

# ANNUAL REPORT

## 2024



# 1. Message from the President

- **Introduction and Overview**

The club celebrated its 50th birthday this year. Twenty-four presidents and over one hundred vice presidents and directors have guided the Club. In its grand days, it had over two hundred members. Wonderful activities, such as charitable activities and balls, were held.

Since then, the number of members has dwindled, with COVID almost hitting the Club with a fatal blow. Thanks to the then President Dann Oliver, the Club survived, albeit with a much-reduced membership.

- **Key Achievements**

Réjean Gravel was elected president in February 2024. Under his guidance, the club's foundational documents, including the Mission, Vision, Governance, and Communications and Marketing Strategy, were reviewed and developed.

Standing at the threshold of a new era, we embarked on a crucial rebuilding process. Beginning in the late summer of 2024, we launched a comprehensive recruitment, communications, and marketing campaign.

One of the President's first accomplishments was developing the club's visual branding. The Club Crest appears on every document, publication, and business card.

In 2024, we hosted numerous activities and events. We organized five monthly luncheons featuring guest speakers, a dinner theater night, a baseball afternoon, and a deep-sea fishing excursion.

- **Challenges**

Despite our efforts, rebuilding the membership remains a challenge. Aside from a core group of around twenty loyal members, we struggled to attract new members despite advertising in the monthly media, which reached 6,300 households and relied on word-of-mouth promotion. This situation is far from reassuring.

Due to our small membership, we had difficulty securing speakers for the Club's monthly luncheons. Fortunately, the newly elected president delivered five captivating presentations in 2024.

The low value of the Canadian dollar and the high cost of living in Florida are challenges. As of this report, the Canadian dollar is well under \$0.70 US and may recede further as the new US president takes office. As a result, many Canadian snowbirds have reduced their stay in Florida, rented their property, gone to other countries with lower costs, and reduced their expenses in Pinellas to a minimum.

The Club's luncheon, a bargain at \$15 per person some years ago when the Canadian dollar was strong, is now expensive at \$20 with a weak Canadian Dollar (as of this report, \$20 US is close to \$30 Canadian). The Dinner theater costs nearly \$60 per person plus drinks and is about \$90 Canadian per person! This may explain the Club's difficulty attracting new members, retaining existing ones, and getting participants for the more expensive activities.

## **2. Mission, Vision and Values**

- **Our Mission**

The Club's mission is to entertain, inform, and build a sense of fellowship amongst Canadians living in Pinellas County, Florida, and to foster goodwill with the American people.

- **Our Vision**

The Club aspires to be a vibrant and dynamic community hub for Canadians in Pinellas County, Florida. We envision fostering a strong sense of belonging and camaraderie while promoting understanding and goodwill between Canadians and Americans. Guided by our commitment to accountability, openness, and inclusivity, we aim to be a beacon of fellowship that upholds our members' trust and contributes positively to the broader community.

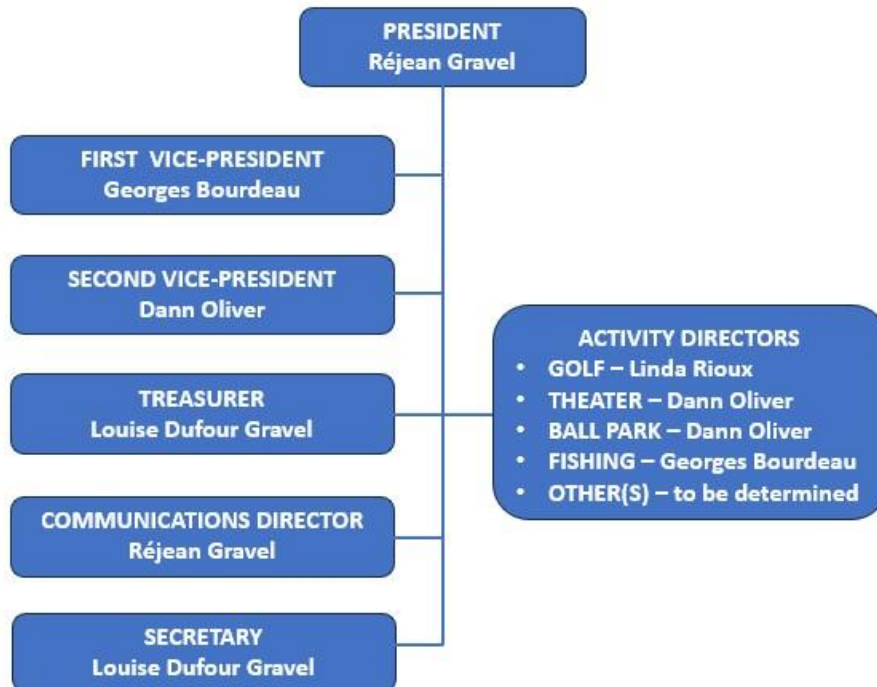
- **Our Values**

The Club values accountability, openness, and transparency in all its operations. It is committed to responding to its members' needs and

concerns and making decisions through a consensus-oriented approach that encourages participation and inclusivity. Additionally, the Club respects the law and strives to be efficient and effective in all its operations while being accountable to its members. These values are at the core of the Club's identity and are reflected in its constitution and operations.

### 3. Board of Directors

- **Names and titles of board members**
  - **President:** Réjean Gravel [gravel.rejean@videotron.ca](mailto:gravel.rejean@videotron.ca)
  - **1st Vice-President:** Georges Bourdeau [gbourdeau468@gmail.com](mailto:gbourdeau468@gmail.com)
  - **2nd Vice-president:** Dann Oliver [dannoliver@galt.biz](mailto:dannoliver@galt.biz)
  - **Secretary:** Louise Dufour Gravel [louised.gravel@videotron.ca](mailto:louised.gravel@videotron.ca)
  - **Treasurer:** Louise Dufour-Gravel
  - **Communications Director:** Réjean Gravel
  - **Activity Director:** Linda Rioux [l.rioux62@gmail.com](mailto:l.rioux62@gmail.com)
- **Organization Chart – Board of Directors**



- **Board meeting summaries**

The Board of Directors met four times at the President's house. Minutes were written and are available on request.

## 4. Membership Overview

- **Membership Statistics**

We currently have twenty-three active members and over thirty previous non-active members for about fifty-six.

- **New Members**

In the fall of 2024, we attracted four new members through word—of—mouth from BOD Members. We do not know if these people will become loyal members.

- **Membership Retention and Engagement**

We have a loyal membership base of around 20, most attending luncheons and activities.

## 5. Events during 2024

- **Luncheons and activities**

Throughout the 2024 exercise, the Club conducted the following.

- A Summer Newsletter
- Five luncheons
- One Dinner-Theater activity
- One Ball Game activity
- One Deep Sea fishing activity

- **Participation statistics**

- Luncheons – a total of 87 / an average of 16.5 attendees
- One Dinner-Theater activity – about 25 attendees
- One Ball Game activity – about 20 attendees
- One Deep Sea fishing activity – about six attendees

# 6. Financial Report

All financial documents, including bank statements, invoices, checks, and cash payments, were either documented or scanned and saved on the President’s computer, with a backup made every time there was a change.

- Financial Summary**

As of January 2024, \$5,098.06 was available to the Club, most of it in the Club’s Truist Bank account. We deposited cash on hand in March 2024. As of December 2024, there was \$2,905.94 in the Club’s Truist bank account.

DATE	ITEM	DEBIT	CREDIT	BALANCE
1 january 2024	<b>SEASON OPENING BALANCE</b>	-	-	<b>3 314,06 \$</b>
22 january 2024	Service charge	(4,00) \$		3 310,06 \$
22 february 2024	Service charge	(4,00) \$		3 306,06 \$
19 march 2024	Deposit - cash on hand	- \$	1 738,00 \$	5 044,06 \$
19 march 2024	Deposit - cash from luncheon	- \$	54,00 \$	<b>5 098,06 \$</b>
19 march 2024	Withdrawal - see comment for details	(390,00) \$	- \$	4 708,06 \$
20 march 2024	Printing of checks for the Club	(179,82) \$	- \$	4 528,24 \$
21 march 2024	Service charge	(4,00) \$	- \$	4 524,24 \$
4 april 2024	Deposit April luncheon	- \$	345,00 \$	4 869,24 \$
4 april 2024	Banquet Master April invoice	(265,16) \$	- \$	4 604,08 \$
13 november	Banquet Masters November Invoice	(300,00) \$	- \$	4 304,08 \$
16 november	Deposit November Luncheon	- \$	335,00 \$	4 639,08 \$
16 november	Withdrawal - see comment for details	(1 037,86) \$	- \$	3 601,22 \$
12 december	Deposit December Luncheon	- \$	415,00 \$	4 016,22 \$
12 december	Banquet Master December Invoice	(500,00) \$	- \$	3 516,22 \$
12 december	Withdrawal - see comment for details	(610,28) \$	- \$	2 905,94 \$
<b>SEASON CLOSING BALANCE</b>		<b>(3 295,12) \$</b>	<b>2 887,00 \$</b>	<b>2 905,94 \$</b>

- Expenditures per categories**

According to the bank account-based general ledger, we spent \$3,295.12 in 2024. The following are the expenditures per category. Detailed accounting for each transaction is available upon request. It should be noted that there is a discrepancy of \$10,80 between the general ledger and the expenditure details (\$10,80 more than we spent). This difference is not worth reconciling and could be linked to having had two Banquet Master payment approaches – cash and checks. In 2025, all Banquet Master expenses will be paid by check.

ITEM	EXPENSES
Paid to Banquet Masters for luncheon	(1 652,30) \$
Door prices - wine bottles to winners	(79,44) \$
Gifts to speakers (CC Whiskey)	(44,00) \$
Xmas luncheon gifts (miscellaneous)	(82,90) \$
Advertising (Monthly Media)+ postage	(864,20) \$
Printing – speakers' presentations	(136,56) \$
Printing - national anthem cards	(177,64) \$
Printing – business cards (paid by president)	- \$
Printing - bank checks & deposit slips	(179,82) \$
Bank service charges	(12,00) \$
Tickets for door prizes & Share -the-Wealth	(50,80) \$
Canadian flags for luncheon tables	(16,03) \$
Donation box (to be used in 2025)	(13,38) \$
<b>TOTAL</b>	<b>(3 309,07) \$</b>

- **Luncheon Accounting**

In 2024, luncheons generated a profit of \$191,40 despite our policy of providing free lunches to new members and presenters.

<b>SUMMARY 2024, LUNCHEONS</b>				
ACTIVITY	NB	UNIT	REVENUE	EXPENSE
Luncheons paid by members or the Club	87	20,00 \$	1 740,00 \$	-
Luncheons paid to Banquet Master	85	20,00 \$	-	1 652,30 \$
Membership - new member(s) fees	8	20,00 \$	160,00 \$	-
Membership - renewals	1	20,00 \$	20,00 \$	-
Share-the-Wealth revenue	1	-	260,00 \$	-
Share-the-Wealth prize #1	1	-	-	85,00 \$
Share-the-Wealth prize #2	1	-	-	45,00 \$
Wine bottle #1 incl 7% tax	5	misc	-	38,05 \$
Wine bottle #2 incl 7% tax	5	misc	-	41,39 \$
CC Bottle for Speakers incl 7% tax	4	misc	-	44,00 \$
Xmas luncheon gifts	1	82,90 \$	-	82,90 \$
<b>TOTALS</b>			<b>2 180,00 \$</b>	<b>1 988,64 \$</b>
<b>REVENUE LESS EXPENDITURES:</b>		<b>PROFIT OF...</b>	<b>191,4 \$</b>	

## 7. Future Plans

- **Strategic goals for the upcoming year**

First and foremost, we want to continue offering affordable luncheons with speakers and activities/events.

We also want to continue implementing our communications and marketing strategy to increase membership. To do so, we will focus on low-cost activities such as visiting Mobile Home Parks, handling business cards and information Tri-fold documents, and posting messages on Next Door social media. The Monthly Media Bulletin advertising is expensive and will unlikely be repeated next year based on the limited if any result.

We also intend to send a summer newsletter in August to keep you posted on the latest Club and Pinellas news.

Finally, we will consider developing a Web site should the cost and effort be minimal.

- **Key initiatives and projects**

We will focus on the current list of projects and activities unless members request something else or different.

- **Challenges and opportunities**

We will continue to deal with a low-value Canadian dollar, which will likely result in Canadians not coming to Florida or coming for a shorter period. Those who will come will likely tightly manage their expenses. This might result in less attendance at luncheons and at more expensive venues such as the Dinner Theater and Sunset Cruises.

# Appendices

- **Record Management**

The Secretary/treasurer and the president developed and maintained an electronic filing system. The table below presents the first of three levels of the system. All files are available for review by request.

Name	Date modified	Type
ACTIVITIES	2025-01-08 16:02	File folder
BANKING	2025-01-02 12:26	File folder
BANQUET MASTER	2024-12-10 10:37	File folder
BINDER FOR MEMBERS	2025-01-02 12:26	File folder
BOD BIOS - PHOTOS	2025-01-05 17:39	File folder
BOD MEETING AGENDAS AND MINUTES	2025-01-02 12:26	File folder
CANADIAN LEGION	2025-01-02 12:26	File folder
COMMUNICATIONS - MARKETING - ADVERTIZING	2025-01-02 12:26	File folder
CONSTITUTION	2025-01-05 18:59	File folder
FINANCIALS	2025-01-02 12:26	File folder
GOLF	2024-11-16 15:50	File folder
GOVERNANCE	2025-01-02 12:26	File folder
LIABILITY - INSURANCES	2025-01-02 12:26	File folder
LUNCHEONS AGENDAS - MINUTES - POSTERS	2025-01-07 15:59	File folder
MEETINGS - MISCELLANEOUS	2025-01-02 12:26	File folder
MEMBERSHIP	2025-01-08 16:02	File folder
MISCELLANEOUS	2025-01-02 12:26	File folder
NEWSLETTER	2025-01-05 18:59	File folder
ORG CHART & JOB DESCRIPTIONS	2025-01-06 15:38	File folder
PHOTO GALLERY	2025-01-02 12:26	File folder
PROGRESS REPORT - DELIVERABLES	2025-01-02 12:23	File folder
SPEAKERS - PRESENTATIONS	2025-01-02 12:26	File folder
WEB SITE	2025-01-02 12:26	File folder