RLI, Clubs etc.)**
- **Continue to strengthen District commitment to leader training and development**
- **“Sell” District roles as a career path for club leaders, build succession**

Objectives

LD – 1: Continue to provide RLI to District 5040 - both face to face in Metro Vancouver and on line to other locales.
Hold at least 4 RLI sessions in 2018 - 19

Darcy / Penny / Dave & RLI team 2018 - 19

Ongoing - 3 sessions delivered to date

1.1: Develop online offering by recruiting a chair to lead the process.

Pending - pilot delivered

Dave / AG's / RLI Committee 2018 - 19

1.2: Consider alternate ways to provide Rotary information to members geographically distributed throughout the district.

Dave / RLI Committee

2018 - 19

Ongoing

LD – 2: Contact and develop RLI grads and other experienced Rotarians (such as Past Presidents) as candidates for selection to District Committees as their next step in Rotary. Operate a District Leadership Development Committee.

Dave/ RLI Committee

Ongoing

Complete

LD – 3: Build the District Learning & Development Committee structure for District 5040 to coordinate training for the District going forward.

Penny / Training Committee

2018 - 19

4 meetings held, committee working well

LD 3.1 – Further develop / lead training in necessary Rotary systems that District clubs have to use such as RCC.

Penny / Jan / Drew / LD&L Committee

Ongoing

Complete

LD 3.2 – Have a formal review of training offered through the District to increase the amount and quality of training.

Penny / District LD&L Committee

2018 - 19

Ongoing

LD – 4: Continue on-line training for club secretaries, treasurers and other club roles to improve the quality and timeliness of key functions for their roles and ensure compliance with District and RI requirements.

Sherrie / LD&L Committee / Program leads Ongoing

4.1: Build online training support team for the District

Penny/ Drew / Sherrie / LD & L Committee 2018 - 19

Ongoing

LD – 5: Encourage clubs to hold “club assembly” meetings at least quarterly, and focus on learning more about Rotary in these meetings. Encourage clubs to invite Rotarians to speak about Rotary topics

Darcy / AG’s Ongoing

Technology Objectives

Key Strategies

- **Maintain an asset management process for District hardware and software**
- **Leverage the use of technology to strengthen key District training and communications**
- **Develop use and support of Social Media**
- **Develop a centralized data store for District documentation**
- **Work with clubs to keep websites current and set example with the District site**

Objectives

T – 1: Encourage submission and update of content from committees for the District 5040 website.

PR Committee / Murray

Ongoing

T – 2: Support clubs to develop Club websites / web pages / social media strategy and encourage clubs who do not have a web presence to help them get established; goal to have 100% with websites and all linked to the District site and updated. Goal to have all clubs subscribe to Club Runner or using District to update info.

PR Committee / Murray / Howard / AG's

2018-20

In progress

T - 3: Maintain an asset management process to keep District hardware and software current

Howard / Technology Committee

2018-19

Ongoing

Projects Objectives

Key Strategies

- **Encourage collaborative projects, clubs working together**
- **Create a database of club projects in progress by clubs in the district - focus to shift to use RI tools going forward**
- **Support and encourage clubs to take advantage of District and Global grants for their projects**
- **Support the Write to Read libraries project**

Objectives

P – 1: Continue to support multi-club projects that align with TRF’s six areas of focus; assist clubs in this focus.

Darcy / Garry

Ongoing

P – 2: Continue the Write to Read partnership with the Government House aimed at literacy development throughout the country that can involve the Rotary Clubs in many communities.

Bob B. / Shirley-Pat / Darcy

Ongoing

10-year anniversary of project - follow up story for website

P – 3: Promote Rotary Showcase (on line, linked to RCC) as a support mechanism for successful Rotary projects.

G Team / PR Committee / AG's

Ongoing

P – 4: Continue to support the District 5040 Business Networking Directory.

Darcy / Peter H.

Ongoing

P - 5 Support Rotary's increasing emphasis on the Environment and sustainability.

Darcy / AG's

2018-19

Ongoing

P - 6 Each club to hold a "Rotary Day" in 2018-19 in their community (individual clubs or together with other clubs in a community)

Darcy / **AG's**

2018-19

P - 7 Ensure each project planning team proactively works with District resources (Website / PR) to ensure up to date information and promotion.

Using the Plan

1. Communicate the key elements of the District Strategic Plan to the clubs through the PEs.

Darcy / Bala / AG's

PETS / Ongoing

2. Keep Strategic Plan on agenda for District Board meetings

Darcy

Monthly

Next Steps:

1. Post the updated 2018 - 19 plan on the 5040 website.

Murray

2. Hold a review and update of the plan for 2019 - 2020 , re do the District Vision Statement at this session

Bala / Dave / Don

June 22, 2019

Attachments:

1. Brainstormed list of strengths, weaknesses, opportunities, and threats
2. Brainstormed "Vision" list

3. Strengths (unranked) Attachment 1 (2016)

- District leadership
- Youth programs
- Major city (Vancouver)
- District conference
- Active PDGs
- Fellowship
- RLI/Training
- Known as a leader in RI
- All Canadian district
- Diversity
- District management
- District communication to clubs
- Experience
- Mentorship and succession
- Awards and recognition
- Foundation
- Involvement in RI beyond the district
- Enthusiasm
- PETS
- Support for youth programs
- Tradition

Weaknesses (unranked)

- Communication with clubs
- Club response to district initiatives
- Succession
- RLI
- Geography – size
- Retention – membership
- Youth representatives at the district level
- Not enough members
- Lack of volunteers for district positions
- Low awareness of club projects
- Low participation in district grants
- Difficulty getting presidents in club
- Cost of PETS
- Small clubs
- Aging members
- Not enough diversity
- Not tapping into resources of big city
- Tradition
- Lack of diversity
- District involvement in youth programs

- Financial reporting
- The Rotary Foundation contributions
- Business networking

Opportunities (unranked)

- Grow membership
- Changes coming from Council on Legislation – flexibility and attendance
- Social media
- Technology
- 100th anniversary of foundation
- Focus on young professionals (RI's)
- Need significant presence with media
- Networking/collaboration with other districts
- Networking/collaboration with other organizations
- Transition of youth into rotary
- Rotary alumni
- Rotary communication core
- Selling our product
- Leverage eradication of Polio
- Canada's 150th birthday
- Celebrate club milestones
- Day of dialogue
- Awareness of district projects
- To increase awareness of scope of Rotary
- New Canadians available to engage
- Bridge the age gap
- Business networking

Threats (unranked)

- Declining membership
- Declining relevance
- Cost of membership
- Demographic changes
- Corporations doing own community service
- Too many weak clubs affecting brand
- Too much competition for volunteer time
- Non awareness of scope of rotary
- Rotarian burnout
- Declining revenues
- Aging members
- Not bridging the age gap
- Not adapting to technological changes
- Availability and flexibility of people to participate
- Not busting the myths of rotary

- Rotarians not meeting needs of youth
- Fear of working with youth

Attachment 2 – Vision Elements Prioritized (unranked 2010)

- Rotary has high profile and visibility
- The Rotary Foundation is a recognized and chosen community charity
- Rotary is the Service Club of Choice for both local and international service
- We have strong well trained leadership
- District 5040 consists of active and involved clubs that are influential and representative of their communities
- We have a diversity in membership that represents our community make ups
- We have a “smorgasbord” of club formats that appeal to a diverse membership
- We are recognized for adding value to our communities
- We are known as an example of ethical leadership
- We use current technology to our advantage
- Rotary is attractive to new generations

Vision elements– brainstormed list, (unranked 2019)

- We are a go to place for the newly retired
- We link vocations and career training in or clubs
- Our clubs lead in community service activities and training
- We are known for supporting and mentoring new members
- We have eliminated the "divide" between north and south in the province
- There is increased support for peace initiatives and the Positive Peace Process
- The six areas of Foundation focus are the basis for our planning
- We have led "Me to We"
- District leaders progress to the Rotary International level
- We have dynamic leadership
- We celebrate our many innovations
- We are people of action and celebrate what we do
- We work together and collaborate with other Districts
- We are positive and inspiring in our approach
- We have many satellite clubs
- Rotary is the o to organization for youth leadership and development
- District 5040 is vibrant
- Our membership is diverse - mirrors our populations
- We partner with other groups
- Our projects improve the lives of those in our communities
- We have strong leadership and learning
- We are well known - a strong public image and awareness
- We are flexible and innovative in our approach
- Rotary is the community leader
- We are international in scope
- Rotary Leadership Institute continue strong
- Our organization attracts newly retired - baby boomers
- The membership pipeline of youth to Rotary is the norm
- We are not bureaucratic

- We are a model of intergenerational cooperation
- We are sustainable - supported by a strong membership growth
- We have succession in our District and our clubs
- We have strong Rotary club - school relationships bolstering our youth programs
- We aid in poverty reduction
- Rotary consistently addresses societal needs
- There are several Rotary Community Corps in our District
- Positive Peace initiatives are operating
- Family memberships are commonplace
- Our clubs routinely participate in District matters
- We support the Rotary Foundation
- Our clubs have strong community relationships
- We have developed relationships and participation with our First Nations
- Rotary is well known for its leadership development programs
- We use technology to pull together the diverse geography of our area
- District and club operations are professional and efficient
- Youth Exchange has grown
- District leaders are proactive
- Peace initiatives come to life
- We are innovative
- Our clubs work together routinely and effectively
- We have built considerable sponsorship at the District level
- Random acts of kindness
- Polio is gone!
- Foundation grants are fully used
- Clubs are well supported by Rotary International
- We are well trained as Rotarians
- District 5040 has an amazing training committee
- Rotary is a welcoming organization
- We have satellite clubs in retirement communities
- We have a focus on membership retention