

## **Shelley Edson**

### **Who she is and why she is running for president of the LCS Board**

Shelley Edson has been a Lakeside resident for 8 years (2008 -14, 2022 - current) and an LCS volunteer 2008-9. Other volunteer activities include creation of lake chapala crime site - where expats could report crimes; and the lake chapala dog center - featuring dogs for adoption at the different rescue facilities and vets.

Shelley's work background includes professional positions at IBM, Amdahl, Los Angeles Banks and more. Examples are: at IBM - manager customer computing; at Security Pacific Bank - bank vice president managing a bank computer data center; At Amdahl Computing - project management: managing the move of data centers from one city to another, for example, Apple Computer; at H & R Block, managing a Los Angeles Tax Office; and lastly being a small retail business owner: Ladies Golf Clubs.

### **What changes must happen at LCS?**

#### **To summarize**

- **Volunteer and member communication, involvement and recognition must improve.**
- **The recent high attrition rate must be addressed and constructive action taken.**
- **Broken processes need to be identified and fixed.**
- **Board Transparency and Accountability must improve to include making the LCS2.0 plan a working document.**

There is, of course, a lot more.

Some things work well at LCS. Shelley believes Steve Balfour provides a valuable contribution with his shows - she hopes he continues in an entertainment event role. Shelley hopes Yoly - the person who encouraged her to run - continues in a liaison role to the Mexican community. Their involvement benefits LCS.

But there is a lot more to do.

In closing, LCS is here for the very diverse lakeside community. These are her ideas - and if elected she will solicit your ideas. What needs to change? Time to ask not tell.

Your vote will make a difference. More of the same? - or a constructive move forward.

## **Attachment 1**

### **Additional detail on positions**

- **Board Transparency and Accountability must improve**

-Strategies must be created and maintained to increase membership as well as reduce member attrition.

-The LCS2.0 long term plan must be updated and the board should start managing the plan - to includes updates and changes needed.

For those not familiar with LCS2.0 it is a Comprehensive Long-Range Plan for the Lake Chapala Society published in 2019 - created by members and the board. If you are not familiar with this plan, information is included at the end.

Here is a good summary from the document on what is expected from the LCS board.

*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.*

This has not happened - recognizing that the board may not have the project planning / management expertise needed to create and manage a LCS2.0 plan. Shelley does.

Terry Vidal and Shelley agree on a lot of things that need to be done - revitalizing LCS2.0 is an excellent example.

-**Financial transparency** has been mentioned by others. Best practices for financial transparency should be defined and put in place.

- **Volunteer and member communication, involvement and recognition must improve.** For example: Ongoing newsletters need to be published at least twice a month to include event information, and newsworthy events such the 2023 audit is completed and where to find the links to the audit report.

Another approach to improve member communication is to add suggestion boxes. And, if your suggestion is accepted, then the member receives one-month free membership.

- The recent **high attrition rate must be addressed and constructive action taken.**
- **Broken processes need to be identified and fixed.**

And Shelley, personally, has run into a lot of broken processes - from the membership desk telling her she could not join as the membership person is not here today, come back another day; to getting wrong answers or no answers trying to volunteer.

## **Attachment 2 LCS 2.0 detail**

### **LCS2.0 Plan Information**

#### **If you are not familiar with LCS2.0**

You can find the link to the plan on one this LCS webpage:

<https://lakechapalasociety.com/governance/>

It appears to be a well-thought-out plan - created with board and member participation in 2014. Although some actions have been taken, the board is not updating the plan annually as recommended in the plan

#### **Snippets from the plan**

- ❖ 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.

The plans sections are:

- Section 1) Organizational Development
- Section 2) Community Engagement
- Section 3) Program Development
- Section 4) Campus Redevelopment

Additionally the plan calls for: **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.