



# Strategic Plan 2020-2023

## Our Mission

The Rotary Club of Point West Sacramento is a vibrant community service organization promoting service to those in need, goodwill, peace, and fellowship

## Our Vision

Be a major contributor to children's charities and other local and global charitable opportunities and to be recognized for such

## Our Core Values

Service, Fellowship, Respect, Diversity, Integrity and Leadership

## Our Brand

Great people doing extraordinary things and having fun while doing it!

## Our Goals

1. Develop and maintain a strong public relations/outreach campaign that will effectively drive membership and fundraising.
2. *Achieve a net increase of 8-10 new members by the **end of each term** during the period 2020-2023. Asking the Membership to seek out possible new members that would be the right person, be the right fit and have the right attitude.*
3. Increase the Permanent Fund of the Point West Rotary Club Foundation to \$1.5 million by the end of the 2020-2023 Rotary year.
4. Encourage a strong presence and participation in District and Rotary International events and programs.
5. Make fundraising decisions with purpose, discipline and full support of the Club and Foundation to fuel our community giving.

# Point West Rotary – Action Plan 2020-2023

## PUBLIC IMAGE

**Goal #1** - *Develop and maintain a strong public relations/outreach campaign that will effectively drive membership and fundraising.*

### **Action Steps:**

1. *Create a Public Image Committee for the following areas:*
  - Social Media - Facebook Twitter, Instagram
  - Websites - club, fundraisers, Foundation
  - Print Media/TV/Radio (when the opportunity arises)
2. *Develop goals for metrics appropriate for each (# of Facebook posts, # visits to the website, etc). Track the metrics on a periodic basis for progress.*
3. *Inventory and document all websites, platforms, Facebook pages, access, costs and log on/passwords. Develop policies and procedures for who should have access and how often access is reviewed and passwords are changed.*
4. *Maintain and update the list of media resources with contact information.*
5. *Research and develop a list of all community calendars available on which to post our events and fundraisers (including the club's and district's website calendars). Add timeframes and deadlines for submission of event information. Share the list with all fundraiser chairs or single point of contact (SPOC) so they can send the event information on a timely basis.*
6. *Develop a list of locations available for posting fundraiser/event flyers for free (Noah's Bagels, Starbuck's, etc).*
7. *Develop a timeline of post-event/project/check presentation for social media posting or press release submission and share with event chairs or SPOC.*
8. *Work with event chairs or SPOC on preparing press releases, social media and website postings, submission of flyers and articles for the club newsletter and website.*
9. *Ensure consistency of branding among all event media, flyers, etc.*
10. *Ensure the appropriate official Rotary branding is used in all media opportunities, as appropriate.*
11. *Encourage Club members to wear their Rotary pin and, where appropriate, Rotary branded clothing, when attending or working on PWR or other Rotary events.*

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## MEMBERSHIP

### Goal #2 –

**Action Steps:** *Achieve a net increase of 8-10 new members by the end of each term during the period 2020-2023. Asking the Membership to seek out possible new members that would be the right person, be the right fit and have the right attitude.*

1. *Create a high profile Membership Team*
  - a. *Composition of the team*
    - 1 Seasoned team leader - 2 year term
    - 1 Longer term club member - 2 year term with expectation of moving into team leader position
    - 2 Newer club members - 1 year term each
    - 1 Past President - 1 year term
  - b. *Budget*
    - \$1,000 annually for marketing materials, incentives, Rotary-in-a-bag for new members, new member orientation
  
2. *Focus on three specific areas:*
  - a. *Recruitment*
    - Engage entire club with a membership growth initiative
    - Create incentives for recruitment - make it fun and exciting
    - Recognize members who sponsor new members in a term
    - Continue to have FUN meetings with interesting speakers
    - Work with the Public Image Committee to "tell our story" throughout the community
    - Visit businesses in the area and invite them to the quarterly evening meetings
    - Develop prospective new member marketing materials
    - Provide prospective members with a hosted meal on their initial visit
    - Meet quarterly with community organizations (Chamber of Commerce, Metro Edge, Urban League, Rotaract, etc) to prospect for new members
  
  - b. *Engagement of new members*
    - Develop a mentor program for new members
    - Assign a mentor to each new member
    - Ensure 2X2s are done timely

- Ensure Red to Blue Badge completion within 6 months
- Ensure new members understand their role in the club's major fundraisers
- Present a new members orientation program at least twice per year

c. *Retention*

- *Focus on creating more fun, informative and interesting meetings which will encourage greater attendance at weekly meetings*
- Select a speaker/program chair to obtain interesting and informative speakers
- Conduct at least three "Tours of Business" throughout the term
- Continue the Vocational Service Thank You Minute at the weekly meetings
- Have each event/project chair personally ask longer term members to assist with their activity to engage and involve them
- Ensure continuity in each event/project within our club through the development of written procedures and policies (institutional knowledge) that can be passed along to the successor of each position
- Recognize members and show appreciation for the time and energy they contribute in all areas of service
- Club leadership and board members will follow up on information gathered in Fireside Chats and report back to the membership on the status of the suggestions

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## FOUNDATION

**Goal #3** – *Increase the Permanent Fund of the Point West Rotary Club Foundation to \$1.5 million by the end of the 2020/2023 Rotary year.*

### **Action Steps:**

- 1. Remind club members (at meetings and in the newsletter) to secure matching grants from the companies they work for.*
- 2. Establish partnerships with local businesses to engage them in either sponsoring our fundraisers and/or allowing their employees to contribute to our Foundation through payroll deduction.*
- 3. Seek funding from outside the club (other Foundations, community grants).*
- 4. Contact past club members requesting their financial support for the Foundation.*
- 5. Continue “Point West Rotary Club Foundation Month” annually, providing information about the foundation and focusing on the benefits of donating*
- 6. Continue to ensure club members understand the difference between The Rotary Foundation and the Point West Rotary Club Foundation*
- 7. Redouble efforts to promote legacy giving from current and past club members.*
- 8. Ensure club members are aware of the Guy Heilman Scholarship Fund and the Brian Kraft Fund as an opportunity for giving.*
- 9. Ensure that the Club President and the club board show support for the Foundation. Have the Foundation President do a presentation about the Foundation annually to the new club president and board.*

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## DISTRICT AND INTERNATIONAL CONNECTION

**Goal #4** - *Encourage a strong presence and participation in District and Rotary International events and programs.*

### **Action Steps:**

1. ***District Conferences:*** *Increase attendance at District Conferences through announcements and identification of benefits and reasons for attending:*
  - Keynote speakers
  - Awards available for the club and club members to win (Club of the Year, Rookie Rotarian of the Year, Rotarian of the Year and Hall of Fame inductee)
  - Hospitality suites and opportunity to meet and exchange ideas with members from other clubs
2. ***Rotary International Conventions/Meetings:*** *Increase number of club members attending and experiencing the Rotary International Convention.*
  - Promote and encourage attendance at the annual Rotary International Convention
  - The Club Information Officer, Club President or President-Elect will make announcements at weekly meetings, when appropriate, to inform members of any Rotary International conventions and events
3. ***District Grants/Global Grants:*** *Continue pursuing opportunities for matching funds or special contributions through the application for district and international grants.*
  - Continue supporting the activities of the International Grants Committee
  - Continue facilitating multiple-club activity to develop international projects
  - The Board Director over District Grants shall ensure application deadlines are met
4. ***The Rotary Foundation:*** *Promote donations to The Rotary Foundation through a variety of activities:*
  - Continue "Rotary Foundation Month" in November each year providing information about the foundation and focusing on the benefits of donating
  - Continue the Polio Plus position in the club to lead the effort to focus on Rotary's number one goal to eradicate polio.

- Ensure club members understand the difference between The Rotary Foundation and the Point West Rotary Club Foundation
- Encourage club member attendance at the annual District Foundation Dinner
- Encourage members to explore any possible funding matches from the companies they work for.

5. ***District Seminars/Training:*** *Encourage club participation in the various trainings and seminars sponsored by the District:*

- Provide opportunities at weekly meetings for the Club Information Officer to share information about upcoming trainings/seminars/webinars
- Promote the training opportunities among all club members in addition to board members and officers
- Require all incoming board members to attend the annual District Assembly

6. ***District Leadership Positions:*** *Encourage club members to participate at the District level by accepting a District leadership position.*

- The Club Information Officer will provide information, when appropriate, to inform members of possible positions available at the District level.

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## FUNDRAISING

**Goal #5** – *Make fundraising decisions with purpose, discipline and full support of the Club and the Foundation to fuel our community giving.*

### **Action Steps:**

- 1. Establish annual fundraising goals for each Club term at least one year in advance of the Club term and amend the Club/Foundation Operating Agreement to add this requirement.*
- 2. The preliminary fundraising goal should include a plan for goal attainment and a list of anticipated fundraising events that will be conducted during the term.*
- 3. Develop parameters to guide decisions to add, continue or delete fundraising events.*
- 4. Adopt and implement guidelines, consistent with the Four-Way Test and in the best interests of the Club, to guide and execute our fundraising efforts in a reasonable, thoughtful manner, that balances community giving with volunteerism and other avenues of public service*
- 5. Schedule major fundraising events to be no closer than 18 weeks apart.*
- 6. Create a new standing Club committee to research, recommend and help vet potential new fundraising activities, as well as potential enhancements and improvements to existing fundraisers. Position this committee under the supervision of a Club Service Board member and include at least one Foundation Trustee.*
- 7. Amend to define the Collection Period for the Current Fund applicable to a Club term as the calendar year preceding that term.*
- 8. Amend the Club/Foundation Operating Agreement to include the date by which the Foundation must determine whether a Permanent Fund distribution to a Current Fund will occur, and the amount of that distribution, to be no later than the Foundation's March Board meeting occurring immediately prior to the commencement date of the Club term to which the Current Fund applies.*



*9. Require each Club President Elect to have a budgeted amount for charitable giving during his or her Club term submitted to the Club and Foundation Boards for approval at least three months prior to his or her Club term commencement date.*

*10. Amend Fundraiser Procedures*

- Include objective criteria for evaluating the current performance and/or anticipated future economic performance of each fundraiser, and whether a fundraiser should be conducted or continued. Priority should be given to enhancing the economic performance of an existing fundraiser over initiating a completely new event.
- Specify a methodology for establishing whether a fundraising event would significantly benefit from naming a primary charity beneficiary, as well as minimum acceptable event participation requirements for each event charity beneficiary, including but not limited to manpower, ticket sales and sponsorship procurement commitments.
- Include a mandatory deadline for filling the Chair, Co-Chair and Treasurer positions for each fundraiser.
- Include a mandatory schedule for selecting, vetting and formally approving fundraising event primary charity beneficiaries.
- Include a mandatory schedule for fundraiser budget development and formal approval by both Boards.

*11. Utilize all available resources to pursue matching grant programs from corporate, public and private foundations.*

*12. Seek opportunities for the Club to assist deserving non-profit charities with their event staffing needs.*