

District 4-C4

Strategic Plan 2012 - 2017

November 10, 2012

Document History

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Introduction

Purpose

The purpose of this paper is to document the approach, background and detail of the District 4-C4 Strategic Plan for the next five years. It includes detailed activities to achieve the objectives outlined in this Strategic Plan.

Structure

The paper is divided into 3 chapters. Each chapter is described as follows:

Formation – How the strategy was developed and what it is based on. This chapter includes:

- ✓ Overview
- ✓ Approach
- ✓ Current State
- ✓ Strategic Culture

Management – How the strategy will be updated, reported on, progressed. This chapter includes:

- ✓ Scope – why 5 years etc
- ✓ Reviewing
- ✓ Governance

Strategy – This is the actual plan and will stand alone outside this document in the future.

This chapter contains:

- ✓ Introduction
- ✓ Vision
- ✓ High level goals
- ✓ Detailed Activities

It should be noted that as this last chapter is expected to become a standalone document, that some aspects of chapter 1 and 2 will be repeated in chapter 3 where it is believed that it is required to maintain context.

Chapter 1 – Formation

Overview

Strategic Planning, Long Range Planning, Succession Planning, Forward Planning – whatever the name, they are all about the future and not just the present. They are usually about a goal, or goals, that are significant and must take effort over a long period of time to complete. Strategic management is the process by which we organize ourselves to achieve these goals. It is not a silver bullet or an overnight change and initially may be hard to measure. In the past long range planning has been an ethereal thing, difficult to grasp, our goals have lacked ownership and there has been little evidence of progress. Like many other organizations and businesses we are trying to do the same (or more) with less and like these others we need to plan today, if we are to survive tomorrow.

Strategic management consists of four basic elements:

Environmental Scanning - Where are we today

Strategy Formulation - Where do we want to go and how do we get there

Strategy Implementation - Taking the steps to achieve our goals

Measuring how we did and making adjustments as warranted

This year we have completed the first two of these elements. We understand where we are now, what we might look like in the future and set some goals of where we would like to be in 4-5 years. We have identified some activities as the first part of a plan to get there. The activities we put in our plan will always be checked against the goals to ensure we are on the right track. The next steps are to carry out or implement these activities and measuring the result.

Another aspect of strategic management is that, while cyclical, it works on a much longer cycle than the traditional Lions annual one. We will need to embed a process and culture around the rolling over of events from one year to the next.

Approach

The strategy was developed using a generally accepted model involving three phases. Each phase relates to the answering of a question.

Phase 1 - Where are we now?

To establish this, data has been gathered from various sources. Including but not limited to:

- ✓ Membership statistics
- ✓ Other Lions strategic plans
- ✓ External surveys
- ✓ Informal discussions with members
- ✓ Informal discussions with non-members

This information was then analyzed and summarized.

Phase 2 - Where do we want to be in the future?

This was a harder question to answer. Various Lions provided items such as more members, better meetings, better projects etc. however these are more about '*what we are going to do to get there*'. First we need to establish where '*there*' is and what does it look like. The starting point for this is the existing 'vision' that has been previously agreed. That is...

To be the premier service club/District – an organization people want to join.

While short and snappy, this statement requires more definition and context in order to be practical as a directional guide. Therefore a more detailed picture of what this 'vision' will look like was developed.

As the vision has an external focus, informal interviews and discussions were held with Lions to determine what they thought this might be. Additionally information from the current cabinet and the strategies of the multiple district and International were also considered. The output of this work is in the "Vision" section of this document.

Phase 3 - How are we going to get there?

The answer to this question was approached at two levels. The first is with the development of high level goals and the second is with the development of detailed activities. The high level goals and detailed activities were developed from:

- ✓ A review of the following documents
 - The Strategic Plan for District 202H
 - Lions Clubs California Multiple District 4 Strategic Plan
 - Lions Clubs International membership information charts for District 4-C4 for the last nine years
- ✓ Input provided by
 - 2011-12 District Governor and 2012-2013 District Governor
 - 2012-2013 First and Second Vice District Governors
 - The Long Range Planning Committee
 - Other Lions
- ✓ Ideas that came from the development of other sections of the strategy

The output of this work is contained in the High Level Goals and Detailed Activities sections of this document.

Current State

Membership numbers for District 4-C4

Despite universal recognition that we need more members, our membership has declined overall for the last seven years. The following table shows numbers for recent years.

Year	Membership	Net Gain or Loss
2005-2006	1391	48
2006-2007	1434	43
2007-2008	1392	-42
2008-2009	1412	20
2009-2010	1351	-61
2010-2011	1215	-136
2011-2012	1236	21

Organization Profile

The adage that 'Lions is the best kept secret' is fact not fiction. Lions continue their tradition of shying away from paid advertising of their achievements and the organization in general. Current mass media channels are either poorly used or not used at all. Television advertising, such as the free plugs Lions received through its involvement in Telethons, no longer exist and have not been replaced. Compared to other organizations Lions Clubs have a poor internet presence, with little information on club activities and less on how to become a Lion member. Free advertising such as Radio and Community newspapers do not reach the populations they previously did.

Since Lions Clubs were established in our District there is increased competition in the market from more than one aspect. From the service organization and volunteer aspect, there are many more organizations in existence than there were previously, all wanting a slice of effectively the same pie.

Perceptions that Lions Clubs are for older people, Lions Clubs are a men's club, we just do breakfasts, or we are just about fundraising are not being corrected.

Generation Profiles

Everyone has heard of groups of people referred to Generation X and Y etc. There is much literature on the analysis of the behaviors, influences and other traits of each generation. This can be used to help organizations move with the ages and evolve in such a way as to remain relevant. It is no longer sufficient to say that 'while there remains need in the world; there will remain a need for Lions' and hope that this will keep the organization going. The following are some examples of very general differences in the generations¹.

Year Born	Generation	Some traits
1946-53	Baby Boomers	Well established in their careers Held positions of power and authority Retired and retiring Work-centric Welcome challenge and strive to make a difference Believe in 'face time'
1954-63	Original Xers	Ethnically diverse Individualistic Work-centric and competitive Over 60% attended college First generation to be educated by TV Cynical
1964-73	PCers	Delayed settlers Flexible Value work/life balance First generation to grow up with PCs Technology startups Use PC as a tool for Business, Science and Gaming Bore the brunt of political correctness
1974-83	Netters	Tech-Savvy Family-centric First generation born with internet Entrepreneurial Achievement-oriented "don't waste my time making me come to your office" Multitask
1984-93	Millennial	Run their lives via social networking Celebrate diversity Optimistic/realistic Team-oriented Attention-craving Internet is seen as a necessity not a luxury Multitask fast Irrelevance of institutions
1994-Present	As yet unnamed	

1 ~ Source – Joshua Glenn, Boston Globe and Sally Kane, [About.com](#)

Lifestyle changes

Lifestyles are significantly different from 20 years ago. Work demands have increased with businesses trading seven days a week, 24 hours a day and increased expectation for staff to up-skill in their own time. More single parent family units and/or both parents working full time. Competition for our leisure time has increased with the proliferation of sports and special interest groups available to join.

The project environment

When you hear stories of large high profile projects that were completed in the past, you know that in today's environment they may not happen. Legislative changes and the general business environment are just some of the barriers that would delay such projects from occurring today.

From Multiple District Plan 2007

Negative growth over the last 10 years has required that the Multiple District open discussions on redistricting the Districts in California. International requests that each district have a minimum of 1,250 Members and 35 clubs. If the negative growth continues at the present pace a redistricting could be required in our District.

From 2007, when the membership totaled 1,434, June 2012, when it was 1,236, the District lost 198 members. This represents an average loss per year of a close to 2.75% It is a sad fact that of this 2.75% loss about 1.5% of it was attributable to the death of current Lions. Translated this means that 44% of the numbers that Lions are currently decreasing by result from the deaths of our members. There is nothing we can do to prevent the deaths, we can support those that remain with kindness and condolences. We can attempt to decrease the average age of Lions so that older Lions become a lesser proportion of our membership. Inevitably death will then start to become a lesser portion of those we lose from Lions.

At present there are 13 (30%) clubs in our District with less than 20 members and 6 (14%) with less than 15 members. Small clubs place a huge burden on their members to repeatedly take office and inevitably will eventually cease to exist.

Strategic Culture

During the many discussions, requests for feedback, and review of other plans, it became clear that Lions are only just beginning their journey into strategic culture.

Organizationally

The Lions organization is still fundamentally based on an annual planning and reporting cycle. Each year it is expected that we elect new officers into each of the key positions at Club, District, Multiple District, and International levels. However it is now recognizing that this is not necessarily the best approach and over time a number of roles have begun to be extended. Some clubs have elected not to change positions annually, or to 'roll-over' some positions (though often this is due to a lack of candidates rather than for continuity reasons). Some key roles, such as Directors, are now appointed for multiple years and others (especially at District and above) have a carefully managed progression process. But role extension is only part of the story. There are other steps that need to be taken.

While strategic, membership and growth plans are starting to pop up regularly, there has been little evidence to date of their effectiveness. The production of a document alone does not mean anything will happen.

Individually

Many members naturally apply strategic planning principles in their personal and work lives, without realizing it, however find it difficult to apply this to Lions. The annual nature of Lions is part of this but also it has a lot to do with developing a common lexicon or terminology and being able to translate familiar activities into a new context. We need to develop and mature our culture around strategic management (the process by which we organize ourselves to achieve goals) in order for such plans (club, district or multiple district) to be effective. Therefore in this first strategic plan the following elements should be noted:

- ✓ It incorporates some strategic training
- ✓ It is for only 5 years
- ✓ It is starting out on the light side

This approach for the first round should enable us to gradually build up capability and maturity together without anyone having to bite off more than they can chew.

Chapter 2 – Management

Scope

The term of this strategic plan is for five years. This is to ensure a sustained general direction for a moderate period of time, but not so long as to delay our ability to adapt as we learn. Changes may be made to the various levels of the plan at their scheduled reviews (see next section).

Within the strategic plan is a set of detailed activities for the next four years. These are of shorter duration due to a) their explicit nature and b) the need to be able to adapt and adjust the finer detail within the overall direction to account for changing environments and the unknown. This will be managed by the Governance Committee.

Reviewing

The following table outlines the review and monitoring schedule for this term of the strategic plan.

Date	Plan element	Role Responsible
January 2013	Detailed activity progress check	Strategic Portfolio holder
June-July 2013	Detailed activity review & set	Strategy Governance Committee
January 2014	Detailed activity progress check	Strategic Portfolio holder
June-July 2014	High level goal review	Strategy Governance Committee
July 2014	Detailed activity review & set	Strategy Governance Committee
January 2015	Detailed activity progress check	Strategic Portfolio holder
June-July 2015	Detailed activity review & set	Strategy Governance Committee
January 2016	Detailed activity progress check	Strategic Portfolio holder
May-July 2016	Complete Strategy Refresh	Strategy Governance Committee

Activities can be set that last longer than one year, however in doing so consideration should be given to the likelihood that a High Level Goal review or Strategy Refresh may make the activity redundant.

Governance

This section outlines the roles and responsibilities with regard to the governance and management of the strategic plan. The following table outlines three roles and responsibilities that have been identified.

Role	Responsibility
Activity Leads	<p>Chair of a specific detailed activity or activities.</p> <p>Responsible for the progression of activity.</p> <p>Able to enlist whomever they need to complete the tasks.</p> <p>Provides updates when scheduled.</p>
Strategic Portfolio Holder	<p>Refers to the Long Range Planning Committee.</p> <p>Responsible for the administration and management of the plan.</p> <p>Provides support to Activity Leads in their endeavors to complete tasks.</p> <p>Co-ordinates and reports to cabinet activity progress when scheduled.</p> <p>Co-ordinates and facilitates review meetings for the Governance Committee.</p> <p>Updates and promotes the strategy to the wider membership.</p> <p>Provides strategy education, advice and support to clubs and cabinet.</p>
Strategy Governance Committee	<p>Consists of District Governor, 1st Vice District Governor, 2nd Vice District Governor, Immediate Past District Governor, the Constitution and By-laws Chair, and the Long Range Planning Committee.</p> <p>Responsible for ensuring the continuity of the strategic plan, realistic Vision, appropriate Goals and Activities so as to support the 'long-term viability and relevance of Lions Clubs in District 4-C4.</p> <p>Responsible for ensuring that the direction of the District is in the direction of the many and not unduly influenced by any one person.</p> <p>Responsible for prioritization of activities to ensure that they remain manageable and achievable.</p>

Chapter 3 – Strategy

Introduction

The term of this strategic plan is for a period of five years. This is to ensure a sustained general direction for a moderate period of time, but not so long as to delay our ability to adapt as we learn. The Strategic Governance Committee will review various levels of the plan at regular intervals to ensure it remains up to date and relevant. Within the strategic plan is a set of detailed activities for the period Next four years. These are of shorter duration due to a) their explicit nature and b) the need to be able to adapt and adjust the finer detail within the overall direction to account for changing environments and the unknown.

The strategic plan includes three key things:

- ✓ Our **Vision** which describes the general picture of our future
- ✓ Our **Goals** which describe at a high level what we are going to do to get there
- ✓ Our **Activities** which set out how we are going to achieve our goals

As we need to develop and mature our culture around strategic management (the process by which we organize ourselves to achieve goals), in order for our plan to be effective, this first strategic plan has had the following elements included:

- ✓ It incorporates some strategic training
- ✓ It includes activities and goals to be achieved over the next few years
- ✓ It is starting out on the light side

This approach should enable us to gradually build up capability and maturity together without anyone having to bite off more than they can chew.

Vision

The strategic vision for the Lions District 4-C4 is...

To be the premier service club/district – an organization people want to join.

This provides a short and snappy statement ideal for the quick answer. However, in order to provide more context for someone wanting to know more and in order for us to be able to identify the goals and activities on which we wish to focus, this statement requires more definition and context. Therefore our vision is further clarified by the following characteristics.

- ✓ Our brand is recognized by the public
- ✓ Our brand is associated with integrity and reliability, it is trusted
- ✓ Our members and clubs are seen to abide by and support our international association's Code of Ethics and Purposes
- ✓ The public see a growing organization, membership and capability
- ✓ Past members continue to support the Lions ethos after leaving
- ✓ We are seen assisting the community in times of need

High level goals

“A **goal** is an open-ended statement of what one wants to accomplish with no quantification of what is to be achieved and no time criteria for completion.”⁴ The High Level Goals support the Vision to which we aspire, by providing a general direction in which to head. Like any other organization or business our resources are limited so they also provide a test by which we can evaluate and prioritize the activities which we may wish to undertake.

The high level goals are stated in general terms and should remain relevant throughout the term of the Strategy. To be perceived by the public as “the premier service club – an organization people want to join” we need to improve the public perception of Lions, ensure consistent branding and lift our public appeal. We need to move with the ages and evolve in such a way as to remain relevant. It is no longer sufficient to say that ‘while there remains need in the world; there will remain a need for Lions’ and hope that this will keep the organization going. While the need to increase our membership needs to remain one of our priorities it is equally important that we nurture other aspects such as the development of our existing members and ensuring the service we undertake are seen as relevant and of value. Promoting Lions as a fun, worthwhile, and appealing organizations’ to belong to are also key.

Our goals currently fall into two broad categories those that support the development of our Membership Capability and those that support our Brand & Profile. The following table describes our initial set of High Level Goals and the indicators or measures of what success would look like.

Goal	Indicators
Develop our Capability	
Increase membership	<ul style="list-style-type: none"> • Net annual membership growth. (90 members per year) • New clubs forming (Two new clubs per year)
Increase the quality and skills of members	<ul style="list-style-type: none"> • Be of the skills that our members have • Be aware of our members’ needs • Members are aware of the training that is available to them • We provide activity specific training
Increase the quality of our clubs	<ul style="list-style-type: none"> • We understand and accept the character of our clubs • Club meetings are more than an administrative activity • Member dissatisfaction is not given as the reason for leaving
Clubs are participating in Community activities	<ul style="list-style-type: none"> • Clubs are aware of their community’s needs • Clubs have active relationships with other organizations’ • Clubs record their contributions
Clubs are able to effectively mobilize in a crisis or emergency	<ul style="list-style-type: none"> • Clubs have active relationships with other organizations’ • Members receive activity specific training • Lions members are called on for event leader roles

4 ~ Strategic Management 6th Edition, J David Hunger and Thomas Wheelen, Chapter 1.4 pages 8-17.

Manage our Brand and Profil	
People know who we are	<ul style="list-style-type: none"> • When our logo is seen people know our name • When our name is given people know we are a service organization • People perceive us correctly and with high regard
People know what we do	<ul style="list-style-type: none"> • Every opportunity is taken to promote our activities and achievements • Key projects call Lions to mind
Maintain the ethics of the 'Lions Family'	<ul style="list-style-type: none"> • Clubs actively fulfill the Objects of Lions • Clubs record participation in Zone, District & International activities • Members feel their welfare is considered • Members' skills are recognized and valued • We welcome visiting members as our own

Detailed Activities

This section outlines the set of detailed activities that are the first step to achieving our eight goals and ultimately our vision. They are very specific, have start and end dates, limited scope and most importantly someone assigned to ensure their completion. As these activities are completed and as our high level goals evolve, to keep pace with our environment, new ones will be added. The activities set for each period should be realistic and achievable, remembering two things. 'Rome was not built in a day!' and we want to move away from treating symptoms instead of the root cause.

Goal - Increase membership

Objective	Activity	Due Date	Activity Lead/s
To achieve positive growth in district membership	Support 5 Clubs to undertake a Club Growth Program.	Jan 2013	GMT Chair utilizing Zone Chairs and Club Presidents
	Hold one Orientation session in each Zone (either for an individual club or as a zone)	Jan 2013	GMT Chair utilizing Zone Chairs and Club Presidents
To cease the annual net decline in the number of clubs in the district	Support 9 Clubs to undertake the "How are your ratings?" Survey.	Jan 2013	GMT Chair utilizing Club Presidents
	Conduct 2 Regional Extension workshops, one in the north and one in south	June 2013	GMT utilizing Zone Chairs

Goal - Increase the quality and skills of members

Objective	Activity	Due Date	Activity Lead/s
Determine Lions members who are interested in attending Lions Leadership Institutes and Forums	The Forum Chairs Team will work through Zone chairs and Presidents to identify candidates, which will be used to plan resources.	Nov 2012	Forum Committee Chairs utilizing Zone Chairs and Presidents
Identify what type of training members would be interested in.	A survey of members to identify what training would be valuable. Will help direct the nature of Officer training days and other programs.	Jan 2013	GLT Chair (in conjunction with the Strategic Portfolio Holder ⁵) utilizing Zone Chairs and Presidents
Develop local training programs that are more accessible to members	Based on the result of the above survey. Develop training programs as required.	Feb 2013	GLT Chair in conjunction with the Strategic Portfolio Holder utilizing skilled resources

Goal - Increase the quality of our clubs

Objective	Activity	Due Date	Responsible
Establish the nature of our clubs	Conduct a survey of each club to determine where on the Social/Project continuum they are and if they would prefer to be somewhere else.	Dec 2012	GMT and GLT Chairs utilizing Zone Chairs and Presidents
Ensure all club members are given the opportunity to contribute	Develop activities for Presidents, to allow them to identify future roles for members.	Ongoing	GLT & GMT Chairs in conjunction with the Strategic Portfolio Holder
Ensure clubs are not meeting for the sake of meeting.	As part of the above survey establish if clubs have a purpose for each meeting outside of the administration duties of the club. Use this information to aid clubs to develop other aims for meetings.	Ongoing	GMT & GLT Chairs utilizing Zone Chairs and Presidents

⁵ A number of activities require a survey. To ensure that resources are best used the Strategic Portfolio Holder will coordinate a single survey incorporating the needs of all activities.

Goal - Clubs are participating in Community activities

Objective	Activity	Due Date	Responsible
Club projects reflect the needs of the community	Conduct a survey to determine the extent to which the Community needs analysis is being used and what other methods are being used to identify community needs.	Feb 2013	GLT & GMT Chairs utilizing Zone Chairs and Presidents
Ensure all clubs complete monthly activity reports.	Identify barriers to completing activity reports and work with relevant skilled resources to remove these barriers.	Ongoing	GLT & GMT Chairs Zone Chairs

Goal - Clubs are able to effectively mobilize in a crisis or emergency

Objective	Activity	Due Date	Responsible
Clubs actively manage relationships with other organizations	Develop a reporting mechanism for clubs to record their external relationships and their ongoing management, especially in the Lions Alert Programs context.	Ongoing	Disaster Preparedness Chair
Clubs, who have active Lions Alert Program relationships, have members in roles that are adequately skilled.	Identify the skill sets need and ensure training is planned (in conjunction with local councils). Where possible make the same training available to other clubs who would like to implement the Lions Alert Program.	Ongoing	Disaster Preparedness Chair

Goal – People know who we are

Objective	Activity	Due Date	Responsible
Tell our side of the story	Create a set of generic scripts for media releases (radio and paper) that can be reused by clubs Utilize Developed plans from International	Dec 2012	Public Relations Chair utilizing skilled resources
	Develop a plan for using any International Grants for promoting Lionism.	Ongoing	Public Relations Chair & District Governor

Goal – People know what we do

Objective	Activity	Due Date	Responsible
Increase publication of successes	Establish why our PR and Marketing was not utilized. Use this information to update role and/or market the role.	Feb 2013	Public Relations Chair utilizing skilled resources
	Develop a process to publish Lions achievements online where we can control the content and spin	Feb 2013	District Web Master

Goal - Maintain the ethics of the 'Lions Family'

Objective	Activity	Due Date	Responsible
Clubs contribute to the International Lions Purposes	Add a component to activity reporting which enables clubs to identify which of the Lions Purposes an activity or project contributes to. Analyze this information to determine future activities.	Oct 2013	GMT and GLT Chairs
Identify the expectations of Lion Members	Conduct a survey on what motivates our members	Feb 2013	Strategic Portfolio Holder and the GLT and GMT
Identify and use specialist skill sets	Conduct a survey to determine what skill sets within our district membership could be thoughtfully re-used to provide recognition to the member and value to the organization.	Feb 2013	VDG's utilizing Zone Chairs and Presidents

It should be noted that a number of activities in this first phase refer to surveying. These activities will be coordinated so as not to put an onerous overhead on to any party.