

Building Community Organizations (BCO) Initiative

Consultants: Laura Carter & Patti Gilbertson

Mentor: Sonya Randle

The Initiative: Strategic planning facilitation with a community service club.

The Client Organization: The Sunrise Rotary Club of Richmond, B.C.

The Richmond Sunrise Rotary club is a group of energetic, committed, business and professional people whose organization is united globally with Rotary International.

The club has been operating for 18 years and currently has over 35 members.

Entry and contracting stage:

The project was outlined as a one day Strategic Planning session to take place during the Richmond Sunrise Rotary Club Assembly June 5, 2006. There was about a one month turnaround time for the entire project. The length of the day was agreed upon (9-3pm) and location had already been determined when we began the project. The club had been experiencing a lapse in energy, some differing opinions on the direction they should go, and some uncertainty as to what members should be expected to contribute in terms of service to the Club.

Our task was to uncover the needs/desires of the club for the Assembly day and pair that with our own findings through interviews and information gathering. This was really a club that wanted to go from good to great and to use this full assembly to build on their strengths and plan for the year ahead. It was a rare opportunity for the whole club to be in a room (it was the first full Assembly in 5 years) so the team building experience was also an objective.

Data Collection and Interpretation:

We conducted interviews with the President and President elect to identify their priorities for the day and what the driving issues were. A number of themes emerged from our discussions that needed to be addressed: vision, implementation and communication of the new Club Leadership plan, contribution (How are we contributing, what are the different ways members can contribute?), communication, (How can we communicate more effectively to more of the membership?) service (what types of projects to we want to keep? Which ones do we want to let go of and what new ones do we want to begin?) and fellowship (How do we engage with each other? How can we enhance this?).

The client provided us with some information on Rotary Clubs, the Leadership Plan, and the output from the previous assembly five years prior.

What we discovered is that the Leadership Plan (essentially an implementation/planning tool for Rotary clubs) dovetailed nicely with the issues the club wanted to address so we recommended using the Leadership Plan as a platform for addressing the themes outlined above. The Leadership Plan was fairly new and hadn't been communicated to the club yet so using it as a framework to address the specific needs of the club seemed a good way to accomplish both objectives.

Action Planning:

We spent time in our meetings with our clients uncovering needs and building a relationship and their trust that we would facilitate a day that was time well spent. We provided our own input and guidance to help shape the day. We designed a workshop style day around the priorities and issues expressed using the Leadership Plan as an introduction. We proposed an outline for the day, obtained input from the client and made revisions to ensure it was designed to meet the objectives outlined.

Implementation:

The dialogue of the assembly/planning day began with capturing membership expectations of the day. This was followed by a presentation from a senior member outlining a new Rotary Leadership Plan.

A small group exercise linking the Leadership Plan to the needs of this Rotary was carried out; this involved breakout groups with facilitated dialogue in response to specific questions for each group. Feedback with large group discussion followed.

The afternoon was kicked off with a brainstorming session regarding future service projects.

Next, the large group was paired off into dyads who interviewed each other with structured questions regarding personal strengths and commitments. Following the interviews, the dyads were brought together and participants introduced their partners to the larger group.

Closure of the day involved revisiting expectations, reviewing early impressions of the data gathered during the day, and expression of wishes for continued use of the information.

We held a debrief/next steps meeting with our clients (President and President elect) approximately 3 weeks later.

Throughout the project, additional perspective was provided at intervals by the mentor.

Outcomes of the project:

Clients reported feeling recharged.

- They re-connected with each other and were reminded of why they love the work of the club.
- They set some goals for the year.
- They generated a lot of ideas for new projects.
- They discussed personal commitment to the work of the club.
- They had fun.

(6 months post project) In the President's words: "Thanks ...for the help at the Assembly, it has really driven our year. We were proactive about searching out 3 great new projects...we have 8 new members join since July, the energy is great and everyone is having a good time."

Evaluation and Debrief:

Following are some points regarding what went well, what could have been more effective and what we as consultants learned or were reminded of:

- This project reminded us that you must meet the client "where they are."
- We wished we could have built in more time for open discussion. There was a tight timeline and lots to do and this is the area that we felt could have been used more effectively to build team cohesion.
- One of the most challenging parts of the day was being able to synthesize the discussion and provide feedback or insights to keep the momentum going.
- The debrief was an essential and valuable part of the process. It helped to consolidate what was learned and put some accountability around the next steps. Fortunately they are a club that is very action oriented and they took the ideas that were generated at the assembly and put them into action very quickly.

Laura Carter

Performance Consulting and Coaching
Tel: 604.929.6619
Cel: 604.313.6632
lauracarter@telus.net

Patti Gilbertson

Tel: 604.984.3875
Cel: 604.805.3983
pattigilbertson@yahoo.ca