



*Extending our legacy
as an oasis for personal enrichment,
socialization and collaboration throughout Lakeside.*

**A Comprehensive
Long-Range Plan
for the Lake Chapala Society**



INTRODUCTION: In December 2018, the Lake Chapala Society Board of Directors created a Master Redevelopment Planning Task Force to conduct a comprehensive campus-wide improvement initiative to assess and analyze its functions (programs, services and activities) offered to members and non-members, its buildings, grounds, and infrastructure, and a major expansion of new buildings, along with a plan to determine where best to locate its functions on the campus. The goal of this taskforce was to create a roadmap for the future development to extend the 60+ year legacy of Lake Chapala Society history, culture and traditions.

Our plans are guided by our vision which is *“a future where all lakeside residents continually have a role in enriching the community’s quality of life, vitality, and prosperity through the exchange of knowledge, expertise, culture and language”*. We used this vision as our **North Star**, which is where everyone involved with the Lake Chapala Society is heading.

On March 14, 2019, the Board of Directors approved the recommendations of the Task Force as the Comprehensive Long-Range

Plan for the Lake Chapala Society. The plan is focused on improving, modernizing, reinventing and transforming LCS by creating a continuous quality improvement culture, and expanding the use of information technology with greater collaboration between and among the Mexican and foreign communities. We will take our best practices from LCS 1.0, with its rich history, culture and traditions of programs, services and activities over the past 60+ years and transcend the organization into Lake Chapala Society 2.0.

GOALS AND OBJECTIVES: This Comprehensive Long-Range Plan consists of the following goals organized into five broad categories:

Section 1) Organizational Development: The Lake Chapala Society is an organization run by volunteer leaders, with an Executive Director responsible for paid and volunteer staff to carry out the day to day operations for over 2,800 members and thousands of non-members. The organization has done a great job in delineating the role of governance from that of operations. However, in order to accomplish an initiative of this scale, a great deal of organizational

development, strategic planning and communication will be required from all facets of the organization. Building a continuous quality improvement culture, an expanded use of information technology and greater collaboration, we can take our best practices and transform the organization into something truly unique and transcendent. The taskforce has concluded that the Lake Chapala Society needs to:



- 1.1) create a culture of engaging the hearts and minds of all stakeholders to inspire them to action and to support the reinvigoration effort at all levels;
- 1.2) create an understanding of, and a commitment to continuous quality improvement, to develop and implement processes for improving all facets of the organization;
- 1.3) develop a recruitment and succession plan to identify potential volunteer leaders willing and able to serve as members of the Board of Directors and standing committees, which should ideally have 5 to 7 members each;

1.4) provide board and committee orientation and training to better understand the history and role of LCS, prior plans and actions, the long-range goals and objectives, and a process for leaders to document the plans and actions taken by their committee;

1.5) create an organizational chart outlining the reporting structure of all current and projected paid and volunteer staff along with job descriptions;

1.6) enhance staff and volunteer effectiveness through modified methods of recruitment, selection, orientation, training and recognition in order for the organization to continually improve;

1.7) acquire a state-of-the-art information technology system in which all data resides and can be easily accessed by individual members and staff as required;

1.8) digitize past, current and future records for easy access to LCS leaders through the cloud, LCS Website and the LCS Archives;

1.9) create a staffing expansion plan to recruit and hire additional professionals to assist in the implementation of the Master Redevelopment Plan;

1.10) create an ongoing process to systematically survey and interpret relevant data to identify strengths, weaknesses, opportunities and threats to and for Lake Chapala Society; and

1.11) create a 25 year plan for the Lake Chapala Society.



SECTION 2) COMMUNITY ENGAGEMENT:

For decades, the Lake Chapala Society has served as a multi-faceted resource for Lakeside residents who want to improve and enrich their own lives and the lives of fellow community members. Via this long-range plan, LCS has an opportunity to take a leap forward in fulfilling this mission. We want to take our best practices of LCS 1.0, which is its rich history, culture and traditions of programs, services and activities and transform the organization into an upgraded version of itself -- LCS 2.0. In order to accomplish this transformation, the taskforce has concluded that the Lake Chapala Society needs to:

2.1) collaborate with other standing committees to develop a comprehensive marketing and communications plan for the Lake Chapala Society, to create greater visibility and positive perception within both the Mexican and foreign communities;

2.2) create relationships between the LCS and leaders within the Mexican and foreign community that create greater opportunities for collaboration;

2.3) morph our programs, services and activities in ways which will serve

community needs while at the same time more fully integrating the Mexican and foreign communities;

2.4) enhance the volunteer program through improved methods of recruitment, selection, orientation, training and recognition.



SECTION 3) PROGRAM DEVELOPMENT:

With the remarkable growth in membership, along with the growing number of programs, services and activities, Lake Chapala Society 2.0 will steadily improve, modernize and reinvent LCS to better support and invigorate the Lakeside Community. We have recently completed an assessment of a number of the programs we offer to the community at large with an emphasis towards improving content, monitoring results and the overall professional presentation of our offerings. The taskforce has therefore concluded that

the Lake Chapala Society needs to:

3.1) maintain a comprehensive catalogue of all programs, services and activities directly managed by LCS and volunteer-initiated efforts;

3.2) create a continuous quality improvement culture with processes for planning, implementing and evaluating programs, services and activities by:

3.2.1) determining best practices for maintaining ongoing programs and working collaboratively with the foreign and Mexican communities to create new programs and upgrade existing programs on the LCS campus;

3.2.2) determining the adequacy and appropriateness of the structures that house the programs, along with desks, seating, audio/visual equipment and other necessary supplies and equipment;

3.2.3) developing processes for recruitment, orientation and training for teachers, facilitators and other personnel;

3.2.4) defining criteria for measuring the performance of teachers, facilitators and other personnel/volunteers and assessing learning outcomes of program participants;

3.2.5) creating an ongoing appreciation and recognition program to celebrate the successes of teachers, facilitators, and participants; and

3.3) develop a transitional plan to move the offerings from the Wilkes Educational Center to the main LCS campus, including programs, services, activities, furnishings, fixtures, equipment, supplies, books, periodicals, etc.



SECTION 4) CAMPUS REDEVELOPMENT:

Redevelopment of the Lake Chapala Society campus has been discussed for nearly two decades. Lake Chapala Society 2.0 includes a major campus redevelopment including new buildings, restoration and renovation of existing buildings, as well as infrastructure and landscaping improvements. A recent (2017) architectural schematic was developed of the existing campus, including a new Learning Center and a Sala Grande. The façade of these schematics is being reworked to be more in tune with the surroundings of the small Mexican village of Ajijic. In addition, the Lake Chapala Society acquired a lakefront residential property, which now extends the campus the length of one city block with access to Lake Chapala. This property was acquired through the support of generous donors, who in turn want to see the property used for campus expansion. An initial phase of expansion on this property will minimize disruption of programs, services and

activities. The taskforce has concluded that the Lake Chapala Society needs to:



4.1) restudy the current architectural plans to locate the Sala Grande within the new lake front property, create a new entry onto the campus that takes advantage of the lake front property, more fully integrate this property into the gardens and make this addition the starting point for new construction;

4.2) Create a comprehensive plan to redevelop the buildings and grounds to include:

4.2.1) recondition and refurbish the Neill James residence;

4.2.2) develop a master infrastructure plan; develop a master landscape and hardscape plan;

4.2.3) develop priorities for future property acquisition;

4.2.4) develop a Phasing Strategy to maximize the build-out of the Sala Grande, the Learning Center and other improvements while minimizing the

impact on our current programs, services and activities; and

4.3) upon full integration of programs, services and activities offered at the Wilkes Educational Center onto the main LCS campus, provide recommendations for future disposition or repurposing of the WEC property.



SECTION 5) FUND ADVANCEMENT: Lake Chapala Society 2.0 includes a major transformation in fund advancement. Funding for its future capital needs and a growing portion of its future operating costs will come from fundraising including Annual Giving, Planned-Giving, Capital Campaign, donor cultivation and rental income, as well as our membership dues and program fees. The third Annual Giving campaign significantly exceeded its goal of \$250,000 pesos and the 2019 campaign is hopeful to follow suit. A new Legacy Giving campaign is planned for the third quarter of 2019 and initial research indicates legacy donations could be a significant source of funds for both operational and capital needs. Planning will commence on “the most significant fundraising initiative ever undertaken at Lakeside” – a Capital Campaign for the new LCS redevelopment.

The taskforce has concluded that the Lake Chapala Society needs to:

5.1) expand collaborative efforts between the Fund Development Committee and the newly created Capital Campaign Ad Hoc Committee to align its goals and objectives to maximize its efforts on all facets of fundraising;



5.2) develop a comprehensive plan in collaboration with key stakeholders to recruit new and former members, retain current members, and increase membership diversity through continuous quality improvement and consistent focus on our relevance to our membership;

5.2.1) increase the retention of current levels of membership by an average of 6 months each year for the next five years;

5.3) create a staffing plan to recruit and hire professionals to assist in Fund Advancement;

5.3.1) develop a comprehensive long-term 5-year plan for the Annual Giving, Legacy Giving and Capital Campaign;

5.3.2) create a Case Statement and ancillary documents necessary to ensure the success of the Capital Campaign;

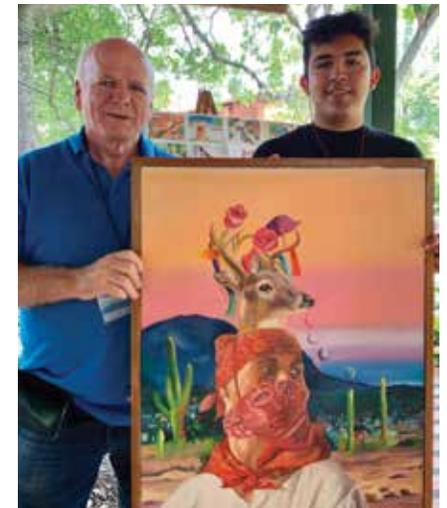
5.3.3) establish an Honorary Committee of key, major donors to kick off the silent phase of the Capital Campaign and enhance the ability to maximize donations during the silent phase; and

5.3.4) kick off the silent phase of the Capital Campaign with a series of gatherings of the key, major donors hosted by the Honorary Committee;

5.3.5) create a comprehensive data base of constituents for all future fundraising endeavors;

5.4) create a capital campaign budget; and

5.5) review current operations and develop a comprehensive plan for the Que Ganga Bazar.



LCS 2.0

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TIMELINES FOR ACTION: The overall goal of LCS 2.0 is to direct the actions of the Lake Chapala Society over the next one to ten years. The Board of Directors will set annual organizational priorities for LCS and assign goals and objectives to a specific individual or committee to accomplish. Professional staff will be assigned



and/or hired to assist in these strategic plans and to develop policies, procedures and best practices to allow for continuous quality improvement. Furthermore, at all future board meetings, these individuals and committees will report on the actions they have undertaken to achieve these goals and objectives.



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