

BBRC Strategic Planning

- Go-ahead from outcome of annual retreat
- Committee chair: President-Elect Jim Zidar
- Process facilitator: Tom Smith
- Committee members:
 - Jenny Andrews, Chuck Barnes, Scott Sadler, Shelley Noble, Rick Klobucher, Jane Kuechle, Will Einstein, Jan Nestler, Jim Owens, John Sheehan, Paul Martin, Steve Szirmai, Phil Salvatori

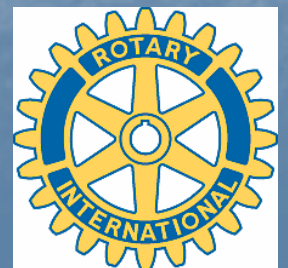


Questions of Priority

Who are we?

What do we do?
How do we do it?

Who do we want
to be?



Our Committee Objective:

Who are we?

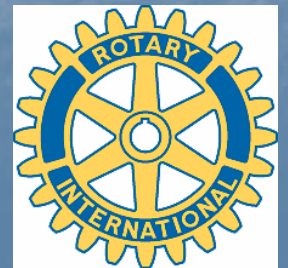
Values

What do we do?
How do we do it?

Mission

Who do we want
to be?

Vision



Process: the “What”

- Reaffirm essential mission elements
 - Summation is our new mission
- Evaluate consistency with VALUES
- Evaluate consistency with VISION
- Adjust, build consensus, publish



Values: Who We Are

Values are how you spend your time
and how you spend your money.

Dr. Bill Grace
Center for Ethical Leadership

- *How does Rotary International spend its time and its money?*
- *How does BBRC spend its time and its money?*



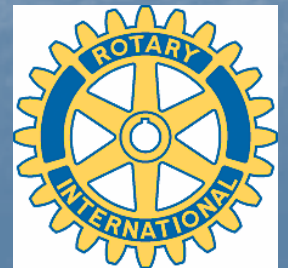
Process: Brainstorming

- We thrive on laughter, fun and joy.
- We believe in service and purpose.
- We have a hands-on emphasis. We value members' active involvement.
- We are inclusive.
- We have a manageable size and a strong identity.
- We have a strong positive impact on our local community.
- We have a strong positive impact on communities throughout the world.
- We have mutual respect among our members.
- We have strong ethics and live by the Four Way Test.



Brainstorming, Continued

- We have a strong positive impact in improving people's lives.
- We are connected to our service - both locally and internationally.
- We value diversity (gender, race, age, classification, etc.).
- We have embraced Rotary International's shift toward broader membership.
- We really care about each other.
- We value having the right people on the bus.
- We believe in Rotary.
- We value people who are leaders or who have leadership potential, regardless of age, experience, classification, etc.



Results: Value Statement

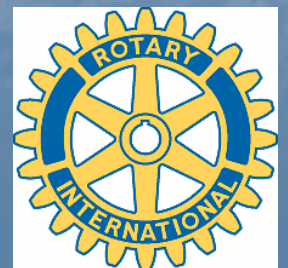
The BBRC is:

- **An inclusive, fun-loving, caring group of community leaders**
- **Coming together to share a common sense of service and ethics**
- **To positively impact lives locally and abroad.**



Our Mission

- As we go forward, we need to clarify:
 - **What** we do
 - **How** we do it
- *Will our fundraising define our mission, or will our mission define our fundraising?*

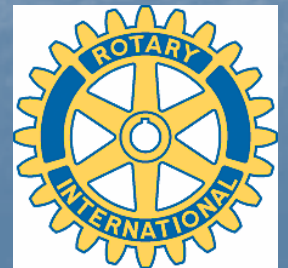


Process: Prioritization and Definition

Tier 1: the mission elements we consider indispensable

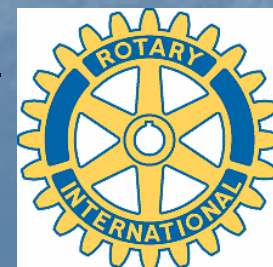
Tier 2: the mission elements that are important, but not indispensable

Tier 3: the mission elements we could discard



Group Observations

- There were many one-time expenditures.
- Scholarships are important (Sammamish HS, RYLA, Business Week, second chance scholarships, etc.).
- Supporting youth is important to the club.
- International projects are deemed important by some members but not too important by others.
- There was not as much hands-on involvement evidenced in the club's expenditures as we would like to see. The BBRC wants to be physically involved in what we financially support.
- Financial expenditures should follow Rotary's four avenues of service.
- We want to create systemic changes in people's lives.
- "Causes" that ultimately received lower priority are those in which we are not physically involved.



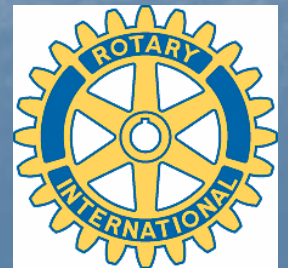
Resulting Themes

- Those items that received the highest priority tend to focus on work that benefits youth (scholarships, clean water, literacy, etc.).
- The causes we want to support are those that create systemic and enduring positive changes in people's lives.
- We strongly support international projects that focus on improving health and eradicating poverty.
- We believe in supporting education, literacy and scholarships.
- We want to have a strong local community involvement.
- We believe in the vocational development aspect of Rotary and want to support that.



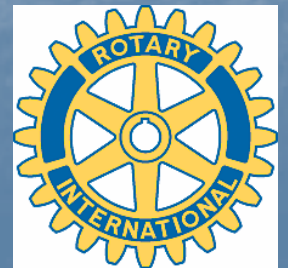
Results: Mission Statement

**The Bellevue Breakfast Rotary Club
changes lives in our local and world
communities through service and
financial support.**



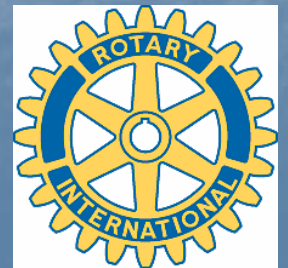
Our Vision

- Who do we want to be?
 - What image do we want of ourselves?
 - What image do we want in the eyes of others?



Vision Process

- Different from most organizations
- Did we even need a vision, or were mission and values close enough?
- Result: unconventional approach that ties mission and values together for the future.



Results: Vision Statement

The vision of the Bellevue Breakfast Rotary Club is to cultivate a dynamic membership that enhances our club values to serve our local and world communities, providing systemic and enduring change.



Long-Term Objectives

- These will help implement the MVVs
- They give multi-year guidance
- LTOs consistency of action from one presidency to the next
- LTOs provide actionable guidance for tactical decisions



LTO Process

- Brainstorm common themes to span 3-4 year time frame (multiple presidencies)
- Provide tangible guidance for tactical decision-making



Results: “Filters”

- Does the project/cause create systemic and enduring change in the lives of people?
- Does the project/cause allow Rotarians to become physically (as well as financially) involved?
- Does the project/cause allow the BBRC to leverage our financial commitment by partnering with other organizations?
- Can the BBRC adequately follow up on the project/cause to ensure that the money and time we’ve committed has been spent as promised?
- Does the project/cause provide an opportunity to advance the community’s awareness of Rotary and the BBRC?
- Does the project/cause have alternate funding sources? (Is our gift a small drop in a big bucket or are we really making a significant difference?)



Purpose of Filters

- Weigh project alternatives against each other.
- To measure merit of projects
- Weed out projects inconsistent with MVVs
- No filter is absolute – they are guidelines



Places to Use Filters

- Discuss with new members at orientation
- Reveille
- Post on grant applications
- Communicate to financial sponsors
- Communicate to partners
- Use in decision-making
- Publicize when awarding funds
- As benchmarks when evaluating results



Primary Filter Users

- Committees
- Directors
- Board

Use as a benchmark for consistency with MVVs.



Summary

- Next step: Board approval
- Then: Roll-out to the club membership
- Publish
- Implement by new board
- Suggested feedback process: Loop back next February to see if we need further adjustments

